***Agenda, Pioneer Days in Florida, Orientation Meeting, March 4, 2013***

**Documents:**

Revised Schedule of Work reflecting April 2, 2013 start date

PDF listing of project items

**Summary of Goals Stated in Grant Proposal:**

Web presence for the P.K. Yonge Library of Florida History (comparable to existing presence for Baldwin Collection

* Consolidate grant items, previously scanned items in “Florida & the Civil War,” and other materials that belong to Miscellaneous Manuscript into a single website for “Pioneer Days in Florida.”
* Make this website either the website for the P.K. Yonge Library of Florida History or subsume it under a P.K. Yonge website

Multiple methods for viewing items, including zoom and flip-book

Re-use of existing metadata

Incorporation of existing typescripts of text; provision for allowing addition of typescripts in future from student/intern work

Highlighting of selected materials as part of lesson plans

**Additional Goal if Possible:**

Embed a short orientation video into main website

**Discussion:**

Input about project hire

Adjustments to personnel/cost share

Review schedule/plan of work

Preparation of materials: inventory and metadata

First stage of project: scanning of diaries

Monitoring benchmarks/performance goals

Tagging of potentially offensive material

**PIONEER DAYS IN FLORIDA DIGITAL PROJECT**

**Time Schedule of Activities, Two Years (April 1, 2013 - March 31, 2015)**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Activity | April-July 2013 | | Aug.-Nov. 2013 | | Dec. 2013-  Mar. 2014 | | April-July  2014 | Aug.-Dec.  2014 | Jan.-March 2015 |
| Selection & Folder Review | Ongoing but primarily at start of imaging for diaries and then of imaging for family papers and letters | | | | | | | |  |
| Conservation Review |  | | | |  | |  | |  |
|  | | | | |  | |  |  |  |
| Digitization Actions | | | | | | | | | |
| Hiring and Training of Imaging Technicians |  |  | | | | | | |  |
| Record Ingest to Tracking |  | Diaries | | | | Family Papers & Letters | | | |
| Imaging |  | Diaries | | | | Family Papers & Letters | | | |
| Quality Control |  | Diaries | | | | Family Papers & Letters | | | |
| Package Markup/ Deployment/ Archiving |  | Diaries | | | | Family Papers & Letters | | | |
| Conservation Assessment |  | Ongoing as need arises and as materials are processed | | | | | | | |
| Re-shelving of Materials |  | Ongoing as materials are processed | | | | | | | |
| Creation of webpage and educational module and project documentation |  | Runs throughout project | | | | | | | |
| Testing of website / promotion of resources |  | | | Target summer teacher workshops, college classes in Florida history, October Gulf South History Conferences (2013,2014) and May Florida Historical Society Annual Meetings (2014,2015) | | | | | |
| EAD finding aids and UF Catalog records updated |  | | | To be done as after initial testing of website for functionality | | | | | |

**SUMMARY PLAN OF WORK:** Upon receipt of the grant award, the Libraries will circulate information about the project through press releases, list-servs, and other media. The project team, consisting of archivists and digital experts, will meet to discuss scheduling and the hiring of the Project Technician. The time schedule of the project is two years. Project Director James Cusick and Co-Director John Nemmers will review all materials and update existing spread sheets to create the master list of project materials. Pre-imaging review of items will be carried out in consultation with the Conservator. At the start of the grant period in April 2013, the project will hire and train a Project Technician at an annual cost in salary and benefits of $39,975. The target goal is for the Project Technician to conduct imaging and attachment of metadata on 18,265 pages of material per year, at an average cost per image of $2.19, with other project tasks covered by UF cost share. Total average cost for digitization per page is estimated at $4.38. Initial training for the Project Technician will include familiarization with equipment and procedures by the Digital Production Supervisor and Imaging Supervisor, along with an orientation to the project, the handling of materials, and associated descriptive data with the Project Director. In May 2013, diary material will be transferred to the DLC for imaging and the production schedule will be coordinated between the Project Director and Co-Director Lois Widmer, Chair of Digital Services. The Project Technician will work from a master spread sheet giving the physical description of each item, its date range, and descriptive data. In cases where an electronic transcription of the item exists, the content or location of content will be provided, to be imported. The normal sequence of digital project activities at the DLC include: registering materials into the DLC tracking database, imaging, image processing and quality control, mark-up, data transfer, and archiving (see the supplementary attachment *Plan of Work* and *Digital Materials Preservation Plan*). From May 2013 through March 2014, the project will focus on digitization of bound diaries, which are the easiest materials to handle and organize. From April 2014 to October 2014, the focus will be on the family papers. The Project Director and Co-Director Nemmers will orient the Project Technician to the arrangement of the family collections, emphasizing the importance of original order, and will consult regularly to ensure that digital versions maintain the structure of the originals. From November 2014 to February 2015, work will focus on the letters. This material will be moved in stages to the DLC from with each item in its own folder along with identifying MS number and metadata. Materials will be reviewed for conservation issues and returned to Special Collections at the completion of each stage (Diaries, Family Papers, Letters).

Website development will begin in July 2013 and will be ongoing, with testing of functionality in late 2013/early 2014. Development of the educational module will take place in the Summer and Fall of 2013. Initial presentations of both the website and module to teacher audiences will take place in Fall 2013, with further input and testing from presentations in the Spring and Summer of 2014. Imaging will be completed by February 2015. The website will go public at the end of the project, and Co-Director Nemmers, the descriptive and technical archivist, will complete updates to EAD finding aids and UF Library Catalog records. The Project Director and Co-Director Widmer, Digital Services, will monitor all DLC activity during the project, generate quarterly output and cost share calculations, and prepare reports on production. Close out and final project reports will be completed within three months of the end of the grant period.

**DETAILED PLAN OF WORK**

**Pre-Imaging: Selection, Preparation, and Conservation Review**

 Award Announcement thru April 1, 2013: James Cusick (Curator of Florida History) and John Nemmers (Archivist), co-directors, will examine each archival container, identify potential special needs materials, daguerreotypes, photographic images, sketches, etc., and complete a pre-imaging spreadsheet. The spreadsheet will record collection, i.d. number, number of volumes/folders/items, page counts, location of existing descriptive data, with notes for the DLC. The Conservator will undertake review of items as necessary and in consultation with the Project Director.

 *March-April 2013.* Initial meeting of project team followed by hiring and training

of the Project Technician. Project Technician will assist in pre-imaging preparation to

become familiar with condition issues and handling of materials while receiving training in the DLC. Minor preparation work (flattening, unfolding of folded page) will be carried out. The Conservator will handle issues requiring expertise, such as disbounding, stabilization of extremely fragile pages, or relaxation of creases. Materials that are fragmentary or torn will be protected in clear mylar envelopes for imaging. Notes on handling will be recorded in the project spreadsheet and forwarded with material. All conservation supplies will be supplied by Special Collections.

**Digitization Actions**

 *April-May 2013:* Project Director and Co-Director Lois Widmer (Digital Services)

establishes the imaging schedule and tools for monitoring output. Diaries move forward to the DLC. All items will be tracked. If a patron requests use of material while it is in the DLC, it will be temporarily retrieved for use in the Special Collections reading room. The DLC will have a copy of the master spread sheet for all items, including the hyperlinks, catalog records, or other locational information for existing descriptions. Once a collection is received by the DLC, the descriptive data will be imported into the UF Digital Collections Tracking Database to be converted to metadata. Descriptive metadata elements in the existing forms include: Collection Name/Name of Creator, Collection Dates, Physical Description, Synopsis of Contents, and Keyword or Library of Congress Subject Heading tags from which national Metadata Encoding and Transmission Standard (METS) metadata will be created. The basic METS files are created and enhanced automatically as materials move through the digitization chain from this point on. The UFDC Tracking database assigns a unique eight digit Bibliographic Identifier (BibID) to each digital object, and that BibID will be used to track the item throughout the digitization process.

 *May-June 2013* and continuing: The Project Technician will commence imaging of the diaries under supervision of Traveler Wendell, Imaging Supervisor, and Randall Renner, Digital Production Supervisor. All imaging will meet the requirements of the item’s physical format. Individual archival pages will be scanned on CopiBook or flatbed scanners at minimum of 300 dpi, 24 bit color. Diaries and journals will be scanned on CopiBooks at 300 dpi, 24 bit color. Processing includes initial image review of all pages, adjusting the image quality as necessary, including adjustment of levels, skew, and contrast. Images will be captured as uncompressed TIFF files (ITU6.0) at 100% scale. Both flatbed and CopiBook scanners will be calibrated regularly in order to maintain color fidelity and optimum image results.

 *July* *2013* and continuing: Meeting of project directors and digital team to review

progress. Initial meeting of team for educational module to discuss design and content. Scanned images move to Quality Control and Text Processing. After initial scanning and image enhancement, all aspects of image control and digital package creation are controlled by the UFDC Toolkit, also known as the SobekCM Toolkit or SobekCM production tools, an integrated software package that controls derivative image formation, quality control review at the package level, and deployment to the UFDC server. This stage of processing is handled through Jane Pen, head of the Quality Control Unit, using a derivative creation tool to create JPG, JP2 (or JPEG2000), and JPG thumbnail images. A second program, the Quality Control tool, displays thumbnails of each image in sequential order. These images are reviewed. Errors are noted and returned to the imaging unit for scan/rescan of the pages. Quality Control also reviews the structural and bibliographic metadata for correctness and completeness. At this point, the initial METS file contains basic structural and administrative metadata, as well as the descriptive metadata re-purposed from the EAD files, catalog records, and MS Access database. Once quality control has been completed, the digital package moves to the Text

Processing, Digital Validation, Archive, & Preservation Unit. For this project, Matt

Mariner, the Text Processing unit head, will ensure all package level metadata conforms to the national METS, our local extension schemas, and to requirements for serving in UFDC, preservation in the Florida Digital Archive, and optimization for interoperabilitywith other systems. Users can view the METS file and MARCXML for any item loaded in UFDC by selecting the “Citation” tab and then the “Metadata” subtab for every item (e.g.; http://ufdc.ufl.edu/UF00094622/00001/metadata ). With final package approval, this unit verifies the online files and sends the package to the local archive and the Florida Digital Archive for preservation archiving. The above procedures have been used successfully to process more than 7.7 million pages into the UFDC collections, available at http://ufdc.ufl.edu/ .

 *July-November 2013*: Continuation of above work on diaries, with monthly meetings of project directors and digital team to review progress. Continuing development of educational module and initial development of webpage with trial population of items.

 *December 2013-February 2014*: Continuation of above work on diaries, with monthly meetings of project directors and digital team to review progress. Wrap up of imaging for diaries (22,095 images). Preparation of family collections for imaging. A test webpage and draft lesson plans for educational module will be ready for review by faculty and student feedback of Fall Semester classes, with a presentation (October) at the Gulf South conference and input from two Alachua county schools. Laurie Taylor (DLC), James Cusick, Project Director, and John Nemmers, Co-Director will be responsible for creating the project home page. James Cusick, Laurie Taylor, and Marilyn Ochoa (Education Library) will create the educational module.

 *March-April 2014:* Family collections move forward, steps above repeated. Curator

and conservator assess diaries for condition, stabilize them, and re-shelve.

 *April-August 2014*: Continuation with family collections.

 *May 2014:* Presentation at Florida Historical Society Annual Meeting

 *September-October 2014*: Wrap up of family papers imaging (10,370 images). Conservation review of processed materials. Preparation of letters for imaging. Presentation and request for feedback on project’s products from summer teacher workshops.

 *November 2014-January 2015:* Imaging of the letters (4,065 images). Final testing and presentations of website and educational module. Launch of radio spot (*Florida Frontiers*) and article to educators (*Forum* Magazine). Presentations to Fall classes and Gulf South conference.

 *February-March 2015:* Finish imaging. Final conservation review. John Nemmers, Co- Director, completes updates of EAD finding aids and UF catalog entries to include appropriate hyperlinks. Team/project assessment and preparation of project reports. Conclusion of project.