



DECIDING TO OUTSOURCE OR DIGITIZE IN-HOUSE

When approaching a digitization project, there are many factors to consider. One key decision to make at the outset of a project is whether to complete digitization in your own organization, or seek an outside vendor to complete the work. Some points to consider include: the size of the digitization project, how complicated the digitization process may be, the project timeline, equipment needed to complete the project, and your organization's experience with digitization projects. There are valid reasons to consider both in-house and outsourcing options during digitization project planning. Resources one should consider in making this choice include: time, money, and personnel. This document will help you weigh these factors, and examine whether outsourcing or in-house digitization is more suitable for any given digitization project.

TASKS IN A DIGITIZATION PROJECT

Conversion from an analog item to a digital file is just one piece of the whole digitization process. Many decisions in a project must be made before conversion begins. Understanding the tasks involved in a given project will make it easier to break down which steps should occur in-house, and which should be outsourced (if any). Outside vendors are available for just about every step in the digitization process. Identify if a vendor will be efficient, cost effective, and culturally appropriate when doing any digitization work for your institution.

These steps must occur in-house, and are important parts of the digitization process.

- Defining the purpose of digitization (determining user needs)
- Selection of materials for digitization (choosing which materials to prioritize)
- Creating descriptive metadata (information that can only be provided within the institution, tribe, or organization)
- Quality assurance after items have been digitized

Any of these processes may need to occur in any given project, and can be completed by an outside vendor or in-house:

- Deciding on technical specifications
- Original materials preparation (flattening, consolidation, cleaning)

- Digitization (the actual conversion of materials)
- Creating and applying metadata
- Quality control of digitized files
- Storage and management of files
- Designing access systems
- Digital Preservation and file back-up services

IN-HOUSE DIGITIZATION

OPPORTUNITIES

- Opportunity to learn by doing, develop custom or specialized processes relevant to your institution
- Ability to define needs for quality, access, and technology incrementally as the project develops rather than all at once at the beginning of a project (though identifying these before starting is part of good project planning and sometimes required for grant funding)
- Ensure security, proper handling, and access to materials, since material stays within your institution the whole time. This includes following and respecting cultural protocols, as well as library/archives/museum standards.
- Ensure focus of library/archives requirements, or cultural concerns
- Maintain consistent checks of the quality of the work

POSSIBLE CHALLENGES

- Large initial and ongoing investment of funds and time - must buy and maintain equipment, train staff, be responsible for unexpected costs
- Substantial ramp-up time needed to create workflows and implement technology - it takes a while to build a solid infrastructure
- No set per-item cost
- Institution pays for expenses instead of products, including costs of downtime, training, and technology obsolescence

- Volume and speed of work is dependent on staff time
- A range of staffing expertise may be required for using technology, applying metadata, dealing with preservation problems, etc.

IF YOU DECIDE TO DIGITIZE IN-HOUSE

- Consider staffing for the project, additional staff training, and how the work will be carried out - personnel are key to digitization
- Invest in computers and equipment that suit your needs
 - Standalone, dedicated digitization units
 - Keep them offline, off-network to avoid issues with automatic updates, clock resets, etc.
- Have a full understanding of your IT department and be able to work alongside them to achieve digitization and digital preservation requirements

OUTSOURCING DIGITIZATION

OPPORTUNITIES

- Cost containment and limited risk
- Ability to contractually define a timeline to get outputs on time, helpful if working under grant funding or other strict deadlines
- Usually a set price per item, which facilitates project planning and budgeting
- Paying for the cost of scanning, not for staffing or equipment
- Costs of expertise, training, and technology obsolescence are covered by vendor
- Costs typically lower than in-house figures, although prices vary widely based on outside vendor
- Vendors may be able to handle larger volume and higher production levels than in-house
- Broad range of options and services available, including imaging, metadata creation, enhancements, processing, encoding, derivative creation, printing, storing and backup, database development

POSSIBLE CHALLENGES

- Your institution must have an idea of specifications and project goals at the start of the project, must be able to measure these and evaluate if vendor can complete to satisfaction
- Institution removed from digitization work; services most often performed off site. May also want to ensure that the vendor is not contracting out to a third party
- Chance of vulnerability or risk if vendor is unreliable
- Vendor must handle rare original items, or materials with cultural significance or protocols, and items will be temporarily out of the home institution's care
- Security, handling, transportation issues
- Vendor could be inexperienced with needs of cultural institutions
- Must develop Request For Proposals documents, negotiate contracts with vendors, and communicate production and quality requirements – which can be challenges in communication
- It can be challenging to refine requirements and negotiate for services

IF YOU DECIDE TO OUTSOURCE DIGITIZATION

- Know your project goals, desired outputs, and materials well
 - Short and long term goals
 - Metadata and other derivative or related file needs
 - Standards for quality and needs for final product
- Find a trusted vendor, try checking with:
 - Regional institutions (develop professional connections with trusted professionals in your area, get their recommendations and input)
 - Association of Recorded Sound Archivists
 - Association of Moving Image Archives
 - Ask others for recommended vendors
- Create a detailed Request for Proposals (RFP), which clearly outlines content and requirements
- Get quotes from several vendors to select the best option for your institution

- Negotiate a contract, including terms for if the vendor you are working with goes over time or budget
- Be aware of best practices, standards, and specific project needs and hold your vendor accountable to these
 - Federal Agencies Digitization Guidelines Initiative (FADGI)
 - Understand that standards are constantly under revision, and there are multiple standards for any given format – find what works best for you
- It is best practice to have master/preservation and access copies, ensure that your vendor will deliver all the files and metadata asked for, in the formats and filetypes that you specify
 - Consider what option will save more time and money: just getting a preservation copy and creating your own access copies or getting both preservation and access copies from the vendor. This depends on each vendor and project
- Once collections are digitized, you must know where and how will you store them. You must have a full understanding of your IT department

ADDITIONAL RESOURCES

- Northeast Document Conservation Center Preservation Leaflet 6.7 Outsourcing and Vendor Relations <https://www.nedcc.org/free-resources/preservation-leaflets/6.-reformatting/6.7-outsourcing-and-vendor-relations>
- Cornell Libraries Moving Theory into Practice Digital Imaging Tutorial, Determining the Best Approach: Outsourcing vs. In-House Programs <https://www.library.cornell.edu/preservation/tutorial/management/management-03.html>
- Connecting to Collections Care resources on Outsourcing <http://www.connectingtocollections.org/>
- Association of Moving Image Archivists <http://www.amianet.org/>
- Association of Recorded Sounds <http://www.arsc-audio.org/>

SOURCES FOR RECOMMENDATIONS OF OUTSIDE VENDORS

- Association of Moving Image Archivists <http://www.amianet.org/>
- Association of Recorded Sounds <http://www.arsc-audio.org/>