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HELIN Consortium LORI Grant Case Statements

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Case Statements
Presentation and discussion
July 16, 2014

Below you will find representative case statements for what we imagine are typical Rhode Island users of the Digital Repository proposed for the first phase. Focusing in on external audiences that would be interested in doing research and using cultural heritage collections, you will meet a genealogist and local historian, a scholar or teaching faculty member, as well as an artist—in this case an author.

For cultural heritage institutions that would make up the internal audiences for this first phase of build out, you have representative users from a small, local, volunteer-run historical society, a public library with special collections, and a mid-sized academic that has some digital collections online already.

These institutions and users are in fact, composite characters based in part on research of Rhode Island using demographic and census data. The statements are meant to represent the audiences we defined in our “what we know” document. It was suggested that the primary audience for the Digital Collections is made up of genealogists and local historians. The Secondary Audience would be made up of Whaling enthusiasts, historians, and scholars. The Tertiary Audience, General special interest groups, creative artists, musicians, authors, fine arts designers, and artisans.

This audience appraisal seemed to meet with general steering committee approval, so I have used those groupings to develop statements about technology comfort, needs, motivations, scenarios, and features desired based on my experience consulting for cultural heritage organizations around the country, and my work in developing audience statements. The quotes are also representative and not “real.” That said, the quotes are meant to capture attitudes and the thought processes of a particular audience segment.

Respectfully submitted,

Leigh A. Grinstead
Digital Services Consultant
Gayle O’Malley, Genealogist/Family Historian

Demographics
• 65-80 years old
• $40K+ annually
• College degree

Technology Comfort
• Online more than 5 years
• Comfortable with technology but not always proficient
• May be familiar with archives only for public records and not be aware of others. She does use her local public library quite a bit

Needs
• She is an open-ended learner
• Her starting point is the name of a specific person
• She is very community or connection-oriented; she takes the long view
• She is very persistent and more familiar with newspapers or services in Ancestry.com or Familysearch.com
• Digital materials only whet her appetite, she will travel to sites that have enough materials to make that trip worthwhile

Quote
“I’m so glad that my friend Darlene showed me how to use Ancestry.com I didn’t know my husband’s Great Uncle Joe served in World War I after coming through Ellis Island. Can I get a copy of his service record?”

Motivations
• Complete family pedigree charts
• Getting the story of a particular individual
• Produce a well-documented pedigree for Colonial Dames and comparable organizations
• Gain an understanding of family history and THEIR context
• Not at all interested in systems or how an organization would define context
• Wants to collect documents
• This is a passion, not her paid profession

Scenarios
• Interested in a name (including miss-spellings), subject access, dates, geographical locations
• Specific searches
• Subject searches for context
• Geography—understanding the meaning of place
• Interested in photographs—mainly of family members, but also of associated groups, and places

Features Desired
• To search by name, subject, and geographical location
• To find 3D objects and historic sites related to her family
• To refine searches so they can be made very specific
• To use autocorrect features for the spelling of names and places
• To share information she finds with family members

Behaviors
• Wants to use the information and objects to create a scrapbook or to self-publish
• Likes to share stories with colleagues, family, archivists (even if no one is interested)
• Has time and is persistent but can go many other places to seek information
• Focused on tangible outcomes

Sean Falconeri, Local Historian (Block Island)

Demographics
- Age: 50-70
- Master’s degree
- Has previous books published
- Earns $50-75K annually

Technology Comfort
- Has been a researcher for over 20 years
- Has worked extensively with physical archives and consulted with archivists, librarians, special collection librarians and other non-profits like the Nature Conservancy for research leads

Needs
- Researching the history of conservation efforts lead by residents of New Shoreham
- He is designing an exhibit on the history of conservation efforts on Block Island for a local museum that will feature both historical and contemporary photographs that highlight the Island’s natural features, historic buildings, and bird sanctuary. These will be interpreted through commentaries by previous and present-day generations of naturalists and historic preservationists. The resulting exhibit will show the evolution of knowledge about the natural and historic built environment of Block Island.

Quote
“Geographical locations and clear photographs are essential for my research.”

Motivations
- Primary motivation is project and passion for subject rather than economic gain
- He pursues high-quality information, often higher quality than those in academia

Scenarios
- Work with museum exhibits staff and regional historic preservationists and conservators to identify scope of exhibit as well as potential sources of materials.
Features Desired

- Getting permissions/forms for getting items is paramount
- Convenient ordering would be highly desirable
- Search engine exposure is extremely important
- Needs to know geographic locations of photos with some precision

Behaviors

- Uses Google as primary search engine.
- Starts search with local archives, and then moves to regional and national archives
- Searches by subject, author, creator, writer, location
- Puts information that he finds into a narrative
- Very confident in research skills
- Uses Word to organize thoughts and information
- Has a template or draft that is continuously refined
- Makes notes in the draft who the contact person is in the archives to acquire high resolution copy and secure permissions
- Consults experts in the field
- Prefers digital photos, but can deal with analog.
- Works with Photoshop and InDesign; well-developed skills.
- Producing or collecting materials that may in themselves be worthy of inclusion in the Rhode Island digital repository.

Image Credit: http://news.illinois.edu/WebsandThumbs/Barrett,James/barrett_james2_b.jpg
Celia Pereira da Silva, College/University Teaching Faculty
Adjunct Professor in Modern and Classical Languages, Salve Regina University

Demographics
- Age 30-45
- Master’s degree in field
- Earns $30-40K annually

Technology Comfort
- Years online 10-15
- PC expert
- Web expert
- Familiarity with library and archives research novice to medium

Needs
- Support teaching basic undergraduate introductory and survey courses
- Search for specific types on content to talk about culture, language, and the immigrant experience (images, maps, posters, diaries, etc.)
- Collections that support specific topics
- Material located at home institution

Quote
“My time is very limited, but I want to offer my students high-quality materials that enrich their understanding of the immigrant experience and its impact on language in contemporary America.”

Motivations
- Search for specific primary resources to support a class research project
- Search for items to illustrate course lecture on a topic
- Search on form/genre type (images, maps, posters, diaries, etc.) of items to use in a lecture on a certain topic or time period
- Unlikely to be teaching research skills in courses

Scenarios
- Searching for information on a specific topic
• Searching for items created during a certain period of history
• Searching for items that students can use to support their research topics
• Searching for items at home institution that students can come in and see/use during a course
• Searching for items created by a person (or groups) of interest e.g., oral histories with Dominican immigrants
• Searching for information on an individual with a common (or commonly misspelled) name.
• Searching/or filtering by item type
• Taking results and integrating into a PowerPoint presentation
• Taking results and posting to a Blackboard or Moodle site for student use
• Time is limited; more likely to work independently or at odd hours; not likely to initiate extensive contact with historians, librarians, or archivists

Features Desired
• Filter search results to items at home institution
• Search by specific periods in time
• Search on specific topics and themes.
• Limit search to material available on-line
• Search for items created by a specific person
• Get biographical information for each name
• Move results into presentation tools (PowerPoint, Blackboard, Moodle)

Behaviors
• Filter search results to put items at institution on the top
• Uses keyword searches that include dates
• Uses keyword searches that include topic headings or phrases
• Uses keyword searches that include names of persons

Image credit: http://newscenter.nmsu.edu/Photos/get/6580/full/Sara_Guengerich.jpg
Darnel Hernandez, Author

Demographics
- Age: 25-35
- Master’s degree in Literary Arts
- Has one previous young adult novel published
- Earns $30-45K annually

Technology Comfort
- Has been a student, writer, and call center operator for 10 years
- Years online 20
- PC and Apple expert
- Web expert
- Familiarity with library and archives research novice to medium

Needs
- He is researching the Revolutionary War era in Providence as background for a young adult novel featuring werewolves and vampires working together to defeat the British

Quote
“I need to understand the culture, the sights, sounds, fashions, social norms, and texture of the City during wartime.”

Motivations
- Primary motivation is immersion in Revolutionary Providence to bring his novel to life
- He pursues descriptive information, images, ephemera and text

Scenarios
- Works with library and archives staff to identify potential sources of materials

Features Desired
- Online resources are key
• Needs contact information for library and archives staff so he can email requests after hours
• Mobile platforms must be enabled
• Search engine exposure is extremely important
• Needs to browse for subjects and items that catch his eye

Behaviors
• Uses Google as primary search engine
• Just discovering local archives, museum and library collections
• Searches by subject, and time period
• Puts information that he finds into a narrative
• Becoming confident in research skills
• Uses Google Docs to organize thoughts and information
• Has draft documents that are continuously added to as more information comes to light
• Makes few notes about where the information comes from and isn’t interested in permissions information as he will be adapting the source materials and creating an original work
• Prefers full text digital representations
• To date hasn’t used analog materials at all
• Well-developed Word skills.
• Researches and writes at night and in off hours

Image Credit: http://bloximages.chicago2.vip.townnews.com/azstarnet.com/content/tncms/assets/v3/editorial/e/61/e6197b74-9d47-5b88-8a7e-45f840a7b17e/5310f3b797299.preview-620.jpg
Institutional Profile

Historical Society

Home of the Old County Jail museum and genealogy library in Kingston RI, and Historic House in Matunuck, RI.

Volunteer-run board of Directors

Two historic buildings and three staff

Technology Comfort

• The Historical Society has a static website, heavily text-based
• The focus of the website is simply to get people to visit the site
• No one on site has any programming or IT experience
• Website hosting and development is handled offsite
• Computers are used for internet browsing and office work. There is one instance of PastPerfect Museum Software for collections management
• There are no online collections yet, but a wealth of materials are available, including printed objects relating to the County and Rhode Island, local histories, maps, ephemera, photographs, slides, newsprint, prints and drawings, three-dimensional materials, as well as family genealogies, and varied manuscript holdings
• There is one scanner onsite but it is a printer/fax/scanner/copier in one, located in the Director’s office

Needs

• Help in selecting materials for digitization
• Training for staff about digitization, file storage and metadata
• Funding for digitization
• A place to store files
• A way to provide access to digital collections and link to the Society website
Quote
“We have the most wonderful collections and wish more people would visit, but with such a small staff and limited resources it is hard to know where to start.”

Motivations
- Share our collections and market the institution
- Make money by digitizing materials so people will pay us to use our collections
- Take advantage of grant money while it is available

Scenarios
- The Museum and library would like to digitize some photographs and genealogy manuscripts
- The Museum and library want to sell photographs to patrons

Features Desired
- A dedicated scanner on site and training
- E-commerce platform
- An automated process for adding digital content, access to IT or systems support
- Access to support for staff during project—a traveling digitization “expert?”
- Online forms to fill in metadata
- Storage provided
- Digital Preservation solution

Image Credit: http://bibor.org/blog/wp-content/uploads/2011/05/Hale-Old-Postcard.jpg
Institutional Profile
Public Library, Special Collections
9 staff ranging from marketing to IT to administration and collection librarians

Technology Comfort
- They have a small IT staff on site focused on implementing open source solutions to save money
- The Public Library Special Collections Department is comprised of several distinct collections of more than 40,000 books, manuscripts, pamphlets, ephemera, newspapers, maps, broadsides, art, and artifacts
- Parts of some of these collections have been digitized and the images presented online. As these digital collections have been created, the website, rather than a digital asset management system has delivered the content to users. The staff does not have access to a digital asset management system and file storage for master files is severely limited by server space
- Some datasets have been loaded onto the website
- There are online references to other related collections
- Over the years a number of “Online exhibits” have been created, most rely heavily on text. In contrast, other “exhibits” simply present images in a slideshare/gallery format with extremely limited text, and no contextual information at all
- Metadata is inconsistent project to project

Needs
- Funding for digitization and cataloging staff
Quote
“Although we have a large building, we have very limited staffing and resources. We hope that participating is a statewide project will raise the profile of our special collection and allow for additional digitization of collections.”

Motivations
- Relate our collections to other complementary collections statewide

Scenarios
- Use the statewide repository to put our digitized content all into the same format and increase access to special collections materials

Features Desired
- Ability to import images and metadata easily
- Online access for staff to a back end interface to add in metadata
- Funding for staff and digitization on site
- Social networking built in so users can “share” items easily
- Some branding of local collections

Image Credit: http://1.bp.blogspot.com/-wrkETCby69k/TxGvxmlsIVI/AAAAAAAABIM/qRXGZjY83hU/s1600/pc-ri-providence-72.jpg
Institutional Profile
Mid-sized academic, Special Collections and Archives

Technology Comfort
- High degree of technical proficiency
- Has a dedicated digitization lab
- Digitization workflows are well developed and new content is being generated slowly but surely, year after year
- Staff uses a combination of open source and vendor provided solutions to host content and is flexible in terms of platforms adopted
- The Special and Archival Digital Projects group is a collaborative venture of the Digital Services Lab and the Special and Archival Collections Department of the campus library. Their mission is to bring to light various “hidden” collections contained within the Special and Archival Collections Department that tell the story of the College and the history of Rhode Island. Collections include manuscripts, photographs, documents, publications, newspapers, oral history interviews, ephemera, posters, menus, musical scores, postcards, scrapbooks and architectural blueprints

Needs
- Need to explore a digital preservation solution, a collaborative option would be met with interest on campus

Quote
“We love the idea of participating in a statewide repository, it is just another opportunity for the campus to be thought of as a key player in the cultural community in Rhode Island.”

Motivations
- Participant in DPLA

Scenarios
- Use the repository as the platform for DPLA participation
- Display metadata records rather than content

Features Desired
- DPLA enabled
- Branded identity
- OAI-PMH enabled
- Automated workflows

Image Credit: http://www.usgwarchives.net/ri/providence/postcards/provco.jpg