

ABSTRACT

The National Digital Stewardship Symposium

On behalf of a coalition of National Digital Stewardship Residency (NDSR) organizers and stakeholders, The Metropolitan New York Library Council (METRO) is requesting \$100,000 to host a Symposium focused around evaluating and sharing the work performed over the first four years of NDSR programs. The purpose of the Symposium is: 1) to provide a forum for NDSR stakeholders to discuss the program evaluation scheduled to be completed by Council on Library and Information Resources (CLIR) in 2016, and use it to develop standardized guidelines for future NDSR programs; 2) to expand the reach of NDSR by identifying potential future organizers of digital stewardship residency programs from under-served areas within the preservation landscape, and inviting them to participate in discussions around the future of NDSR; 3) to foster the development of a digital preservation community of practice through face-to-face discussion of digital stewardship initiatives and challenges encountered during NDSR projects; and 4) to raise awareness of the NDSR program by sharing NDSR's achievements with a broader audience.

The Symposium will be held at the Library of Congress in the late spring of 2017, and will be free and open to the public. Starting in the summer of 2016, Program Staff will collaborate with an Advisory Committee of NDSR program organizers -- including representatives from the Library of Congress, Harvard, MIT, and WGBH -- to recruit a Program Committee composed of stakeholders from all four past and current NDSR programs (NDSR DC, NDSR Boston, NDSR NY, and AAPB NDSR). Over the next several months, the Program Committee will solicit proposals and develop the educational curriculum for the Symposium. During this time period, NDSR stakeholders such as past and current hosts and residents will have the opportunity to apply for travel grants for attendance at the Symposium. Additionally, up to 5 representatives of organizations that serve under-resourced areas in the preservation landscape will be specifically invited and funded by the Program Committee to attend the Symposium as potential future digital stewardship residency program organizers.

Over the course of the first 1.5 days of the Symposium, NDSR stakeholders will present sessions, workshops and panels focused around digital stewardship projects and research related to the NDSR program. The last half-day of the Symposium will focus on evaluations of the NDSR program, including the evaluations of individual NDSR programs completed by Howard Besser and Michelle Gallinger, and the cross-program evaluation scheduled to be completed by CLIR in December of 2016. NDSR stakeholders will use these evaluations as a springboard to discuss and develop a set of standards and guidelines for future digital stewardship residency programs, incorporating feedback from the potential future program organizers who have been invited to attend the Symposium.

In the three months following the Symposium, the Project Staff and the Advisory Committee will build upon the notes generated by the group discussion and compile the agreed-upon standards and guidelines into an NDSR Handbook, to encourage the development of future NDSR programs. The Handbook will be made publicly on the NDSR site and presented at the National Digital Stewardship Alliance's (NDSA) Digital Preservation Meeting in 2017 for the benefit of the broader digital preservation community.

NARRATIVE

Statement of Need

On behalf of a coalition of NDSR organizers and stakeholders, METRO is requesting \$100,000 to host a Symposium to support and grow the NDSR community and the digital preservation community. The Symposium will serve the following functions:

- 1) it will provide an opportunity for existing NDSR stakeholders (current and past hosts, residents and organizers) to convene and participate in discussions around the program evaluation scheduled to be completed by CLIR in December 2016, and develop a handbook of guidelines, recommendations and standards for future NDSR programs with a coordinated national perspective;
- 2) it will invite potential future stakeholders in NDSR -- groups and organizations from underserved areas within the preservation landscape who may benefit from applying for new NDSR grants to spread digital preservation awareness within their community -- to learn about the process of developing an NDSR program by interacting with current NDSR stakeholders, thus expanding the reach of the initiative, and participate in the creation of the handbook;
- 3) it will foster a digital preservation community of practice by giving NDSR stakeholders from around the country -- including digital stewardship professionals from within libraries, museums, archives, and public media organizations -- an opportunity to learn from each other's achievements and perspectives, discover potential partnerships, and bring their experience back to share with digital stewardship professionals in their geographic regions; and
- 4) it will raise awareness of the NDSR program by presenting the work performed during past NDSR projects to a broader audience, thus encouraging discussion around shared digital preservation challenges and opportunities

One of the primary goals of the NDSR program model is to address the shortage of individuals adequately trained to fill digital stewardship positions, and support the development of a national digital platform, by building a strong, engaged, experienced community of digital preservation professionals. All of the NDSR programs to date have proven themselves well able to meet this expectation by developing mentorships and strong cohort bonds among the hosts and residents of each regional program. However, the relationships and knowledge networks formed over the course of these programs have for the most part remained siloed – strong within the boundaries of the regional programs, but offering few opportunities for cross-program collaborative development.¹

¹ Howard Besser's assessment of the first NDSR program in DC stated that "as new cohorts are developed in other cities, there needs to be coordination between the cohorts." Michelle Gallinger's assessment of NDSR New York and NDSR Boston a year later confirmed that this remained a challenge: "Work needs to be done to fully realize the "national" part of the National Digital Stewardship Residency [...] The NDSR programs would benefit from banding together to connect their networks and expand them further."

Moreover, the digital preservation communities who have benefited from this project have largely remained clustered along the East Coast of the United States. The AAPB NDSR, which will send residents to public media organizations across the country, is one step towards expanding the reach of the program, but there exist many more preservation communities of location and association who would benefit significantly from the digital preservation support and development that an NDSR program provides.

IMLS has recently recognized a need to assess the NDSR program, not as a set of individual initiatives, but as a whole. To that end, CLIR has been funded to perform an assessment of the program overall and produce a report with recommendations for future initiatives, based on the experiences of residents and mentors in the various projects that have existed to date.² Their assessment is scheduled for completion in December of 2016. Because the CLIR assessment is a cross-program evaluation, NDSR stakeholders recognize the vital importance of discussing CLIR's conclusions and recommendations as a community, and developing standards and guidelines based around them. The Symposium, which will be held in early 2017, will provide a unique opportunity for these important discussions to take place. During the Symposium, the community will use the report as a starting point out of which to develop a sustainable handbook and set of guidelines for future NDSR projects. This will support and magnify the impact of CLIR's research, and lower the barriers for the development of future digital stewardship residency programs.

The Symposium will also address the need to expand the program's reach into underserved areas by inviting potential NDSR program organizers from communities that are under-represented in the digital preservation community of practice -- such as coalitions of rural archives, indigenous archives, or community-based archives -- to join existing NDSR stakeholders in the Symposium. These potential program organizers will participate in the discussion of the CLIR report, and provide feedback on the development of the handbook. In this way, the Symposium will ensure that the NDSR guidelines, documents and standards set forth in the handbook will effectively serve the needs of a diverse community of future NDSR stakeholders.

From the beginning, the NDSR program has been intended to bolster and grow the digital stewardship community by "building a dedicated community of professionals who will advance our nation's capabilities in managing, preserving, and making accessible the digital record of human achievement."³ Thus far, the bulk of the work of building this community has largely occurred within the geographic localities of each program, through the collaboration between residents, hosts, and program organizers in completing designated digital preservation projects. However, the broader digital preservation community does not yet have a strong understanding of the work performed by the NDSR program or the value it brings. Michelle Gallinger's assessment notes that "even new programs will only reach a select group of participants in each region [...] Conference attendance and

² "CLIR Receives IMLS Grant to Assess National Digital Stewardship Residency Programs," accessed 1/10/2016, <http://www.clir.org/about/news/pressrelease/NDSR>

³ "About NDSR," accessed 12/29/2015, <http://ndsr.nycdigital.org/about-ndsr/>

presentations are one important way to continue to expand the national understanding of the NDSR.”⁴ After five years, there is a need for the NDSR program to look outward and work towards a broader sense of community-building. The NDSR Symposium will play an important role in this, allowing NDSR stakeholders to build ties to external digital preservation professionals -- including, specifically, the broader community represented by the National Digital Stewardship Alliance, who have committed to supporting the event and providing opportunities to share the results. This will further the reach and impact of the Symposium as a vehicle for education and networking within the digital preservation community of practice.

In studies done on digital preservation education, researchers have emphasized “the importance of face-to-face sessions held over a number of days with numerous social events. Participants learn both in the formal presentations and in the informal discussions. Participants learn from each other and gain a great deal of confidence from being part of a digital community and knowing that others share their concerns and problems.”⁵ As a face-to-face educational networking event, the NDSR Symposium will allow NDSR stakeholders to discuss their digital preservation concerns and problems with each other and with other members of the digital preservation community who are not specifically affiliated with the NDSR. The first four years of NDSR have generated numerous digital preservation practical and research projects, all of which have tremendous value for the digital preservation community beyond the smaller group of NDSR stakeholders.

Impact

There are several representative groups who will benefit from the NDSR Symposium in distinct and tangible ways:

1) Current NDSR stakeholders -- including program organizers, current and past hosts and residents, and funders -- will utilize their shared experience to assess and improve the framework of the NDSR program. They will discuss the program evaluations performed by Howard Besser, Michelle Gallinger, and the CLIR team in a group setting, addressing shared challenges, determining cross-program standards, and laying down a roadmap to implement recommendations suggested by the evaluations for future NDSR programs. They will also incorporate feedback from prospective NDSR organizers and hosts about what materials, guidelines and standards will be important for future program organizers to have available to them. By the end of the discussions held at the Symposium, the NDSR program organizers will have an outline of an NDSR handbook, which will be developed and completed by the Advisory Committee, incorporating feedback from NDSA, in the three months following the event. The focused discussion around appropriate program standards, and the resulting guidelines, will benefit IMLS and other funders of digital stewardship residency programs in assessing future proposals for residency programs.

⁴ Gallinger, Michelle, “NDSR New York: Assessment of the 2014-2015 Program Year,” June 2015

⁵ Wendy M. Duff, Amy Marshall, Carrie Limkilde, and Marlene van Ballegooie, “Digital Preservation Education: Educating or Networking?” *American Archivist* 69 (2006), 188-189, <http://www.jstor.org/stable/i40011850>.

NDSR stakeholders will also benefit from the opportunity to share their work with each other and present it to a broader audience in a context that emphasizes the role of the NDSR program. Michelle Gallinger's evaluation recommends that "additional focus should be paid to consistently presenting more information about the program itself and the benefits it provides to the digital preservation community in addition to the very important role it plays in the career paths of the residents;" the NDSR Symposium will provide the ideal opportunity to share practical digital stewardship advice while also broadening awareness of the NDSR program.⁶ Moreover, the format of the Symposium will allow NDSR stakeholders from various different programs and environments to discuss their digital preservation work in the context of other similar other projects, drawing out patterns and trends in the digital preservation landscape. This will allow stakeholders to learn from each other and from the other attendees from outside NDSR who may have similar stories to share about digital preservation projects that they have undertaken. Additionally, it will enhance the overall benefit these projects provide as case studies and examples for the digital preservation field.

2) Prospective future NDSR stakeholders, such as potential NDSR organizers and hosts, will learn from current NDSR stakeholders about successful past NDSR projects, organizational challenges, and lessons learned. They will have access to discussions focusing on NDSR evaluations, including the CLIR report and the programmatic evaluations conducted by Howard Besser and Michelle Gallinger. They will also have the opportunity to raise their own concerns with the program as it currently exists and address any issues that might prevent them from pursuing an NDSR project of their own. Their feedback about what NDSR template materials would be useful to them in future grant applications will shape the NDSR handbook and guidelines that will be created in the months following the Symposium. After the NDSR handbook is completed, they will gain access to the handbook and template materials for use in their future NDSR projects. They will also make contacts within the national NDSR community who can support and mentor them through the process of applying for an NDSR grant. The participation of these prospective stakeholders and their eventual development of strong NDSR programs will, in turn, support and grow the range and diversity of the NDSR community.

3) Members of the broader preservation community with no direct ties to NDSR will learn from the collective knowledge gained over the course of five years of projects and research performed by NDSR hosts and residents. As Duff et al. noted in their study on ERPANET workshops and seminars, "attendees feel that the case studies and exchanges with other participants are key to the overall success of the events; face-to-face networking is important because it increases confidence levels."⁷ The fact that NDSR projects -- while complex, ambitious, and fulfilling -- are designed to be completed by new professionals and recent graduates who may not have any previous specific digital preservation experience makes them excellent case studies for preservation professionals who may feel intimidated by the challenges of digital preservation, or uncertain of their welcome at a digital-focused event. Additionally, placing NDSR projects from various years, locations and contexts in conversation

⁶ Gallinger, Michelle, "NDSR New York: Assessment of the 2014-2015 Program Year"

⁷ Duff et al., "Digital Preservation Education"

with each other will provide important perspectives on cross-disciplinary trends in digital preservation over the past five years, from which all attendees will benefit. Finally, the networking aspect of the Symposium will encourage attendees to build connections so that, in the future, they can tap into existing NDSR and digital preservation networks to ask for assistance, develop partnerships, and problem-solve digital challenges.

Project Design

Phase 1: Planning -- The planning process for the Symposium will be undertaken by a Program Committee, consisting of NDSR residents from the AAPB NDSR and NDSR DC programs that will be ongoing at the time of the event; as well as NDSR resident alumni from the previous NDSR DC, NDSR Boston and NDSR NY programs; and representatives from hosts and organizers of past and current NDSR programs.

In the first phase of the project, an Advisory Committee of NDSR organizers -- including representatives from AAPB NDSR, NDSR Boston, NDSR NY, and NDSR DC -- will reach out to their representative stakeholder communities of current residents, resident alumni, and host alumni to identify appropriate representatives (2 per program) for the Program Committee. The work of the Program Committee will be guided and supported by Margo Padilla and Rebecca Fraimow, as Project Staff. Each Program Committee member will receive an honorarium of \$1,000.

Beginning in September of 2016, the Program Committee will have regular virtual meetings to begin planning for the Symposium. By the end of September, information will go up on the NDSR website advertising the Symposium and inviting interested parties to apply for funding to attend as prospective NDSR organizers. Information about the event and the call for session proposals will also be posted publicly on the website and advertised through general and specialized library, archive and museum mailing lists and communication channels. The website will provide information on how NDSR current residents and hosts, resident and host alumni, and prospective NDSR organizers can apply for travel stipends to offset the costs of attending the Symposium. Up to 60 NDSR stakeholders may receive up to \$750 in travel money for Symposium attendance. In addition, the Program Committee will identify and directly reach out to organizations that represent underserved communities within the library, archive and museum landscape through phone and email to invite them to attend the event. These directly invited organizations may receive up to \$1000 in travel money for Symposium attendance.

The Program Committee will be responsible for identifying and inviting prospective NDSR organizers; selecting and inviting speakers; setting the Symposium schedule; updating the website; implementing the communication plan described below; and managing logistics onsite. The Program Committee will also coordinate with CLIR, NDSA, and the Library of Congress, who will be hosting the event. Based on the schedule of selected programs, the Program Committee will also determine whether additional event space outside of what the Library of Congress can provide will be needed for the event. The Advisory Committee will continue to support the Program Committee by recommending speakers and

participants to invite, assisting with the communication plan to advertise the symposium, and providing advice and feedback when requested. As the lead institution on the project, METRO will also support the Program Committee by managing the budget for the Symposium and assisting with planning and logistics of the event.

Phase 2: Symposium -- The Symposium will take place primarily at the Library of Congress in the late spring of 2017, with additional locations determined by the Program Committee as needed, and will run for two days. Symposium attendance will be free for all attendees.

The Symposium will begin with a keynote address, presented by a speaker selected and invited by the Program Committee, on the topic of the NDSR program, its achievements over the past four years, and its role within the digital stewardship community. The keynote address will provide an understanding of the importance of the NDSR program and contextualize the projects discussed in the rest of the Symposium.

After the Keynote, the Symposium will include 1.5 days of presentations and workshops around digital stewardship projects and research related to the NDSR program. Potential topics might include digital preservation methodologies, workflow development, research, and common challenges. Sessions may include presentations, in which speakers present the results of specific NDSR projects; workshops, in which speakers provide hands-on education with a process, workflow or tool that they worked with or developed over the course of an NDSR project; or panels, in which a group of speakers discuss a shared digital preservation challenge and compare their methods and solutions for managing it. The program will include a mix of speakers identified and invited by the Program Committee, as well as proposals submitted by NDSR stakeholders through the joint NDSR website and selected by the Program Committee. These presentations will be open to the digital preservation community; all will be welcome to register for the Symposium and participate in the discussions around digital stewardship. Breakfast and lunch will be provided on the first day of the Symposium, and breakfast will be provided on the second day. These meals will be specifically designated as networking events encouraging digital preservation professionals and NDSR stakeholders to interact with each other and discuss the topics presented at the Symposium more informally.

The final half-day of the Symposium will focus on the discussion of the CLIR report, as well as previous evaluations performed by Howard Besser and Michelle Gallinger, and on the development of a standardized set of NDSR program recommendations. It will include an open session to discuss the report, guided by the NDSR program organizers. This session will go through the reports and evaluations, and highlight action items for adjusting the the NDSR program model and developing standards to be included in the NDSR program guidebook. It will also include a session in which potential NDSR organizers are specifically invited to ask questions and brainstorm ideas for future NDSR programs.

Phase 3: Recommendations -- Following the Symposium, the Advisory Committee of NDSR organizers will build upon the recommendations generated during the final half-day of the Symposium.

Over the subsequent three months, the Advisory Committee, led by the Project Staff, will develop a standardized handbook of instructions and documents for the use and adaptation of future NDSR programs. The Advisory Committee will also solicit feedback on the handbook from NDSA working groups. This handbook will be published on the joint NDSR website and will also be sent directly to the invited Symposium attendees who may develop NDSR programs in future. Finally, the handbook and the results of the Symposium will be presented to the digital stewardship community at NDSA's annual Digital Preservation Meeting in 2017.

Diversity Plan

Any NDSR stakeholder may apply for funding to attend the NDSR Symposium, which will be granted without regard to a person's race, color, religion, national origin, sex, sexual orientation, age, disability, veteran status, or other characteristic protected by law.

One of the Symposium's key goals is to expand the NDSR community beyond its current locations, which have thus far been mostly limited to East Coast cities that already feature robust preservation communities and serve as major loci of digital preservation expertise. The Symposium aims to provide support and assistance to preservation communities with fewer preservation resources that would benefit from an NDSR program targeted to their needs and requirements, much as the AAPB NDSR has developed a program to serve the needs of the public broadcasting community. This will be accomplished by including prospective NDSR program organizers in discussions around the future of NDSR and ensuring that they receive encouragement and mentorship. Prospective NDSR program organizers may therefore also apply, like other NDSR stakeholders, to receive a travel stipend to offset the travel costs of attendance at the Symposium. The project will only require that individuals applying for this funding describe their interest and potential investment in organizing or hosting an NDSR program.

Additionally, the Project Committee and Advisory Board will specifically identify preservation organizations that act on behalf of under-resourced or under-served areas within the preservation community, and contact these organizations with an offer of travel funding to send a representative to attend the Symposium. These organizations may represent libraries, museums or archives with rural collections, community-run collections, minority-focused or minority-run collections, First Nations collections, or other areas of focus within the preservation landscape that have a strong need for the benefits provided by an NDSR program and whose participation will significantly expand the diversity of the NDSR community. The Program Committee is committed to sponsoring the participation of up to 5 organizations that fall within this category. This will support these organizations in their ability to provide their designated community with digital preservation assistance, as well as strengthening their ties to the digital preservation community of practice.

Project Resources: Personnel, Time, Budget

Key Project Personnel:

Margo Padilla, Project Director (.05 FTE for 1 year)

Ms. Padilla, METRO's Strategic Initiatives Manager, will be responsible for overall project management including planning and scheduling, and coordinating the Program and Advisory committees. She will be responsible for IMLS reporting requirements and communications. Ms. Padilla is currently the Project Director for NDSR-NY and a former resident in the inaugural NDSR-DC program. She has experience as a project manager for multi-institutional initiatives, as well as educational event planning.

Rebecca Fraimow, Project Coordinator (.05 FTE for 1 year)

Ms. Fraimow, Program Coordinator for the AAPB NDSR, will support the Project Director in coordinating the Advisory Committee and the Program Committee to complete their obligations throughout the course of the project. As the coordinator of one of the two NDSR programs which will be ongoing at the time of the Symposium, Ms. Fraimow will take responsibility for the involvement of AAPB NDSR residents in the Symposium development. She will also maintain the joint NDSR program website, which is currently hosted by WGBH. In addition to acting as the Program Coordinator for the current AAPB NDSR project, Ms. Fraimow is a resident alumna of NDSR Boston and a former conference organizer for United Business Media. She has extensive experience with educational event planning and with various iterations of the NDSR project.

Additional Staff:

Shelly Mohammed, METRO Controller: Ms. Mohammed has been METRO's controller since 2014 and will manage the NDSR Symposium finances through an in-kind contribution of her staff time. Since 2014, she has managed METRO's financial reporting on a number of grant projects and has extensive experience managing grant funds and meeting the mandated government requirements involved with METRO's partially state-funded status.

Technology Consultants, To Be Hired: (100 hours at \$40 per hour; \$4000 in grant funds)

Technology consultants will assist with the website for the Symposium, set-up and manage digital technologies that will be used in breakout sessions, and manage all A/V needs during the Symposium. METRO will draw on its existing relationships with many technology consultants having performed similar work.

Advisory Committee:

The Advisory Committee will be comprised of at least one representative from each institution that has received a grant to organize an NDSR program at the time of the Symposium (with the exception of METRO, who will be leading the project) The duties of the Advisory Committee include: 1) reaching out to their specific program's stakeholder communities to identify appropriate representatives for the Program Committee; 2) supporting the Program Committee by recommending speakers and participants to invite, assisting with the communication plan to advertise the symposium, and providing advice and feedback when requested; 3) hosting and moderating discussions at the Symposium around the CLIR evaluation and other evaluations performed on NDSR programs; and 4)

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participating in the joint development of the NDSR program guidebook after the conclusion of the Symposium.

George Coulbourn, Executive Program Officer, Library of Congress

Nancy McGovern, Head, Curation and Preservation Services, Massachusetts Institute of Technology

Andrea Goethals, Manager of Digital Preservation and Repository Services, Harvard University

Karen Cariani, Director, WGBH Media Library and Archives

Casey Davis, Project Manager, American Archive of Public Broadcasting

Program Committee

Each NDSR program represented by the Advisory Committee will be responsible for determining 2 representatives from their stakeholder community to serve on the Program Committee. At least 1 of those representatives for each program will be a current or former NDSR resident. The Program Committee will be guided and led by Margo Padilla and Rebecca Fraimow.

The duties of the Program Committee will include: 1) selecting and inviting prospective NDSR organizers; 2) selecting and inviting speakers; 3) setting the Symposium schedule; 4) updating the website; implementing the communication plan described below; 5) coordinating with CLIR and NDSA; and 6) managing logistics onsite. The Program Committee will hold monthly virtual meetings with METRO project staff, and will invite feedback at regular intervals from the Advisory Committee on the proposed Symposium schedule and deliverables for the event.

Timeline

This project will take place over a period of 12 months, from July 15, 2016 to July 15, 2017.

7/16 - 10/16: Advisory Committee determines the date for the Symposium, alerts stakeholder communities, and selects Program Committee members

10/16 - 4/17: Program Committee implements communication plan, opens call for proposals and applications for travel funding for NDSR stakeholders, selects and invites speakers and prospective NDSR organizers, and plans logistics for the onsite event; Advisory Committee reviews CLIR evaluation (due 12/16) and plans for Symposium discussion

4/17 - 5/17: Symposium (specific date TBD)

5/17 - 7/17: Advisory Committee reviews notes and recommendations from Symposium discussion, and compiles them into the NDSR program handbook and white paper

Budget

METRO is requesting \$100,000 from IMLS to support the NDSR Symposium. Costs include: travel for 22 committee and advisory attendees (\$22,000) and up to 60 NDSR Stakeholders (\$45,000), technology consultants (\$4,000), program committee honoraria (\$8,000), printing and production

materials (\$3,550), catering for 2 days (\$12,450), and venue space (\$5,000). METRO and its partners are contributing \$6,584 in total cost share.

Communications Plan

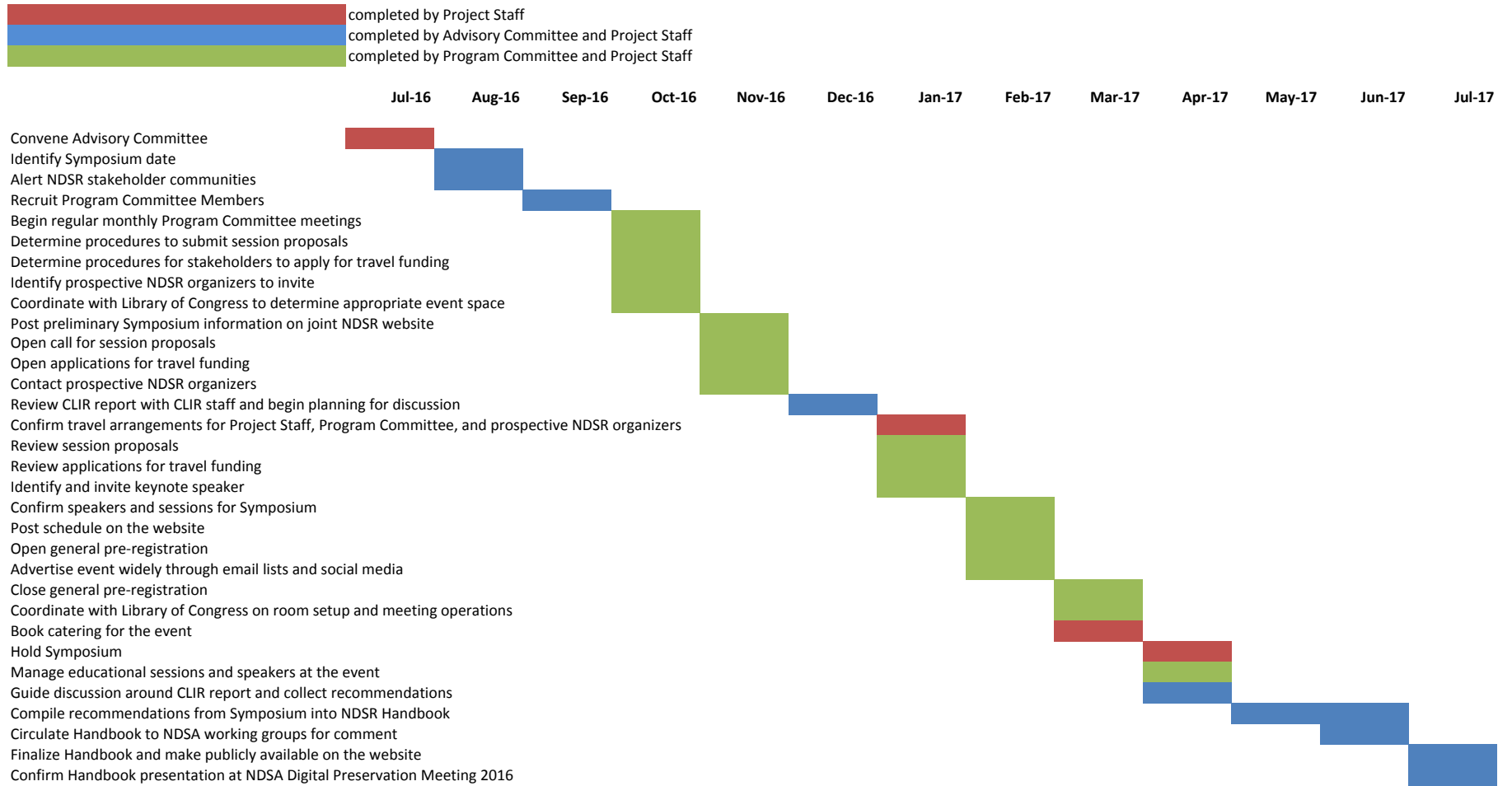
To spread information about the NDSR Symposium, the Advisory Committee and Program Committee will leverage the communication networks that have already been put into place through the various NDSR projects. In the past, individual NDSR programs have successfully recruited a variety of host and resident applications from within the digital preservation community by promoting the program on social media using the highly active #ndsr hashtag, advertising in a range of professional listservs, hosting informational web events, and blogging extensively on dedicated project sites as well as on external sites, such as the Library of Congress Digital Preservation-focused blog The Signal. Each program is able to effectively contact their own localized NDSR communities through the use of program listservs, and there exists, in addition, an active NDSR alumni listserv which can be used to reach resident alumni across the four existing programs.

The NDSR Advisory Committee and program organizers have also developed a joint NDSR landing page -- currently hosted by the AAPB NDSR at WGBH -- which, with the launch of the NDSR Symposium, will grow into its designated function as a centralized point of access for the national NDSR program. The individual NDSR program websites, the NDSR social media networks on Twitter, LinkedIn, and Facebook, the NDSR resident alumni email listserv, and the various other listserv connections utilized by the different programs will all serve to drive traffic to the centralized NDSR page (and vice versa). This website will be the main public-facing source of information about the Symposium, including date and location information, calls for presentation proposals, and instructions for how NDSR stakeholders may apply to receive travel funding to attend the event. Once the schedule for the Symposium is finalized, this information will go on the NDSR landing page as well. After the Symposium concludes, the website will host the NDSR handbook developed out of the discussions at the Symposium, as well as contact information for NDSR stakeholders so that prospective NDSR organizers have an easy way to reach out and find more information about the program.

Additionally, as described in the Diversity Plan, the Symposium Program Committee will identify organizations that represent traditionally underserved areas in the preservation community and contact them directly with an offer of funding to send a representative to the event as an NDSR stakeholder/prospective NDSR organizer. The Program Committee will also request that any NDSR stakeholders -- including prospective NDSR program organizers with no prior affiliation with NDSR -- that receive funding to send a representative to the Symposium will utilize their own communication networks to promote the open portion of the event to their network of contacts and local/regional preservation communities. This will ensure that the NDSR Symposium is promoted beyond the usual NDSR community of interest, and serves its function as an educational event that benefits the entire digital preservation community.

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SCHEDULE OF COMPLETION



Original Preliminary Proposal

The National Digital Stewardship Residency Symposium

Summary

The Metropolitan New York Library Council (METRO), in partnership with Harvard, MIT, WGBH, and the Library of Congress, is requesting support to host a Symposium of National Digital Stewardship Residency (NDSR) stakeholders for the purpose of fostering meaningful connections between NDSR programs, considering issues and challenges raised during the first four years of residencies, and furthering the NDSR goal of building a strong and self-sustaining national community of digital stewardship professionals.

Background

The network of National Digital Stewardship Residency (“NDSR”) programs – now in its fourth year of operation – has to date extended across three cities, thirty-three host institutions, and thirty-five residents. With the third round of the NDSR DC program and the addition of the new NDSR American Archive of Public Broadcasting (“AAPB”) program next year, that community will stretch to include an additional seven cities, twelve more residents, and twelve more host institutions, as well as an ever-broadening web of mentors, instructors, partners, and supporters. One of the primary goals of the NDSR program model is to address the shortage of individuals adequately trained to fill digital stewardship positions, and support the development of a national digital platform, by building a strong, engaged, experienced community of digital preservation professionals. All of the NDSR programs to date have proven themselves well able to meet this expectation by developing mentorships and strong cohort bonds among the hosts and residents of each regional program. However, the relationships and knowledge networks formed over the course of these programs have for the most part remained siloed – strong within the boundaries of the regional programs, but offering few opportunities for cross-program collaborative development.¹

In order to continue building a truly national digital stewardship network – and to better demonstrate the achievements of the NDSR program overall and its value to the larger preservation community -- the four existing NDSR programs to date (DC, Boston, NY, and AAPB) see great potential to further the program’s impact by convening a joint NDSR Symposium (“the Symposium”). The Symposium will bring together stakeholders, including residents, hosts, alumni, and program administrators from across the four networks of NDSR, in the first fully collaborative NDSR project. It will be held in the spring of 2017, towards the end of the last two currently scheduled rounds of residencies (NDSR DC and NDSR AAPB, 2016-2017). The Symposium will allow members of the NDSR community to reflect and build on the work and experiences that they have undertaken over the course of the program, expand their networks by presenting their work to a broader audience, and develop recommendations to guide future iterations of the NDSR program and further support the growth of the digital preservation community. The Symposium will be administered by METRO for NDSR NY in partnership with the other lead organizations for past NDSR projects: the Library of Congress for NDSR DC, Harvard and MIT for NDSR Boston, and WGBH for NDSR AAPB.

Work plan

The 12-month project will take place over the course of 4 phases, from August 1, 2016 - August 1, 2017.

Phase One (3 months): A program committee (“the Program Committee”) consisting of at least one administrator from each NDSR program, as well as residents in the NDSR AAPB and NDSR DC cohorts, will convene 6 virtual meetings to plan the logistics of the Symposium, such as location, dates, format of presentations, extent, speakers, number of participants, food, program structure and communications plan.

¹ As noted in Michelle Gallinger’s assessments of NDSR New York and NDSR Boston, “Work needs to be done to fully realize the “national” part of the National Digital Stewardship Residency [...] The NDSR programs would benefit from banding together to connect their networks and expand them further.”

Phase Two (3 months): The Program Committee will finalize logistical details, including location; formally announce the Symposium; and review and curate programming proposals.

Phase Three (3 months): The Program Committee will finalize speakers and programming. A detailed schedule of the Symposium will be created and made available on the joint NDSR website (ndsr-program.org), along with additional information about the program, activities, and registration. The Symposium will be held at the end of Phase Three.

Phase Four (3 months): After the symposium, Program Committee will coordinate the symposium evaluation and submit the evaluation along with the white paper. The white paper will summarize the recommendations about the NDSR program and community developed at the Symposium. All proceedings and presentations will be made available on the joint NDSR website.

Performance goals and outcomes

- **Convene stakeholders across the NDSR programs**

By convening stakeholders across all four NDSR programs representing a wide range of perspectives and roles in the project -- including residents, hosts, resident alumni, host alumni, program coordinators, instructors, mentors, and partners -- the NDSR Symposium will generate a multifaceted view of the successes and challenges experienced across the NDSR initiative as a whole, and provide guidance for future NDSR initiatives.

- **Encourage collaboration and community-building within the NDSR network**

Participants in the symposium will have the opportunity to present on the ongoing impact of past NDSR residency projects, discuss trends in tackling digital preservation challenges across the different organizations, and take advantage of the experience of the community to pose problems and brainstorm collaborative solutions. This will encourage hosts and residents to form cross-regional connections, partnerships and knowledge-sharing networks, and strengthen the development of an active nationwide NDSR community.

- **Raise the profile of NDSR within the broader community**

NDSR hosts and residents have successfully embarked on a wide number and variety of digital preservation projects with results worth sharing and publicizing broadly. Inviting members of the digital preservation community to join NDSR stakeholders at a prestigious and professionally valuable educational event on the topic of digital preservation will make the broader community more aware of NDSR's achievements and provide opportunities to expand the NDSR network.

- **Provide residents with experience in putting together a professional event**

NDSR DC and AAPB residents will be invited to play a major role in the design, organization, and management of the Symposium. This experience will not only serve as a valuable exercise in planning and networking, but also provide them with the confidence and experience to plan further collaborative digital preservation-focused events as they go forward in their careers, thus continuing to expand the reach and knowledge of NDSR.

- **Generate recommendations on the future of NDSR**

The Symposium will build on the experience of stakeholders, as well as the information in the recently funded CLIR report (due to be released in late 2016), to address key questions about the NDSR program, including how NDSR programs can continue to develop sustainably and how to continue supporting and growing the NDSR community. The conclusions generated at the Symposium will be summarized in a white paper.

Estimated project budget

The project budget will go towards supporting travel for key NDSR stakeholders and speakers (\$50,000); securing a venue, catering, and equipment for the NDSR Symposium (\$40,000); and providing technological support for virtual attendance (\$10,000) for a total budget of \$100,000.