Words with Friends: Digital Preservation Peer Assessment

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Poll
I’m a digital preservation practitioner: my job is directly related to digital preservation
I am a digital preservation consultant and/or trainer providing services to cultural heritage institutions
I am interested in digital preservation, but not directly involved with it at my institution.
I don’t have much experience with digital preservation, but I’m here to learn more
I don’t fit into any of your very narrow categories!
Goals

Participants will leave this workshop with an understanding of…

- How peer assessment can make digital preservation challenges more manageable
- Steps in a digital preservation peer assessment
- Tools to perform a peer assessment
Agenda

• Digital Preservation Peer Assessment background
• Peer Assessment Framework overview
• Fast Peer Assessment
• Conclusion
Assessment Framework Background
Publications: Assessment Frameworks

Digital Preservation Assessment

<table>
<thead>
<tr>
<th>Level 1 (Protect your data)</th>
<th>Level 2 (Know your data)</th>
<th>Level 3 (Monitor your data)</th>
<th>Level 4 (Repair your data)</th>
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</thead>
<tbody>
<tr>
<td>Storage and Geographic Location</td>
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<tr>
<td>Two complete copies that are not collocated</td>
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<tr>
<td>- For data on heterogeneous media (optical discs, hard drives, etc.) get the content off the medium and into your storage system</td>
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<tr>
<td>At least three complete copies</td>
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<td>At least one copy in a different geographic location</td>
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<td>Document your storage system(s) and storage media and what you need to use them</td>
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<tr>
<td>At least one copy in a geographic location with a different disaster threat</td>
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<tr>
<td>Obsolescence monitoring process for your storage system(s) and media</td>
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<tr>
<td>At least three copies in geographic locations with different disaster threats</td>
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<tr>
<td>Have a comprehensive plan in place that will keep files and metadata on currently accessible media or systems</td>
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File Fidelity and Data Integrity
- Check file fidelity on ingest if it has been provided with the content |
- Create file info if it wasn’t provided with the content |
- Check fidelity on all ingests |
- Use write-blockers when working with original media |
- Virus-check high risk content |
- Check fidelity of content at fixed intervals |
- Maintain logs of file info; supply audit on demand |
- Ability to detect corrupted data |
- Virus-check all content |
- Check fidelity of all content in response to specific events or activities |
- Ability to replace/repair corrupted data |
- Ensure no one person has write access to all copies

Information Security
- Identify who has read, write, move and delete authorization to individual files |
- Restrict who has those authorizations |
- Document access restrictions for content |
- Maintain logs of who performed what actions on files, including deletions and preservation actions |
- Perform audit of logs

Trustworthy Repositories Audit & Certification: Criteria and Checklist
NEH Grant activities

2017
- Task force meeting
- Round 1 assessments
- Feedback interviews
- Framework update
- Regional Alliance for Preservation (RAP) Meeting

2018
- Round 2 assessments
- Framework update
- Consulting cohort training
- Cohort assessments
- Feedback interviews
- Symposium

2019
- Peer assessment handbook release
- Assessment handbook release
"Community of practice"
Assessment Framework
Assessment Framework

1. The Organization
2. Staff and Resources
3. Policy Infrastructure
4. Processes and Workflow
5. Technological Resources
Discussion Prompts

The Organization

Organizational Structure

Discussion Prompts

- Is there a Board of Directors or similar governing organization? Is the organization a part of a larger institution? How do these groups influence planning and implementation of digital preservation?
- Which parts of the organization have responsibility and/or authority for planning for digital collections and digital preservation? (Avoid details covered in the Staff and Resources section, below.)
- Is there a decision-making structure or project management approach in use elsewhere in the organization that could be adapted or applied to improve digital preservation planning and implementation?
- Which stakeholders are involved in long-term planning for digital preservation? Are there stakeholders who should be involved but are not?
Idea Bank

- Suggestions for improvement
- Not prioritized
- Not comprehensive

Organizational Structure

Idea bank
1. Create a cross-functional decision-making structure that can devise short-, medium-, and long-term plans for the digital preservation program.
2. Add responsibilities within job descriptions to fill gaps in the organizational chart.
3. Change reporting structures to more accurately reflect digital preservation workflows and goals.
4. Add non-staff stakeholders to decision-making processes and groups.
Assessment methods

Interview    Co-assess
Interviewing tips

• Gather information without judgement
• Keep an open mind
• Practice active listening
• Agree to the interview duration
• Decide on a deliverable
• Talk about your strengths
1. Pair up
2. Start with the Collections section
3. Ask each other the questions and answer about your own institution
4. Take notes
5. Choose other section(s) to co-assess
6. Report back, group discussion

Peer Assessment Handbook
Which sections did you tackle?

What did you learn about your own organization?

What are your action items for your institution?
Next Steps
Take this project home with you

- Share your findings
- Full Assessment
- Planning
  - Prioritization
  - Deadlines
## Planning Spreadsheets

### November 1, 2020-October 31, 2025

<table>
<thead>
<tr>
<th>Year</th>
<th>Activity</th>
<th>Strategies &amp; Steps</th>
<th>Measures of Progress</th>
<th>Target Date</th>
</tr>
</thead>
</table>
| 1    | Policy development| 1. Update collection development policy  
2. Modify deed of gift to include transfer of intellectual property rights  
2. New deed of gift is approved by staff  
| 1    | Staff and resources| 1. Update job descriptions to include digital preservation  
2. Add budget line item for preservation  
3. Have staff join digital preservation listservs | 1. Job descriptions approved by admin.  
2. Line item approved  
3. Listservs selected and joined | 1. Nov.  
| 1    | Digital storage   | 1. Work with staff to identify current storage in use | 1. Surface level storage inventory created | 1. Apr.  
2. Dec. |
Thank you!

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