

Technology: Going Digital: Questions to Ask When Outsourcing Digitization

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Outsourcing digitization of library materials can be a daunting endeavor. Developing a clear sense of project scope, requirements, and expected deliverables can help make a first digitization undertaking a success.

What Is the Project Scope?

Become reacquainted with the items in the collection. Individual items or collections may already be identified as candidates for digitization. This may include high-use, fragile, or rare materials. Investing time early on will assist in determining the scope and requirements of the project. Consider utilizing a spreadsheet to record, track, and calculate the total number of estimated items for digitization. Later, this spreadsheet can be provided to the vendor for a quote and used as a packing slip and inventory list.

Make note of the dimensions, uniformity, and format of the materials. Are the materials loose-leaf or bound? Are they handwritten or typed? Are there black-and-white or color images? Do blank pages or front and back covers need to be captured? Does the collection consist of formats such as newsprint, microfiche, or microfilm?

If possible, start with a small number of materials to test the digitization waters. This will help to build confidence in the process and allow refinements in the workflow before jumping headlong into a large-scale digitization project.

What Are the Output Requirements?

Envision how patrons will interact with the content, and consider additional uses of the final digital output. Will the digital items need preservation and access versions created? Do the scans need to be searchable or Americans with Disabilities Act (ADA) compliant? If the digital items will be sold or licensed to authors or the media, should specific image resolution, processing, or digital format guidelines be followed? These considerations might impact the cost and schedule of the project.

Give thought to the processing services required. If there is limited in-house expertise or personnel, the broad range of outsourcing options may be attractive. Vendors can supply services such as disbinding of bound materials, creation and quality control of digital image masters and derivatives, output to specific file formats, optical character recognition (OCR) processing, customized file naming conventions, and metadata creation.

What Can Be Expected in the Librarian-Digitization Vendor Interaction?

Internet search engines and professional organizations, such as the Association for Information and Image Management (AIIM) (www.aiim.org), can provide starting points for gathering vendor contact information. Utilize library discussion lists and colleagues for recommendations.

Find out how long the vendor has been in the business, the size of its workforce, and the types and age of equipment used. Provide the project scope, details, and output specifications, and confirm that the vendor can support them. Ask about the transport, on-location security, storage of materials, and backup of the digital files. Request a list of customer references with similar project requirements. It is preferable that the vendor understands the needs of libraries.

The vendor should provide the quote in writing, along with specific project requirements and assumptions, including vendor responsibilities and cost-per-unit information. Review the document carefully and look for penalties. The vendor should specify how it would handle error remediation.

Request ways to realize savings (e.g., typically the per-unit price decreases as the scale of the project increases). Some expenditures (such as shipping or data transfer charges) may only appear on the final bill, so ask if all costs are reflected in the quote. See if the vendor can guarantee a “do not exceed” amount.

Before moving forward with the project, request a digitized sample of an item to be processed. This will help to provide an idea of the quality of the final product and can provide early feedback to the vendor. It also allows adjustments and will assist the vendor in developing a timeline for completion. Confirm that the equipment, workflow, and output specifications used for the sample will also be applied to the project.

Once the contract is signed and the materials are in the vendor’s hands, be sure to check in on a regular basis to ensure that the project is on track.

Resources

- Association for Information and Image Management. AIIM vendor resource locator [Internet]. The Association [cited 14 Oct 2009]. <www.aiim.org/ResourceCenter/Locator/Search.aspx>.
- Cornell University. Digital imaging tutorial: determining the best approach: outsourcing vs. in-house programs [Internet]. The University; 2003 [cited 14 Oct 2009]. <www.library.cornell.edu/preservation/tutorial/management/management-03.html>.
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