

Orbis Cascade Alliance
Archive Engine West Working Group
For the Content Creation & Dissemination Team
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Archive Engine West Working Group Members

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Background and Charge

Under the extension of the Archive Engine West grant to December 31, 2014, approved by the Institute for Museum & Library Services, the Archive Engine West Working Group was charged to:

- Review the project's findings around infrastructure needed to continue and consider how to integrate it into NWDA's technical infrastructure;
- Coordinate with NWDA's planned redesign of its finding aid site and revision of its Best Practices in FY16;
- Review the project's findings around digital content metadata;
- Create shared digital content metadata standards;
- Create a proposed plan for digital content and EAD metadata cleanup;
- Continue active conversations with the Digital Public Library of America about becoming a service hub, including pursuing external funding;
- Coordinate with the work of the Content Creation & Dissemination Team in order to be able to consider continuation of AEW and DPLA participation in the context of the [Alliance's new Strategic Agenda](#), structure, program offerings around unique content, and integration into the FY16 budget.

The group convened in June 2014 and has completed its work aside from a few details. Here it presents its recommendations for consideration by the Content Creation & Dissemination Team for potential integration into their report to the Alliance's Board of Directors.

Technical Recommendation

The first portion of the technical recommendation call for an addition to the existing infrastructure associated with the Northwest Digital Archives researcher site (<http://nwda.orbiscascade.org/>) and supports a portion of the planned redesign of the site in FY15. It creates a relatively simple and sustainable way to associate finding aids with digital content that allows end users the ability to understand linkages between collection descriptions and content and to limit their searches to collections that include links to digital content.

The second portion calls for the creation of a metadata pipeline that makes possible not only enhancement of the NWDA site, but participation in the Digital Public Library of America, or any other aggregation of digital content that may be desired on the Alliance level.

The infrastructure will be developed using grant funds between October and December 2014. The group feels strongly that an infrastructure separate from the Shared ILS remains critical at this time. This may change with further development with Ex Libris under the Center of Excellence agreement.

A schematic and specifications are attached to the Technical Recommendation.

For more details on the technical recommendation, see [Technical Recommendation](#).

EAD Best Practices Revision

One of the project's key findings is that the existing NWDA Best Practices for Encoded Archival Description (EAD) inadequately prescribed how to create linkages between a finding aid and any associated digital content. Members have thus taken a variety of approaches or, more commonly, have not invested the time since it is very time consuming and because the researcher site did not present digital content in a useful manner.

The proposed addition to the Best Practices is a needed proscriptive approach that will facilitate improved access to digital content through the redesigned researcher site.

For more details on the proposed addition to the NWDA Best Practices for EAD, see [EAD Best Practices Recommendation](#).

Digital Content Metadata Standards

Another key finding was that the absence of shared metadata standards for digital content presented an untenable barrier to the efficient digital content aggregation not only for this project, but for any other.

The proposed digital content metadata standards are the lightest possible set of shared standards to facilitate interoperability and discovery without time-intensive metadata massage at the consortium level. They are deliberately general in order to be applicable to content in either digital asset management systems (DAMs) or institutional repositories (IRs).

The Working Group further proposes that these standards be used by participating institutions going forward and for any content that they wanted to have included in any aggregation. Metadata cleanup on existing content would need to be done by those institutions and would not be done centrally.

For more details on the proposed standards, see [Digital Content Metadata Standards](#).

Digital Public Library of America

The Working Group affirms the recommendation from the Content Creation & Dissemination Team that the Alliance become a DPLA Service Hub for Alliance members and NWDA program members who have digital content in a system from which we can harvest. The Working Group's actions on the details of what are required to support this proposed initiative.

Successful implementation of this proposal requires:

- The adoption and implementation of the proposed digital content metadata standards;
- The adoption and implementation of the proposed EAD Best Practices revision;
- Acceptance and implementation of the technical recommendation;
- Creation of a working group with expertise in digital content metadata to support maintenance of the standards;
- Acquisition of adequate staff (Alliance, member, and/or contractor) to support training and coordination;
- Aggregating content for the near term with assistance from the UO-OSU collaboration, Oregon Digital, to provide a single data feed to DPLA;
- Development by CCD of a business plan that includes financial support by Alliance members and by NWDA program members who are not Alliance members.

In addition, the Alliance should also coordinate with other entities in the Northwest to are working or would like to work with DPLA to plan a rational approach in the region.

For more details on the DPLA proposal, see [DPLA Recommendation](#).

Staffing

Implementing the above requires an investment in staffing: a minimum of 0.25 FTE and maximum of 1.0 FTE. Some minimal level of staffing at the Alliance is required for coordination and integration into governance; options for distribution of other duties to Alliance members and/or contractors may vary depending on the outcomes desired. A portion of this FTE could come from what is currently the NWDA Program Manager's FTE.

For more details on the staffing required, see [Staffing Recommendation](#).