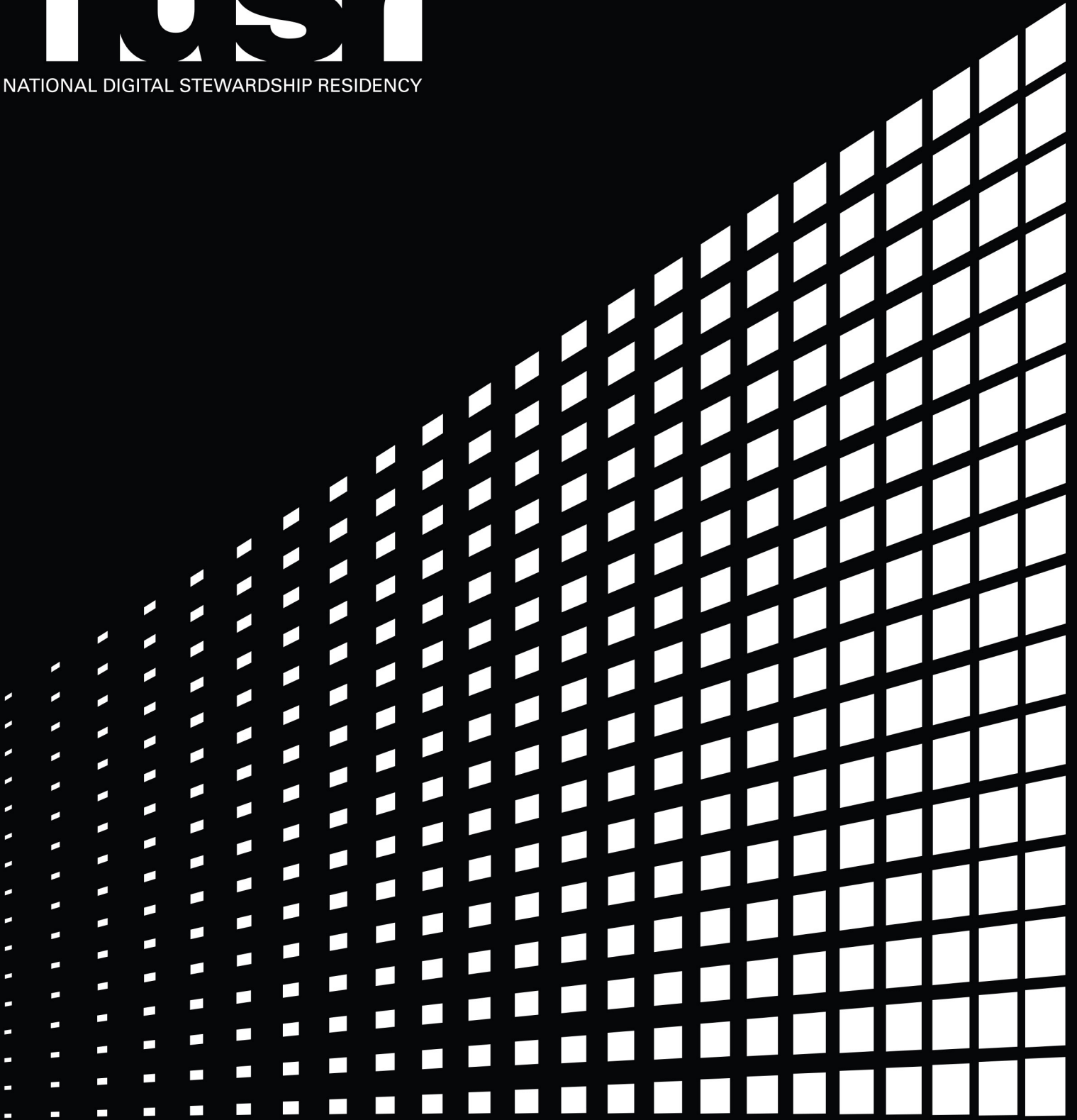




NATIONAL DIGITAL STEWARDSHIP RESIDENCY



HANDBOOK AND TOOLKIT
VERSION 1.0



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The National Digital Stewardship Residency
Web site at <https://ndsr-program.org>

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The National Digital Stewardship Residency Symposium held at the Library of Congress in April 2017 was made possible by a grant from the Institute of Museum and Library Services. The symposium consisted of one day of programming presented by members of the NDSR community, followed by a half-day evaluation meeting to generate discussion points and recommendations for the NDSR Handbook and Toolkit. A draft version of the handbook was sent to current and former residents, mentors, program staff, and other NDSR stakeholders. Their thoughtful feedback and recommendations were incorporated into this final version.

1. INTRODUCTION

The range of processes involved in the long-term management of digital objects requires an adaptable skillset and specialized training. As the amount of digital material acquired by cultural heritage and other stewardship institutions continues to grow, building and maintaining professional capacity for digital stewardship is becoming increasingly vital. The National Digital Stewardship Residency (NDSR) program is designed to address this need by cultivating a dedicated community of new professionals who have the knowledge and technical skills to ensure the long-term viability of the digital record. Since the initial pilot program was launched in Washington, D.C., there have been not only subsequent D.C. cohorts, but also five additional iterations: NDSR–New York, NDSR–Boston, American Archive of Public Broadcasting (AAPB) NDSR, NDSR–Art, and NDSR Foundations to Actions (BHL NDSR). Although these programs shared the same characteristics, each operated independently; there were no formalized guidelines or standards to ensure consistent practices across NDSR programs.

In the fall of 2015, the Council on Library and Information Resources (CLIR) received an Institute of Museum and Library Services (IMLS) grant to evaluate the early NDSR programs. The evaluation, published as *Keepers of Our Digital Future*,¹ provides a background and history of the NDSR program, a comparative assessment of the early iterations, and recommendations for the future. By providing a comprehensive picture of the NDSR programs that were completed by 2016, the study helped the NDSR community build connections across initiatives and learn from the experiences of the first program participants. IMLS subsequently funded the NDSR Symposium that took place in Washington, D.C., in April 2017. The symposium brought NDSR stakeholders together to discuss the CLIR report, evaluate program-specific needs and goals, make recommendations that incorporated the most effective practices of each iteration, and develop guidelines and a standardized model for future NDSR programs.

Building on the recommendations of CLIR's evaluation, this handbook contains standard best practices and guidelines for the operation of an NDSR program. Although the handbook is intended to describe a general framework for NDSR programs, future administrators should understand that the program is adaptable, that it should continue to change and grow, and that the procedures outlined in this handbook should be updated over time.

2. THE NATIONAL DIGITAL STEWARDSHIP RESIDENCY PROGRAM MODEL

The NDSR program addresses the need for a dedicated community of professionals with the knowledge and adaptable technical skills to ensure the long-term viability of the digital record by matching recent postgraduate degree recipients with cultural heritage institutions. Residents gain practical, hands-on training by managing digital stewardship projects in real-world settings. Institutions gain a dedicated, full-time resident focused on advancing the field of digital stewardship and strengthening institutional capacities through project work.

Each NDSR program is designed and managed by an administrative organization. Organizations opt

¹ Mink, Meredith Beck. 2016. *Keepers of Our Digital Future: An Assessment of the National Digital Stewardship Residencies, 2013-2016*. Council on Library and Information Resources. Available at <https://www.clir.org/pubs/reports/pub173>.

to administer NDSR programs in order to support the needs of their organization and community. The administrative organization is responsible for determining the focus and particular goals of its initiative, designing its program, and securing funding.² An NDSR program may be designed around a specific topic (e.g., specific collection material type, a facet in the digital stewardship life cycle), geographic area, or organizational type. The recommended residency length is 12 months; cohorts typically include 4 to 5 residents.

To launch an NDSR initiative, staff from the administrative organization and their appointed advisory board first set project guidelines based on the focus of their initiative and then put out a call for potential host institutions to propose projects based on these guidelines. Host institutions are selected based on their proposed project, their ability to mentor and support a resident, and other criteria that ensure effective, high-level training. Project details from the selected host institutions are posted to the program website, and a call for resident applications is issued. Eligible applicants submit a cover letter and resume, letters of recommendation, and a video or online project. Host institutions select residents with input from NDSR program staff and the advisory board.

Cohorts begin the program with a week of intensive training, referred to as the immersion week.³ During this time, program staff provides an orientation to the residency program, residents visit their host institutions and meet with their mentors for the first time, and instructors selected by program staff conduct a series of interactive, hands-on workshops for the cohort. The workshops address varied topics related to project management and digital stewardship (mentors may also be included in the workshops). After immersion week, the residents begin working full-time at their host institutions.

NDSR program staff continues to plan monthly training and professional development activities, referred to as enrichment sessions, throughout the residency. Enrichment sessions can range in topic from tool trainings, site visits and tours, or speaker series to the development of soft skills, such as public speaking or time management. Additionally, residents identify and engage in self-directed learning, take advantage of professional development opportunities, and travel to meetings and conferences.

The residency concludes with a culminating activity, such as a capstone event or symposium. Residents submit a final report to NDSR program staff, and both residents and primary mentors participate in an evaluation of the program.

3. NDSR PROGRAM ADMINISTRATION

The administrative organization for an NDSR program should be in a position to coordinate and communicate with a network of institutions or should partner with an organization that has this ability. For example, AAPB NDSR was administered by WGBH, a trusted leader in public broadcasting that provides archival services to public broadcasting organizations through the American Archive of Public Broadcasting, a collaboration with the Library of

² Sample Grant Narrative

³ Glossary of Terms

Congress; NDSR–New York was administered by the Metropolitan New York Library Council, a nonprofit organization that provides essential services to libraries, archives, and museums throughout New York City and Westchester County. The NDSR program staff from the administrative organization and its advisory board should also possess the knowledge base and expertise to assess the proposed projects and credentials of NDSR host institution applicants.

Successful administration of an NDSR program requires a dedicated staff with enough time to effectively manage the program and communicate with participants. NDSR program staff should consist of one full-time position or one part-time position paired with a permanent full-time position in which the staff member spends at least 50 percent of the workday on the NDSR program. Except in rare and compelling circumstances, the NDSR administrative organization should be separate from host institutions, and program staff should not serve as mentors to a resident. Separation between NDSR administrative duties and hosting or supervising a resident is essential to avoid perceived or actual conflicts of interest in managing the residency program.

Program staff are responsible for assembling an advisory board. Members of the advisory board assist with honing project guidelines, selecting host institutions, and developing program-specific curricula (a separate Curriculum Development Task Force may also be appointed). They may also act as instructors, assist residents with their projects according to their area of expertise, or serve as advisors to residents. Standing in as project advisors is particularly crucial in the rare event that a primary mentor leaves the host institution or drops from the program unexpectedly. Criteria for selecting advisory board members should include knowledge of the digital stewardship needs of the host community, experience with providing education and training in the field, and the ability and commitment to invest time and effort in the initiative. It is advisable to include an NDSR stakeholder who has experience with past NDSR programs on the advisory board, whether it be a former program administrator, mentor, resident, or other participant.

OUTREACH AND COMMUNICATION

NDSR program staff are responsible for creating a resident handbook with contact information, descriptions of policies and procedures, and other information that residents will need to have readily available.⁴ Distinct responsibilities of program staff should be well-defined, and NDSR participants must know with whom they should communicate about logistics, requirements, or any program-related issues.⁵ Expectations of residents and primary mentors, deadlines for required reporting or other outputs, the approximate schedule of program-related events, and similar residency activities should be made clear at the start of the residency and should remain consistent.

In addition, NDSR program staff are responsible for providing clear and timely communication throughout the residency. Enrichment sessions, conferences, meetings, or training should be scheduled far enough in advance for residents and primary mentors to manage their schedules

⁴ Sample Resident Manual

⁵ Definition of Roles

efficiently; any sudden shifts in scheduling or sudden changes are extremely disruptive to the workloads of NDSR program requirements and the residents' projects. After the residency begins, a monthly digest e-mail is an effective way for program staff to keep all NDSR participants informed. The monthly digest should contain reminders of upcoming scheduled events or due dates, as well as notifications of new blog posts, recent changes to aspects of the program, the whereabouts of residents, and more. Program staff should answer e-mail messages or phone calls from NDSR participants within two business days.

Early in the process, program staff should establish an NDSR program online presence (e.g., website, resident blog, Twitter account). All information pertaining to the current initiative should be available, as should information about the history of the program.⁶ Program staff should strive to keep their activities as transparent as possible. The criteria and methods for selecting host institutions and residents, as well as the procedures and reasons for any major funding decisions (including, but not limited to, resident compensation), should be clear. Program staff may also want to set up an online project space for resident training; such areas may include resident portfolios, program materials and project reports, and resident blogs.

New NDSR program staff should initiate a working relationship with the staffs of other NDSR programs, past and present. Coordinating across programs strengthens the core principles of NDSR to build a community of professionals and to further advance digital stewardship theories and techniques. Program staff should also initiate contact between current and former resident cohorts.

HOST AND RESIDENT APPLICATION PROCESSES

About six to eight months before the anticipated start of the residency, program staff put out an open call for potential host institutions to propose projects. An open call for project proposals ensures that more institutions have an opportunity to participate. In certain cases, however, it may be necessary or advantageous to identify and select host institutions in advance (e.g., a coordinated effort toward a common goal, a regional or interinstitutional program design). If host institutions are pre-selected, information about the purpose of pre-selection and the method or criteria used for the process should be made available on the program website.

NDSR program staff and the advisory board are responsible for setting project guidelines based on the particular goals of their initiative. Host institutions are competitively selected based on their proposed project, their ability to mentor and support the resident, demonstrated buy-in from high-level executive leadership within the institution, and other criteria that ensure effective and high-level training.⁷ It is recommended that NDSR program staff or advisory board members schedule site visits to a host institution prior to its selection to discuss program expectations with its staff, interview mentors, and assess the work space and available resources.

Details for the selected host institutions' projects are posted to the program website before an open call for resident applications is issued.⁸ Eligible applicants must have received a postgraduate degree in a field related to digital stewardship within two years of the start

⁶ See <https://ndsr-program.org/>

⁷ Host Institution Guidelines

⁸ Sample Project Proposal

date of the residency, demonstrate leadership or teamwork experience, and possess strong communication skills. Applicants submit a cover letter and resume tailored to their preferred projects; two or three letters of recommendation; and a portfolio, online project, or video.⁹

Throughout the course of the NDSR program, residents do a considerable amount of public speaking, outreach, and communicative writing. In past NDSR programs, administrators have looked at the video or online project portion of the application as a creative way for applicants to demonstrate their communication skills and their interest in contributing to the field of digital stewardship, as well as a useful tool to help NDSR administrators determine whether applicants have the potential to succeed in this aspect of the program. However, as mentioned in *Keepers of our Digital Future*, opinions in the NDSR community have been divided on the most effective practice, and NDSR program staff may wish to experiment with other approaches to this part of the application.

The term *online project* is intentionally broad to allow applicants a variety of ways to fulfill this aspect of the application, particularly if creating a video does not suit or appeal to them. Applicants who do decide to create a video can use still images, screencasts, animation, original footage, or any moving image desired; videos should be between two and three minutes long. Neither high production value nor technical perfection is expected. Online projects can be e-portfolios, digital collection portals, published articles, blogs, or other previous work that demonstrates the applicant's professional capabilities and communication skills.

Host institutions select residents with input from the NDSR advisory board and program staff as necessary. NDSR program staff receive the application materials and check them for completeness. Candidates, as part of their application, are asked to rank their preferred host institution projects. Based on the preference of the host institution, NDSR program staff may share all received applications or only those that rank the host institution in their top three. Host institutions are responsible for reviewing the application materials and for conducting in-person, phone, or virtual interviews with candidates. NDSR program staff may provide standardized interview questions if desired. Host institutions should select and rank two to three candidates. If necessary, program staff or the advisory board may make or facilitate making the final decision about an applicant who has been selected by more than one host institution or about any other circumstance requiring mediation. NDSR program staff notify the selected applicants at least two months in advance of the residency start date to give them enough time to relocate if necessary. Regardless of the outcome, all applicants should receive an e-mail acknowledgment from program staff.

ONBOARDING PROCESS

After the cohort has been selected, NDSR program staff should meet with mentors at each host institution to review and reinforce program expectations. This meeting is particularly important if program staff did not visit the host institution site prior to the selection of residents.

⁹ Resident Application

At this time, primary and secondary mentors sign a commitment form to fulfill the responsibilities of a host institution.¹⁰ Host institutions are expected to integrate their resident into their workplace with the status of a regular employee, ensure that the resident's time is dedicated to their NDSR project, and offer the resident all the tools and support needed to complete their project as outlined in the proposal. Host institutions should have a thorough orientation for their resident that covers all of the necessary aspects of the workplace and organization that the resident will need.¹¹ Although residents work full time, NDSR program staff should make clear to mentors that residents are required to spend 20 percent of their time on program requirements and professional development.

Before residents arrive, program staff should place them in contact with one another via an introductory email and should send them preliminary information about the program (e.g., start date, work schedule, relevant contact information, what to bring with them for immersion week). On the first day of immersion week, program staff provide an orientation to the residency program. All logistic and administrative topics from the resident handbook and resident commitment form¹² should be covered in-depth, including, but not limited to, the following:

- Introduction to the NDSR program, including goals, principles, and initiatives to date
- Program requirements and deliverables (e.g., blogging, interim and final reports, conference presentations)
- Compensation and benefits, including professional development funds
- Work hours, including the management of scheduled or unscheduled absences
- Resources available to residents, such as library privileges, professional head shots, and access or login information to applicable NDSR or organizational accounts

OTHER ADMINISTRATIVE DUTIES AND LOGISTICS

NDSR program staff are responsible for distributing pay; reimbursing professional travel expenses and fulfilling other budget management duties; managing benefits, including, but not limited to, personal/sick/vacation leave; and scheduling activities associated with the program. In some cases, host institutions rather than the NDSR administrative organization may distribute pay and benefits, but the NDSR program staff remain responsible for coordinating funding with host institutions and ensuring that residents are paid and receive benefits in a timely fashion.

Program staff also advocate for residents and mentors, and manage any logistic or personnel issues that come up over the course of the residency.

¹⁰ Host Institution and Mentor Commitment Form

¹¹ Sample Host Institution Checklist for Resident Orientation

¹² Resident Commitment Form

BUDGET¹³: When preparing the budget, the administering organization should consider how the residents will be classified within their payroll or human resources system and whether they will be paid through the administering organization or through the host institution. It is critical to make this determination prior to the arrival of the residents to avoid any late distribution of pay, unexpected tax liabilities, or other unforeseen challenges. It is especially critical in distributed residencies (i.e., cohorts in which the members live and work in different locations) where tax liabilities and benefit requirements may differ across jurisdictions.

Compensation for residents should reflect the cost of living for the area where they will be working. The recommended pay base for residents is a GS-8 or GS-9 position in the General Schedule (GS) classification and pay system maintained by the U.S. Office of Personnel Management.¹⁴ For distributed residencies program staff might consult the GS Locality Pay Tables to consider the need for pay adjustments.¹⁵

NDSR program staff is responsible for ensuring that residents have health care coverage as part of their appointment. If the administrative organization or host institution cannot provide health care coverage, NDSR program staff should investigate coverage options for residents and should include the full cost of individual health care coverage in resident compensation. Residents are entitled to take personal/sick leave as needed and vacation leave by approval of their primary mentor. Professional development funds for residents should reflect the full cost of attending two to three national or regional conferences. Reimbursement for travel and professional development expenses should follow the existing policies of the administering organization.

REPORTING AND ASSESSMENTS: Over the course of the residency, program staff should monitor project progress and the general residency experience. Residents are required to file interim reports outlining their progress to date, challenges, and projected plans.¹⁶ At least once during the residency period, usually at the midpoint, program staff should conduct a site visit and meet with primary and secondary mentors and residents separately.¹⁷ This visit provides an opportunity for program staff to receive updates and assist residents or mentors with any concerns that they have about the project or residency experience.

Program staff are responsible for collecting and assessing data about resident competencies and the NDSR initiative. Residents should complete an evaluation or survey upon beginning and finishing the residency to measure their digital stewardship competencies, to assess their experience in the program, and to provide their insights into ways to make the program stronger. It is recommended that administrators include in their budget the cost of hiring an outside consultant to conduct an independent evaluation of the program. The results of these assessments are beneficial to the NDSR community and strengthen the initiative.

PROGRAM EVENTS AND ACTIVITIES: NDSR program staff are responsible for scheduling and planning or overseeing the planning of program-related events and activities, such as immersion week, enrichment sessions, conference travel, and a culminating event at the end of the residency.¹⁸

¹³ Sample Budget

¹⁴ Individuals with a master's degree typically qualify for GS-9 positions. See <https://www.opm.gov/policy-data-oversight/pay-leave/pay-systems/general-schedule/>.

¹⁵ See <https://www.opm.gov/policy-data-oversight/pay-leave/salaries-wages/2017/general-schedule/>.

¹⁶ Resident Interim and Final Report Guidelines

¹⁷ NDSR Program Staff Interim Site Visit Worksheet

Program staff and the advisory board plan the immersion week curriculum. Program staff are responsible for identifying and hiring instructors; arranging travel as necessary; setting the schedule; booking instruction rooms; gathering necessary software, tools, and equipment; and performing other related tasks. Either program staff or residents and mentors can plan enrichment sessions. When residents or mentors plan the sessions, program staff should assist in any way needed. Enrichment sessions should take place at least once a month throughout the residency, except during the final month or two when residents are busy finishing their projects and fulfilling other program requirements.

Residents are expected to attend professional meetings and conferences during the residency. Program staff should organize any required conference attendance far in advance, especially if residents are expected to present and must meet a conference submission deadline (some of which might occur before the residency starts or shortly thereafter). For similar reasons, residents should be encouraged to begin thinking in advance about conferences they would like to attend that are project-related or of professional interest. After the cohort has had time to acclimate to the program and become familiar with each other's projects, residents can be encouraged to attend different conferences and have others in their cohort represent their work.

Either the residents or the program staff can plan the capstone event. In the past, residents have organized major symposia, program staff have arranged for poster sessions, or other professional development activities have taken place. The main purpose of the capstone event is to give residents an opportunity to share the results of their work and to grow professionally. Program staff may choose to plan an additional reception, luncheon, or ceremony to close the residency.

ADVOCATING FOR RESIDENTS AND HOST INSTITUTIONS: As part of their responsibility for any logistic or personnel issues that arise over the course of the residency, NDSR program staff take measures to ensure that residents and mentors have a positive experience in the program. In addition, they work to ensure that residents are growing professionally and gaining new technical skills. Program staff should facilitate networking opportunities, attend resident events and presentations, and make program policies transparent.

It may be necessary to coach residents through the process of “managing up” and taking ownership of their projects, professional development, and self-directed learning. NDSR program staff can support them by identifying solutions to project challenges, advising on common workplace issues or organizational bureaucratic processes, and providing structured feedback on aspects of their performance. NDSR program staff need to support the best interests of residents while simultaneously encouraging them to embrace the autonomous nature of the NDSR program.

Similarly, program staff assist mentors with reconfiguring a project when obstacles arise. For example, staff can connect primary mentors with other host institutions or professionals in the field to discuss aspects of a project. Program staff also assist mentors with any issues pertaining to their resident or their resident's performance. In the event that a resident leaves the

¹⁸ Sample NDSR Program Timeline and Residency Schedule

program early, program staff consult with the host institution staff and determine how they may want to proceed (e.g., replacement in the case of departure during the first three to four months of the residency, a shift in project priorities, connection with the remaining residents).

4. PROJECTS

Host institutions are responsible for submitting a project proposal to NDSR program staff for consideration. Proposals should include a project title and summary, goals and objectives, timeline (with relevant milestones), proposed deliverable(s), resources required, project context (the project's role in the context of the host institution and the field in general), and required and preferred skills of a resident.¹⁹

NDSR program staff set project guidelines based on the particular characteristics of their initiative (e.g., specific collection material type, a facet in the digital stewardship lifecycle, organizational type). Some programs may benefit from shared resources or expertise, especially when one of the goals is to benefit host institutions that may not possess sufficient digital preservation resources or in-house expertise. For example, larger institutions could contribute technical support to smaller institutions, institutions with similar project goals could work collaboratively, or residents could each work on a different aspect of a larger coordinated effort.

Because residents must be highly qualified recent postgraduate degree recipients with both coursework and advanced training in digital stewardship theory and practice, their work should be similar to that of other new professionals. Host institutions should provide significant digital stewardship projects with measurable outcomes that can be publicly documented in a resident's final portfolio. The project plan should include definitions of what the resident will learn as a result of the project, including core competencies and specific areas of expertise. Projects should not be routine, task-oriented work. For example, although digitization is part of the overall digital stewardship life cycle and may be included, scanning should not be a project's primary activity.

Projects for residents should

- Be well-defined and contain explicit descriptions of deliverables, skills necessary for success, the project's place in the larger scope of digital stewardship and the institution's mission, and the way in which project outcomes will be incorporated into organizational operations
- Be practical, hands-on, and collaborative in nature
- Be designed so that residents have ownership of the project and can complete the project by the end of the residency

¹⁹ Host Institution Application

- Focus either on an aspect of the digital curation life cycle or some specific process that spans the entire cycle
- Require significant intellectual engagement and high-level research
- Include transferable skills that will be beneficial for the resident's future career
- Have significance outside the institution and be relevant to peer organizations and partners in the field
- Include work and outcomes beyond documentation that can be presented by the resident to a national audience in conferences, writing, and publications

Although projects should be neatly conceived and well planned, they should also be designed for flexibility. Both host institutions and residents should enter the project with a willingness to adapt to the availability of resources, the skills and learning interests of the resident, and unforeseen obstacles to completing aspects of the project.

Most of the residency should be devoted to project work; however, secondary activities such as training and networking are also important. About 80 percent of the resident's time is allotted to the project, while the remaining 20 percent is devoted to NDSR program activities and professional development.

5. CURRICULUM AND SKILLS DEVELOPMENT

Several factors complicate the adoption of a core curriculum, such as the tension between broadly covering everything in the field and focusing more narrowly on the particular skills needed in the different disciplines involved. When an organizing team at the Library of Congress launched the NDSR program, they planned for the first cohort an immersion program that used the Digital Preservation Outreach and Education (DPOE) modules, which were designed for novice audiences. Though the DPOE modules were readily available and topically relevant, these training materials had not been designed for day-long instruction for a postgraduate audience. The mismatch between training material and intended audience was clear from the first use of DPOE for the NDSR program. Since the first NDSR program, there have been ongoing discussions about the common features that characterize an NDSR program curriculum and distinguish it from other programs.

Because of the absence of a universal core curriculum that each NDSR program can use and build on, this essential component has varied significantly. It was an early principle of the NDSR program that residents could come from any discipline, and program staff have interpreted this principle in different ways. Including residents who have not previously received digital curation and preservation training means that some baseline of training and skill-building opportunities should be available to residents, especially those who are new

to the field. In addition, the need to provide specialized skills to match the objectives of assigned NDSR projects has informed the kinds of training that are provided throughout the residency period.²⁰

The NDSR model provides three distinct opportunities for training:

- **Immersion week:** The objective of the immersion week is to provide residents with an intensive week of training to prepare them for their NDSR program and project. Different residents, projects, and programs require varying amounts of time and effort to help residents acclimate to NDSR and become sufficiently familiar with their host institution, project, and cohort to be successful. This onboarding process begins over once the residents are selected and continues with greater emphasis during the immersion week.
- **Professional Development Time:** NDSR programs devote 20 percent of the resident's time to enrichment sessions, professional development, and training that is beyond the immediate scope of the project and that will contribute to the residents readiness for post-residency employment. So long as the time is devoted to developing digital stewardship, information management, or related skills and does not require funding beyond what is provided, this component does not require specific approval from program staff or host institutions. However, program staff should clearly detail minimum requirements in the resident handbook for residents who find it difficult to gauge the appropriate level of activity. In the past, residents have used this professional development time for activities ranging from doing coursework on metadata data manipulation, to volunteering their expertise to local organizations, to independently developing open-source digital preservation tools, to presenting panels or professional events for the broader community.
- **Enrichment Sessions:** Beyond the immersion week and throughout the residency as part of the requirement that 20 percent of the resident's time be spent on professional development, enrichment sessions of all kinds can enhance the NDSR experience by deepening and broadening skills and providing various forms of hands-on experience. The availability of webinars, MOOCs, and other online offerings—in conjunction with cohort-specific discussions—provides a variety of options for enrichment sessions. These sessions are open to mentors, residents, or any or any affiliated community members and offer a great opportunity to reach out and extend human, technical, and other resources available to residents and host

institutions. They can be an effective way to help residents complete their required deliverables. One role of enrichment sessions may be to identify and address unmet curriculum needs and gaps in educational opportunities, such as developing time and project management skills.

²⁰ Sample Curriculum

An NDSR program includes some combination of curriculum and skills development, which should be as interactive and hands-on as possible with only limited lecture-based instruction. NDSR program staff and the advisory board should define clear goals and expectations for skills to be developed over the course of the residency; these skills should be suited to the resident's project, strengths, and interests. One key to success is to help residents take ownership of their professional development, project, and career. NDSR program elements that address skill and career development planning include the following:

- **Personal learning plan:** Each resident should develop a personal learning plan with contributions from program staff, primary mentors, and others.²¹
- **Skills assessment:** At the start of each NDSR program, program staff should distribute a skills assessment to be completed by residents. Completing this assessment before the start of the residency enables development planning to be more timely and tailored.²²
- **Peer-to-peer interaction:** NDSR program staff should provide informal and formal opportunities for residents to learn from other residents across and among cohorts. These opportunities help to develop training and presentation skills.
- **Feedback:** Providing and receiving constructive feedback ensures the best outcomes. Each NDSR program should have routine and ad hoc mechanisms for bi-directional feedback between mentors and residents, residents and host institutions, administering organizations and host institutions.
- **Core skills:** NDSR program staff and the advisory board should identify a core set of skills that they work with and coach residents in acquiring. It would be ideal to provide residents with an opportunity to develop these skills and share them between cohorts as a common NDSR characteristic.

Each NDSR program should intentionally and thoughtfully develop its approach to curriculum and skills development, and incorporate the means to evaluate and share outcomes to iteratively improve programs.

6. THE COHORT

NDSR cohorts have taken two distinct forms: local cohorts, in which residents live and work within the same city, and distributed/virtual cohorts, in which residents live and work in different geographic areas of the country, communicate primarily online, and meet for joint professional events. Cohorts have varied in size across different NDSR programs. The standard size is five, and it is recommended that a cohort consist of no more than seven and no fewer than three residents.

²¹ Personal Learning Plan Worksheet

²² Sample Skills Assessment Questionnaire

As outlined in the Curriculum and Skills Development section, residents are expected to spend 20 percent of their time on enrichment sessions, training, and professional development beyond the original scope of the project. Although individual residents self-select some of this work, they spend a significant portion of this professional development time on collaborative cohort activities, such as co-presenting at conferences, maintaining a shared blog about project work and the residency experience, planning educational events for the digital preservation community (e.g., webinars, symposia), and collaborating on other group projects as defined by program administrators or desired by the residents.

In every iteration of the NDSR program to date, including distributed residencies, the cohort model has been identified as one of the most valuable components. Further iterations of the NDSR program are expected to continue to implement this model. For cohort development, NDSR program staff should

- Clearly define expectations for participation in the cohort early and throughout the experience by means of explicit documentation.
- Require members of the cohort to attend an immersion week training session together at the beginning of the residency. Immersion week is also a good time to build support for primary mentors and encourage them to consider themselves part of their own cohort.
- Schedule ongoing educational and professional events for the cohort to attend together.
- Schedule joint presentations for the cohort at professional events.
- Encourage residents to leverage the cohort as a body of knowledge.
- Encourage the cohort to meet monthly or bimonthly with program staff to discuss blogging, group work, and collaborative NDSR professional development projects.
- Promote participation and collaboration through shared goals or group projects, such as cohort-organized symposia, and provide tools for cohort communication, such as a dedicated Slack channel.

Distributed residents have said that they experience more difficulty in relocating for their residency and more isolation during the course of the program than residents participating in a local cohort. Program staff planning for a distributed model should consider some of the following suggestions to provide greater support for residents in a distributed cohort:

- Designing distributed cohorts to take place in the same greater regional area so that in-person meet-ups can still occur

Distributed residents have said that they experience more difficulty in relocating for their residency and more isolation during the course of the program than residents participating in a local cohort. Program staff planning for a distributed model should consider some of the following suggestions to provide greater support for residents in a distributed cohort:

- Designing distributed cohorts to take place in the same greater regional area so that in-person meet-ups can still occur
- Designing distributed cohorts such that two residents undertake their residencies in each location
- Taking an active role in connecting residents with members of local professional chapters and organizations
- Strengthening the roles of local mentors (as distinct from onsite primary mentors or advisory board project advisors) to provide more active support to the residents

7. MENTORSHIP

In the context of NDSR, the person at the host institution who acts as the resident's supervisor and project advisor, as well as the primary contact with NDSR program staff, is referred to as the primary mentor. Host institutions are required to designate one or more secondary mentors to support the resident in addition to the primary mentor. Secondary mentors should be able to fulfill the obligations of the primary mentor in the rare event that a primary mentor leaves the host institution or drops from the program unexpectedly. Secondary mentors may be staff who can better assist with administrative issues or workplace connections, or they may be from a separate department whose members work closely with the resident. Host institutions may want to consider integrating the resident into standing working groups or committees.

It is expected that primary mentors will dedicate at least 20 percent of their time to the NDSR program and to project supervision. Obtaining the support of high-level executive leadership in a host institution makes allocating time for mentoring easier. Responsibilities for mentors include, but are not limited to, the following:

- Introducing the resident to key personnel at the host institution or external stakeholders who will help them complete the project
- Ensuring that the resident is included in meetings and committees related to the project
- Ensuring that the resident has access to the work space, tools, equipment, and other resources necessary to complete the project

- Helping the resident adjust to the host institution
- Ensuring that the resident remains on task with the project, preventing scope creep, and protecting the resident from being pulled away to work on unrelated projects at the host institution
- Setting project milestones and assisting the resident with developing a detailed project plan for achieving the deliverables
- Supporting the resident in finding resources, providing some training in skills essential for the project, and putting the resident in contact with other individuals who have needed experience and knowledge
- Meeting regularly with the resident to discuss the progress of the project
- Providing clear and explicit feedback on a regular basis regarding the residents' projects and performance
- Attending some portion of immersion week with the residents
- Attending some portion of educational and professional events scheduled by the administration with the residents
- Being available onsite and via e-mail to the residents when they have questions about their projects

Recommended actions for program staff to ensure that mentors understand and fulfill these responsibilities to their NDSR resident include

- Providing mentors with a clear list of contractual requirements for their position as a mentor²³
- Requiring that primary mentors commit to devoting at least 20 percent of their time to the project and the resident throughout the residency program
- Creating mentorship guidelines with resources and recommendations
- Discussing the primary mentor relationship as soon as the host institution is selected and revisiting that conversation periodically throughout the residency during scheduled check-ins
- Requiring new mentors to engage with previous NDSR mentors and residents, and providing opportunities for them to do so

²³ Host Institution and Mentor Commitment Form

- Providing initial training in mentorship for primary mentors before the arrival of the resident or during immersion week
- Building in a system of accountability for mentors who do not fulfil their contractual obligations to their residents

It is generally expected that primary mentors will provide a degree of support that goes beyond project supervision and aligns more with the broader definition of a mentor. For example, they may serve as a resource for digital preservation learning, promote professional networking, or encourage the residents in their career development during and after the residency. To be sure, supervising and mentoring require distinct qualifications, and there have been cases where primary mentors have not had the capability to fill both roles for their residents. Primary mentors are not always experts in digital preservation, or they may not have time in their work schedule to devote to the development of a closer mentor–mentee relationship with the resident. Furthermore, it is impossible to guarantee that a strong interpersonal relationship will develop between a primary mentor and a resident; to an extent, this will always depend on the personalities and capabilities of the individuals involved. However, it is possible for program staff to provide more structural opportunities, support, and encouragement for the development of such a relationship, both within and without the host institution.

Suggestions for ways to strengthen the mentorship aspect of the NDSR program beyond the existing requirements for program participation include the following:

- As part of the competitive aspect of host institution selection, require that primary mentors at the institution demonstrate a commitment to the program, to the broader NDSR experience, and to the residents' professional development.
- Ensure that designated secondary mentors at host institutions can be a resource for skills that the primary mentor may not have, or split the role of "supervisor" and the role of "mentor" between two different people—one who has authority over the project and one who has the necessary expertise and the ability to provide mentorship as described.
- Designate additional mentors outside of the host institution who have a connection to the stewardship community, a set of related project skills, and a demonstrated strong interest in mentorship. Advisory board members may fill this role as needed.
- Engage former residents to act as mentors for current residents.
- Build a cohort of/for mentors, and encourage or require mentors to engage in a wider community of current and former mentors.
- Provide an opportunity for residents to describe the sort of mentorship they are looking for in their application or in an interview so that host institutions can determine how they might fulfill that need.

- Encourage host institutions to provide additional financial or professional incentives for employees to invest time in mentorship.
- Identify past NDSR mentors who have provided exemplary mentorship and learning experiences for their resident, and encourage them to serve as repeat mentors.
- Provide training and advice for new mentors.

Both AAPB NDSR and NDSR Art have experimented with alternate mentorship models to provide greater support during distributed residencies. AAPB NDSR used three mentors: a primary mentor to provide onsite support, an advisory board mentor to provide digital preservation expertise, and a secondary mentor outside the host institution to connect the resident with local professional communities. NDSR Art program staff prepared to supplement designated mentor relationships with additional mentors through the Art Libraries Society of North America (ARLIS/NA) mentorship program if a resident had needs beyond the purview of the designated mentors. These additional mentorship relationships can be valuable to the residents, but establishing a strong pre-existing investment in the development of a mentor–mentee relationship on the part of both mentor and resident is critical to success.

8. CONCLUSION

The NDSR program is designed to cultivate the professional skills and community that are key to advancing the nation’s capabilities to ensure the long-term viability of the digital record. By developing impactful, significant tools, projects, and partnerships, the NDSR program has launched participants into the field of digital stewardship and enriched the field through their contributions. Participants leave the program with experience in the development of fruitful partnerships and effective project management, a broad knowledge of core concepts of digital stewardship, and the readiness to continue to learn new skills and adapt to new tools and technology.

The NDSR program has proven to be an effective model for training new professionals in digital stewardship. The NDSR handbook was created to ensure consistent practices, expectations, and standards across NDSR initiatives. By establishing a baseline for program implementation, program leaders can continue to increase the value of NDSR and the program’s potential. In addition, they must continue to look both inward and outward if the NDSR program is to remain a sustainable long-term model for community growth and for the ongoing development of a robust digital stewardship community of practice.

9. APPENDICES

APPENDIX A.

GLOSSARY OF TERMS

Advisory board: A group of individuals appointed by the administrative organization that have expertise in their field and past experience with the NDSR program. The advisory board assists NDSR program staff with program development and management.

Capstone event: A culminating activity at the end of the residency period planned by either NDSR program staff or residents. Examples of a capstone event include a symposium, poster sessions, or other professional development activities that give residents an opportunity to share the results of their work and to grow professionally.

Cohort: A group of residents participating in the NDSR program during the same period of time. This term can refer to a cohort based in the same locality or a distributed cohort.

Distributed cohort: A cohort in which residents live and work in different geographic areas, communicate primarily online, and meet for joint professional events.

Enrichment sessions: Training and professional development workshops scheduled throughout the residency. Enrichment sessions can range in topic from tool trainings, site visits and tours, or speaker series to the development of soft skills, such as public speaking or time management.

Host institution: An institution selected by NDSR program staff and its advisory board to engage a resident in a substantial digital stewardship project. The host institution is responsible for integrating the resident into the workplace, overseeing project work, handling day-to-day personnel issues such as sick leave, and other similar duties.

Immersion week: One week of intensive training during which program staff provides an orientation to the residency program, residents visit their host institutions and meet with their mentors for the first time, and instructors selected by program staff conduct a series of interactive, hands-on workshops for the cohort.

NDSR administrative organization: The organization responsible for determining the focus and particular goals of its NDSR program initiative, designing the program, and securing funding. The administrative organization is responsible for pay and benefits, budget management, grant reporting, and other similar duties.

NDSR program staff: Staff hired or assigned by the administrative organization to manage and operate its NDSR program. NDSR program staff are responsible for outreach and communication, host and resident selection, managing logistic or personnel issues, and other similar duties.

Primary mentor: A person at the host institution who acts as the resident's supervisor and project advisor, as well as the primary contact with NDSR program staff.

Resident: A recent postgraduate degree recipient selected for the NDSR program who works on a discrete digital stewardship project at a host institution, participates in program and cohort-related events and activities, and engages in professional development and continued education.

Secondary mentor: A person at the host institution who can assist with administrative issues or workplace connections, or from a separate department whose members work closely with the resident. Where appropriate, a secondary mentor may be from a separate institution or group.

APPENDIX B.

DEFINITION OF ROLES

	PRIMARY MENTOR	SECONDARY MENTOR	NDSR PROGRAM STAFF
RESOURCE	<p>Work with the resident throughout the residency to determine an effective and achievable timeline for host project deliverables</p> <p>Work with resident and organization to adjust host project and timeline as circumstances at the institution require</p> <p>Liaise with the organization to ensure that the resident has the space, supplies, and equipment required for completion of the host project</p>	<p>Serve as resource to the resident in matters relating to digital preservation and the broader preservation landscape</p> <p>Connect the resident with other professional resources and contacts as required</p> <p>Notify the resident of potential educational and professional opportunities</p> <p>Offer career advice, resume feedback, and support to the resident</p>	<p>Serve as resource to the resident in matters relating to the NDSR program and program expectations</p> <p>Provide educational and professional training opportunities for the residents and hosts throughout the residency</p> <p>Create and maintain calendar to alert the NDSR community to NDSR events and other professional/educational opportunities</p> <p>Offer career advice, resume feedback, and support to the resident</p>
SUPERVISE	<p>Work with the resident throughout the residency to determine an effective and achievable timeline for host project deliverables</p> <p>Work with resident and organization to adjust host project and timeline as circumstances at the institution require</p> <p>Liaise with the organization to ensure that the resident has the space, supplies, and equipment required for completion of the host project</p>	<p>Provide guidance and feedback to the resident on creating their professional development plan at the start of the residency</p> <p>Work with the resident throughout the residency to help determine effective and achievable timelines and goals for development plan and AAPB NDSR joint program deliverables</p>	<p>Provide template, instructions and guidance for the resident on creating their professional development plan at the start of the residency</p> <p>Review resident development plan and joint program deliverables</p> <p>Work with resident, host and mentors to ensure that all parties are fulfilling their responsibilities to each other and to the NDSR program</p>

MEETINGS AND AVAILABILITY	<p>Schedule regular meetings with the resident to discuss progress of their project</p> <p>Attend NDSR events with the resident</p> <p>Work with the resident to determine when additional advice from or joint meetings with virtual or local mentors would be useful for the project</p> <p>Be available to the resident in the office for feedback and guidance</p>	<p>Schedule regular meetings with the resident to discuss educational and professional development</p> <p>Schedule in-person meetings with the resident at professional events when both are present</p> <p>Be available to the resident via phone and email</p>	<p>Schedule monthly meetings with the resident cohort to discuss project and residency experiences as a group</p> <p>Organize educational and professional events for the residents and hosts, and arrange for resident travel</p> <p>Be available to all residents and mentors via phone and email</p>
FEEDBACK	<p>Act as primary point person to review host project deliverables with the resident</p> <p>When needed, reach out to secondary mentors for additional review of host project deliverables</p>	<p>Act as a resource to review development plan and NDSR program deliverables with the resident</p> <p>Provide feedback to the resident and/or host mentor on host project deliverables if requested</p>	<p>Act as a resource to review development plan and NDSR program deliverables with the resident</p>
REVIEW	<p>Conduct formal professional review with the resident half-way through the residency and again at the end of the residency</p> <p>Participate in evaluation of the program at the end of the residency</p>	<p>Review resident work and progress with the resident at the end of the residency</p> <p>Participate in evaluation of the program at the end of the residency</p>	<p>Review resident work and progress with the resident at the end of the residency</p> <p>Conduct evaluation of the program at the end of the residency</p>

1. NDSR PROJECT GUIDELINES

PROJECT PROPOSALS

The host institution will be responsible for submitting a project proposal for consideration for the residency. Project proposals should include an explicit description of how the project and its outcomes will be incorporated into organizational operations and a summary of how the project fits in the larger scope of digital stewardship and the institution's mission.

Projects for residents should:

- Be well-defined and contain explicit descriptions of deliverables and skills necessary for success.
- Be practical, hands-on, and collaborative in nature.
- Involve significant intellectual engagement.
- Focus either on an aspect of the digital lifecycle or some specific process that spans the entire cycle.
- Include transferable skills that will be beneficial for the resident's future career.
- Include work and outcomes that can be presented by the resident to a national audience in conferences, writing, and publications.
- Provide leadership opportunities for both the resident and their institutional mentors.

Proposals should include a summary of the project, the context for the project (the project's role in the bigger picture of the institution and possibly for outside the institution), a proposed timeline for completion (with relevant milestones), a description of the project goals and deliverable(s), and plan for the project's long-term sustainability.

Potential host institutions are encouraged to reach out to NDSR program staff to discuss projects that would fit within the program criteria while also being of lasting benefit to their organization.

2. SAMPLE PROJECT PROPOSAL



NDSR Project: A Digital Preservation Roadmap for Public Media Institutions

Goal Summary

New York Public Radio (NYPR) seeks an NDSR resident to aid in the creation of a robust digital preservation roadmap for its digital assets. This project will include a detailed investigation of the current landscape of the organization's digital collections and the formulation of recommendations for long-term, institution-wide digital curation policies. Our goal is to lay out a trajectory leading to a seamless and integrated approach that will leverage in-house resources, but also think of new and creative ways to capture the digital history and legacy of NYPR. As one of the nation's largest public media companies, our hope too is that the resident will produce an adaptable framework that will assist other public media companies in the creation of more comprehensive digital preservation strategies.

Specific Objectives

The resident would be expected to deliver a series of reports that would outline the following.

1. An assessment of the current state of digital production at NYPR (file formats, amount of materials being produced, where the materials are located, who is producing digital material). During the course of this assessment, the resident will not be expected to include an inventory of producer's personal desktop hard drives, or digital files located on non-networked storage sources. Rather, this assessment will be based on an examination of our existing institutional on-line and near-line digital storage solutions, which are managed by both the Engineering and Archive Departments.
2. A description of the various kinds of structural, descriptive, and administrative metadata being generated within the stations various departments. This portion of the project is meant to help the archives pinpoint what data is being generated by the station's various software production systems, but also in what format the information is encapsulated (XML, text,

RSS, .xls). From this initial stage of discovery, the resident can make recommendations to the archives as to what metadata is important for future metadata mappings or formulate recommendations for a new metadata schema for the archives.

3. An outline of NYPR's current digital storage and production strategies. This outline could take the form of a workflow chart or diagram, with accompanying explanation, that tracks the lifecycle of a digital object, from its creation on a networked SAN, to its storage on a station NAS, to its eventually life as a streaming access copy. It is this portion of the project where the resident will have the opportunity to contextualize digital object life within the rubric of an OAIS model and to reflect on the potential future uses and public access to the digital collections.

4. This last report will be based on a series of objectives completed in the prior three goals. Depending on the outcome of the previous investigations, the last report will include a series of recommendations that will help the archives bolster its digital stewardship strategies. The recommendations could take various forms. For example, the resident might decide that only small tweaks to the systems are needed, and that the archives can find simpler or better ways to leverage existing workflows to ensure better long term preservation. Or the resident could recommend that producers need to change the way they capture, name, and store digital information. The resident would not necessarily need to investigate new potential digital assessment systems. Although in this rapidly changing digital environment, NYPR remains open to suggestions as current systems and best practices are evolving. Depending on the skill and experience of the resident, this kind of research may be out of the scope of the residency. However, if the resident believes that entirely new systems are required at NYPR to ensure long term preservation, they can certainly point NYPR in that direction and suggest areas of future discussion.

Timeframe & Deliverables

1-2 Months Audio Training and Workflow Orientation

Because of the complexity of systems and workflows involved with media creation at NYPR, the resident will spend the first two months familiarizing themselves with the born-digital workflows and digitization best practices of the station's archives department. This training will include learning the analog-to-digital workflow for a variety of audio formats in the collection, including 1/4" open reel tape, lacquer transcription discs, and cassette. The resident will also be trained in proper transfer of digital assets from their original carriers into appropriate file-based preservation masters. This process will include working with minidisc, DAT, CD-DA, F-1 Beta, and VHS DBX-700. The resident would not be required to process a certain amount of materials during this training.

Rather, the archives feels that learning the fundamentals of audio preservation will help the resident create more informed decisions during the next stages of the residency.

3-6 Months

Collection Assessment

The goal of next three months of the residency will be to gain a detailed understanding of the digital assets the station creates. This will be accomplished by creating a collection assessment document, which will include the kinds of digital assets producers are creating (file formats, codecs, software tools) and the total volume in terms of file size.

This assessment will require interviewing stakeholders from across departments, including IT, Engineering, Digital Operations, News, and the various show production departments within NYPR. The mentor will help facilitate these interviews and make the appropriate introductions. There is a shared interest amongst archives and engineering to codify and streamline many of NYPR's current digital preservation strategies, and these departments would welcome any fact-finding endeavors by the resident. Additionally, NYPR has recently hired a systems administrator, dedicated solely to maintaining stable and reliable audiovisual streaming capabilities. The administrator has expressed interest in working with the archives to formulate a better more efficient preservation workflow, possibly leveraging some of the solutions in NYPR's new audio tools server, which he manages.

There have been attempts in the past to create collection assessments for the station, and this part of the residency will also include a review of these past assessments in order to see what information needs to be changed, added to, or updated. Some of the ideas in past assessments have taken root in various departments. For example, there has been some progress in preserving born-digital video, but because of the rapid changes in technology many of the reports are now out of date: software systems have changed and encoding standards have shifted. NYPR has also greatly expanded its Digital Operations Department to include programmers, systems administrators, digital producers, and engineers – all of whom have had an effect on content creation and production workflows.

At the end of month 6, the resident should have completed a comprehensive report that details the state of digital preservation at NYPR.

7-9 Months

Recommendations and Final Reporting

In the last two months, the resident will have the opportunity to make recommendations based on their previous work. This time will be spent identifying the things the archives are doing right, but also identifying the key roadblocks and challenges the archives faces to digital preservation. A final report will be due at the end of this term, and it should include recommendations for the implementation of new digital preservation workflows. These recommendations could take a number of different forms. They could be used to evaluate available open-source or commercial digital repository solutions, but the time could also be spent formulating new ways the archives could use its current digital infrastructure.

Resources Required

Two mentors (John Passmore, Andy Lanset) and one resident. The archives will provide a dedicate workstation and the resident will have access to stakeholders throughout the institution including members of the Engineering, IT, Digital Operations, and Production departments.

The mentors will schedule weekly meetings with the resident and facilitate the interviews with stake holders in other departments. The mentors anticipate near constant contact throughout the residency, but certainly daily communication during the first 3 months of training and orientation. The archives workspace is a large communal audiovisual laboratory, so the residency will be in the center of the archives activity during the course of the project. John Passmore will be able to train the resident in basic programming skills, how to use the command line, and how to run simple queries in our various databases.

Context

The NYPR archives was founded in 2000 by Andy Lanset, but the broadcast radio stations that comprise NYPR have a history that reaches as far back as the earliest days of radio. For example, WNYC, NYPR's largest and most popular station, first broadcast on July 8th, 1924. Throughout its more than 90-year history, WNYC, New York Public Radio, has faithfully observed and documented the political, historical, scientific, and cultural events—both large and small—that have shaped New York City and the entire nation. Outside of the federal government, the WNYC Collection is the largest non-commercial collection of archival audio recordings and ephemera from an individual radio broadcaster.

The NYPR archives has spent the last 15 years repatriating, digitizing, and preserving parts of our historically older collections, but at the same time, we realize that our digital collections deserve equal care and consideration.

The archives current system of archiving digital objects is reliant on the use of disparate and largely unconnected hardware and software solutions within the

station: DAVID Systems is used as the digital asset management system for the archives preservation audio files, both born-digital and digital derivatives of analog objects. The descriptive metadata for the objects stored in DAVID are captured in a separate open source PBCore-backed content management system. Various other archival digital objects (video, pdfs, photos, scanned objects) are cataloged and kept track of in a variety of ways, but primarily with Microsoft Access databases and Excel spreadsheets. Because of this workflow, the archives see a need to develop a more integrated solution – one that specifically meets the needs of a growing digital repository.

The NYPR Archives also realizes that shoehorning archival workflows into what are essentially radio production-oriented systems, is becoming inefficient. For example, DAVID Systems strips archives- embedded metadata from audio files upon upload. It also renames uploaded archival audio files to adhere to its own content model structure. In the case of digital video, DAVID supports limit file formats and codecs.

File storage is becoming an issue for the NYPR archives as well. The growing number of archives' digital preservation files stored on local servers and managed through the DAVID interface by the archives is becoming a prohibitive expense, and has the potential to slow down the system as a whole, affecting the needs of producers and reporters, and other employees at the station.

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Having a NDSR resident that can dive deeply into NYPR's current digital preservation issues and make sound recommendations for a sustainable digital preservation strategy would be invaluable.

Required Knowledge and Skills for Resident

- MILS or degree in equivalent archives and preservation program.
- Ability to run complex MYSQL queries
- Reading and understanding XML
- Using XSLT to transform XML files
- BWF MetaEdit command line utility to run and validate checksums and embed metadata
- Using the MediaInfo command line utility to extract technical metadata
- Basic familiarity with operating in the Windows command line

*Preferred Knowledge or
Experience*

- Advanced Microsoft Excel (Visual Basic for Applications and Open Database Connectivity)
- Scripting language like Ruby or Python
- Basic understanding of digital audio workflows and play back systems
- ProTools or Adobe Audition
- Understanding of current metadata standards to describe audiovisual materials (PBCore , AES)
- Knowledge or experience with open source digital asset management tools such as Collective Access and Resource Space.
- Familiarity and understanding of ISO 14721:2003 (OAIS)

3. HOST INSTITUTION GUIDELINES

PROGRAM DETAILS

The NDSR [PROGRAM NAME] seeks partner institutions across the United States to host recent postgraduate degree recipients for a year-long residency. These residents will work onsite to complete a digital stewardship project designed by host institution staff.

PROGRAM BACKGROUND

The National Digital Stewardship Residency (NDSR) [PROGRAM NAME] is an iteration of the NDSR program that began in 2013, with a pilot project developed by the Library of Congress in conjunction with the Institute of Museum and Library Services (IMLS). The NDSR program was developed to bridge the gap between existing well-developed classroom education and the need for more direct professional experience in the field. The program serves several different populations: students interested in the field of digital stewardship, partnering institutions, and the broader cultural heritage community. The mission of the NDSR program is to build a dedicated community of professionals who will advance our nation's capabilities in managing, preserving, and making accessible the digital record of human achievement.

NDSR [PROGRAM NAME] adapts and expands the NDSR model by [SUMMARY OF INITIATIVE GOALS]. The program will support [NUMBER OF COHORTS] dispersed/local cohort(s)– consisting of [NUMBER OF RESIDENTS] recent postgraduates placed in host institutions for [NUMBER OF MONTHS] month residencies.

Sample: NDSR Art adapts and expands the NDSR model by addressing issues of digital preservation and stewardship in relation to the arts, with a particular focus on new media and arts information. The program will support two nationally dispersed cohorts– each consisting of four recent postgraduates placed in host institutions for twelve-month residencies.

PARTNERSHIP BENEFITS

NDSR [PROGRAM NAME] is committed to the success of each resident and their host institution. As our contribution to the partnership with the host institution we provide:

- A salary and professional development stipend for a full-time resident for [X]-months (hired by the host institution in partnership with the program)
- Access to continuing education and professional development for staff
- The chance to be an integral part of a collaborative, national network of host institutions

ORGANIZATIONAL COMMITMENT

The success of the residency experience is dependent upon the participation of engaged, committed host institutions and mentors. Host institutions should:

- Be responsible for the long-term stewardship of digital information assets or be in a position to influence other institutions through policy, advocacy, consortia activities, and other non-collecting methods of supporting digital stewardship.
- Have a clear vision of the project plan and how the resident will be effectively utilized.
- Have the stated support of leadership to ensure the resident is considered and treated as an integral part of the organization.
- Be an active participant in the hiring and recruiting processes. The host institution will select the resident in partnership with NDSR program staff. Host institutions should be prepared to review applications and conduct interviews.
- Provide an engaging supervisor/mentor (fulltime staff) with the time and resources to support a resident for [X] months.
- Allow resident supervisor/mentors to participate in occasional meetings with project colleagues and NDSR program staff.
- Be able to integrate the resident into the broader work and organizational culture of the institution.
- Provide project resources (including software and storage space).
- Provide a valuable learning and work environment for the resident.
- Immerse the resident in the ongoing activities of the host institution as much as possible.
- Provide a computer workstation, email address, and business cards for residents consistent with institutional practice.
- Understand that residents will dedicate 80% of their working hours to their host institutions and 20% of their working hours to training, education, and collaborative NDSR projects of benefit to the NDSR community. This will include taking part in an ongoing series of seminars, workshops, and other educational programs designed by NDSR program staff, host institutions, affiliated NDSR programs in other cities, and the residents themselves.
- Be willing to provide assistance in locating affordable housing (although residents will ultimately be responsible for securing and financing their own living accommodations).

HOST INSTITUTION PRIMARY MENTOR

Host institutions will designate one onsite supervisor to act as the resident's primary mentor. Primary mentors will be expected to commit a percentage of their time to training, project supervision, and guidance. The primary mentor will be asked to:

- Provide weekly supervision and support for the resident.
- Conduct bi-annual evaluations.
- Attend a week-long digital stewardship training session.
- Join monthly conference calls to discuss progress on projects..
- Contribute to the assessment and promotion of the NDSR program.

4. HOST INSTITUTION APPLICATION

NDSR Host Application

Deadline:

Please see the Host Application instructions and checklist on pages 2 and 3 of this document. There are detailed guidelines outlining application instructions and attributes of a host institution, as well as links to sample past applications, on the [website](#). Application forms should be completed in Acrobat or Adobe Reader.

Please e-mail the completed application and supporting documents to:

Deadline for application is:

Your Contact Information

First Name

Last Name

E-mail Address

Phone

Date Submitted

Organization name - (Name, location)

Primary Mentor (Name)

Primary Mentor (Title)

Primary Mentor (E-mail address)

Primary Mentor (Phone number)

Additional Mentor Name (if applicable)

Additional Mentor Name (if applicable)

NDSR Host Applicant Instructions

To become a host for NDSR, please compile the following and submit in one email to **[EMAIL]** with the subject “[Organization Name] Host Application.” Application documents can be sent separately or as a single PDF.

The deadline to submit is 5 pm on **[DATE]**

1. **Letter of Commitment** – This brief letter (one page maximum) should be created and signed by an upper-level manager and should state their support for NDSR at their institution.
2. **Statement of Interest** – This brief document (one page maximum) should outline why this applicant will make a good host institution. It should describe the nature and size of the organization and any archival practices, initiatives, or staff currently in place, discuss the organization's commitment to preserving its content, and identify how the environment will be conducive for resident learning. This is where the applicant institution could also identify previous experience hosting residents, previous experience participating in preservation initiatives, or existing connections to local archivists or archival institutions.
3. **Identification of Mentor(s)** – This document should identify a primary mentor that will be the staff member designated as the resident’s “supervisor of record”. This person will serve as the resident’s main point of contact and be able to answer questions about the organization, program and community, as well as participating in NDSR program opportunities. In addition, you may want to include additional mentors who make up the project team. Please describe why those individuals will be effective mentors and how they are qualified.
4. **Mentor CV** – Please include the CV of the primary mentor (2 pages maximum) as part of the application package.

5. **Project Proposal** – Please use the form beginning on page 4 of this document to clearly identify the scope of work that the resident will complete throughout the experience. The proposal should include a summary of the project; specific goals and objectives; a proposed timeline for completion and description of project deliverables; required resources to complete the project; a description of the context of the project within the institution (the project’s role in the bigger picture of the institution and possibly for outside the institution); required and preferred skills and experience for residents undertaking the project; and a brief description of how the results of the project will be integrated into the organization after the end of the residency. The project proposal form can be filled out in Acrobat or Adobe Reader.

6. **Additional Support (optional)** – If desired, please use the final part of the Project Proposal form to identify any additional support or benefits that the organization can provide for the resident beyond the minimum required by the program, such as transportation assistance, additional travel funding, the use of organizational space or facilities for events, or local benefits associated with institutional or organizational employment or membership.

7. **Signed Host/Mentor Checklist** – Both the primary mentor and the upper-level manager who creates the Letter of Commitment should read and digitally sign the commitment checklist on pages 9-10 of this document, which outlines the specific responsibilities that the host institution is agreeing to undertake if they are selected to participate in the program.

Host Application Checklist

Completed application form	<input type="checkbox"/>
Statement of interest	<input type="checkbox"/>
Letter of commitment	<input type="checkbox"/>
Identification of Mentors	<input type="checkbox"/>
CV of Primary Mentor	<input type="checkbox"/>
Project Proposal	<input type="checkbox"/>
Signed host/mentor checklist	<input type="checkbox"/>

Project Proposal

Date Submitted

Submitted By

Project Title

Project Summary

Project Proposal

Specific Project Goals and Objectives

Project Timeframe and Deliverables

Project Proposal

Resources Required for Project

Project Context

Project Proposal

Required Knowledge and Skills for Residents

Preferred Knowledge and Experience of Residents

Project Proposal

Post-Residency Project Integration Plan

Additional Support

Host Institution and Mentor Checklist

The success of the residency experience is dependent upon the commitment of host institutions and mentors. Host institutions selected to participate must provide the resources necessary to ensure a valuable professional experience. Host institutions must also provide one or more full-time staff members as mentors who can commit to dedicating at least 20 percent of their time to the project.

The following criteria are required of all host institutions:

1. Designate at least one full-time staff member who is able to commit at least 20 percent of their time to supporting the project and the resident, including attending NDSR events.
2. Provide the resident with the status, resources, and privileges of a full professional staff member of the organization for the period of the residency, including an organizational email address, business cards representing their position as a resident in the organization, and access to dedicated staff physical and digital spaces consistent with institutional practice for other staff.
3. Ensure that the organization's management and staff are informed of the resident's position and requirements.
4. Provide adequate space, supplies, and equipment required for the successful completion of the residency project, including a computer, any required software and hardware, any necessary training, and required storage space.
5. Understand that the resident will spend 80 percent of their working hours on their project for the host institution, and 20 percent on other activities, including working on NDSR collaborative projects, attending conferences and educational events, and pursuing personal career development opportunities.

The following criteria are required of all primary mentors:

1. Integrate the resident into the work and organizational culture of the institution.
2. Serve as a resource for the resident in understanding the needs, culture, challenges, and requirements of the digital stewardship landscape.
3. Schedule weekly meetings with the resident to discuss progress of their project.

4. Act as the primary point person to review project deliverables with the resident. When needed, consult advisors for review of project deliverables.
5. Conduct a formal professional review with the resident halfway through the residency and again at the conclusion of the residency.
6. Contribute to an evaluation of the NDSR program at the conclusion of the residency.

I agree to commit to the responsibilities outlined in this document.

Signature

Printed Name

Signature

Printed Name

Date

Organization

5. RESIDENT APPLICATION

Resident Application

Deadline:

Please see the Resident Application instructions and checklist on pages 2 and 3 of this document. Please compile the completed application and supporting documents in a single email to: [EMAIL] by [DATE]

Your Contact Information

First Name

Last Name

E-mail Address

Phone

Date
Submitted

Recent Degree - (Degree, College/University, Date awarded)

Undergraduate College/University (Degree, College/University, Date awarded)

U.S. Citizen?

☐ Yes

☐ No

Must be eligible for employment in the United States; AAPB NDSR will not be able to sponsor employment visas.

URL of Video or online project if it is accessible online; otherwise, zip it up and e-mail it to [EMAIL] with applicant name and "Video/Online Project" in the subject line. (If you are accepted to the program we may ask you to sign a release form to make your video public.)

Top three host projects listed in order of preference
(to read about the host projects, visit [LINK])

References

Please ask 2 references to e-mail their letters to: [EMAIL] with applicant name and "Recommendation Letter" in the subject line.

NDSR Applicant Instructions

Submit Application by [DATE]

Residents should compile the application and supporting documents and submit in one e-mail to [EMAIL] with the subject "[Your Name] Application".

Application video or online project

The video or online project should answer the question, "Why are you interested in digital stewardship?"

The video or online project is a creative way for you to demonstrate your communication skills, your interest in the projects, and in contributing to the field of digital stewardship. The term *online project* is intentionally broad to allow you a variety of ways to fulfill this aspect of the application, particularly if creating a video does not suit or appeal to you. Applicants who do decide to create a video can use still images, screencasts, animation, original footage, or any moving image desired; videos should be between two and three minutes long. Neither high production value nor technical perfection is expected. Online projects can be e-portfolios, digital collection portals, published articles, blogs, or other previous work that demonstrates your professional capabilities and communication skills. The NDSR program may ask those accepted to the program to allow their videos or online projects to be posted publicly, so you should have the rights to use any embedded material or cite your sources properly.

Applications submitted without videos or online projects will not be considered.

Include the URL of your video or online project on Page 1 of this application if it is accessible online. Otherwise, email a zip file to [EMAIL] with your name and 'Video/Online Project' in the subject line.

Cover letter and curriculum vitae

The cover letter should provide a clear statement of your goals and demonstrate an understanding of or strong interest in digital stewardship as a profession. It should discuss relevant leadership, professional service, outcomes from coursework, and work or internship experiences. Applicants may also choose to discuss the 3 projects they are most interested in working on. The cover letter should be no longer than 1 page. The curriculum vitae should contain a summary of your employment history, qualifications and education.

Reference Letters

References should e-mail their letters to [EMAIL] from their own e-mail accounts with your name and "Reference Letter" in the subject line. References may include professors; past supervisors from jobs, internships, or volunteer projects; or colleagues who have collaborated on professional endeavors. Applicants should have letters from two individual references.

Resident Application Checklist

- Completed Application Form ☐
 - Resume/Curriculum Vitae ☐
 - Cover letter ☐
 - Video or online project ☐
 - 2 Reference letters ☐
-

6. HOST INSTITUTION AND MENTOR COMMITMENT FORM

The success of the residency experience is dependent upon the commitment of host institutions and mentors. Host institutions selected to participate must provide the resources necessary to ensure a valuable professional experience. Host institutions must also provide one or more full-time staff members as mentors who can commit to dedicating at least 20 percent of their time to the project.

The following criteria are required of all host institutions:

1. Designate at least one full-time staff member who is able to commit at least 20 percent of their time to supporting the project and the resident, including attending NDSR events.
2. Provide the resident with the status, resources, and privileges of a full professional staff member of the organization for the period of the residency, including an organizational email address, business cards representing their position as a resident in the organization, and access to dedicated staff physical and digital spaces consistent with institutional practice for other staff.
3. Ensure that the organization's management and staff are informed of the resident's position and requirements.
4. Provide adequate space, supplies, and equipment required for the successful completion of the residency project, including a computer, any required software and hardware, any necessary training, and required storage space.
5. Understand that the resident will spend 80 percent of their working hours on their project for the host institution, and 20 percent on other activities, including working on NDSR collaborative projects, attending conferences and educational events, and pursuing personal career development opportunities.

The following criteria are required of all primary mentors:

1. Integrate the resident into the work and organizational culture of the institution.
2. Serve as a resource for the resident in understanding the needs, culture, challenges, and requirements of the digital stewardship landscape.
3. Schedule weekly meetings with the resident to discuss progress of their project.
4. Act as the primary point person to review project deliverables with the resident. When needed, consult advisors for review of project deliverables.
5. Conduct a formal professional review with the resident halfway through the residency and again at the conclusion of the residency.
6. Contribute to an evaluation of the NDSR program at the conclusion of the residency.

I agree to commit to the responsibilities outlined in this document.

Signature

Printed Name

Date

Signature

Organization

Printed Name

7. RESIDENT COMMITMENT FORM

PROGRAM BACKGROUND

The National Digital Stewardship Residency (NDSR) [PROGRAM NAME] is an iteration of the NDSR program that began in 2013, with a pilot project developed by the Library of Congress in conjunction with the Institute of Museum and Library Services (IMLS). The NDSR program was developed to bridge the gap between existing well-developed classroom education and the need for more direct professional experience in the field. The program serves several different populations: students interested in the field of digital stewardship, partnering institutions, and the broader cultural heritage community. The mission of the NDSR program is to build a dedicated community of professionals who will advance our nation's capabilities in managing, preserving, and making accessible the digital record of human achievement.

NDSR [PROGRAM NAME] adapts and expands the NDSR model by [SUMMARY OF INITIATIVE GOALS]. The program will support [NUMBER OF COHORTS] dispersed/local cohort(s) consisting of [NUMBER OF RESIDENTS] recent postgraduates placed in host institutions for [NUMBER OF MONTHS] month residencies.

Sample: NDSR Art adapts and expands the NDSR model by addressing issues of digital preservation and stewardship in relation to the arts, with a particular focus on new media and arts information. The program will support two nationally dispersed cohorts– each consisting of four recent postgraduates placed in host institutions for twelve-month residencies.

STIPEND AND BENEFITS INFORMATION:

Include information on how much residents will be paid, how and at what intervals they will receive payment, and any information about benefits they will receive.

EMPLOYMENT STATUS OF INTERNS:

Include information about how residents will be classified within the applicable payroll/human resources system (e.g. full-time employee, temporary employee, fellow) and information about tax liabilities.

SUPERVISION:

Residents will be overseen and supervised by the host institution. Residents are subject to the on-site expectations set by their host institution and primary mentor and to any agreements between them and their host institution regarding the residency.

STATEMENT OF EXPECTATIONS:

The following commitment is required of all residents:

1. Accept a full-time position as an NDSR resident with your host institution, from the period of [DATE] to [DATE]
2. Designate 80% of your standard work week over this period towards completing the assigned deliverables for the digital stewardship project designed by your host institution.
3. Designate 20% of your standard work week over this period towards professional development in coordination with NDSR, including (but not limited to), attendance at professional conferences, engaging in self-directed learning, attending educational events, creating blog entries, reports and presentations, and pursuing other professional development opportunities.
4. Attend at least 90% of scheduled NDSR educational events.
5. Share all materials produced for the NDSR Residency under a Creative Commons Attribution-Non Commercial 4.0 International License, including but not limited to, blog posts, webinars, tutorials, and any other materials required by NDSR that are not specific host deliverables.
6. Contribute to an evaluation of the residency program at the conclusion of the residency.

Name of Resident (print): _____

Date: _____

Signature: _____

8. SAMPLE RESIDENT MANUAL



2017/18 Program Handbook

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Welcome

We are delighted that you have chosen to be part of the inaugural NDSR Art cohort! This is a very exciting program and your time, energy and commitment to this endeavor is critical to the field of art information digital stewardship. Your questions, comments and perspectives are invaluable to help us continue to advance the program and digital stewardship throughout the Art Libraries Society of North America. We hope that you too will learn and grow from this program as much as we have already and we look forward to continuing the next phase of this journey together with you. As you embark on the challenges of the upcoming year of professional development, please always remember to ASK for help; be CREATIVE; and have FUN.

Good luck and all best wishes for a productive 2017-2018 cohort.

Sincerely,

Eumie Imm-Stroukoff, President, ARLIS/NA

Kristen Regina, NDSR Art Program Director, Former President ARLIS/NA

Karina Wratschko, Program Manager

National Digital Stewardship Residency (NDSR) Mission Statement

The mission of the National Digital Stewardship Residency (NDSR) program is to build a dedicated community of professionals who will advance our nation's capabilities in managing, preserving and making accessible the record of human achievement held in digital form. This will enable future generations to fully realize the potential of digital resources now and for years to come.

PROGRAM BACKGROUND

NDSR began in 2013 with a pilot project developed by the Library of Congress in conjunction with the Institute of Museum and Library Services (IMLS). Developed to bridge the gap between existing classroom education and the need for more advanced professional experience in the field, the program serves several different populations: students interested in digital stewardship, partnering institutions, and the broader cultural heritage community. In 2016, the Philadelphia Museum of Art and the Art Libraries Society of North America (ARLIS/NA) received an IMLS grant to develop a National Digital Stewardship Residency program focused on art information professionals (NDSR Art). NDSR Art adapts and expands the NDSR model by addressing issues of digital preservation and stewardship in relation to the arts, with a particular focus on new media and arts information. The program supports two cohorts, each of which has four residents who serve twelve-month residencies at art and cultural heritage institutions across the country.

NDSR Art 2017-2018 Cohort

Managing Time-Based Media/Digital Art at (an appropriate) Scale

Host Institution: Minneapolis Institute of Art

Resident: Erin Lee Barsan

Host Mentor: Frances Lloyd-Baynes

ARLIS/NA Local Mentor: Meg Black (Minneapolis Institute of Art)

The NDSR Resident will help the museum effectively assess and address our current needs, and the anticipated surge in digital collections. The Resident will help Mia enhance our capacity to acquire, manage, preserve and provide access to the digital art collections over time; recommend technical solutions for management and preservation; and oversee the initial implementation of the new policies, procedures and systems. In the final stage of their residency, the Resident will train Mia staff to carry forward what they have helped put in place. By developing Mia's capabilities to preserve and manage its digital collections, the residency's outputs will facilitate our users' exploration of these complex artworks, addressing the expectations of today's audiences to engage with rich digital content and the latest artistic creations. The foundational framework created during the residency will also ensure the preservation and viability of these art works into the future.

Planning for Time-Based Media Artwork Preservation

Host Institution: Philadelphia Museum of Art

Resident: Elise Tanner

Host Mentors: Marge Huang (primary), Rose Chiango, Allison McLaughlin

ARLIS/NA Local Mentor: Amanda McKnight (The Barnes Foundation)

The NDSR Resident will be responsible for researching issues regarding time-based media that will come out of the assessment. The Resident will help to create a foundational roadmap to inform Museum staff of best practices, standards, tools, equipment, software, hardware, metadata and other technical needs imperative for the preservation of time-based media art in a sustainable and accessible way. This roadmap will be focused initially on digital time-based media art, however, it will also be applied to any analog time-based artworks that are migrated to a digital format in the future.

NDSR Art 2017-2018 Cohort

To Capture and Keep!: Establishing Preservation Practices for Born Digital Art Collections and Projects at Penn

Host Institution: University of Pennsylvania

Resident: Coral Salomón

Host Mentor: Hannah Bennett (primary), Laurie Allen, Ian Bogus

ARLIS/NA Local Mentor: Shannon Marie Robinson (Drexel University)

To help the Penn Libraries identify and prepare born-digital and digitized art-related assets for archiving and preservation. This residency focuses on three distinct areas, critical to the arts, falling within the larger theme of digital preservation. The resident will develop metadata guidelines and input workflows for the preservation and stewardship of archived web collections, engage in a series of immersive studies to develop recommendations/priorities for the inclusion of arts-related born digital assets into Penn's institutional repositories, and take aim at the issues and challenges surrounding arts-related publications served through new and emerging platforms such as Apps, interactive e-books, journals published through YouTube, Issu, journals published exclusively for iPads, etc., so as to consider how today's arts research library can acquire, maintain, and preserve said publication types.

A New Paradigm for Preserving Born-Digital Art Collection Records

Host Institution: Yale Center for British Art

Resident: Cate Peebles

Host Mentor: Rachel Chatalbash

ARLIS/NA Local Mentor: Kraig Binkowski (Yale Center for British Art)

This project will use the digital preservation system, workflows, and procedures implemented by the Yale Center for British Art's Institutional Archives as a guide for developing and executing a digital preservation plan to ensure the integrity, accessibility, and usability of the museum's born-digital art collection-related records permanently held by departments other than the museum's archives. In the past, the museum's collection-related records were analog and could be stored and organized relatively easily by any department. The preservation of born-digital records, however, requires additional expertise and action at an early stage in order to ensure preservation. This project aims to document how these born-digital records can be properly stewarded according to professional digital preservation standards, while retaining the level of immediate access and flexibility required by the records creators.

Program Components

2017-2018 IMPORTANT DATES

July 24-28, 2017: Immersion Week

July 31, 2017: Onsite Residency Begins

Oct 2017: Host Enrichment Session at Mia

January 2018: Resident midterm self-evaluations due

February 25 - March 1, 2018: ARLIS/NA New York 2018 Conference

April/May 2018: Host Enrichment Session at YCBA

June 2018: Capstone report due

July 23, 2018: Residency ends

Key Residency Activities:

- Immersion Week at Philadelphia Museum of Art, July 24-28, 2017
- Twelve-month residencies begin at host institutions, July 31st
- Monthly Virtual Training Sessions
 - The Curriculum Development Task Force and Program Administrators will organize 3 continuing education sessions in August, September, and November.
 - Residents and mentors will coordinate or facilitate additional virtual sessions, roughly monthly.
 - ARLIS/NA members will be invited to join in-person events or to watch online webinars.
 - Sessions should focus on professional development activities, topics related to digital preservation, and may include guest speakers and topical discussions.
- Host Enrichment Sessions, held at host institutions
 - Fall 2017 – Minneapolis Institute of Art; Spring 2018 – Yale Center for British Art
 - Arranged by host mentors and residents with guidance from program staff.
 - Funding for residents' travel and accommodations will be provided by NDSR Art.
- Resident self-evaluations due, January 2017 and June 2018
- Annual ARLIS/NA Conference in New York, February 25-March 1, 2018
 - Residents present as a group. Conference attendance is mandatory.
- Final capstone, June/July 2018
 - Final presentations of project conclusions will be held at host institutions

WORK SCHEDULE

Residents work in accordance with the full-time work schedule and leave policies at their host institutions and should familiarize themselves with the employee handbook of their host institution. Hosts may allow alternate work schedules as long as residents are meeting all the deliverables and requirements set out in the resident work plan. Hosts or residents must inform program staff of alternative schedules.

Brief absences (personal illness, etc.) should be reported directly to host mentors and are governed by each host's institutional employee benefits policies. Longer absences (family emergencies, etc.) should be reported to both host mentors and NDSR Art program administrators.

NDSR Art residents may from time-to-time attend workshops, lectures, and special events. They should clear planned absences with host mentors.

COMMUNICATION SCHEDULE

Residents will have virtual meetings with NDSR Art program staff 1-2 times per month for up to 2 hours beginning in August. The agenda of the meetings will be set by the residents. The purpose of these meetings will be to collaborate, report project updates, plan conference presentations, ask NDSR Art to provide feedback and/or support, etc.

Host mentors should expect bi-monthly check-ins with program staff.

PAY

Residents will be paid by their host institutions, who will withhold payroll and income taxes.

PROFESSIONAL DEVELOPMENT

Each resident will receive \$1,000 in professional development funds. This funding is intended to cover transportation, lodging, meals, and conference registration. Travel should be made in an economical fashion, and travelers should endeavor to seek out the least expensive reasonable travel option. Luxury travel costs such as hotel suites or business class air travel are unallowable except in limited circumstances. Receipts are required for all expenses submitted for reimbursement. Receipt documentation should show the vendor, amount paid, form of payment, date, place and essential character of the expense. Meal receipts should show an itemized list of food and beverages purchased (alcohol is non-reimbursable). While not required, travel funds should be used as much as possible for conference presentations (poster session, panel, breakout, etc.), and/or events where the NDSR Art program/your project are announced or discussed to some extent, if not directly.

Please keep in mind that you will not be reimbursed until after you return from the trip. Keep all receipts and do not go over the GSA rate for the city in which your event takes place; federal grant funding requires that you travel only on US carriers. GSA rates and travel requirements can be found at

<http://www.gsa.gov/portal/content/104877>

Professional development funds may also be used for professional memberships and workshops or classes that fall outside of what is covered by NDSR Art.

RESIDENT EVALUATIONS

Each resident should consult with their mentors and program staff to create an individualized development plan in the first month of the residency, to document their goals for performance and growth during the residency. Mentors and program staff will periodically check in with the residents to see that they are progressing towards their goals. In addition, residents will be evaluated before and after the program to see how the program contributes to the resident's core competencies in digital preservation, professional network, and perceived readiness for a career in digital preservation.

TERMINATION OF RESIDENCY

While residents have flexibility in their schedule, residents are being paid to complete the project at hand. If the host institution concludes that the resident is no longer fulfilling the duties by which they signed on to the residency due to excessive absence, disengagement from work, etc. the Program Manager will determine the course of action to take, ranging from pay being docked to termination from the residency. If the resident leaves the program early and does not complete the project he or she forfeits completion of the program.

Roles & Responsibilities

EXPECTATIONS FOR RESIDENTS: 20% TIME

In addition to completing the NDSR Art project as defined by your host institution, residents have 20% of their time to devote to cohort activities, their own professional development, research, and learning opportunities.

Immersion Week is considered 5 days of Cohort activities and residents should not plan to take a 20% day until after the first 5 weeks of the beginning of the residency.

Residents are required to:

- Attend and present at the annual ARLIS/NA conference
- Schedule regular (at least monthly) meetings with local ARLIS/NA mentor
- Attend 80% of scheduled online NDSR Art professional development events
- Organize at least one webinar or online training session for the NDSR Art cohort, solo or in collaboration with another resident
- Contribute a post to the NDSR Art blog when using NDSR Art professional development funds to attend an event
- Write a midterm self-evaluation of their NDSR experience (approximately 500 words), progress on their projects, expectations, and challenges
- Participate in a final collaborative "capstone" report that reflects upon their residency and

describes the education and training most vital to empower colleagues in the profession to engage with digital stewardship projects of art information.

Residents are encouraged to:

- Contribute regular blog posts to the NDSR Art blog about their project
- Utilize available professional development funds to attend webinars, training sessions, meetings, and professional events
- Submit proposals for papers, presentations, posters, and lightning talks related to their work for NDSR Art
- Assist with planning and organizing for Host Enrichment Sessions
- Organize and participate in additional events or projects for the benefit of the ARLIS/NA community, online or in person, solo or collaborative
- Engage with audiovisual and digital preservation communities on social media
- Engage with local ARLIS/NA chapters communities and expand their knowledge of digital stewardship
- Connect and collaborate with present and past NDSR residents.

NDSR ART BLOG

Residents will create blog entries about the work they are doing at their host institution on the NDSR Art website: <http://ndsr-pma.arlisna.org/>.

- We encourage the residents to use the space creatively in a variety of ways. For example, content could encompass short updates, longer pieces, images, and/or videos.
- We encourage the cohort to work collaboratively to figure out the best structure for the blog. The group may want to create a rough schedule or topical themes to achieve some consistency/cohesiveness.
- Contributions from mentors are welcome.

SOCIAL MEDIA PRESENCE

Residents are strongly encouraged to maintain a personal social media presence during the residency period.

- Any content posted on social media that is relevant to the residency and a professional audience should be hash-tagged with '#NDSRArt' or '#ndsr'.
- This includes, but is not limited to, Facebook posts, Tweets, and Flickr photos.
- It is imperative that residents keep personal posts with the #ndsr tag professional in nature. The resident's professional discretion must be exercised in how and what they post on this hashtag.
- #NDSRArt will aggregate the program's social media content so that program coordinators can showcase the work the residents have been doing.

The following social media checklist provides some useful reminders for maintaining a professional social media presence in general, not just for NDSR Art:

- Don't share potentially confidential information about your host institution or project. If you are unsure, check with your mentor(s).
- Spell out acronyms.
- Current and future employers and colleagues may read anything you post. It's a great way to network, but should also be approached with some caution.
- Offer information of value.
- Target a specific audience.

INTERIM REPORT

Residents must produce a written report that documents the progress on projects midway through the program. This document will provide NDSR Art program administration with valuable information that will be used to not only document your work, but to inform the future structure of the program.

Interim Reports Due: January 19, 2018

Description of the Project

A brief overview describing the need, problem, or challenge addressed by the project, the audience served, project design, intended results, and the extent to which intended results were realized.

Project Execution

List of activities completed during the project in comparison with planned activities. Whenever possible, activities should be described in both quantitative and qualitative terms. If all activities were not completed, explain why.

Analysis and Evaluation

Compare the actual accomplishments of the project with the intended results, outcomes, and impacts identified in the project proposal. Identify and document significant project achievements and their value. Describe any significant unanticipated costs or circumstances that created obstacles to project success, and summarize lessons learned during the course of the project.

For this report, outcomes are changes in individuals' knowledge, skills, attitudes, behaviors, or other conditions related to the purpose of the project. Impact is a large- scale and/or long-term result that affects one or more institutions, communities, or fields. Include recommendations for future projects in this area and benefits of the project beyond the conclusion of the program.

Provide images, screenshots, maps, floor plans, charts, tables, publications, or datasets as appropriate to illustrate the project's achievements. Attach a copy of any product that resulted from program activities, including research findings, learning resources, or other deliverables. For web-based material, provide URLs and sample screenshots.

RESIDENT COMMITMENT CHECKLIST

The following commitment is required of all residents:

1. Accept a full-time position as a NDSR Art resident with your host institution, from the period of July 2017 to July 2018
2. Designate, on average, 80% of your standard work week over this period (approximately 28 or 32 hours) towards completing the assigned deliverables for the digital stewardship project designed by your host institution
3. Designate, on average, 20% of your standard work week over this period (approximately 8 hours) towards professional development in coordination with NDSR Art, including (but not limited to) attendance at professional conferences, attending educational events, creating blog entries, reports and presentations, working on NDSR Art collaborative projects, and pursuing other professional development opportunities
4. Attend at least 90% of scheduled NDSR Art virtual educational events
5. Attend NDSR Art Immersion Week from July 24-July 228, with attendance and travel funded by NDSR Art
6. Attend and deliver a presentation about your residency project at the ARLIS/NA national conference.
7. Attend regular virtual meetings with other members of your cohort (approximately bi-weekly).
8. Join monthly conference calls to discuss progress on projects with program administrators
9. Organize and lead 30-60 minute training sessions for ARLIS/NA's Learning Portal
10. Co-author a paper with their NDSR Art host mentor for the ARLIS/NA peer-reviewed publication Art Documentation
11. Schedule regular meetings with your assigned local ARLIS/NA mentor (minimum once a month)
12. Execute an employment agreement as reasonably required by your host institution and comply with its terms
13. Contribute to an evaluation of the residency program at the conclusion of the residency
14. Contribute to the assessment and promotion of the NDSR program.

HOST COMMITMENT CHECKLIST

The success of the residency experience is dependent upon the participation of engaged, committed host institutions and mentors.

The following criteria are required of all host institutions:

1. Designate at least one full-time staff member who is able to commit approximately two hours of their time per week over twelve months on average to support the project and the resident and attending NDSR Art events (variable according to the needs of the project and scheduling of events)
2. Provide the resident with the status, resource and privileges of a full professional staff member of the organization for the period of the residency, including an organizational email address, business cards representing their position as a resident in the organization, and access to dedicated staff physical and digital spaces consistent with institutional practice for other staff
3. Ensure that the organization's management and staff are informed of the resident's position and requirements
4. Provide adequate space, supplies, and equipment required for the successful completion of the residency project, including a computer, any required software and hardware, any necessary training, and required storage space
5. Allow at least one supervisor/mentor to dedicate time for attendance at NDSR Immersion Week and further NDSR Art virtual educational events
6. Understand that residents will dedicate 80% of their working hours to their host organizations and 20% of their working hours to training, education, and other activities including working on NDSR Art collaborative projects, attending conferences and educational events, pursuing personal career development opportunities.

Host institutions will designate one onsite supervisor to act as the resident's primary mentor. Host mentors will be expected to commit a percentage of their time to training, project supervision, and guidance.

The following criteria are required of all host mentors:

1. Schedule regular (minimum bi-weekly) meetings with the resident to discuss progress of their project
2. Integrate the resident into the work and organizational culture of the institution
3. Serve as a resource for the resident in understanding the needs, culture, challenges, and requirements of the public media landscape
4. Act as the primary point person to review project deliverables with the resident
5. Attend a week-long digital stewardship training session in Philadelphia
6. Join monthly conference calls to discuss progress on projects and receive 30-60 minute training sessions
7. Attend and deliver a presentation about the project at the ARLIS/NA national conference
8. Co-author a paper with their NDSR Art resident for the ARLIS/NA peer-reviewed publication *Art Documentation*

9. Conduct a formal professional review with the resident halfway through the residency and again at the conclusion of the residency
10. Contribute to an evaluation of the residency program at the conclusion of the residency
11. Contribute to the assessment and promotion of the NDSR program.

LOCAL ARLIS/NA MENTOR COMMITMENT CHECKLIST

The Local ARLIS/NA Mentor provides the third important component in supporting the NDSR Art resident throughout the course of their project. Their responsibilities include guiding and supporting the resident in local professional networks, and providing additional support and feedback on their institutional project.

We request that Local ARLIS/NA Mentors commit to the following responsibilities:

1. Be available to the resident via informal in-person meetings, email, or phone once a month or as appropriate (i.e. anticipate more frequent contact in the beginning of the residency as the resident settles in to a new city, job, and program.)
2. Notify residents of local educational and professional opportunities
3. Encourage residents to connect with the local ARLIS community
4. Offer career advice, resume feedback, and professional support to the resident throughout the residency
5. Provide feedback on resident deliverables for projects at their host institutions if requested
6. Meet in person with residents at professional conferences, and introduce resident to colleagues
7. Contribute toward evaluations of the NDSR Art program at the conclusion of the residency.

NDSR Art Contact Information

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9. SAMPLE HOST INSTITUTION CHECKLIST FOR RESIDENT ORIENTATION

NDSR program staff expects host institutions to integrate their resident into their work place like a regular employee and offer them all the tools and support they need to complete their projects as outlined in the project proposals. Host institutions should have a thorough orientation for their resident that covers all of the necessary aspects of the workplace and organization that the resident will need to complete their projects. This outline can serve as a guide to what a resident may need to know about your organization:

- Brief History of Organization
 - Organization strategic goals
 - Service unit goals
- Organization Structure
 - Staff directory
 - Organization chart
 - Service unit chart
- Access to Building
 - Public transit information
 - Building entry
- Tour of Facilities
- Physical Security
 - Badges and ID
 - Emergency Procedures
 - Emergency evacuation plan
- Services
 - Conference room scheduling
 - Desk and key requests for drawers
 - Electronic door key access
 - Who to contact for administrative tasks
 - Equipment repair and service (fax machines, copiers, etc.)
 - General support (air, heating, light, etc.)
 - Computer support (hardware or software – IT Services)
 - Mail distribution (internal and external)
 - Printing and graphics services
 - Multimedia services
- Telephone and Computer Set Up
 - User instructions

- o Voice system
 - o General dialing
 - Transfers
 - Conference calls
 - Holds
 - Speed Dial
- Office Equipment
 - o Copy and fax machine locations
 - o User instructions
 - o Supplies cabinet/closet
- Training
 - o Mandatory trainings
 - Harassment
 - IT security
- Organization Resources
 - o Access to research facilities
 - o Organization newsletters
 - o Events
 - o Gym
 - o Health and wellness facility
 - o Cafeteria and snack bars
- Additional Orientation Options
 - o Public Tour – arranging a tour for the resident to attend a public tour of your organization’s collections will help reinforce your resident’s sense of prestige and inform them about the content available within the collections.

10. NDSR PROGRAM STAFF INTERIM SITE VISIT WORKSHEET

Resident Name: _____

Host Institution: _____

PROJECT

Discuss interim report. Discuss any updates.

Scope/Timeline

- Does the project feel manageable?
- Are the objectives clear?
- How is the timeline going thus far and how do you see it unfolding as the residency moves forward?
- Does the work match what you expected?
- Are you performing activities not outlined in the original proposal?

MENTOR/INSTITUTION

- Are you receiving the guidance and support you need from your mentor(s) to execute your project? In what form do you receive feedback and input? How often?
- Are you receiving the support you need from the institution to execute your project?
- What opportunities have you had to participate in the organization and meet staff outside of your project?
- What professional development opportunities, if any, have you received from the organization?
- Is your workstation/work area meeting your needs?

NDSR PROGRAM

- Have the workshops been constructive? Have they been covering material you find useful? What components might be added or eliminated?
- Do you feel you are getting enough/too much/not enough face time with the other residents? The other mentors? Program staff?
- Are you receiving the support you need from program staff (i.e. support for projects, professional development, PR)?

- Is program staff communicating effectively?
- Do you feel like events get scheduled unexpectedly or without due notice?
- Do you understand program expectations and the reasons behind them?
- Do you feel there is transparency regarding program decisions (i.e. conferences, budget)?
- Are there any areas where you would like more clarity and/or documentation?
- Are you able to communicate with program staff?
- Are your questions answered to your satisfaction? Are they answered in a timely manner?
- Do you feel you have someone to go to if you have a problem with your project? Mentor? NDSR program staff?
- Is the residency program delivering what you expected?
- Do you have any questions or concerns about conferences, blogging, or other work outside of the project itself? (Check in on level of program work--too much? Just right?)
- What are your initial ideas for your enrichment session?

Do you have any questions for us?

SITE VISIT WORKSHEET - MENTORS

Host Institution: _____

Mentors participating in the site visit: _____

PROJECT

- How is the project timeline going thus far and how do you see it unfolding as the residency moves forward? Has the scope of the project changed? Have the deliverables changed?
- Is the resident performing activities not outlined in the original proposal?
- Are you/the resident receiving the support you need from the institution to execute the project? Did you have bureaucratic problems (with badges, desks, computer accounts, etc.)? Any issues we should be aware of (mostly to advise future institutions)?
- What is your biggest challenge or concern? (e.g. getting buy-in; perception within the organization; scheduling; lack of knowledge and/or experience).

RESIDENT

- Is the performance of the resident matching your expectations? Does the resident have the

prior training/experience that you expected?

- Have any issues come up that we should be aware of? (Frequent absences/tardiness, personality conflicts, etc.)
- What is your approach to providing guidance and support to the resident? How/When do you provide feedback and input on the project?
- Do you have any questions or concerns about the mentorship process?
- What opportunities has the resident had to participate in the organization and meet staff outside of their project?

NDSR PROGRAM

- Do you feel you are getting enough/too much/not enough face time with the other mentors? The other residents? Program staff? Do you feel you can reach out to other mentors with questions, advice, for feedback, etc.?
- Are you receiving the support you need from program staff? (i.e. support for projects, professional development, PR, etc.)
- Is program staff communicating effectively?
- Do you feel like events get scheduled unexpectedly or without due notice?
- Do you understand program expectations/goals for residents and the reasons behind them?
- Do you feel there is transparency regarding program decisions (conferences, budget, etc.)
- Are there any areas where you would like more clarity and/or documentation?
- Are you able to communicate with program staff?
- Are your questions answered to your satisfaction? Are they answered in a timely manner?
- Do you feel you have someone to go to if you have a problem with the project? NDSR program staff?
- Is the residency program delivering what you expected?
- Do you have any questions or concerns about conferences, blogging, or other work outside of the project itself? *(Check in on level of program work--do they feel residents are spending too much time away due to program requirements? Spending too much time working on program requirements?)*

Do you have any questions for us?

11. RESIDENT INTERIM AND FINAL REPORT GUIDELINES

INTERIM REPORTS

REPORTS DUE

- MM/DD/YYYY
- MM/DD/YYYY

As a resident in the NDSR program you must produce written reports that document your progress throughout the residency and the state of the project at your departure. This document will provide NDSR program staff with valuable information that will be used to document your work and to inform the future structure of the program.

Below are topics that should be covered in your interim report.

INTRODUCTION

1. Name of resident.
2. Name of host institution.

DESCRIPTION OF THE PROJECT

1. Brief overview of the planned project and proposed outcome.
2. Resources required.
3. Outline of steps necessary to complete the project.

PROJECT EXECUTION

1. Project timeline with discussion of milestones and deliverables achieved.
2. Did the project need to be altered from the original project that was proposed?
If so, explain why and provide a summary of the final project description.
3. Significant accomplishments.
4. Any additional work activities not included in the original proposal that have been achieved during this reporting period.

5. Outreach or dissemination activities (conferences, etc.).
6. Challenges faced relating to project work (how did you address them?).
7. Impact or significant outcomes for the host institution, the professional community, and the resident.

ANALYSIS AND EVALUATION

1. Lessons learned and recommendations for future projects in this area.
2. Skills you acquired as a result of the project work.
3. What aspects of the program design have best supported you in your work, and what could be improved?
4. General conclusions and recommendations.

FINAL REPORTS

REPORTS DUE

- MM/DD/YYYY

Below are topics that should be covered in your final report.

DESCRIPTION OF THE PROJECT

1. Project Title.
2. Overview: Provide a very brief overview describing the need, problem, or challenge addressed by your project, the audience served, your project design, your intended results, and the extent to which you achieved your intended results.
3. Description of Project Partners: List the names and describe the roles and contributions of any project partners as identified in your project proposal.

PROJECT EXECUTION

1. List the activities completed during the project and compare them to the activities you set out to complete for the project. Whenever possible, describe activities in both quantitative and qualitative terms. If you did not complete all the activities, explain why.

2. Did the project need to be altered from the original project that was proposed? If so, explain why.
3. Significant accomplishments in terms of project work.
4. Outreach or dissemination activities (conferences, etc.)

ANALYSIS AND EVALUATION

1. **Project Results:** Analyze your entire project. Compare the actual accomplishments of the project with the intended results, outcomes, and impacts you identified in your proposal. Use quantitative data as well as qualitative examples, highlights from your evaluation, and compelling anecdotes. Identify and document significant project achievements and their value. Describe any significant unanticipated costs or circumstances that created obstacles to project success, and summarize lessons learned during the course of the project. For this report, outcomes are changes in individuals' knowledge, skills, attitudes, behaviors, or other conditions related to the purpose of the project. Impact is a large-scale and/or long-term result that affects one or more institutions, communities, or fields. Provide images screenshots, maps, floor plans, charts, tables, publications, or datasets as appropriate to illustrate your project's achievements during the reporting period.
2. **What's next?** Describe any plans to continue work in this area and/or to sustain the benefit of this project beyond this grant's end date.
3. **Products:** Attach one copy of any product that resulted from grant-funded activities, including final evaluation reports and instruments; research findings, publications, or manuscripts; learning resources; and other deliverables. For web-based material, provide URLs and sample screenshots.

The final report will be shared with other host institutions and be made publicly available on the NDSR site. Please let us know if there are any portions of the report that you would prefer to have edited before we share the public version on the NDSR site.

12. HOST INSTITUTION FINAL REPORT GUIDELINES

FINAL REPORT (PRIMARY MENTOR)

REPORT DUE

Each host institution is responsible for producing a final assessment (2-4 pages) that documents the progress and achievements of the project.

Below are topics that should be covered in your final report.

INTRODUCTION

1. Name of resident.
2. Name of host institution.

DESCRIPTION OF THE PROJECT

1. Brief overview of the planned project and proposed outcome.
2. Outline of steps necessary to complete the project.

PROJECT EXECUTION

1. Brief overview of the planned project and proposed outcome.
2. Outline of steps necessary to complete the project.
3. Any additional work activities not included in the original proposal that have been achieved during this reporting period.
4. Outreach or dissemination activities (conferences, etc.).
5. Challenges faced relating to project work (how did you address them?).
6. Impact or significant outcomes for the host institution, the professional community, and the resident.

ANALYSIS AND EVALUATION

1. Lessons learned and recommendations for future projects in this area.
2. General conclusions and recommendations.

The final report will be shared with other host institutions and be made publicly available on the NDSR site. Please let us know if there are any portions of the report that you would prefer to have edited before we share the public version on the NDSR site.

13. SAMPLE CURRICULUM



Education and Training Curriculum
For Publication

July, 2017

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Introduction

About this document

This document summarizes the recommendations for curricular aspects to the 2017-18 National Digital Stewardship Residency in Art Information (NDSR Art) cohort, as developed by the NDSR Art program's Curriculum Development Task Force:

- Karl-Rainer Blumenthal (chair), Internet Archive / NDSR-NY 2014-15
- Patricia Guardiola, Fisher Fine Arts Library, University of Pennsylvania
- Julia Kim, American Folklife Center, Library of Congress / NDSR-NY 2014-15
- Hannah Marie Marshall, Artstor
- Morgan McKeehan, Yale University / NDSR-NY 2015-16
- Karen O'Connell, Georgetown University Library
- Heather Slania, Decker Library, Maryland Institute College of Art

It also reflects the recommendations made by the NDSR Art Advisory Board upon that body's reviews of drafts delivered in July 2016 and February 2017.

It is intended for use by invited guest facilitators to refine their education modules during the program's "Immersion Week" (July 24-28, 2017) and by the full cohort of residents and host mentors to coordinate continuing education modules throughout the program year.

Goals and objectives

The curriculum's principal goal is to prepare the cohort and its stakeholders to successfully achieve their residency objectives, and furthermore to prepare them for the longer term responsibilities of careers in the stewardship of digital art and art information. The curriculum therefore reflects the following NDSR Art principles and objectives:

- **The cohort model.** The diversity of NDSR Art's residency projects, its host institutions, and residents, ensure that each individual stakeholder's education, training, and professional development enhances that of the other's. This curriculum provides a common foundation of understanding of the role of digital stewards in the art/information realm, upon which each participant is encouraged to share their unique perspective and provide mentorship and leadership for each other in areas of respective strength.
- **Community of practice.** As this residency is unique for its inclusion of a professional organization--ARLIS/NA--in the role of a key stakeholder, the curriculum is also made for the benefit of that broader membership, to speak to the concerns of all digital stewards in the art information realm.
- **Art/information.** The above stakeholders and projects represent a distinct constituency within the wider fields of librarianship, curatorship, and digital preservation, defined by their service to art and art information. The curriculum builds from a foundation laid by prior NDSR education and training initiatives by identifying opportunities to forefront the unique needs of this constituency.
- **Active learning.** NDSR programs excel at advancing digital stewardship education and training through practical, project-based learning. To prepare NDSR Art's participants to optimize lessons learned outside of the classroom environment, and to optimize its brief opportunity for immersive training of geographically distributed stakeholders direct and indirect alike, the curriculum

prioritizes education that gets stakeholders out of their seats and working hands-on with cohort members in practical problem-solving situations.

- **Outreach and ambassadorship.** Digital stewardship requires engagement with internal and/or external stakeholders. For this reason the curriculum emphasizes the “soft skills” that NDSR Art’s residents, hosts, and wider community of practice must cultivate in order to both successfully complete its residency projects and see that the products of those projects make sustainable impact on the art information sector, inclusive of public speaking and outreach, policy writing, project management, and long term planning.

In developing this curriculum, the Task Force reviewed the NDSR Art grant documentation and directives from its Advisory Board, curricula from select prior NDSR cohorts, core elements of the Library of Congress’s Digital Preservation Outreach and Education (DPOE) program, a survey of ARLIS/NA members, and added to all these its own unique insights as a body of professionals representing typical art information host institutions, leaders in digital preservation education and outreach, and NDSR alumni.

Curriculum

“Summer Reading”

NDSR Art will provide hosts and residents with the full schedule and details for the Immersion Week described in the following section, in order that all may familiarize themselves with the subjects to be engaged and read suggested reference material. NDSR Art will facilitate access to the reference material as required. NDSR Art grant administrators will furthermore furnish residents and mentors with the following three texts for their general preparation for the residency program year..

“What makes a digital steward: A competency profile based on the National Digital Stewardship Residencies” (Blumenthal, Griesinger, Kim, Peltzman, & Steeves, 2016): <https://osf.io/zndwq/>

- Research conducted by the NDSR-NY 2014-15 cohort into the skills, proficiencies, and knowledge most critical towards successfully completing National Digital Stewardship Residency projects, based on analyses of the project descriptions and surveys of the residents who perform(ed) them.

Re-Collection: Art, New Media, and Social Memory (Rinehart & Ippolito, 2014)

- As a survey of issues in the preservation of and access to born-digital artworks, an accessible and engaging guide through the many different challenges and opportunities that residents and hosts may face, from the challenges of format obsolescence to emerging opportunities for descriptive work.

The Information: A History, a Theory, a Flood (Gleick, 2011)

- A social and biographical history of information technologies, providing contextual reminders of the humanist goals, development histories, and problems inherent to the computational tools that NDSR Art program stakeholders will use, improve, and steward.

prioritizes education that gets stakeholders out of their seats and working hands-on with cohort members in practical problem-solving situations.

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Curriculum

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Immersion Week

Monday July 24	Tuesday July 25	Wednesday July 26	Thursday July 27	Friday July 28
Program Orientation	Flex Time		Flex Time	
1.1 Managing digital stewardship projects		3.1 Policy writing		5.1 Making the digital stewardship case
	2.1 <i>Thinking Like a Computer</i>	Flex Time	4.1 Copyright & Fair Use	
1.2 Mentorship workshop		3.2 Applying emerging standards in the field	4.2 NDSR + Art	5.2 PMA Pitch session
	Flex Time		Flex Time	Flex Time
On-site at PMA	Off-site			

The Task Force outlines the following schedule to provide NDSR Art participants and stakeholders a common foundation in digital stewardship roles and responsibilities, to foreground the special concerns and ongoing work of stewards in the art information realm, and to foster the cohesion of the geographically distributed cohort.

Guests invited to lead these education modules are invited and encouraged to refine and improve them as they see fit and in coordination with the NDSR Art program manager and Curriculum Development Task Force Chair.

The Philadelphia Museum of Art (PMA) will provide space and appropriate resources to accommodate these modules on-site at the PMA or at proximal venues as necessary.

Modules

1.1 Managing digital stewardship projects

- Topics: Agile project management; Scrum and Kanban processes for libraries
- Objectives: Survey best project management practices in information organizations, with special attention to agile project management for digital media projects; articulate clear understandings of NDSR projects descriptions in terms of challenges, deliverables, stakeholders, and available resources
- Formats: Instruction; short mentor-resident and group exercises
- Facilitator: Sheila Rabun, Community and Communications Officer, International Image Interoperability Framework (IIF) Consortium
- Suggested reading: "UCLA Library Special Collections Digital Project Toolkit" (UCLA Library, 2015). <http://www.library.ucla.edu/special-collections/programs-projects/digital-projects-special-collections>
 "The NDSA Levels of Preservation: An Explanation and Uses" (Phillips et al, 2013). http://ndsa.org/documents/NDSA_Levels_Archiving_2013.pdf

1.2 Mentorship workshop

- Topics: Mentorship and menteeship; professional communication
- Objectives: Learn good mentorship/menteeship characteristics and practices, with particular focus on collaboratively setting and pursuing professional goals
- Formats: Instruction; short mentor-resident and group exercises

This workshop will largely follow the participant manual for the mentorship program established by the ARLIS/NA Professional Development Committee's Mentoring Subcommittee.
- Facilitators: Heather Slania, Director, the Decker Library at the Maryland Institute College of Art

Shira Loev Eller, Art and Design Librarian, the George Washington University

Suggested reading: "Facilitating Mentee-Driven Goal Setting" (Zachary, 2013).
 "Strategies and Checklists for Mentors: Mentoring Excellence Toolkit" #1 & #2 (Zachary & Fischler, 2012).
 "Begin With the End in Mind: The Goal-Driven Relationship" (Zachary, 2010).

2.1 Thinking Like a Computer

Topics: History of digital media; information network architecture; format obsolescence

Objectives: Fortify a common baseline understanding of and vocabulary for defining digital information and media characteristics that shape current and emerging paradigms for long-term stewardship; cultivate collaborative problem-solving between and among residents and hosts

Formats: Instruction; video; games and group problem-solving activities

This module is an application of Jacob Nadal's DPOE train-the-trainer module, "Access, Describe, Store: Thinking Like a Computer."

Facilitators: Jacob Nadal, Executive Director, Research Collections and Preservation Consortium (ReCAP) / NDSR Art Advisory Board

Suggested reading: *Digital preservation management: Implementing short-term solutions to long-term problems* (English tutorial). http://www.dpworkshop.org/dpm-eng/eng_index.html
 "Sustainability of Digital Formats: Planning for Library of Congress Collections" (NDIIP, 2013). <http://www.digitalpreservation.gov/formats/>
 "Sustaining Media Art" (Matters in Media Art, 2015) <http://mattersinmediaart.org/sustaining-your-collection.html>

3.1 Policy writing

Topics: Digital preservation policy writing

Objectives: Understand the roles of written policies, their effects on technical specifications and documentation in sustaining digital stewardship goals beyond the project phase; practice summarizing complex workflows and routines as they constitute larger preservation systems to be performed by professionals, initiated by donors/stakeholders, and supported by resource allocators

Formats: Instruction; individual and small group exercises

Facilitator: Emily Rafferty, Head Librarian and Archivist, the Baltimore Museum of Art

Suggested reading: "Better together: A Holistic Approach to Creating a Digital Preservation Policy in an Art Museum" (Rafferty & Pad, 2017)
 "Born Digital: Guidance for Donors, Dealers, and Archival Repositories" (Redwine et al, 2013). <http://www.clir.org/pubs/reports/pub159/pub159.pdf>

“Born Digital @ Yale: Digital Accessioning Service”
<http://guides.library.yale.edu/c.php?g=300384&p=3593184>

3.2 Applying emerging standards in the field

- Topics: Vendor relations; digitization and digital reformatting; digital storage media and architectures
- Objectives: See digital stewardship standards and workflows applied in practice by a dynamic and collaborative team, with emphases on reformatting obsolete media and contemporary storage regimes; understand the place and practices of third-party vendors or external peer collaborators in permanent digital stewardship work
- Format: Field trip
- Host: George Blood, L.P.
- Suggested reading: “Outsourcing and Vendor Relations” (Dale).
<https://www.nedcc.org/free-resources/preservation-leaflets/6.-reformatting/6.7-outsourcing-and-vendor-relations>
Memorandum of Understanding Workbook, Version 1.0 (Mizra et al, 2016).
<https://uta-ir.tdl.org/uta-ir/handle/10106/25651>

4.1 Copyright & Fair Use

- Topics: Copyright, fair use, and open access standards and resources for museum libraries
- Objectives: Understand the current constraints on acquiring and serving digital properties in exhibition, research, and educational environments, and fair use opportunities; identify and explore intellectual property rights issues specific to each NDSR Art project, possible risks and impacted stakeholders, and strategies for access
- Formats: Instruction; small group exercises
- Facilitator: Anne Young, Indianapolis Museum of Art
- Suggested reading: “How User-Friendly are Museum Image Rights?” (Voon, 2016).
<http://www.hyperallergic.com/304000/how-user-friendly-are-museum-image-rights/>
 “Code of Best Practices in Fair Use for the Visual Arts” (CAA, 2015). <http://www.collegeart.org/pdf/fair-use/best-practices-fair-use-visual-arts.pdf>
 “Images of Works of Art in Museum Collections: The Experience of Open Access” (Kelly, 2013). <http://www.clir.org/pubs/reports/pub157>
 “Rights Statements” (Digital Public Library of America).
<http://rightsstatements.org/>

4.2 NDSR + Art

- Topics:** Digital stewardship goals and project models adopted by previous NDSR residencies in art information contexts
- Objectives:** Learn lessons from prior NDSR projects with special focus on art information issues and institutions; connect with peers in the NDSR community for ongoing professional collaboration and help throughout the program year
- Formats:** Short panel presentations; question and answer; on- or off-site breakout time
- Participants:** Sumitra Duncan, Head of Web Archiving Program, Frick Art Reference Library / NDSR-NY 2014-15 Host mentor
- Dragan Espenschied, Preservation Director, Rhizome / NDSR-NY 2015-16 Host mentor
- Peggy Griesinger, Metadata & Cataloging Librarian, George Mason University Libraries / NDSR-NY 2014-15 Resident, Museum of Modern Art
- Julia Kim, Digital Assets Specialist, American Folklife Center at the Library of Congress / NDSR-NY 2014-15 Resident, New York University Libraries

5.1 Making the digital stewardship case

- Topics:** Public outreach and stakeholder engagement; public speaking
- Objectives:** Survey tools, resources, and recommended practices for internal and external stakeholder engagement through policy documentation, outreach documents, and public events; introduce and exercise best practices in public speaking and written public engagement to prepare for module 5.2, “PMA Pitch Session”
- Formats:** Instruction; group exercises; resident-mentor lunches
- Facilitators:** Jaime Mears, National Digital Initiatives, Library of Congress / NDSR-DC 2015-16 Resident, DC Public Library
- Karl-Rainer Blumenthal, Web Archivist, Internet Archive / NDSR-NY 2014-15 Resident, New York Art Resources Consortium
- Suggested reading:** “Digital Preservation Business Case Toolkit” (Digital Preservation Coalition, 2014).
http://wiki.dpconline.org/index.php?title=Digital_Preservation_Business_Case_Toolkit
- “Perspectives on Personal Digital Archiving” (Ashenfelder et al, 2013).
http://www.digitalpreservation.gov/documents/ebookpdf_march18.pdf
- “Community Stories and Institutional Stewardship: Digital Curation Dual Roles of Story Creation and Resource Preservation” (Kunda & Anderson-Wilk, 2011).

5.2 PMA Pitch session

- Objectives:** Prepare residents and mentors for joint presentation of their respective projects to institutional decision makers and resource allocators; practice articulating the

scopes, values, and resources of projects tersely and to a general/uninitiated audience; receive and share constructive criticism for improvement in messaging and rhetorical style

Format: Mock “elevator pitch” presentations; question and answer

Participants: Kristen Regina, Arcadia Director of the Library and Archives, Philadelphia Museum of Art

Philadelphia Museum of Art preservation, curation, and interpretation leadership

Module 5.1 facilitator/s

Continuing Education

Education and training will continue virtually throughout the remainder of the program year to steward the cohort’s cohesion and curricular interdependence, and to provide the most accessible benefit to secondary stakeholders in their wider community of practice. Specifically, the Task Force, the residents, and their host mentors will coordinate, and ARLIS/NA members will be invited to join, 11 webinars scheduled roughly monthly throughout the year following Immersion Week.

Once completed, all webinars will be made accessible in the ARLIS/NA Learning Portal (pathlms.com/arlisna). Residents and their hosts will collaborate on blog posts that summarize the activities and lessons of these modules (at least module one per pairing) throughout the year on the program’s official website (ndsr-pma.arlisna.org).

To begin the Continuing Education program, the Task Force suggests the following two model modules of particular relevance to all NDSR Art residencies:

6.1 Designing, building, and maintaining the smart home for art/information

Topics: Repository design and management; time-based media; format migration and emulation

Objectives: Learn/review the critical information architecture and infrastructure requirements for storing born-digital art and art information; survey preservation actions important to born-digital art and art information, including emerging practices in emulation/virtualization.

Suggested reading: Rieger & Murray et al, “Preserving and emulating digital art objects” (1-20)
<http://hdl.handle.net/1813/41368>

Matters in Media Art, “Documenting Media Art”
<http://mattersinmediaart.org/assessing-time-based-media-art.html>

Rosenthal, David S.H. “Emulation & Virtualization as Preservation Strategies.”
<https://mellon.org/Rosenthal-Emulation-2015>

“Designing Storage Architectures for Digital Collections 2015”
<http://www.digitalpreservation.gov/meetings/storage15.html>

6.2 Grant writing and reporting

Objectives: Understand factors and considerations for funding past and potential future projects in digital art/information; learn best practices in scoping and articulating problems for project-bound resource allocation by key funders in the cultural heritage sector; learn core components for good grant-funded project deliverables vis-a-vis resource allocator/funder needs and expectations

Suggested reading: Foundation Center, “Proposal Writing Short Course”
<http://foundationcenter.org/getstarted/tutorials/shortcourse/summary.html>

Further virtual modules (7.1-4) will be coordinated in direct response to and support of residents’ and hosts’ project-based needs. Each residency will have the opportunity to propose topics and potential facilitators for education and training sessions like those that they engaged during Immersion Week, but which will immediately benefit them as their current work demands.

Four webinars (8.1-4) will be facilitated by NDSR Art projects hosts and residents—one virtual session per project—such that each project participant will have the opportunity for stakeholder engagement on behalf of their residency, to communicate its values and form relationships with interested and affected parties across ARLIS/NA.

Finally, all four residents will coordinate with the moderators of ARLIS/NA’s section for students and new professionals, ArLiSNAP, to produce a single module (9.1) in the latter’s “virtual conference” model that summarizes their residencies’ key themes and outcomes, and the cumulative course forward that residencies chart for incoming professionals. This module is envisioned as an effective companion to and opportunity for direct feedback on residents’ capstone report (see section below).

Capstone Report

To synthesize their year of learning for the benefit of secondary stakeholders inside and outside of the ARLIS/NA professional community, NDSR Art residents will complete their residencies by jointly authoring a “capstone” report that specifically enumerates the education and training that impacted their work, thereafter to be accessed via the ARLIS/NA Learning Portal.

This will by definition include, but not be limited to, the modules described above. This is envisioned as an opportunity for residents to reflect upon their work and to describe the education and training most vital to empower their new colleagues in the profession to perform the same. As their mid-career facilitators in these projects, the residents’ host mentors will lead the design and definition of specific deliverables for this report. However, the Task Force specifically recommends that this report include at least one representative case study of an art information institution with an opportunity to engage a digital stewardship project, to include as much relevant advice from the year’s education as the residents can provide toward that project’s scoping, planning, outreach, and execution.

Resources

To facilitate the activities above concerning organizing educational modules and written/recorded deliverables, all residents and host mentors will be granted access to the following software services maintained by the NDSR Art program team and/or PMA:

- **GoToMeeting**, for internal meetings throughout the year and outreach/continuing education programs facing ARLIS/NA and broader public communities.
- **Basecamp**, for internal file sharing, task/project management, and reporting to NDSR Art program administrators.
- **Slack**, for group messaging related to education module coordination as well as other task and project sharing throughout the year.

Evaluation

The PMA will apply and they and the Task Force will analyze the findings of two evaluation instruments in order to facilitate the continuous improvement of this curriculum through the first and in preparation for the second NDSR Art program year.

NDSR Art residents and host mentors will complete self-assessments before Immersion Week commences in order to benchmark their existing competencies in or knowledge of the education module topics included. Upon commencing project work for their host institutions, they will furthermore provide short evaluations of all Immersion Week modules.

Both survey instruments will be designed to anonymize response data. Directly relevant Immersion Week review data may be shared with each module's guest facilitators/participants, however no further data will be made generally accessible beyond the PMA and Task Force without explicit permission of the survey participants.

14. SAMPLE SKILLS ASSESSMENT QUESTIONNAIRE

YOUR NAME: _____

1. How familiar with digital preservation concepts and applications are you?
2. What is the best thing that can happen as a result of you participating in NDSR? What are you hoping to gain from the residency?
 - a. Personally
 - b. Professionally

PROJECT EXECUTION

3. What kind of impact would you like to make on your host institution? How will you measure this?
4. What are your expectations of being a part of the cohort in terms of responsibilities or impacts?
5. How would you like to be supported by NDSR staff members?
6. What topics outside of digital stewardship are you hoping to learn through workshops or gain experience in at your host institutions?
7. When the residency is over, what outcomes would you judge as either a success or a failure for the residency?

Please check either 'Yes' or 'No' for each task based on your experience:

TASK	YES	NO
I have taken courses on digital preservation.		
I am familiar with the PREMIS standard for preservation metadata.		
I am familiar with the OAIS standard.		
I have used some tools related to digital stewardship.		
I have experience managing a project.		
I have conducted research related to digital stewardship.		
I have contributed to the development of a digital stewardship policy.		
I have contributed to the development of a digital stewardship strategy.		
I have collaborated with people in different departments or organizations on a digital stewardship project.		

I have participated in the development of best practices related to digital stewardship.		
I have contributed to an inventory of digital content or media.		
I have contributed to the design of a workflow related to digital stewardship.		
I have contributed to the development of a digitization plan.		
I have contributed to the development of format requirements or specifications.		
I have contributed to the development of metadata requirements or specifications.		
I have set goals for myself for developing technical competencies related to digital stewardship		
I have contributed to a format migration plan		
I have contributed to the requirements or specifications for a digital preservation repository (software, hardware, storage, etc.).		
I have contributed to a digital preservation repository audit or assessment.		
I have contributed to the development of requirements or specifications for providing access to preserved content.		
I have participated in a project to raise digital stewardship awareness.		
I have participated in a webinar related to digital stewardship.		
I have attended a professional conference related to digital stewardship.		
I have written a public blog post on my digital stewardship research or project.		
I have presented a poster on my digital stewardship research or project at a professional conference.		
I have given a presentation on my digital stewardship research or project at a professional conference.		
I have contributed to the organization of an educational event related to digital stewardship.		

15. PERSONAL LEARNING PLAN WORKSHEET

1. Project goals: Given the project goals listed by your host institution, please list 3-5 key key topics, skills and/or tools you would like to learn so that you can achieve the project goals. Note the ones that are essential for the successful completion of your project.

Project-specific Topics, Skills and Tools	Ideas for how you might learn or gain experience in these topics, skills or tools during the residency

2. Professional development goals: Please list 3-5 additional topics or tools that you would like to learn so that you can advance your professional knowledge and skills.

Topics, Skills and Tools	Ideas for how you might learn or gain experience in these topics, skills or tools during the residency

16. SAMPLE GRANT NARRATIVE

The National Digital Stewardship Residency Program: Educating Digital Stewards in New York Libraries, Archives, and Museums

Narrative

1. Statement of Need

The National Digital Stewardship Residency in New York (NDSR-NY) project is designed to address the specific need for trained staff to successfully acquire, manage, and preserve digital assets. Though the phrases digital curation and digital preservation are more commonly encountered, “digital stewardship” is emerging as a more inclusive term -- one that accurately captures both digital curation’s selection and collection-building activities as well as the ongoing-accessibility and technology-dependent processes implicit in ensuring permanent access to digital materials (Lazorchak, 2011).¹ Others have noted the confluence between digital stewardship and the larger mission of cultural heritage organizations (Cloonan and Mahard, 2010; Bastian et al., 2011) and initiatives like the National Digital Stewardship Alliance (NDSA), an organization founded by the Library of Congress in 2011 to “to establish, maintain, and advance the capacity to preserve our nation’s digital resources,” have emphasized the term’s collaborative associations. While digital stewardship’s importance to cultural organizations has been widely articulated (Bahr, 2011), other studies have demonstrated that organizations often lack staff trained in “the range of procedures, processes and challenges across the life-cycle of digital objects” (Berman et al., 2010).

In 2012, the Library of Congress in partnership with the Institute for Museum and Library Services established the National Digital Stewardship Residency. The Program is designed to “build a dedicated community of professionals who will advance our nation’s capabilities in managing, preserving, and making accessible the digital record of human achievement” (<http://www.digitalpreservation.gov/ndsr/>). The initial class of residents will work at Washington D.C. based institutions starting in June 2013. (The Washington D.C. based NDSR program will hereby be referred to as NDSR-DC). In order to expand this cadre of digital stewardship professionals and build a national model for postgraduate residencies, The Metropolitan New York Library Council (METRO) and project partner Brooklyn Historical Society (BHS) propose to establish the NDSR-NY project, building off the NSDR-DC program and coordinating with a potential concurrent Boston-based implementation being proposed by Harvard University. The NSDR-NY program will enable the continuing education of the next generation of digital stewards, expand the New York cultural community’s capacity to preserve digital collections, and ultimately validate and augment the NDSR framework for widespread adoption. The NDSR-NY program will build on METRO’s existing role as a provider of innovative professional development, training, and grants and services for the local library, archives, and museum community. The New York City metropolitan area offers one of the best locations for an NDSR program as it has a diverse student

¹ See Appendix H for the Narrative Bibliography.

population with five area accredited MLS graduate program and a rich concentration of libraries and cultural organizations – organizations managing increasing volumes of digital materials but needing trained staff to perform digital stewardship. METRO’s Partnering Organization, BHS, contributes significant experience in educational programming, training MLS students, and developing digital projects, and serves as an example of the types of organization that the NDSR-NY seeks to serve. groups like the American Library Association and Society of American Archivists have all worked to train information professionals in digital stewardship practices. Since 2009 METRO itself has provided over 200 workshops to over 3000 New York area information professionals; this includes dozens of digital stewardship-related events (See Appendix C in the supporting documents). What all these training events lack, however, is the combination of conceptual knowledge matched with extended, practical, hands-on work in an institutional setting to apply the skills learned in the classroom. As the recent *Aligning National Approaches to Digital Preservation* report explains, efforts are needed to “bridge formal education with professional development training opportunities more coherently” (McGovern and Skinner, 2012). The IMLS-funded DigCCurr project reported that “digital curation education programs should... blend theory and classroom learning with hands-on professional experience... [and] involve hands-on work with digital objects with actual consequences, rather than just conceptual work” (Hank, 2010). Similarly, a 2011 environmental scan by the Association of College and Research Libraries (ACRL) found that “new librarians should be given opportunities to develop practical skills, including support for mentorship programs and continuing education,” citing in particular a study that found that “library school is not where librarians are acquiring the proficiencies that they later find very important to their work” (ACRL, 2011; Westbrook and Fabian, 2010).

Concurrent with the need for new training opportunities for students is the need for expertise within libraries, archives, and museums around digital stewardship. A 2010 OCLC survey on special collections and archives reported in its executive summary that “user demand for digitized content remains insatiable” while “management of born-digital archival material is still in its infancy” (Dooley, 2010). Of the 169 libraries, archives, and museums surveyed, 97% “completed one or more digitization projects and/or have an active program” and 79% reported “having collected born-digital materials” while “lack of funding, planning, and expertise were cited as the largest impediments to their management and preservation” (ACRL, 2011). Similarly, “born-digital materials” was listed as the second “most challenging issue.” A September 2012 ACRL article notes that “data curation, digital resource management and preservation... are growth areas where new skill sets are needed.” A 2011 NEH- and IMLS-funded report also found that “the substantial investment cultural heritage organizations are making in creating digital collections must be met with a commitment and infrastructure to protect this content for its lifetime” however “many cultural heritage organizations do not have staff to support either [digital] preservation or access systems in-house” (Portico, 2011).

The reports cited above highlight the two audiences whose needs NDSR-NY seeks to address: postgraduates lacking practical, on-the-job training in digital stewardship and institutions managing an ever more digital materials with limited staff and staff expertise. The NDSR-NY project, working in conjunction with NDSR-DC and potential NDSR-Boston staff, will also address these needs by testing and refining a national model for training, standardizing a digital stewardship curriculum, and providing a replicable framework that can be widely adopted to train digital stewardship professionals.

Two ongoing projects funded by IMLS LB21 grants are noteworthy for working to address opportunities for experiential learning and institutional capacity for managing digital materials. The Moving Image Specialists in Libraries (MISL) program of NYU's Moving Image Archiving and Preservation Program, funds both internships and post-graduate fellowships. The fellows worked on-site managing moving image collections in libraries and performed a variety of activities including managing digital projects (<http://bit.ly/PwNmCI>). The program also featured a robust social and collaborative element with the goals of "improving staffing in moving image archiving and preservation" and "facilitating dialogue and exchange of knowledge" around the issues of preservation of these collections. The Project CHART program run by Pratt Institution is another LB21-funded effort (<http://bit.ly/c5z8B4>). It is a multi-institutional initiative between three cultural heritage institutions working in conjunction with Pratt's School of Information Science. Project CHART combines a digital curation graduate specialization with nine-month-long, one-day-a-week internships within cultural organizations working on digital curation projects. Both programs combine institutional capacity-building with specialized student training to develop the skills of emerging professionals. The NDSR-NY aims to accomplish similar goals as these programs. In addition, METRO will be organizing and delivering many of the MSIL program, NDSR-NY staff have worked on Project CHART and BHS is currently the project's coordinating institution

The NDSR-NY project will build upon and expand these models while leveraging expertise through consultation with staff from other embedded fellowship and residency programs for recent PhDs, including the DigCCurr programs and Carolina Curation Fellowships run by University of North Carolina-Chapel Hill LIS and the CLIR Postdoctoral fellowship programs in Data Curation and in Academic Libraries. In addition NDSR-NY will draw upon recent studies identifying core competencies in digital stewardship and curation including the Matrix of Digital Curation Knowledge and Competencies (Lee, 2009), and the recent work of Digital Curator Vocational Education Europe (DigCurV) to define skills and competencies for digital curation (Engelhardt et al., 2011).

The NDSR-NY project will meet the needs of its intended audience of new professionals, local libraries, archives, and museums, and the national community through a number of project activities. Recent graduates will receive advanced training in the stewardship of digital assets. This training will be combined with full-time, nine-month residencies working on digital projects within a New York library, museum, or archive alongside a mentor. Host institutions will have their staffing and expertise needs addressed by having a highly-trained, enthusiastic new profession working on digital stewardship as well as the opportunity for resident mentors to also participate in NDSR-NY training. Through group activities

and an online community platform, residents will be inducted into a cohort group with a shared identity as future digital steward practitioners, advocates, and leaders. Participation in NDSR-NY will also allow host institutions to engage with the local community on digital stewardship needs and challenges, thus encouraging other collaborative activities in this area. Lastly, by testing and refining the NDSR framework, NDSR-NY will help address the needs for a standardized curriculum focused on digital stewardship and the need for a replicable model for experiential postgraduate residencies.

2. Impact

The NDSR-NY program will build greater skills and abilities in postgraduate residents participating in the program by giving them practical, hands-on experience in a full-time, nine-month residencies working on the curation, management, dissemination, and preservation of digital materials. By evidencing student work, and widely promoting and publishing their project results and the program itself, the NDSR-NY will transform current educational practices that feature only limited workplace experience (typically one-day-per-week internships) in their curriculum. It will also transform the current landscape of for-cost postgraduate certificate programs by codifying a blended approach to postgraduate residencies that combines continuing education and practical, hands-on work. The curriculum currently being developed by Library of Congress (see Sample Curriculum document) is evidence of the mix of conceptual knowledge and mastery of emerging technologies currently needed by digital stewards. The 10 digital stewards resulting from NDSR-NY project will increase the number of professionals that can support digital services within libraries, archives, and museums and foster future advocates and leaders in this rapidly-changing profession. NDSR-NY will also have a positive impact on the greater libraries, archives, and museums of New York, as METRO will be able to use NDSR-related materials in training events for the entire community, not just residents. The NDSR-NY project will also create new impetus for members of the community to work together to create new residency

and extended experiential learning programs. Lastly, the overall NDSR model will be tested and made suitable for nationwide implementation, increasing the opportunities for other future digital stewards. Scaling up NDSR for use in new regions helps align community best practices and helps build an accepted curriculum for teaching core competencies to tomorrow's digital stewards.

3. Project Design

The NDSR-NY will be a three-year project. The first year will be a planning year, working closely with the NDSR-DC program and the potential NDSR-Boston implementations to refine the NDSR model.

Years 2 and 3 will focus on the residency program, with 5 residents working at 5 host institutions each year. (See Appendix G for a list of potential NY-area hosts). The project will draw upon the framework and program elements designed and tested by the Library of Congress as it implements the NDSR program in Washington D.C. in 2013-2014. The NDSR-NY project will build upon and refine that model. Specific project goals, activities, and outcomes listed below are ongoing through Year 2 and Year 3:

Goal 1: Create a cohort of practitioners and future digital stewardship leaders through a program combining advanced theories and training in current digital stewardship practices through a practical, hands-on residency working in an institutional setting.

Goal 1, Objective 1: Develop the NDSR-NY residency program, refining and enhancing the NDSR-DC program

Activities:

- Work with other NDSR projects (D.C. and potentially Boston) to refine NDSR program framework — ongoing
- Tailor and enhance existing NDSR-DC curricular materials to the particular needs of libraries, archives, and museums by Fall 2013
- Hire Project Coordinator to start December 2013
- Assemble Project Advisory Panel and work with panel to hone project guidelines by Fall 2013
- Establish the NDSR-NY project online presence as part of www.metro.org and establish a separate website for student portfolios, project reports, and blogging; also implement technologies needed for resident training by Fall 2013

Outcomes: Within the first nine months, the project will have created the NDSR-NY curriculum based on results of the NDSR-DC program and consultation with host institutions and the advisory panel. The project will have hired Project staff and established a web presence and Advisory Panel.

Goal 1, Objective 2: Implement the cohort residency program June 2014-May 2016

Activities:

- Meet with potential host institutions to discuss potential resident projects and program expectations; repeated in Year 3 for second resident class
- Select host institutions for first resident class; repeated in Year 3 for second resident class
- Plan and schedule resident training event by April 2014; repeated in Year 3 for second resident class
- Identify immersion, seminar, and capstone instructors by Winter 2014
- Recruit and select of residents by February 2014
- Implement a one-week resident immersion program combining morning lectures with afternoon training in specific tools and technologies.
- Participate in nine-month residencies at host institutions starting June 2014 and June 2015
- Conduct monthly, day-long continuing educational lectures for residents and mentors.
 - Conduct site visits with each resident and host institution.
- Conduct a week-long capstone event including three days of professional development and workplace skills training and two days for residents to present and review of projects.

Outcomes: Based on established criteria, the program will select 10 residents, 10 institutions and identify specific projects that residents will undertake. 90% of residents and 95% of the host institutions will report being very satisfied or satisfied with the residency program. 90% of the residents will complete their projects. Training participants will report the education session expanded their understanding of digital stewardship. 90% will report that the sessions supported their project activities.

Goal 2: Build New York regional digital stewardship capacity through a national digital stewardship program.

Goal 2, Objective 1: Through a New York based digital stewardship residency program, create a network of individuals and institutions dedicated to digital stewardship.

Activities:

- NDSR-NY residents working full-time for nine months will complete stewardship projects that will expand the host institutions' digital stewardship capacity.
- Host institution mentors will attend the immersion, seminar, and capstone sessions building their knowledge of digital stewardship and capacity to manage future digital stewards.
- Host institutions, as members of the Project Advisory Panel, will provide input on further refining and developing program guidelines, curriculum, and expectations for new-hire qualifications.

Outcome: 90% of the residents will complete their stewardship projects within 9 months. 100% of the host institutions will report that the program enhanced or expanded their digital stewardship capacity. 95% of the host institution mentors will report that attendance at NDSR-NY program expanded their capacity to manage digital stewards. 50% of the host institutions will report that they have modified an existing position or created a new digital stewardship position.

Goal 3: Develop a collaborative NDSR program working in conjunction with the Library of Congress and proposed NDSR-Boston implementation that will expand national digital stewardship capacity.

Goal 3, Objective 1: Expand the existing NDSR-DC program into a national collaborative supporting development of qualified digital stewards by May 2016.

Activities:

- Create an NDSR collaborative planning committee involving project management staff from the NDSR-NY, NDSR-DC and NDSR-Boston responsible for managing the collaborative network
- Create the NDSR collaborative network to support residents and host institutions activities
- Gathering input from residents and mentors for program revision across all NDSR programs.
- Promote the NDSR program through presentations at national conferences, articles in relevant publications, and engage digital stewards in development of the field through blogging.

Goal 3, Objective 2: Create the NDSR-NY collaborative network by May 2016.

Activities:

- NDSR-NY residents, host institution mentors, and project staff identify strategies for development the NY network by January 2016 and implement them by May 2016.
- Provide online access to program guidelines, manuals, curriculum and other materials supporting other digital stewardship residency programs by May 2016.
- Promote network to METRO member libraries through newsletters, project website, blogs, etc.

Outcome: The NDSR model will be expanded into a national collaborative initiative with former and concurrent implementations. The NY digital stewardship network will expand to include XX non-NDSR Metro institutions. Conduct 9 continuing education programs where the NY network is promoted. 90% NDSR-NY network participants will report that their knowledge of digital

stewardship elements was enhanced through the network. New funding sources and business models will continue the program beyond grant.

A detailed, chronological list of project activities can be found in Appendix A. The NDSR program documents in Appendix B outline guidelines for hosts, projects, residents, and application process.

Project Evaluation: The NDSR-NY project will contract with an evaluation consultant who will assist the Project Director and Project Coordinator in evaluating the project outcomes.

Formative Evaluation: The Project Coordinator will build upon METRO's existing methods for evaluating the success of professional development and training workshops. The formative evaluation will use identified and anonymous online surveys, in-person interviews, written project reports, and pre- and post-residency self-assessments. The evaluations will include both residents and host intuitions and will focus on three areas: curriculum, residencies, and project activities. As part of the ongoing curriculum development residents and participating mentors will provide feedback on syllabus content (topics, readings, exercises), training structure (in-person and on-line methods, technologies used), and instruction (quality of instructors). Residency evaluation will assess residency projects, workplace issues, mentorship, and institutional expectations. The formative evaluation will evaluate effectiveness of project activities such as meetings, site visits and tours, social activities, and other project logistics and details. Data from these evaluations will be used to identify areas for improvement. Residents will complete a self-assessment both before and after their residencies identifying their digital stewardship competencies and perceived professional development status. These assessments will be used to collect baseline data to measure the success of the program in preparing emerging professionals in digital stewardship. Additionally, host institutions will also complete a pre- and post-residency self-assessment to document institutional capacity increases and provide details on resident projects and outcomes. The NDSR-NY projects will coordinate with other NDSR project for a program-wide summative evaluation.

Partnering organization: Founded in 1863, Brooklyn Historical Society is a cultural hub for civic dialogue, thoughtful engagement, and community outreach, as well as a nationally recognized urban history center dedicated to preserving and encouraging the study of Brooklyn's extraordinary 400-year history. BHS works across the domains of libraries, archives, museums, and public programming. BHS staff serving on the Project Advisory Panel will provide an understanding of the needs of a broad range of cultural heritage organizations and their specific experience as a managing partner on Project CHART. Throughout the NDSR-NY, Jacob Nadal, BHS's Director of Library and Archives, will serve as a curriculum consultant and potential instructor during the immersion and capstone sessions. Mr. Nadal launched preservation programs and digitization projects at Indiana University, New York Public Library, and UCLA. He has extensive experience teaching digital preservation in graduate classes and professional workshops, and serves on the NDSR Curriculum Advisory Panel. Mr. Nadal will be a key advisor on the NDSR-NY curriculum revision to bring it in-line with digital stewardship practices within the specific domain of libraries, archives, and museums. BHS will commit to host one project resident in Year 1, and contribute to curriculum revision based on this experience throughout the NDSR-NY.

Hosting of a second resident in Year 2 will be evaluated based on the demand in the NY Metro area and BHS. BHS has extensive experience hosting graduate students working on digital stewardship projects. BHS will also provide an alternate facilities space for the monthly seminars, lectures, and meetings taking place during the NDSR-NY project.

Preliminary work: Appendix B evidences the extensive preliminary work of the NDSR-DC program to develop program guidelines. The attached Curriculum evidences its ongoing work creating a curriculum.

Innovative techniques: The NDSR model of advanced training combined with full-time extended residencies working in an institutional environment is new to the field of digital stewardship. The NDSR curriculum will take an innovative approach to instruction, featuring an immersion boot camp that combines training in concepts and principles with use of specific tools and technologies to perform digital stewardship. The baseline NDSR-DC curriculum will be tailored to address the specific needs of the libraries, archives, and museum community. Lastly, the project will utilize an online “sandbox” environment where residents can use software tools and technologies with sample digital collections, similar to the IMLS-funded Simmons Library and Information Science Program’s *Digital Curriculum Laboratory* (<http://calliope.simmons.edu/dcl/>). Also, new collaborative, blended on-line and on-site continuing education models will be possible between the NDSR-NY and NDSR-Boston projects.

Proposed Curriculum: The proposed curriculum for the immersion, seminars, and capstone will be built off of the NDSR-DC curriculum, a current draft of which can be found in Curriculum supporting document. Topics taught in the curriculum include: digital preservation advocacy; appraisal/selection of digital objects; format obsolescence; digital preservation metadata; storage repositories; distributed approaches to preservation; digital preservation planning; economic modeling and sustainability; digital forensics; preserving digital audio and video; web archiving; and digital preservation policy.

4. Project Resources: Personnel, Time, Budget

Key Project Personnel:

Jefferson Bailey, Project Director (.25 FTE for 3 years). *Duties:* Mr. Bailey, METRO’s Strategic Initiatives Manager, will be responsible for overall project management including planning and scheduling, curriculum development, hiring and managing the project coordinator, coordinating the selection and management of residents, working with host institutions, and managing the Project Advisory Panel. He will be responsible for IMLS reporting requirements and dissemination of information about NDSR-NY. *Qualifications:* Mr. Bailey is currently a member of the NDSR Curriculum Panel, was involved in the development of the NDSR program while working on the Digital Preservation Outreach and Education program and the National Digital Information Infrastructure and Preservation Program (NDIIPP) at Library of Congress. He is currently co-chair of the NDSA Innovation Working Group. Mr. Bailey was the Brooklyn Public Library’s project manager for Project CHART, where he managed and mentored graduate student interns working on digital curation projects.

Anne Karle-Zenith, Project Support (.10 FTE for 3 years). *Duties:* Ms. Karle-Zenith METRO’s

Digital Services Manager will support the NDSR-NY program's work with curriculum instructors, assist with curriculum development, help coordinate residencies and logistics with resident host institutions, and other project planning. *Qualifications:* Ms. Karle-Zenith manages METRO's Collaborative Digitization Grants program and develops and implements new digital services for METRO. She has experience as a project manager on digital initiatives in the University of Michigan Library, including managing an IMLS-funded multi-institutional initiative involving the HathiTrust Digital Library. She has experience in digital preservation projects and developing and implementing digital services.

Jacob Nadal: Project Support (.05 FTE for 3 years). *Duties:* Mr. Nadal, Brooklyn Historical Society's Director of Library and Archives will manage the project's curriculum revision, including related meetings, research, necessary staff support, and activities. He will also help manage the Project Advisory Panel and project oversight. *Qualifications:* Mr. Nadal launched preservation and digitization projects at Indiana University, New York Public Library, and UCLA. He has extensive experience teaching digital preservation in graduate classes and professional workshops.

Jason Kucsma: Project Support (.05 FTE for 3 years). *Duties:* Mr. Kucsma, METRO's Executive Director, will contribute project oversight. He will help recruit and manage the Project Advisory Panel, recruit and liaise with host institutions, work with the Controller to manage the project budget, and approve project communications and IMLS reporting. *Qualifications:* Mr. Kucsma was previously METRO's Emerging Technologies Manager, implemented a consortia digital repository for METRO members, and was a Visiting Lecturer in Rutgers' graduate Library Science program.

Project Coordinator, To Be Hired: (.5 FTE for 2.5 years; \$70,400 in grant funds)

METRO will hire a part-time project coordinator to start December, 2013. This position will handle day-to-day management of the NDSR-NY project, including scheduling training, workshops, coordinating with curriculum instructors, managing resident needs, maintaining the project's web presence, and contributing to project communications, reporting, and evaluation. A position description is in the Project Staff documentation.

Additional Staff:

G.P. Varshneya, Controller: Mr Varshneya METRO's controller since 2002 will manage the NDSR-NY finances through an in-kind contribution of his staff time. Since 2002, he has managed METRO's financial reporting on a number of grant projects associated with New York State including the Hospital Library Services Grants and the New York State Regional Bibliographic Databases Program. Mr. Varshneya has extensive experience managing grant funds and meeting the mandated government requirements involved with METRO's partially state-funded status.

Laura Forshay: Ms. Forshay is METRO's Professional Development Manager and will contribute training planning and logistics support through an in-kind contribution of her time.

Consultants and Advisory Panel: See Appendix D & Resumes for detailed descriptions.

Instructors, To Be Hired: (4 total; \$1000 honorarium, \$4000 in grant funds)

Instructors will be selected from METRO's existing roster of instructors who are leading experts in the field of digital stewardship and have training and teaching experience. They will lead resident and

mentor training workshops including the immersion and capstone training sessions.

Technology Consultant, To Be Hired: (4 days at \$500 per day; \$2000 in grant funds). METRO will draw on its existing relationships with many technology consultants having performed similar work.

Evaluation Consultant, To Be Hired: (2 days at \$1000 per day; \$2000 in grant funds). METRO will hire an evaluation consultant to work with project staff in conduction formative project evaluation.

Advisory Panel: Members will be drawn from METRO, BHS, host institutions, and local LIS faculty.

Facilities, Equipment, Materials and Supplies: The NDSR-NY project seeks \$7,000 in grant funds for materials and supplies costs: \$1,000 total for supplies for resident training and conference materials and \$6,000 total for catering costs during resident training. METRO is cost-sharing \$30,000 in facilities cost for use its Training Center. See Appendix E and the Budget Justification for a breakdown of these costs.

Timeline: NDSR-NY is a three-year project, with one planning year followed by two years each with a class of 5 residents doing nine-month residencies in host institutions.

Year: 1

- **June 1, 2013 - May 31, 2014:** Planning year includes evaluation of the NDSR DC pilot project, incorporating lessons learned into NDSR-NY, arranging host institutions, hiring Project Coordinator
- **August 26, 2013 - February 4, 2014:** First resident class recruitment and selection.

Year 2:

- **June 2, 2014 - February 27, 2015:** First class of NDSR-NY residencies.
- **March 2, 2015 - May 29, 2015:** Review, evaluate, and revise the NDSR-NY program model and curriculum as necessary, select second class of residents.

Year 3:

- **June 1, 2015 - February 26, 2016:** Second class of NDSR-NY residencies.
- **February 29, 2015 - May 31, 2016:** Review, evaluate, and revise the NDSR-NY program model and curriculum for implementation in other locations. Write and deliver final report.

Budget: See Budget Justification for detailed explanation of the project budget. METRO is requesting \$498,135 from IMLS to support the NDSR-NY project. The majority of the budget, \$370,360, is allocated to student support. Over the 3 years of the project, student support will be \$36,036 per student for 10 students, plus an additional \$1000 per student in professional development support. Non-student costs include a 2.5 year, part-time Project Coordinator (\$71,500), project consultants (\$15,000), IMLS-mandated staff travel (\$12,000), project materials (\$7,000), and project services (\$9,000). Total non-student direct costs are \$114,500. METRO is requesting \$13,275 in indirect cost share at the 15% rate. METRO and it partner are contributing \$187,633.44 in total cost share.

Project Revenues: This project will not generate any revenues.

5. Diversity Plan

The New York Metropolitan area is one of most diverse metropolitan area in the nation. The 2010 US

Census reported that 44.6% of New Yorkers are white, 25.1% are Black, 28.6% are Hispanic and 11.8% are Asian. (U.S. Census Bureau, 2010). Yet, as a recent report noted, “out of the 6,608 ALA-accredited library science master's degrees awarded in the U.S. in 2008-2009... only 5 percent went to Hispanics (333), 4.7 percent were awarded to African Americans (313), 3.8 percent to Asian/Pacific Islanders (252)” (Li, 2012). To expand the pool of librarians of color, the American Library Association initiated the Spectrum Scholarship program and since its inception more than 700 scholarships have been awarded. To attract librarians of color to digital stewardship, much can be learned from the ALA Spectrum Scholar program. Scholars praised both the funding that supported their education and the leadership development components (Roy et al, 2006). From the beginning ALA built into the program the concept of developing cohort groups, which would enhance networking both within each class and across the classes. The cohort model of NDSR-NY also aims to attract a diverse group of residents and promote their successes to encourage additional diverse applicants to future NDSR implementations.

With four LIS graduate programs in the greater New York area graduating over 2000 students, many from ethnically diverse communities in the outer boroughs, NDSR-NY can recruit residents from a diverse student body. METRO will use established online communication channels, as well as outreach events at local library schools and information sessions, to recruit students to the NDSR-NY program. Key to this success will be active promotion into those communities at each of the four area LIS programs, promotion of the program to the New York Area librarians of color groups, and potentially one-on-one visits with individual applicants to encourage diverse candidates to apply.

6. Communications Plan

The Library of Congress, in launching the NDSR, has already begun promoting the program through the <http://www.digitalpreservation.gov> website and through conference presentations and journal articles. NDSR-NY will expand awareness of the program through a comprehensive, ongoing communication program that includes promotion in both the New York region and national community. On the local level, the project will make presentations to local chapters of professional groups including ALA, ACRL, ARLIS, Archivist Round Table, and others. Quarterly project updates will be available through METRO's website <http://www.metro.org> (which receives over 300,000 visits and over 1 million page views per year) and online newsletter (which reaches over 10,000 members). Project information will also be distributed via local and national listservs (see Appendix F), and via Facebook and Twitter. To reach a national audience, the project proposes to make presentations at a variety of conference such as ALA, and SAA, and decidedly at the annual NDIIPP/NDSA Digital Preservation conference hosted by Library of Congress. Conference presentations and online webinars will allow feedback both from project stakeholders and the digital stewardship community. The project will also establish a social media presence and a project website where information on the project will be posted, including the grant narrative, residency promotional materials, sample application for residency, project reports, and promotional materials. As well, a separate dedicated website will host resident reports and final projects.

7. Sustainability Plan

The benefits of the NDSR-NY will last well beyond the end of the funded grant activities. Given METRO's role as a hub for dialogue across the broader New York City cultural heritage community, its mission in delivering professional development, and its role building partnerships and awarding grants, METRO is well positioned to sustain the NDSR-NY program beyond its grant-funded three years.

To *sustain project activities or products*, METRO will:

- make publicly available any and all curriculum, exercises, and other training products, as well as program manuals and evaluations that are developed during the NDSR-NY program
- offer program staff expertise, to future implementations of the NDSR program in other locations
- maintain the project's web present to showcase the continuing work of NDSR-NY alumni and provide a platform for ongoing communication, professional development, networking
- after the first year of successful residencies, METRO will be pursuing additional funding, business models, or partnerships to continue the program beyond the life of the grant

To *sustain access, expertise, and capacity*, METRO will:

- continue to recruit a diverse group of students and new professionals into digital stewardship careers by hosting career planning and professional development workshops based on NDSR materials
- continue to refine and develop the NDSR-NY educational materials for their use in continuing training events for local cultural heritage professionals in digital stewardship
- continue to act as a centralized meeting-space for institutions to share knowledge on digital stewardship by hosting special events, symposia, and meetings promoting digital stewardship

To *sustain systemic change*, METRO will:

- continue to work with NDSR-NY host institutions beyond the end of the program to support their capacity-building in digital stewardship in the form of grants, partnership, and consultative services
- continue to build and evaluate programs to expand the technical knowledge and professional development of emerging digital stewardship professionals, including scholarships and fellowships
- continue to work with area library science and other graduate programs to develop and support new educational initiatives for new professionals.

The NDSR-NY project will also inform future practice by creating a vetted curriculum and experiential training model for use nationwide, help build local institutional capacity, and create a community of knowledge around digital stewardship. Continuation of the outcomes and impact of the NDSR-NY project will benefit the broader library, archives, and museum community by providing a replicable model for digital stewardship residencies that train the next generation of professionals working to preserve our nation's digital materials.

17. SAMPLE BUDGET

This is a sample budget for a fictional residency based in the Seattle area. It assumes residents will attend one national conference together. In developing a proposal to administer an NDSR project, it is likely that an administrative organization would plan to cover some of these costs through grant funding, and others via cost share. All numbers provided in this budget, including salaries and fringe benefits rates, are intended as examples/estimates and should not be taken as reflective of any real past or present project.

STAFF

Project Director: \$15,000 [1 senior staff member with a salary of \$100,000, at 10% of time for 1.5 years]
 Fringe benefits for Project Director: \$4,950 [\$15,000 x fringe benefit rate of 33%]
 Project Manager: \$87,000 [1 project manager with a salary of \$58,000, at 100% of time for 1.5 years]
 Fringe benefits for Project Manager: \$28,710 [\$87,000 x fringe benefit rate of 33%]
 Total: \$135,660

RESIDENTS

Resident salaries: \$268,675 [5 residents at 100% of time for 1 year at GS-9 recommended rates for the Seattle area]
 Fringe benefits for residents: \$88,663 [\$268,675 x fringe benefit rate of 33%]
 Professional Development allowance: \$7,500 [\$1,500 per resident x 5 residents]
 Total: \$364,838

ADDITIONAL PERSONNEL

Project Advisors: \$5,000 [5 advisors with a \$1,000 stipend each]
 Independent Evaluator: \$8,000 [estimated contract rate]
 Total: \$13,000

JOINT CONFERENCE TRAVEL

Resident Hotel: \$3,750 [5 residents x \$300/night x 3 nights]
 Resident Airfare: \$2,500 [5 residents x \$500 round-trip airfare]
 Resident Per Diem: \$1,035 [5 residents x \$69 GSA per diem rate x 3 days]
 Staff Hotel: \$1,800 [2 staff x \$300/night x 3 nights]
 Staff Airfare: \$1,000 [2 staff x \$500 round-trip airfare]
 Staff Per Diem: \$345 [2 staff x \$69 GSA per diem rate x 3 days]
 Total: \$10,430

EVENT COSTS

Immersion Week Instructors: \$3,000 [3 instructors with a \$1,000 stipend each]
 Immersion Week Meals/Catering: \$1,200 [8 attendees x \$15/attendee per meal x 2 meals/day x 5 days]

Immersion Week Mixer/Reception: \$500 [approximate cost of renting space/purchasing appetizers at a bar]

Capstone Event Catering: \$600 [40 attendees x \$15/attendee]
Total: \$5,300

ADMINISTRATIVE COSTS

Website Hosting: \$198 [\$99/year x 2 years]

Misc. Printing Costs: \$1000

Organizational Administrative Overhead (occupancy, computer, phones): \$30,000 [\$20,000/year x 1.5 years]

Total: \$31,198

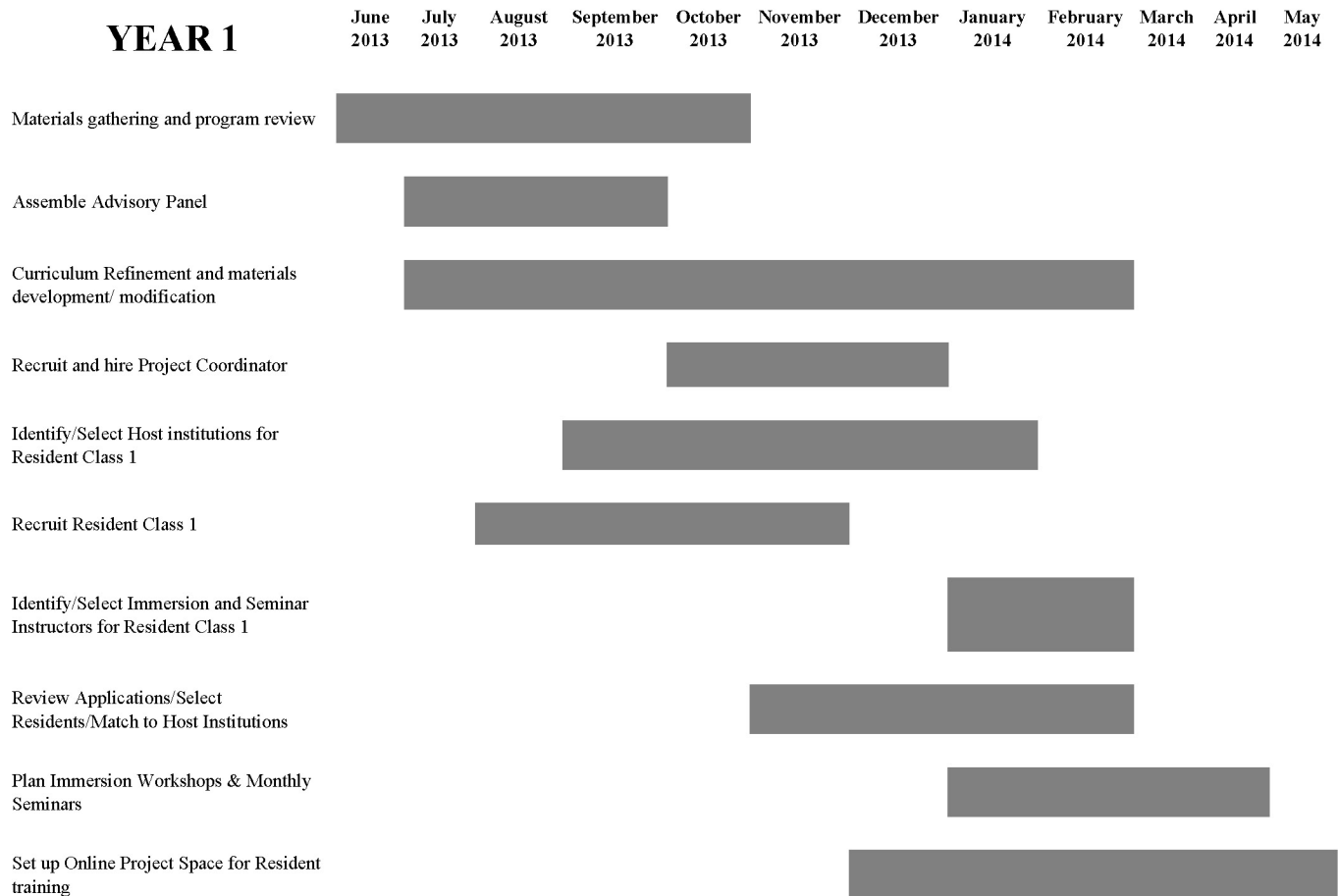
TOTAL BUDGET: \$530,456

18. SAMPLE NDSR PROGRAM TIMELINE AND RESIDENCY SCHEDULE

MILESTONES

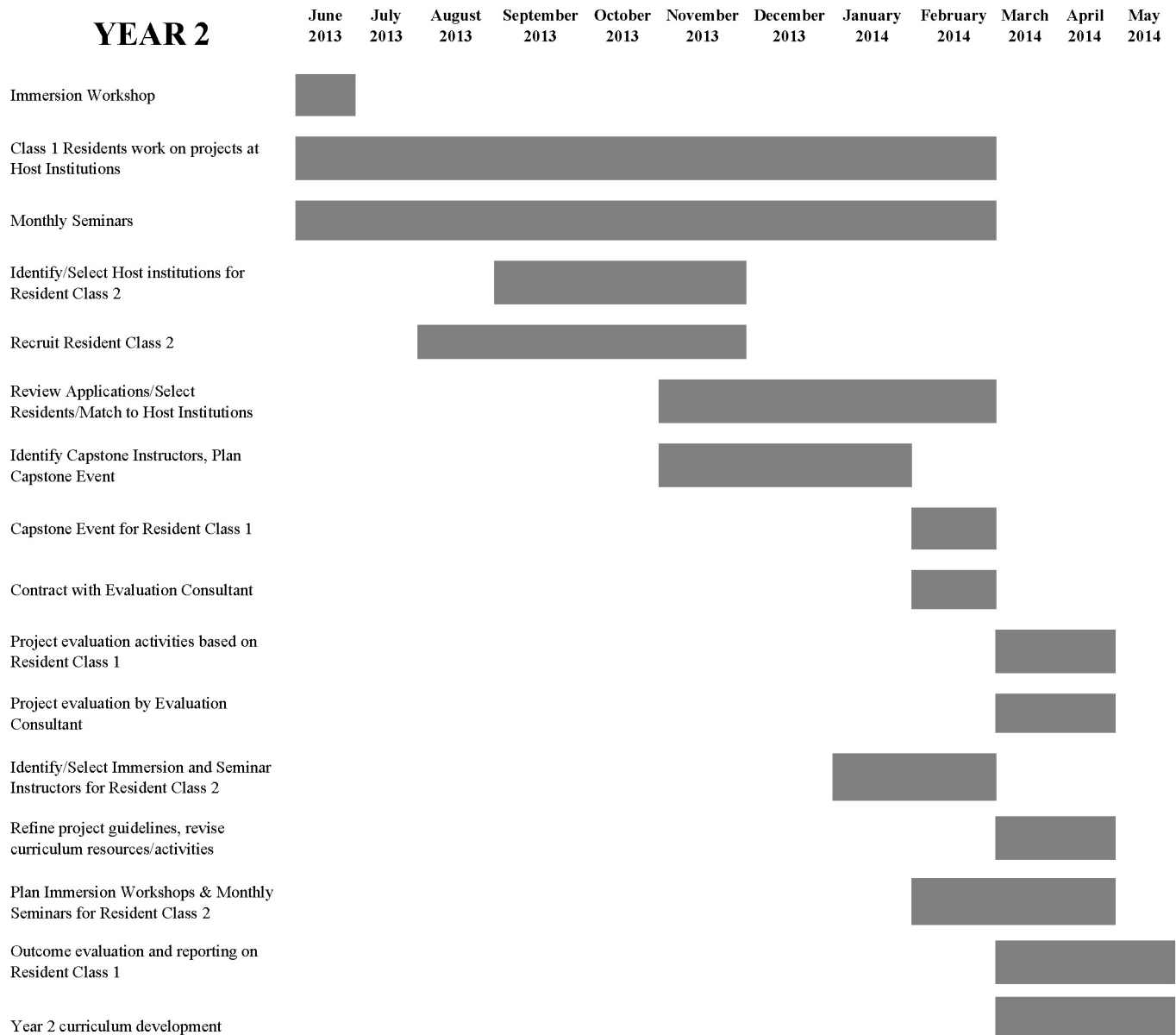
- Program planning and review (*recommended time allotment is at least 5-6 months*)
 - Assemble advisory board
 - Hire program manager
 - Curriculum development
 - Select immersion week instructors
 - Create online presence and promote the program
- Select host institutions (*recommended time allotment is 3 months*)
 - Put out call for applications approximately two months before application due date
 - Review project proposals with advisory board
 - Host institutions selected and notified within 2-3 weeks after due date
 - Selected projects published on NDSR program website
- Select residents (*recommended time allotment is 2 months*)
 - Put out a call for residents approximately one month before application due date
 - Host institutions review applications and conduct interviews
 - Residents selected and notified within 3-4 weeks after due date
- Residents begin program approximately 2-3 months after acceptance
- Immersion week during first week of the residency program
- NDSR program staff and/or resident begin scheduling monthly enrichment sessions
- NDSR program staff and/or residents begin planning conference travel
- Resident interim reports due and NDSR program staff conduct site visits
- NDSR program staff and/or residents begin planning capstone event
- Residents begin program approximately 2-3 months after acceptance
- Resident and host final reports due
- NDSR program staff contract with evaluation consultant
- Capstone event and closing ceremony
- End of residency
- NDSR program evaluation and reporting on program

Metropolitan New York Library Council - NDSR-NY Project



Metropolitan New York Library Council - NDSR-NY Project

YEAR 2



Metropolitan New York Library Council - NDSR-NY Project

