



## Workshop Outline

DRAFT – March 2014

### I. Expected Outcomes

#### A. A high-level understanding of the types of digital preservation tools and services available and how their functionalities map to the digital preservation lifecycle.

- Tool grid & Digital Curation Lifecycle (Patrice's Prezi of Doom)

#### B. Additional explanation of specific tools, found to work well for practitioners coming from institutions with fewer resources

- Screenshots: Depending on audience in room: go faster on some rather than others. Curator's Workbench? Archivemata (hosted vs onsite), Duracloud, Preservica, Bagger/MetaArchive? Need to ask MetaArchive for screenshots? Internet Archive (depending on audience)

#### C. Hands on experience with certain tools

- opportunity to play with on POWRR Laptops during all breaks, break-out sessions, etc., with a workshop leader on hand to answer questions and provide guidance.

#### D. A Demonstration of how the processes described in the OCLC report "Walk this Way" actually work using selected tools to demystify the processes.

- Discuss minimum level description for Inventory creation: brainstorm fields (minimum level) Accession number, collection name, processor name (need slide of a good spreadsheet)
- Demo live Duke Data Accessioner with participants & play with it on their laptops. Test collection that is uniform on flash drives provided.

#### E. Create an institution-specific action plan with a timeline for

## implementation

- **ACTIVITY: identify the key stakeholders: institutional actors that should be involved in their planning process, how to best approach them, and possible strategies for increasing their level of awareness. (we need to create a form for this?) How to get a copy of the form? (take pictures?)**
- **Communication one pagers (handouts)**
- Digital Preservation Plan/Policy Templates (handouts)
  - Preservation Intent Statements?
- **Preservation workflow (handouts)**
- **Point to institutional case studies and policy examples**
  - **WHO PAYS FOR PRINTOUTS/packets: ask Carrie?**

## II. PREREQUISITES

- A. NDSA Levels of Preservation
- B. Ricky Erway Articles
  - You've Got to Walk Before You Can Run  
<http://www.oclc.org/content/dam/research/publications/library/2012/2012-06.pdf?urlm=168601>
  - Walk This Way (POWRR favorites)  
<http://oclc.org/content/dam/research/publications/library/2013/2013-02.pdf>
- C. POWRR Site? DP101 section...
- D. Bring Laptop

**Comment [1]:** This will actually be discussed as the icebreaker and will be one of the handouts...so not necessarily a prereq unless we want them coming into the workshop with an understanding of where their organization is on the Levels of Preservation grid???

**Comment [2]:** Yes, I think the idea was for them to have a familiarity with it and place themselves (the institution) on it

**Comment [3]:** probably should make clear it's only the main document we're asking them to read, not added resources or tool downloads. My nominations are pp. 7-8, 10-11 ("connect source media" only) 17 (will be using "Karen's Directory Printer but I think we should also give a stand-alone checksum tool), 20-21 (consolidate and prepare), 29 (update collection info).

## III. HOUR 1 - Overview/Workflow (Flash Drive distribution)

- A. Logistics & Housekeeping
- B. Pretest?
- C. Expected Outcomes
- D. Who we are & How we got here (1 slide. *No more.*)
- E. Levels of preservation as an icebreaker? What do you hope to get out of this? Set a Time. 20 minutes?

### Hour 1-1.5 is How to we get from here to there?

- F. Solution in Theory: AIP/SIP/DIP/OAIS (Jaime will add to grid)
- G. Things you don't need to worry about
  - a. TDR (TRAC certification), Scary OAIS, Perfection
- H. Solution in Practice (Good Enough Digital Preservation): Different tools for different steps and phases of the digital preservation lifecycle (CURATION LIFECYCLE)--> **Patrice flow/mind map document (there's a price for that)**
  - a. Microservices approach: Tools/POWRR Grid (30min)  
Microservices: Single pieces of software that do specific tasks.

**Comment [4]:** The AIP/SIP/DIP connection might be good as the higher level of Mindomo for anyone who is more visual. Anyone in the group feeling creative?

**Comment [5]:** add AIP/SIP/DIP headings to grid

b. Macroservices approach: The tools POWRR project tested (processing and back-end) Macroservices: Software that performs multiple microservices together, either in sequence or simultaneously.

POTTY BREAK

#### **IV. HOURS 2.5 & 3 – In Your Office (getting started) Demo - Accessioning Files**

- A. Microservices Approach
- B. Insert flash drive, open explorer window
- C. Open up excel file that has accession & capture tab
  - 1. we took this from DPOE (locally defined by curator/archivist)
  - 2. [http://www.carli.illinois.edu/sites/files/digital\\_collections/documentation/digipres\\_identify.pdf](http://www.carli.illinois.edu/sites/files/digital_collections/documentation/digipres_identify.pdf)
    - i. Category (Digization project; born digital; university archives)
    - ii. Title and Description
    - iii. Date (date range of what's IN there or date of creation if born digital)
    - iv. Location (CD, Jump drive, server location?)
    - v. Extent (quantity: 48 journal issues; 106 images; 2 TB of video)
    - vi. Format (file formats: PDF, .Jpeg, Animated GIF, Wordstar2.0 file)
- D. Open up Duke Data Accessioner (show tool grid snapshot)
- E. Capture (demo Duke Data Accessioner and list other options--grid)
- F. Accession (begin completing spreadsheet accession/capture tab)
- G. Describe/Process (complete descriptive record)
- H. Store/Preserve (discuss/show different storage options-local vs. cloud based option)
- I. 'Macroservice' Approach [**rename to avoid either/or message**]
  - 1. **Perhaps "MacroService Approach"?**
  - 2. Demo tools from POWRR evaluation
    - i. You need x skills and this much \$ for n system
    - ii. What it does
    - iii. What it needs
  - 3. Screenshots of tools
  - 4. Functionality/Advantages/Disadvantages of each.
  - 5. Make decision based on institutional needs (case studies).

#### **V. LUNCH**

#### **VI. HOUR 4 - In Your Office (getting started) Hands on practice -**

## Accessioning Files (MicroServices Approach)

- A. Capture (demo Duke Data Accessioner)
- B. Accession (begin completing spreadsheet accession/capture tab)
- C. Describe/Process (complete descriptive record)

## VII. HOUR 5 – Outside Your Office

- A. Your stakeholders – who are they?
  - Have attendees create a list and then whiteboard them
  - Handout One-Pagers
- B. Generating buy-in
- C. Let's make a list specific to your institution! (small groups?)

**Comment [6]:** Cultivating Allies?

**Comment [7]:** Intro & share the communication one-pagers to start the discussion?

**Comment [8]:** I concur

**Comment [9]:** Agree

## VIII. HOUR 6 – Making Your Plan

- A. Keep talking – to your folks and others
  - Pass out the '3-3-3 Action Plan' forms that will include:
    1. Who will be contacted
    2. When will they be contacted
- B. Evaluation (Final 15 minutes)
- C. Post test?  
1

**Comment [10]:** Make this a takeaway: A form they can complete and share with you or in some kind of collaborative environment so you can share it w/ IMLS.

**Comment [11]:** Really think it's vital that the "Making your plan" section including "documenting" your plan. Write. It. Down.

**Comment [12]:** agreed. and they should also share w/ project so you so you can do both short term assessment and long term assessment

**Comment [13]:** Physically or on the jump drive?

**Comment [14]:** Both? Not everyone will have laptops so perhaps both as well as have a special workshop section on our website with all of the prereq's, handouts, etc.

## IX. HANDOUTS

- A. NDSA Levels of Preservation
- B. Communication One-Pagers
- C. Digital Preservation Plan/Policy Templates
  - Preservation Intent Statements?
- D. Resources
  - Additional Reading
  - U of Utah's DP Flowchart
  - Additional Sites (incl. The Signal)
  - How to stay connected to the DP community (NDSA?)

WHAT NEEDS TO BE PRINTED OUT????

EVALUATION MATERIALS

1. Pre-Test
2. Post-Test
3. Workshop Evaluation (aka was the workshop well-delivered, useful, etc)

STUFF THAT WILL USED DURING THE WORKSHOP

<sup>1</sup> DDA errors (Meg found) Unable to set last modified date (C:\Users\meg accession test\0002\UDISK): Negative time

1. The Action Plan form - to fill out WHO they will be in contact with, HOW, and WHEN (the upper half could be their 'take-home'...the lower half could be a tear-off that they will copy this info on to, include their 3 month contact info, and leave with us)

2. One-Pagers

3. Levels of DP Grid? May be useful to have a hard copy for them to look at...we reference this a couple of times and have an activity built around it.

#### STUFF THAT THEY WILL TAKE HOME WITH THEM

1. Hard Copy of DPOE's simple Inventory Grid???

2. Sample Policy **Outline?**

3. Decision Tree document/U of Utah's DP Flowchart

**Comment [15]:** I like the idea of giving them a template to work from.

#### OTHER STUFF

1. Workshop Agenda

2. Sheet for email/phone info for our 3 month follow up evaluation (if we don't use the half-sheet Action Plan idea)



## Workshop Pre-Test

\*\*\*\*\*in case they don't fill out name, etc. we need an identifier to connect a pre test with a post test for evaluation/comparison purposes

Name:

Institution:

Date:

### **QUESTION 1**

Have you initiated or been involved with any (including minimal) digital preservation (DP) activities within your organization in the past 6 months?

- A. Yes
- B. No

If Yes, please estimate how many of these activities you have carried out at your institution in the past 6 months:

- A. 1-2
- B. 3-4
- C. 5 or more
- D. Lots - DP is a primary function of my job responsibilities

### **QUESTION 2**

Indicate your level of understanding around how a variety of DP tools/ services can fit your institutional needs.

1. I am unfamiliar with DP tools/services and unsure how they might fit my institutional needs.
2. I am aware that different tools/services exist but haven't looked at them closely enough to map them to my institution's needs.

3. I have basic knowledge of some DP tools and what they can do, but struggle to apply them locally.
4. I understand how certain tools/services can satisfy different needs within my institution.
5. I can explain to a colleague how certain tools/services can satisfy different needs within my institution.

### **QUESTION 3**

Indicate your awareness level of and skills using basic DP tools.

1. I am unfamiliar with DP tools and how they work
2. I have heard of some DP tools, but aren't quite sure what they do.
3. I have basic knowledge of some DP tools and their functionality.
4. I have limited hands-on experience with basic DP tools.
5. I am able use at least one DP tool with confidence.

### **QUESTION 4**

Indicate your current ability to build awareness around the need for DP activities at your institution.

1. I don't know how to build awareness regarding DP at my institution and am unaware of resources available to help me with this.
2. I have attempted to build awareness of the need for DP, but did not have the necessary skills and/or resources to be successful.
3. I am able to build awareness with colleagues in my profession/department, but do not have the skills and/or resources to communicate with those in other institutional roles.
4. I have the resources necessary to increase my skills to the point where I can begin to build awareness at my institution.
5. I have the resources and enough skills necessary to build awareness at my institution, and have a plan of action for initializing/continuing discussions with others at my institution.

### **QUESTION 5**

Do you currently perform pre-ingest activities to prepare digital materials for digital preservation at your institution? i.e. inventory, normalization, checksums?

- 1: I don't understand what pre-ingest activities are.
- 2: I know why I should perform the activities, but have no idea where to start.
- 3: I attempted to perform these, but it was not sustainable.
- 4: I currently perform 1 or 2 pre-ingest activities.
- 5: I have a robust pre-ingest activities workflow that I successfully use.



## Workshop Post-Test

Name:

Institution:

Date of workshop:

### **QUESTION 1**

Indicate your level of understanding around how digital preservation(DP) tool/services fit within a digital curation lifecycle and can potentially fit your institutional needs.

1. I still do not understand.
2. I am aware that different tools/services exist but do not understand that they fit within a digital curation lifecycle .
3. I have basic knowledge of some tools/services and are aware that they can perform different functions with a digital curation lifecycle.
4. I understand how certain tools/services fit within a digital curation lifecycle and how they can satisfy different needs within my institution.
5. I can explain to a colleague how certain tools/services can satisfy different needs within my institution.

### **QUESTION 2**

Indicate your awareness level of and skills using basic DP tools.

1. I am unfamiliar with DP tools and how they work.
2. I have heard of some DP tools, but aren't quite sure what they do.
3. I have basic knowledge of some DP tools and their functionality.
4. I have limited hands-on experience with basic DP tools.
5. I am able use at least one digital preservation tool with confidence.

### **QUESTION 3**

Based on today's activities and the resources you have been given, indicate your ability to build awareness around the need for DP activities at your institution.

1. I don't know where to start building awareness regarding DP at my institution and have no useful resources to help me.
2. I don't know where to start building awareness regarding DP at my institution, but have the resources I need to create a plan of action.
3. I am aware of 1 or 2 basic activities I can do to begin building awareness and have

the resources I need to create a plan of action.

3. I understand several basic activities I can do to begin building awareness and have the resources I need to create a plan of action.

5. I have the resources and enough skills necessary to begin building awareness at my institution, and now have a simple plan of action for initializing/continuing discussions with others at my institution.

#### **QUESTION 4**

Based on the skills practiced today, will you be able to perform pre-ingest activities to prepare digital materials for digital preservation at your institution?

1: I still don't understand what pre-ingest activities are or why they matter.

2: I know why I should do them, but still have no idea where to start.

3: I now have a better understanding of pre-ingest activities and will be able to initialize at least one at my institution.

4: I now have a better understanding of pre-ingest activities and will be able to initialize several at my institution.

5: I now have a better understanding of pre-ingest activities and will be able to initialize several at my institution, including the use of a basic DP tool.

#### **QUESTION 5**

Based on the skills and knowledge you gained today, are you prepared to begin initial DP activities within your organization in the next 3 months?

1. I have not gained any skills and/or knowledge to help me begin any DP activities within the next 3 months.

2. I have gained some skills and/or knowledge, but not enough to begin DP activities in the next 3 months.

3. I have gained enough skills and/or knowledge to possibly begin DP activities in the next 3 months.

4. I have gained skills and/or knowledge that I will use as I begin digital preservation activities within the next 3 months.

5. I will use the skills and/or knowledge gained today to implement the 3-3-3 Action Plan I created.

Any additional comments and suggestions?

Follow up Post Workshop

1. Have you initiated any (including minimal) digital preservation activities with your organizations?

A. Yes

I. Please describe

B. no

2. Have you carried out 1 or more digital preservation activities?

Yes

No

3. Have you carried out 3 or more digital preservation activities?

Yes

No

4. How confident are you in your ability to continue to carry out digital preservation activities within your organization?

A. Not at all confident

B. somewhat confident

C. Average confidence

D. Mostly confident

E. highly confident

Given the skills taught today, how prepared are you to implement a pre-ingest workflow in the next 3 months? \*\*\*\*Include this question on 3 month interview script/survey

1: Uh, the what now?

2: Sorta gotta think about it more

3: I'm in , but I need to talk to some people

4. Downloaded it

5. LEMME AT IT





# Workshop Evaluation

Comment [16]: Since we are

Workshop Date: \_\_\_\_\_ Training Location: \_\_\_\_\_

Job Title: \_\_\_\_\_ Years in present position: \_\_\_\_\_

1=Strongly disagree 2=Disagree 3=Neither agree nor disagree 4=Agree 5=Strongly agree

1. I was well-informed about the content of this workshop. 1 2 3 4 5 N/A

2. This workshop was what I thought it would be. 1 2 3 4 5 N/A

3. This workshop is relevant to my job. 1 2 3 4 5 N/A

4. The workshop objectives were made clear to me. 1 2 3 4 5 N/A

5. The activities were helpful in learning concepts. 1 2 3 4 5 N/A

6. The pace of the workshop was appropriate. 1 2 3 4 5 N/A

7. The difficulty level of the workshop was appropriate for my level of understanding on digital preservation. 1 2 3 4 5 N/A

8. The instructors were well-prepared and helpful. 1 2 3 4 5 N/A

9. I will be able to implement some of the objectives from this workshop. 1 2 3 4 5 N/A

10. How would you improve this workshop?

11. What was the least valuable part of this workshop?

12. What was the most valuable part of this workshop?

13. Are there any other comments you would like to leave for the instructors?



# Workshop Evaluation

Comment [17]: Shorter Version

Workshop Date: \_\_\_\_\_ Training Location: \_\_\_\_\_

Job Title: \_\_\_\_\_ Years in present position: \_\_\_\_\_

1=Strongly disagree 2=Disagree 3=Neither agree nor disagree 4=Agree 5=Strongly agree

- 1. This workshop was what I thought it would be.                    1   2   3   4   5   N/A
- 2. The workshop objectives were made clear to me.                    1   2   3   4   5   N/A
- 3. The activities were helpful in learning concepts.                    1   2   3   4   5   N/A
- 4. The pace of the workshop was appropriate.                    1   2   3   4   5   N/A
- 5. The difficulty level was appropriate for my  
level of understanding on digital preservation.                    1   2   3   4   5   N/A
- 6. The instructors were well-prepared and helpful.                    1   2   3   4   5   N/A

\*\*\*\*\*

How would you improve this workshop?

What was the least valuable part of this workshop?

What was the most valuable part of this workshop?

Are there any other comments you would like to leave for the instructors?



## Workshop Agenda

8:30-9:00 - Set-up and registration

9:00-10:00 - Overview and Workflow

10:00-10:30 - Solution in practice (?)

10:30-10:45 - Break

10:45- 12:00 - Getting Started

12:00-1:15 - Lunch

1:15-2:15 - Hands on Practice

2:15-2:30 - Break

2:30-3:?? -

3:45-4:00 - Evaluations

## 3-3-3 Action Plan Exercise



Identify 3 existing institutional roles that you believe are important to involve in the process of creating a digital preservation program at your institution (perhaps in the areas of tech, admin, and advocacy?)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Of all the roles identified by the group, list 3 individuals *at your institution* in these roles that you already have a working relationship with

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

In the next 2 weeks, which of these individuals are you most comfortable reaching out to and discussing your collective next steps towards a digital preservation program?

\_\_\_\_\_

After reaching out to this individual, who should be the next individual you both connect with in the next month? \_\_\_\_\_

Who will be the third individual that your burgeoning digital preservation advocacy team brings on board in the following month? \_\_\_\_\_

List three actions you think your team can reasonably accomplish in your first three months together to move your program forward.

\_\_\_\_\_

How will you know whether the three actions you've initiated were successful?

\_\_\_\_\_

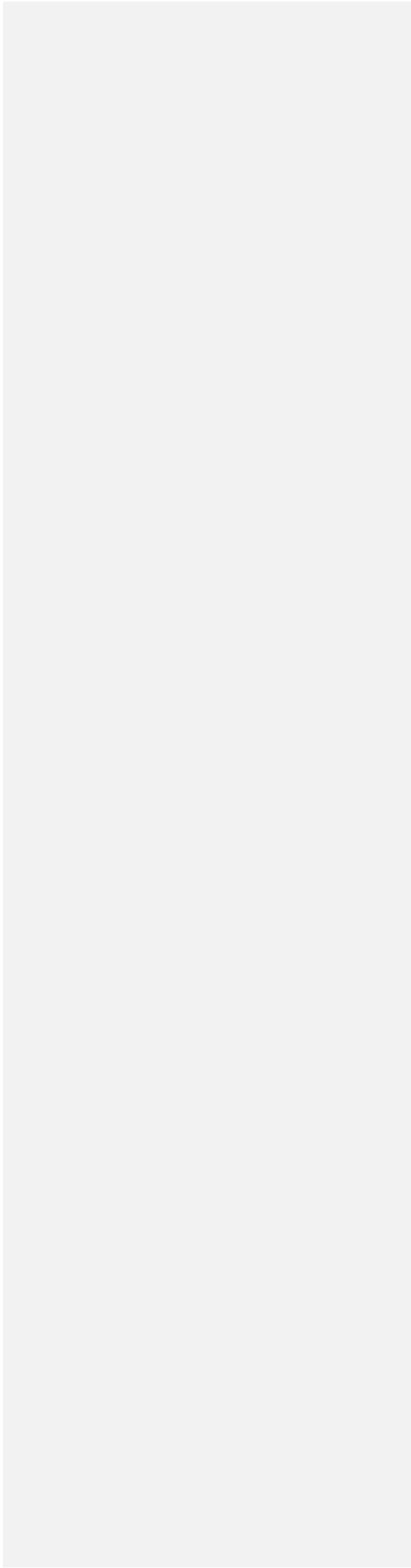
Name: Institution:

Phone: Email:

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Name: \_\_\_\_\_ Institution: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_



## 3 Month Post Workshop Survey



1.

follow up for: Given the skills taught at the workshop, how prepared are you to implement a pre-ingest workflow in the next 3 months