

South Carolina Digital Library

Stakeholders' Summit

November 14, 2007

Columbia, SC

Full Report

## Introduction

On November 14, 2007, the South Carolina Digital Library (SCDL) staff held a summit at the South Carolina State Museum in Columbia, SC to address issues including sustainability, funding, institutional support, and inter-institutional collaboration. Appendix A provides a list of the institutions' representatives who donated their time to attend the summit. Dr. Toby Graham, director of the Digital Library of Georgia, delivered a presentation to those present outlining the core concepts of success and sustainability for a statewide digital library program. See Appendix B for more information about Dr. Graham.

Kate Boyd, Digital Collections Librarian at the University of South Carolina and SCDL project coordinator, delivered the opening remarks and introduced Dr. Graham. Ms. Boyd remarked that the primary purpose of the summit would be to discuss the creation of a statewide digital library in South Carolina—a goal that could be achieved with the necessary institutional and financial support of key stakeholders.

This report will serve its purpose by: outlining the events of the stakeholders' summit, highlighting the key discussion points and questions, providing the suggestions for sustainability and institutional support addressed during discussion, and recommending a list of next steps that the South Carolina Digital Library should take in forming a sustainable plan and organizational structure.

Our staff would like to extend its most sincere gratitude to Dr. Toby Graham and all representatives who attended the summit for their time donated to the South Carolina Digital Library.

## Presentation by Dr. Toby Graham

Dr. Graham's vast knowledge of and experience with digital libraries provided the attendees of the summit with invaluable information to ignite discussion. He described that a record of a state's past is represented by its cultural heritage, and that an effective strategy is required to get that cultural heritage content online for access by all people. An outline of the four major concepts discussed by Dr. Graham in his presentation follows:

### *Financing and Funding*

- Six attributes of a financially sustainable program:
  - Ongoing and one-time support
  - LSTA funds as a key component
  - “Big players” are involved
  - Program generates incentive for all partners
  - Fee structure (in some capacity)
  - Important to maintain a sustainable mix of financial support; do not solely depend on grant funding
  
- Develop a project of national interest

- LSTA can serve as an incentive to be inclusive with digitization for major players
- Major players want to realize how involvement will ultimately benefit their own institution
- Ongoing financial support also includes state funds, private gifts, and corporate sponsorship
- Projects have a greater chance for sustainability using a shared infrastructure—garner funding from a variety of sources
- Funding for the Digital Library of Georgia (DLG) staff comes from a variety of sources. The director is funded by University of Georgia (UGA), while others are funded through other institutions or grants
- Funding sources for the DLG include UGA, GALILEO, Office of Contract, LSTA, IMLS, and NEH, among others

### *Technical and Operational Sustainability*

- Sustainability is not all about money. It is also important to cultivate both expertise and capacity
- Carry over knowledge from project to project to reduce repetition of effort. Leverage existing knowledge
- Build a concentration of expertise and capacity in key areas such as metadata, programming, and audio/visual media
- Draft a Memorandum of Understanding for all potential partners. The Memorandum of Understanding should address issues such as loaning and licenses for public display. Insure institutional commitment!
- Define your relationship with each type of institution. Be sure to identify the individual needs of each institution because your relationship with them will change depending on their needs.
- When writing grants, make the terms worthwhile for other institutions. Building the capacity of another institution through grant funding benefits both parties and strengthens your relationship with them
- Develop a technological capacity that makes your collections harvestable and searchable by Google

### *Digital Preservation*

- Digital preservation requires three factors: technology, policy, and resources
- Collaboration is a logical response to digital preservation, especially with a program such as LOCKSS (Lots of Copies, Keep Stuff Safe) where you depend on other institutions to store your electronic material, just as they depend on your institution to do the same. Florida has a fee-based model for system sharing

### *Oversight*

- Accountability to the stakeholders
  - Identify key resources that should be digitized. Needs assessment surveys and project selection guidelines are useful for identification of these resources

- Develop steering committees and scope documents to define the project’s “shared vision”
- Develop working groups to oversee more technical operations such as project and proposal planning
- Project Selection
  - Embrace diversity by finding the right mix of collections. Diversity in collections includes: topical, chronological, geographical, institutional, and the format and type of content (e.g., audio/video)
  - Address “wish list” collections—what does the state want to see digitized? These projects may be rather large in size and require several years of involvement until completion
- How do you deal with institutions who fear that putting their collections online would negatively affect demand and visitation?
  - Explain that putting collections online does not typically decrease demand for the original collections. In fact, digitizing collections and making them freely available online usually increases demand and awareness of collections
- 3 collaborative models for digital production
  - A centralized model works excellently for the proper execution of standards, but may be too focused on too few institutions. Frequent transportation of material would also be required
  - A decentralized model allows a greater sense of ownership and participation among partners, requires a smaller central staff, and builds practical knowledge across the state. However, a decentralized model also requires extensive training, excludes places without sufficient capacity, and can eventually provide uneven or inconsistent results
  - Under a hybrid model, you serve different roles for different partners
- Oversight of digital materials
  - Digital Library of Georgia stores all master images for partners, thus far totalling 11 terrabytes in size
  - Union metadata catalog
  - UGA also handles all Galileo accounts

## Discussion

The discussion that followed Dr. Graham’s presentation revolved around four recurring issues: funding and sustainability, developing an organizational model, devising methods of appealing to smaller institutions and museums, and determining the parameters of a collection policy.

### *Funding and Sustainability*

- The SC State Legislature could be a possible source of financial support. A plan should be developed that outlines an approach that appeals to state legislators. For example,

Glen McConnell has an interest in the Hunley. How could SCDL take advantage of that interest? Senate journal and House journals could also be considered for inclusion in SCDL. The Legislature would also possibly support a connection to the K-12 community because it brings culture to the classroom

- Appeal to rural legislators and underrepresented communities
- A large part of sustainability is sustaining interest
- PASCAL will continue its support of SCDL, although the extent of that support has yet to be determined
- Do not think of SCDL as a project, but rather a long-term program
- Institutions involved with SCDL need to take steps to commit to the program in order to work together
- USC, Clemson University, and the College of Charleston have committed to working together for SCDL through staff sharing
- The SC SHRAB has an archivist [not an SCDAH employee] on contract to assist in updating the Board's directory of SC historical repositories and assist regrant recipients. Some of her repository information and advice might be helpful for a future SCDL survey effort.
- A number of the attendees expressed that it is too early to consider sources of funding for now. For the time being, use the LSTA grant and PASCAL funds to determine an organizational structure and collection policy
- Dr. Samantha Hastings pointed out that SCDL should use organizations that are already in place

### *Organization*

Getting an idea of the desired organizational structure of SCDL from this stakeholders' summit was a major goal of the SCDL staff. Attendees contributed the following suggestions:

- A number of questions were raised on the subject of organization:
  - How can institutions contribute to SCDL (in an organizational capacity) in a way that is consistent with the institution?
  - What institutional needs are covered by SCDL? Where do our interests lie?
  - If a steering committee is developed, how do you translate it into interest?
  - What institutions would need to be involved with SCDL on an executive level?
  - Who will be the parent institution of SCDL?
- Emily Gore, Digital Collections Librarian at Clemson University, recounted that NC ECHO had an advisory committee of Special Collections Librarians/Curators, Museum professionals and K-12 representatives from throughout the state who developed strategic goals and a mission. SCDL could develop a similar committee
- A steering group could generate interest by identifying projects that would have a statewide appeal
- It was suggested that SCDL file under 501(c)(3) status to become a non-profit organization. This suggestion did not have much support, though the suggestion of having a "friends of the library" type of organization for SCDL that could file for 501(c)(3) status

- The State Librarian, David Goble, showed interest in possibly incorporating SCDL into the State Library when Samantha Hastings pointed out that most digital library programs are a part of other state's state libraries
- David Goble also suggested that some sort of dynamic tension must exist, and thus favored the formation of a committee
- A similar suggestion for the creation of an advisory board also had general support among attendees
- Agreement that any executive board should be under the auspices of the State Library
- Tom McNally, Interim Dean of USC Libraries, posed the question: "Who would take part in this board?" Suggested institutions include:
  - SC Department of Education
  - SC Educational Television (SCETV)
  - State Legislature
  - SC Federation of Museums
  - Professional library organizations such as SCLA
  - State Library
  - PASCAL
  - Small, focused groups
- Deliverables would be expected from each meeting of this board

#### *Appeal to Small Institutions and Museums*

- Any barrier to small institutions, such as a fee structure, would not be a good idea
- Fritz Hamer, Chief Curator of History at the SC State Museum, pointed out in the discussion that museums feel a disconnect with the SCDL. He argues that more should be done to accommodate and involve museums
- Determined that SC museums need further contact and involvement
- Jill Koverman, President of the SC Federation of Museums, said that it could be possible to appoint a new staff member of that organization to primarily focus on digital activities
- Suggested that a statewide assessment of materials, or a survey of what smaller institutions want to have digitized, could be a grant-funded opportunity to go around the state and develop relationships with these smaller institutions
  - Samantha Hastings demonstrated great support for this idea, and offered resources to conduct survey
  - Dwight McInvaill, Director of Georgetown Public Library, recommended one-on-one counseling with institutions if a survey were to be done
  - Interact with the people that are constantly involved with SCDL and let them network for you as well
  - Visit each institution and get to know the employees and their collections
  - Develop an idea of the scope of the collections, and how it would fit into the scope of SCDL
- If a small institution has resources, what benefit does it gain from becoming part of SCDL?
  - Better public relations and exposure of collections

- Heightened access to their materials
- One attendee noted that it is best practice to present a unique package for each individual institution that shows interest
- Include museum representatives on SCDL board

### *Collection Policy*

- Use the findings from the survey to determine a collection policy
- A better collection policy can be developed with a heightened knowledge of South Carolina's collections
- A collection policy should be in place before requests for funding are made
- Should SCDL's collection policy be limited to collections directly related to South Carolina's cultural heritage, or should it include any collection held by a South Carolina institution? (such as broadsides or illuminated manuscripts)

### Next Steps

Dr. Graham's presentation and the following discussion led to a number of ideas about what direction the South Carolina Digital Library should take. At the end of the day, the staff targeted four areas that need to be addressed in the coming year:

#### 1) Committees

Much of the discussion at the stakeholders' summit revolved around the creation of some type of steering committee. After much thought and consideration of the ideas brought up by the attendees, it has been determined by SCDL staff that an executive committee needs to be formed, 11-13 members in size, that includes representatives from large and small universities, archives, museums, small cultural institutions, state government, state broadcast agencies, and historical and arts societies. Once a list of potential candidates has been drafted, they will be contacted and invited for a discussion of how to best form the executive committee and possibly develop a draft of committee by-laws. This committee would be responsible for determining what avenues SCDL should follow in terms of acquiring sustainable funding and capacity.

Reporting to this committee will be an advisory board composed of each Working Group chairperson. The members of this advisory board will elect a spokesperson to report to the executive committee and SCDL staff about the findings of the Working Groups. Creating a hierarchical structure through these committees would lead to greater accountability on the part of the Working Groups and their members.

#### 2) Statewide Survey

Given the interest by Dr. Samantha Hastings about providing resources to conduct a statewide survey of cultural heritage materials in South Carolina, SCDL will attempt to coordinate with Dr. Hastings, USC's School of Library and Information Science, and Dr. Jennifer Marshall to develop a plan that explores the possibility of conducting this survey with the aid of USC SLIS and graduate students under the direction of Dr. Marshall. While this survey will be useful to determine a collection policy for future projects

undertaken by SCDL, current projects and projects that are presented to SCDL staff in the near future should not be put on hold because of the vast amount of time involved in conducting a statewide survey.

3) Working Groups

Members of the current task forces will be notified that more permanent Working Groups will be established this winter. Those members will be asked if they want to continue their involvement with the Working Groups, and notified of the possibility of a Working Group Advisory Board that reports to the Executive Committee. Some of the current task forces may not evolve into Working Groups since their tasks have been completed this year.

4) Role of State Library

SCDL staff will continue contact with the State Librarian, David Goble, to determine if it is feasible for the South Carolina Digital Library to be incorporated by the State Library. Other issues of the support and sustainability of SCDL will also be presented to Mr. Goble this winter. SCDL would also like to discuss K-12 access to SCDL collections with the State Library.

## Conclusion

The South Carolina Digital Library faces a host of changes and challenges in the coming new year. The Stakeholders' Summit on November 14<sup>th</sup> has demonstrated that many of the cultural institutions in South Carolina support the efforts of the SCDL staff, but many of them also observe that organizational gaps exist in the program that could eventually undermine any goals of future sustainability. The recommendations presented in this report aim to address those organizational issues, as well as demonstrate that SCDL actively seeks to collaborate with other institutions to develop a statewide digital library that benefits education, students, the public, and our state, nation, and world at large.

## APPENDIX A

### **Stakeholders' Summit - Attendee List November 14, 2007**

#### **Guests**

Randy Akers – SC Humanities Council  
Grace Cordial – Beaufort County Public Library  
Alma Creighton – USC Libraries  
David Goble - Director, South Carolina State Library  
Fritz Hamer – SC State Museum  
Dr. Samantha Hastings – Director, USC School of Library and Information Science  
Glen Inabinet – Confederation of Local South Carolina History  
Beverly James- Greenville County Public Library  
Faye Jensen – SC Historical Society  
Dr. Lynn Kelley – Academic Affairs, SC Commission on Higher Education  
John Kennerly – Erskine College and PASCAL  
Jill Koverman – McKissick Museum  
Dwight McInvaill – Georgetown County Public Library  
Tom McNally – Interim Dean, USC Libraries  
Rick Moul – Director, PASCAL  
Bob Neville – College of Charleston  
Troy Travis – SC Division of the Chief Information Officer  
Roy Tryon – SC Department of Archives & History  
Kay Wall – Director, Clemson University Libraries  
Guynell Williams – South Carolina State Library

#### **SCDL Staff**

Kate Boyd – Digital Activities Librarian, USC  
Christopher Vinson – Assistant Coordinator, South Carolina Digital Library  
John White – College of Charleston  
Emily Gore – Digital Collections Librarian, Clemson University

## APPENDIX B

### **Dr. Toby Graham**

Toby Graham has been director of the Digital Library of Georgia since 2003.

Beginning in 1999, he was Head of Special Collections at the McCain Library and Archives at the University of Southern Mississippi.

He earned a Ph.D. in Library and Information Studies and a Masters in History from the University of Alabama, Tuscaloosa. He received a B.S. in Social Science and History from James Madison University.

Toby has written and presented numerous publications and has been a successful grant writer. He has been awarded two National Leadership Grants from the Institute of Museum and Library Services (IMLS): one for almost half a million dollars to fund the collaborative digital effort in Mississippi, and a more recent grant to create the Civil Rights Digital Library Initiative in Georgia for \$761,000.

He also helped the Digital Library of Georgia receive an LSTA, or Library Services and Technology Act, grant for Georgia HomePLACE, a multi-year project to enhance access to local and family history resources and to forge partnerships between public libraries and the Digital Library of Georgia. That grant was funded for \$800,000.

In 2006, Toby was given the University Librarians Award for Outstanding Employee of the Year for Faculty at the University of Georgia.