

Digital Resources Plan

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The rationale of this digital resources plan is to benefit our faculty and students by providing services for digital resources that are as well developed as more traditional (e.g. print, physical) library resources. This plan articulates a shared vision for how best to create, manage, and provide ready access to digital resources; describes a high-level overview of existing systems and services; considers and incorporates best practices defined by ALA, SAA, and other sources cited within this document; and provides recommendations and an implementation timeline for future efforts.

In addition to Buswell Library Archives & Special Collections, another Wheaton College archival repository is an integral part of this plan: the Marion E. Wade Center (the Wade Center). The Wade's participation in creating this plan provides a crucial nexus for the shared vision mentioned above. Members of the plan working group include Emily Banas, Katherine Graber, Jeffrey Mudge, Steve Oberg (chair), Laura Schmidt, and Jill Walker.

While a definition of digital resources is necessarily broad and incorporates subscription or purchased content from external sources such as publishers and content providers, this plan focuses on locally hosted and created digital content, including digitized materials and born digital resources.

The audience for digital resources will be nuanced by each repository, but the Wheaton College community (on or off campus) is fundamental, including students, staff, faculty, and alumni. Other key stakeholders include visiting researchers and the global church.

This plan is intended to be reviewed and updated on a biennial schedule.

1. Vision Statement

The realm of scholarly digital resources is both exciting and challenging. Researchers of all types expect immediate access to a wealth of digital resources as a normal part of their work. Libraries and archives have adapted to this expectation in several ways, such as through one-time grant funding, or by implementing new or realigned staff positions, as well as new systems and workflows to support digital library development. At the same time, libraries and archives continue to build and maintain significant analog

collections, mostly in print format. The scope of digital resources to collect and/or create is enormous, as are the inherent challenges and opportunities they represent in terms of long-term access and preservation. One challenge, for example, is in deciding which materials are suitable (and a priority) for digitization vs. those that are not. Digital resources also require significant changes in systems and staffing responsibilities to successfully accomplish long-term access and preservation.

Wheaton College's archival repositories—Buswell Library Archives & Special Collections and the Wade Center—have long grappled with growing collections of digitized as well as born digital resources. These materials are managed in a variety of ways using a variety of systems, tools, and processes, but collectively we are aware of the need to maintain a unified vision for workflow and resources in creating, preserving, and providing access to these materials. The following three principles articulate our collective vision for digital resources:

- 1.1. We will continue to collect and maintain digital resources as well as resources in more traditional analog formats.

A common assumption is that libraries and archives focus on analog or digital material, but not both. This is flawed and simplistic. Wheaton College is already deeply engaged in a hybrid analog and digital context and has been for years. In addition, this “both/and” view (instead of “either/or”) recognizes that we frequently digitize material that we also want to retain in its original analog form. The digital version needs as much or even more care and attention than its analog counterpart. Also, we increasingly collect and maintain born digital content that we want to make available more broadly, not just in-person. For those resources which are, for various reasons, unable to be shared publicly, digitization efforts will be mainly for long-term preservation purposes both improving on-site access to those materials, and ensuring perpetuation of them in the event the analog copy suffers some kind of loss. The items chosen for preservation digitization should be of a unique quality which would be valued for posterity, i.e. archival collections of materials unavailable anywhere else.

It is vital for us to continue to build digital collections along with and complementary to building our analog collections into the future.

- 1.2. We envision broadening the scope of what is available to researchers locally and worldwide.

Although great progress has been made in organizing and making the college's rich archival and special collections material more findable via descriptive metadata, these efforts are not enough. Instead, our vision is to make as much of our rich content available digitally to any researcher anywhere in the world as we possibly can. This vision aligns well with the college's increasing focus on globalizing a Wheaton education. Examples where we might make an immediate impact are creating digital access to photographs from significant figures in American evangelical history

(like Elisabeth Elliot, Corrie Ten Boom, John and Betty Stan, Billy Graham, and Kathryn Kuhlman), as well as digitizing materials to make them more accessible to the global church.

This vision is not simply a matter of making rich content more accessible via digital format, but also supporting and enabling research on topics of significant importance to the college and to the broader realm of evangelical Christianity. Increased focus on digital content creation via digitization, as well as collection of born digital content, also directly promotes liberal arts excellence.

- 1.3. We have significant contributions to make to the scholarly record through support of publications such as open access journals.

As a leading institution of higher education, the college not only has the opportunity to better support research of its collections through improvements to and expansion of its digital resources, but also to contribute research output via its own publishing program through its library and archives. We are aware of significant interest in methods of highlighting our own student and faculty research in various disciplines and programs at the college. The Wade Center's peer-reviewed, scholarly journal, *VII*, is an existing example. Supporting our own publishing program through the library and archives will significantly enhance the reach of our own scholarship and lower the barrier for important research in areas of special interest to the college to become available within the scholarly record.

These three principles guide us toward a clear and achievable future of building an excellent and sustainable digital collections program for Wheaton College.

2. Existing Systems and Services

We have been working with digital resources for many years, using various systems and services with varying degrees of success. A brief description of those existing systems and services gives helpful context before moving on to an outline of key challenges.

- 2.1. Existing systems and services include the following:

Alma / Primo

Alma is the library system that manages workflows and description of collection resources. Primo is the public interface (library catalog) patrons use to search and view the metadata relating to those resources.

ArchivesSpace

ArchivesSpace is used to house archival finding aids and digital assets (ASC only), and is jointly used by Archives & Special Collections and the Wade Center. Managed by Digital Initiatives, this system replaced Archon in 2018.

Blogs

Blogs are a key method of delivering digital collection content and information about collection materials. Buswell Library Archives & Special Collections publishes a blog entitled [From the Vault](#), using the WordPress platform, highlighting individual collection items or stories from the history of Wheaton College or collection authors. Archives & Special Collections also maintains two legacy blogs, [ReCollections](#) and the [Bulletin Board](#), which are no longer updated but continue to provide access to collection contents and items of interest. The Wade Center also maintains a WordPress blog titled "[Off the Shelf](#)" to share institution news, publication announcements, closer looks at collection holdings, and stories surrounding the Wade authors' lives, works, and influence in today's world.

Box

As the standard for campus-wide cloud storage, Box plays a key role in the storage and delivery of digital content for the three repositories. The Wade Center uses Box for administrative records and for digitized versions of photo, microfilm, and audio-visual collection content. There is a public folder which allows on-site patrons to view audio-visual content (MP3 and MP4 files) and is secured by a password (changed quarterly). Wade also uses Box for delivery of large digital files to on and off campus users (such as photo loan images for publishers, video files from AIT, etc.). Buswell Library Archives & Special Collections also uses Box for administrative records and collection content in specific formats (MP3, MP4, and JPEG files) for researcher copies (rather than master copies, which are stored on T3) since Box provides faster access. Box suffers significant buffering issues, however, particularly with video content and larger files. Along with administrative records and collection content, Archives & Special Collections uses Box as its file delivery system to researchers, especially for audio, video, and photographic content.

Captivate

Adobe Captivate is software used by the Wade Center to create interactive digital exhibit content. Plans are to design on-site and web-based exhibits for patron use, migrating previous digital exhibit content to the new platform, and adding more exhibits to the roster.

Confluence

A web-based corporate wiki that hosts "Wheaton A-Z," a site devoted to documenting notable aspects of the College's

history, managed by Archives & Special Collections as a reference service to the public, providing brief information on a variety of topics.

files.library.wheaton.edu

This is a server containing space to deliver locally hosted electronic theses and dissertations (ETDs), PDFs of HNGR papers, and some locally hosted ebooks and ejournals. The server environment is managed by Digital Initiatives while the content is managed by Resource Description and Continuing Resources within Buswell.

Fileshares

This is a file system for storing various born digital and digitized resources maintained by Special Collections. [a.k.a. T2 and T3] The Wade Center also uses this file system for administrative files, and some digitized archival content.

Internet Archive

An internationally recognized host for significant digitized material, we use it to host one of our most valuable digitized books, Martin Luther's *Operationes in Psalmos*, and may use it more in future for other projects.

Omeka

Managed by Digital Initiatives, Omeka is a web-based system that provides infrastructure to present digital exhibits for the campus archives.

Open Journal Systems (OJS)

OJS is an open source system that provides a platform for managing journal reviewing, editing, and publishing. It currently hosts *VII: Journal of the Marion E. Wade* and *Wheaton Writing* but can host additional journals if needed.

Podcast (Wade Center)

The Wade Center's co-directors, David and Crystal Downing, host a regular podcast about the Wade Center's authors and their works. Accessible on multiple platforms listed here: <https://www.wheaton.edu/listen/wade-center-podcast/>.

Panopto

Managed by Academic and Institutional Technology (AIT), Panopto is the campus-wide video and audio platform. It is used by Archives & Special Collections to deliver audio and video content through ArchivesSpace, exhibits, and the Archives' website. The Wade Center uses Panopto to deliver some sound and video files on its website for public access, primarily from early programming before the establishment of the Wade's YouTube channel.

Preservica

Managed by Digital Initiatives, Preservica is the main digital content management and preservation system for Archives & Special Collections and the Wade Center.

Social Media

Archives & Special Collections and the Wade Center manage multiple different social media accounts in order to share news, upcoming events, programming content, and collection-related information. The Wade Center has an Instagram account, Facebook page, and YouTube channel. Archives & Special Collections has an Instagram account, Facebook page, and Twitter account.

WebDev

This web server hosts content for Archives & Special Collections' exhibits, Bulletin Board, and other legacy online resources. This content is not being added to and is now selectively migrated to newer online platforms. WebDev is also used to provide online access to pdf accession inventories through links in ArchivesSpace. This secondary use is active and ongoing.

3. Key Challenges

There are many challenges to be addressed if we are to move forward effectively.

3.1. Defining needs and identifying the best existing or new solutions

We must continually monitor what existing and planned digital objects and formats we need to create, support, and maintain locally; and as needed, adjust the services that might go along with those formats.

3.2. Discoverability and interoperability

Digital resources are notoriously difficult for users to discover, and are frequently siloed in systems that do not interact with each other. Whenever possible, we should strive to identify solutions that will help make our local digital resources more accessible to our users.

To ensure minimal loss of information and functionality when exchanging data between systems, we should anticipate

future uses both when digitizing material and when creating and managing metadata about digital objects.¹

3.3. Funding for equipment and services to support digital library collections

In the past, funding tended to be ad hoc or opportunistic. If we are to develop a robust, workable digital library program, it will require an evaluation of equipment and services needed to create and maintain digital library collections over time. Funding may come from one-time funds, such as grants, but we need to consider how to establish long-term support for a digital library program.

3.4. Staffing, roles, and responsibilities

A key aspect to effective, long-term management of digital resources is to determine who will do the work necessary to create and maintain local digital collections over time, and to define roles and responsibilities between operational units within the library and archives. Experience at other institutions demonstrates the importance of having constant, dedicated staff time for this purpose. In addition, clear roles and responsibilities across functional units allow for good communication and smooth operation within and among digital resources projects. In our current climate of shrinking budgets and personnel positions, a key priority is incorporating digital preservation into existing staff roles, while continuing to advocate for the dedicated staff and funding lines to create and maintain a robust and effective digital preservation program.

3.5. Priorities

Of the various potential projects, and also existing digital collections, how do we determine what should be focused on first, or in what order? The variations and possibilities are significant and can be overwhelming. Figuring out and applying a process of prioritization is vital. Also, priorities may shift over time, which is natural.

3.6. Metadata

“Metadata is structured information that describes, explains, locates, or makes it easier to retrieve, use, or manage digital content...It ensures that the digital content will be accessible into the future.”²

¹ Jane D. Monson, *Getting Started with Digital Collections: Scaling to Fit Your Organization* (Chicago: ALA Editions, 2017), 173.

² Aaron D. Purcell, *Digital Library Programs for Libraries and Archives: Developing, Managing, and Sustaining Unique Digital Collections* (Chicago: Neal-Schuman, 2016), 116.

Metadata comes in multiple categories³:

- *Administrative metadata*. Used in managing and administering collections and resources (e.g. acquisition info, rights, legal access, physical/electronic location).
 - *Technical metadata*. Related to how a system functions or metadata behaves (e.g. software requirements, digital formats, compression ratios, authentication, encryption keys/passwords)
 - *Preservation metadata*. Related to the preservation management of the resources (e.g. physical condition, preservation steps taken, changes occurring during digitization/preservation).
 - *Rights metadata*. Used for managing copyright, legal access, etc.
 - *Use metadata*. Circulation records, user tracking, use/searching statistics.
- *Descriptive metadata*. Used to identify and describe collections and related information resources (e.g. catalog records, finding aids).
- *Structural metadata*. Indicates how compound objects are put together, such as the order of sections in an electronic book.

Good metadata practice includes use of national standards to maintain interoperability between systems, and using standardized, robust metadata is key for any successful digital collection. For a list of commonly used standards, see Appendix A.

3.7. Usability and accessibility

Usability and accessibility considerations impact all areas of digital resource collections, from metadata that allows users to find what they need, to discovery and access systems that are compatible with accessibility tools for compliance with the Americans with Disabilities Act (ADA). These considerations can easily be overlooked when approaching digital resources in an ad hoc manner, but they are critical to making our resources useful to the broadest audience possible. Our existing digital resource tools are focused on making the digital resources available, but their usability and accessibility are often an afterthought.

3.8. Ethics

We should respect the wishes of those who donate material (e.g. according to donor/accession agreements) when considering it for digitization and long-term retention as digital objects. In many cases, although we may have physical ownership of material, we do not retain copyright. Digitization does not equate to a new copyright, so we should be

³ Marcia Lei Zeng and Jian Qin, *Metadata*, 2nd edition. (Chicago: Neal-Schuman, 2016), 19; Jenn Riley, *Understanding Metadata: What Is Metadata, and What Is It For?* (Baltimore: National Information Standards Organization, 2017), 6, accessed April 11, 2018, https://groups.niso.org/apps/group_public/download.php/17446/Understanding%20Metadata.pdf.

careful to digitize material for public access for which we clearly have permission and rights to do so. Note that we may also legitimately digitize material for staff or on-site use only without requiring the same level of permission as for materials made publicly available.

Another ethical consideration involves decisions about how/whether digitization will impact original source material. Whenever possible, we should attempt to digitize collections in such a way as to minimize damage to the original material.

At times, we may choose to link to or include material from outside of the college, for example in an online exhibit of digital resources. We will be sure to only do this if we have obtained appropriate permissions; the material is clearly in the public domain; or if it has the appropriate license (e.g. Creative Commons Attribution (CC BY) or something like it).

Application and use of appropriate rights metadata is a key component to ethical practice (see also section 3.8).

3.9. Digital collections policy

We do not have a clear digital collections policy that drives our priorities for collecting born digital resources or digitization projects of physical materials. Without such a policy, the tendency to be opportunistic rather than strategic with our digital resources is reinforced.

4. Recommendations

These address the key challenges described in section 3 and incorporate best practices in section 4. They are intended to provide practical next steps for administration to consider.

4.1. Select the appropriate systems or infrastructure to manage and deliver digital resources

As noted earlier, we have many existing systems in place. Our aim should be to work with an appropriate suite of systems and services that are interoperable, reduce functional overlap, and require less maintenance.

Specific recommendations:

- 4.1.1. Select and implement an Institutional Repository (IR) solution that allows us to better manage existing digital resources (such as ETDs from files.library.wheaton.edu). This will also allow us to grow in scope to include more types of digital resources related to faculty research projects.
- 4.1.2. Use tools such as Adobe Captivate and Omeka for digital exhibits.
- 4.2. Maintain a preferred metadata framework for digital resources with the goal of maintaining metadata in one place and reusing it elsewhere, whenever possible, including with external agencies such as the IDHH and DPLA.
- 4.3. Create policies for each repository to guide collection development of born digital materials as well as selection of materials for digitization, including guidelines for in-house vs. outsourced digitization. Also, honor the intellectual property rights of copyright holders of digital content and use RightsStatements.org as reference for assigning standardized rights metadata.
- 4.4. Maintain a digital preservation plan as a collaborative effort of all three repositories.
- 4.5. Advocate for budget support for ongoing, long-term digital resources management and delivery.
- 4.6. Define staff roles and responsibilities for long-term digital resources management and sustainability.
- 4.7. Implement a method of assessment and evaluation for our digital collections.

Appendix A: Metadata Standards

This list is not exhaustive but intends to include the most commonly used metadata standards.

Content Standards

- CCO (Cataloging Cultural Objects)
- DACS (Describing Archives: A Content Standard)
- RDA (Resource Description & Access)

General Purpose

- Dublin Core
- MODS (Metadata Object Description Schema)

Cultural Objects and Visual Resources

- CCO (also a content standard)
- CDWA/CDWA Lite (Categories for the Description of Works of Art)
- LIDO (Lightweight Information Describing Objects)
- VRA Core (Visual Resources Association)

Research Data

- Though research data is not a primary focus for this report, it is under consideration as a future possibility.

Archives

- EAD (Encoded Archival Description)

Rights Management

- copyrightMD
- ODRL (Open Digital Rights Language)

Publishing

- ONIX (Online Information Exchange)
- EPUB

Multimedia Objects

- MPEG Standards
- ID3v2

- PBCore (Public Broadcasting)

Preservation and Provenance

- OAIS Reference Framework (Open Archival Information System)
- PREMIS (Preservation Metadata: Implementation Strategies)
- PROV (Provenance Working Group)
- DCMI metadata terms for provenance (Dublin Core Metadata Initiative)

Controlled Vocabularies

- AAT (Art and Architecture Thesaurus)
- LCGFT (Library of Congress Genre and Form Terms)
- LCSH (Library of Congress Subject Headings)
- RBMS (Rare Books & Manuscripts)
- TGM (Thesaurus for Graphic Materials)

Appendix B: Resources

“A Framework of Guidance for Building Good Digital Collections | Framework.Niso.Org.” Accessed March 26, 2018.

<http://framework.niso.org/5.html>.

CARLI Created Content Committee. “Guidelines for the Promotion of Digital Collections: Best Practices for Promotion and Marketing,” 2018. Accessed May 31, 2018.

https://www.carli.illinois.edu/sites/files/digital_collections/documentation/guidelines_for_promotion.pdf.

Digital Library Federation. “Digitizing Special Formats.” Accessed May 31, 2018.

https://wiki.diglib.org/Digitizing_Special_Formats.

DLF Assessment Interest Group. “DLF AIG Metadata Application Profile Clearinghouse.” Accessed May 31, 2018.

<https://dlfmetadataassessment.github.io/MetadataSpecsClearinghouse/>.

DLF Metadata Assessment Working Group. “DLF AIG MWG Metadata Assessment Toolkit,” 2017. Accessed May 31, 2018.

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Monson, Jane D. *Getting Started with Digital Collections : Scaling to Fit Your Organization*. Chicago : ALA Editions, an imprint of the American Library Association, 2017.

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“RightsStatements.Org.” Accessed April 22, 2018. <http://rightsstatements.org/en/>.