NHDS
National Heritage Digitization Strategy

Business Plan 2018-2019

The National Heritage Digitization Strategy (NHDS) envisions a future in which digital access to Canada's diverse documentary heritage is comprehensive, ubiquitous, and has a profound impact on Canadian culture, education, research and innovation.

The strategy engages the Canadian library, archive and museum community and Canadian creators in sharing expertise, to facilitate the digitization, preservation and discovery of Canadian documentary heritage.

Our principles

This business plan is based on the principles outlined in the NHDS content strategy, namely:

- Representativeness and inclusion
- Collaboration
- Quality-based efforts
- Access and openness
- Impact
- Sustainability
- Intellectual Freedom
- Flexibility

The activities outlined in this plan are also grounded in the principle of efficiency to ensure maximize shared knowledge and expertise and minimize duplication of effort and investment.
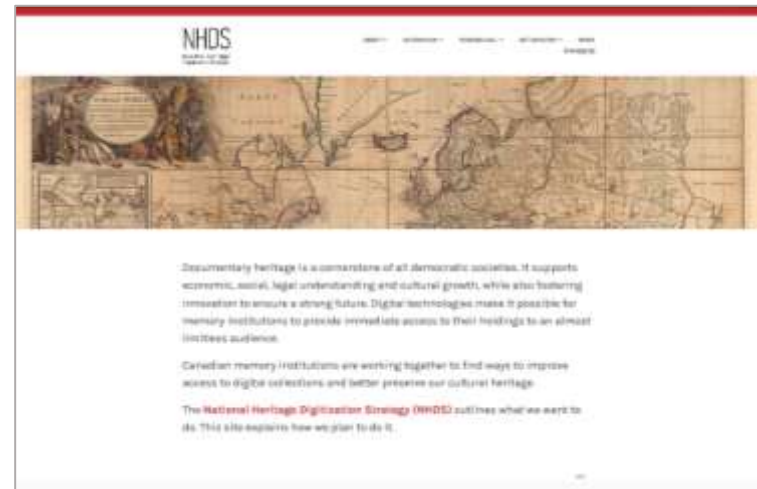
Homepage of the NHDS website

NHDS
National Heritage
Digitization Strategy

GOAL #1 – Grow the national digitized collection

OBJECTIVE 1.1 – Identify potential digitization projects

Activities

- Define a content strategy that considers all media types and formats (e.g. books, manuscripts, audio-visual material etc.) to identify a starting point (e.g. material in public domain, orphan works, out of commerce works that are still under copyright etc.), considering the work of related activities.
- Build on existing inventories of digitization projects to identify opportunities, strengths, gaps and areas of expertise.
- Identify and prioritize projects, from the focus section of the strategy and elsewhere that are of mutual benefit and interest.

- Work with Indigenous communities to identify and develop projects where appropriate.

OBJECTIVE 1.2 – Provide funds to Canadian cultural heritage organizations

Activities
- Manage call to provide digitization funds to organizations.
- Distribute HBC History Foundation funding to Manitoba Archives to digitize collection of Hudson's Bay Company.
- Manage pilot project to digitize Indigenous newspapers.

GOAL #2 – Develop a national, collaborative, distributed technical infrastructure and expertise

OBJECTIVE 2.1 – Facilitate content digitization, deposit and preservation in open networked repositories across the country

Activities

- Identify file format standards
- Consult with Indigenous communities to explore considerations for working with indigenous material and intangible cultural heritage captured digitally
- Develop metadata guidance, to make content discoverable (based on 2.2 below)
- Raise awareness of the importance of digital preservation and mechanisms for achieving it
- Provide information about who content owners can work with to have content digitized and deposited in a repository
- Recommend checklists, policies and best practices for clearly identifying the copyright status of digitized works, through licensing (e.g., http://rightsstatements.org/en) or other means, to reduce barriers to maximum access and reuse of digitized collections, considering in particular the projects identified in goal #1.
- Create and/or endorse a best practices toolkit for digitization and preservation and share it with the community as part of goal 3 below.

OBJECTIVE 2.2 – Develop mechanisms to enhance discovery and utilization of Canadian digitized cultural heritage

Activities

- Define the goals of the discovery platform
- Conduct user-centred design (defining audiences, developing personas)
- Design and develop a discovery platform that federates/searches the metadata of content stored in multiple repositories
- Develop a flexible metadata schema and model for content providers to enable the discoverability of their content in the federated search tool
- Explore mechanisms to develop and exploit the opportunities of federated data sets enabling the creation of new knowledge
- Explore opportunities to collaborate with Canadiana, Portage and others
- Research and develop end-user policies (Privacy, Accessibility, Multiple Languages and Terms of Service etc.) and workflows for the discovery platform.
- Develop a business case for the sustainability of the discovery platform.

NHDS
National Heritage
Digitization Strategy

OBJECTIVE 2.3 – Build technical expertise across the country

Activities
- Provide useful tools for sharing information (e.g. website, Slack)
- Promote the authoritative guidance and other information developed in 2.1 and 2.2
- Promote training opportunities
- Develop a network of people working in this area – a community of practice

Documentary heritage is a cornerstone of all democratic societies. It supports economic, social, legal understanding and cultural growth, while also fostering innovation to ensure a strong future. Digital technologies make it possible for memory institutions to provide immediate access to their holdings to an almost limitless audience.

- National Heritage Digitization Strategy

GOAL #3 – Engage the community

OBJECTIVE 3.1 – Build awareness and understanding of the NHDS

Activities
- Develop a clear value proposition for the NHDS.
- Develop a communications plan to engage interested stakeholders, including identifying key audiences; messages; methods of communications; feedback mechanisms; and user satisfaction metrics.

OBJECTIVE 3.2 – Establish and maintain relationships with the national and international cultural heritage community.

Activities
- Develop approaches to help smaller and under-represented communities and organizations participate in NHDS digitization initiatives.
- Actively engage with stakeholders by delivering presentations, attending meetings etc.

NHDS
National Heritage
Digitization Strategy

GOAL #4 – Build a solid foundation

OBJECTIVE 4.1 – Support an active and effective Steering Committee that advances the NHDS goals.

Activities
- Foster accountability, transparency and good governance.
- Elect a new chair and new committee members at the end of their terms.
- Write a business plan for 2019.
- Develop terms of reference for the working groups, technical, communications and content.
- Conduct a survey of international digitisation efforts, analyse findings, and present recommendations about best/common practice for evaluation.

OBJECTIVE 4.2 – Broaden the reach of the NHDS

Activities
o Develop a funding model that considers partner resources (in-cash and in-kind); government funding; philanthropic support; public-private collaboration; cost-recovery services; and crowdfunding.
o Promote existing funding opportunities to partners and collaborators.

The NHDS is currently funded by private donations, Library and Archives Canada, and in-kind support from Steering Committee organizations. The Steering Committee continues to seek additional funding to ensure the sustainability of the NHDS in the coming years.

Expenses	Costs
Funding call	$1,000,000
Newspaper pilot project	$50,000
HBC digitization	$50,000
Total Expenses	$1,100,000
Revenues	**Source**
Anonymous donation	$1,000,000
Salamander Foundation	$50,000
HBC History Foundation	$50,000
Total revenues	$1,100,000
In-kind contributions	**Source**
Development of discovery platform	LAC
Secretariat	LAC
Steering Committee members (% of salaries)	Steering Committee organizations

Our structure

The NHDS is led by a national Steering Committee with volunteer members from institutions across Canada. The committee sets direction, organizes projects and develops funding models for various initiatives.

For more information, please visit our website: nhds.ca.

NHDS
National Heritage
Digitization Strategy

GOAL #1 – Grow the national digitized collection

	Activities	LEADS		TASKS	
		Group	**Individuals**	**Planned**	**Accomplished**
OBJECTIVE 1.1: Identify potential digitization projects					
	Define a content strategy that considers all media types and formats (e.g. books, manuscripts, audio-visual material etc.) to identify a starting point (e.g. material in public domain, orphan works, out of commerce works that are still under copyright etc.), considering the work of related activities..	Content Working Group	Jonathan Bengtson Geoff Harder Heather Menzies	Update content strategy to reflect comments and survey results

Approve and release final document | Drafted a content strategy

Sent to community for comment |
| | Build on existing inventories of digitization projects to identify opportunities, strengths, gaps and areas of expertise. | Content Working Group | NHDS Secretariat | Conduct research

Draft and release final document | |
| | Identify and prioritize projects, from the focus section of the strategy and elsewhere that are of mutual benefit and interest. | Content Working Group | Jonathan Bengtson Geoff Harder Heather Menzies

NHDS Secretariat | Analyze survey results

Include results in updated content strategy | Drafted survey to identify priorities and invited input |
| | Work with Indigenous communities to identify and develop projects where appropriate | To be determined | | | |
| **OBJECTIVE 1.2:** Provide funds to Canadian cultural heritage organizations | | | | | |
| | Manage call to provide digitization funds to organizations. | LAC | Guy Berthiaume LAC staff NHDS Secretariat | Evaluate proposals

Distribute funding | Finalized guidelines

Set up application space |

			Report on results	Drafted communications material Invited external evaluators Launched call
Distribute HBC History Foundation funding to Manitoba Archives to digitize collection of Hudson's Bay Company.	LAC	Guy Berthiaume MB Archives LAC staff NHDS Secretariat	Execute project and complete digitization	Drafted agreement Signed agreement
Manage pilot project to digitize Indigenous newspapers.	LAC	NHDS Secretariat LAC staff	Complete digitization and make all titles available Release final report with findings	Consulted with organizations with experience in newspaper digitization Selected titles to be digitized Released interim progress report Began digitization and made titles available online

GOAL #2 – Develop a national, collaborative, distributed technical infrastructure and expertise

	Activities	LEADS		TASKS	
		Group	**Individuals**	**Planned**	**Accomplished**
OBJECTIVE 2.1: Facilitate content digitization, deposit and preservation in open networked repositories across the country					
	Identify file format standards	Technical Working Group	Ern Bieman Paul Durand National, Provincial and Territorial Archives Conference Audiovisual Preservation Working Group	Invite community feedback Post link to updated AV recommendations when published	Researched best practices for file formats for access and preservation, thinking ahead to future potential uses and access. Created a survey Drafted a list of file format standards Provide input on updated recommendations for AV digitization with the National, Provincial and Territorial Archives Conference Audiovisual Preservation Working Group
	Consult with Indigenous communities to explore considerations for working with indigenous material and intangible cultural heritage captured digitally	To be determined			
	Develop metadata guidance, to make content discoverable (based on 2.2 below)	Technical Working Group			

	Raise awareness of the importance of digital preservation and mechanisms for achieving it	Technical Working Group / Communications Working Group			
	Provide information about who content owners can work with to have content digitized and deposited in a repository	Technical Working Group	Carole Urbain Loubna Ghaouti Émilie Fortin (ULaval) Martine Renaud (BAnQ)	Complete report and share on NHDS website. Create FAQ.	Drafted preliminary report and presentation
	Recommend checklists, policies and best practices for clearly identifying the copyright status of digitized works, through licensing (e.g., http://rightsstatements.org/en) or other means, to reduce barriers to maximum access and reuse of digitized collections, considering in particular the projects identified in goal #1.	Technical Working Group	NHDS Secretariat LAC staff	Develop RightsStatements pilot project with partner Draft and share a list of existing copyright tools and checklists to help organizations identify the copyright status of works	Became member of RightsStatements.org Steering Committee Analyzed RightsStatements applicability in Canada (LAC)
	Create and/or endorse a best practices toolkit for digitization and preservation and share it with the community as part of goal 3 below.	Technical Working Group	Ern Bieman Paul Durand Mary Rae Shantz National, Provincial and Territorial Archives Conference Audiovisual Preservation Working Group	Invite comments from the community	Conducting environmental scan of what exists already; Drafted list of digitization recommendations and best practices Began drafting survey to community
OBJECTIVE 2.2: Develop mechanisms to enhance discovery and utilization of Canadian digitized cultural heritage					
	Define the goals of the discovery platform	Technical Working Group			

National Heritage
Digitization Strategy

	Conduct user-centred design (defining audiences, developing personas)	Technical Working Group		Build on work already done (CHIN and others)	
	Design and develop a discovery platform that federates/searches the metadata of content stored in multiple repositories	Technical Working Group			Evaluated DPLA metadata and technical platform to see if they were viable options for the NHDS. Report on Findings Developed requirements Developed metadata schema Gathered usage scenarios and user stories Developed prototype based on 3 datasets Invited feedback on pilot platform from Steering Committee
	Develop a flexible metadata schema and model for content providers to enable the discoverability of their content in the federated search tool	Technical Working Group	Kathryn Ruddock Andrea Mills		Formed group to support metadata. Drafted possible areas of focus for group
	Explore mechanisms to develop and exploit the opportunities of federated data sets enabling the creation of new knowledge	Technical Working Group			

	Explore opportunities to collaborate with Canadiana, Portage and others	Technical Working Group			
	Research and develop end-user policies (Privacy, Accessibility, Multiple Languages and Terms of Service etc.) and workflows for the discovery platform.	Technical Working Group		(To be discussed when discovery platform has been defined)	
	Develop a business case for the sustainability of the discovery platform.	Technical Working Group	Jonathan Bengtson Geoff Harder Martha Whitehead	Work with Steering Committee to create business case for ongoing development, hosting and maintenance	
OBJECTIVE 2.3 – Build technical expertise across the country					
	Provide useful tools for sharing information (e.g. website, Slack)	Technical Working Group			
	Promote the authoritative guidance and other information developed in 2.1 and 2.2	Technical Working Group			
	Promote training opportunities	Technical Working Group	Ern Bieman Paul Durand Mary Rae Shantz	Launch survey. Analyze and share results	Created an inventory of digitization and preservation training Conduct survey to understand gaps
	Develop a network of people working in this area – a community of practice	Technical Working Group			

Goal #3 – Engage the community

	Activities	LEADS		TASKS	
		Group	**Individuals**	**Planned**	**Accomplished**
OBJECTIVE 3.1: Build awareness and understanding of the NHDS.					
	Develop a clear value proposition for the NHDS.	Communications Working Group	Martha Whitehead NHDS Secretariat Others	To be completed in Summer 2018	
	Develop a communications plan to engage interested stakeholders, including identifying key audiences; messages; methods of communications; feedback mechanisms; and user satisfaction metrics.	Communications Working Group	Martha Whitehead Heather Menzies Clare Appavoo (TBC) Mary Rae Shantz LAC Staff NHDS Secretariat	Establish communications channels (website, social media, email list etc.) Update the community through established channels Publish steering committee minutes on the NHDS website	Drafted a communications plan. Began a video and a two pager Published steering committee minutes on the NHDS website Sent updates to community through email/website
OBJECTIVE 3.2: Establish and maintain relationships with the national and international cultural heritage community.					
	Develop approaches to help smaller and under-represented communities and organizations participate in NHDS digitization initiatives.	Communications Working Group	Ern Bieman Karen Fudge-Jensen NHDS Secretariat	Develop online space to match organizations that digitize with those needing digitization, emphasizing sustainability and preservation	Developed idea for matching organizations that need digitization help with those that can provide it.

Actively engage with stakeholders by delivering presentations, attending meetings etc.	Communications Working Group NHDS Secretariat		Presented at OLA, CRKN general meeting, UofT iSchool, History Museums Network.

GOAL #4 – Build a solid foundation

	Activities	LEADS		TASKS	
		Group	Individuals	Planned	Accomplished
OBJECTIVE 4.1: Support an active and effective Steering Committee that advances the NHDS goals.					
	Foster accountability, transparency and good governance.		Martha Whitehead NHDS Secretariat All committee members	Review terms of reference and update as needed	Updated Steering Committee's terms of reference
	Elect a new chair and new committee members at the end of their terms.		All committee members	To be completed in Fall 2018	
	Write a business plan for 2018.		Martha Whitehead NHDS Secretariat	To be completed in Spring 2018	
	Develop terms of reference for the working groups, technical, communications and content.		All committee members NHDS Secretariat	To be completed in Spring 2018	
	Conduct a survey of international digitisation efforts, analyse findings, and present recommendations about best/common practice for evaluation.		Alexandra Freeland Mary Rae Shantz	Complete logic model for NHDS	Drafted document outlining evaluation metrics of different national strategies
OBJECTIVE 4.2 – Broaden the reach of the NHDS					
	Develop a funding model that considers partner resources (in-cash and in-kind); government funding; philanthropic		Guy Berthiaume Martha Whitehead	Explore other funding models and opportunities	Secured private funding from Salamander Foundation, HBC and anonymous donor.

	support; public-private collaboration; cost-recovery services; and crowdfunding.				
	Promote existing funding opportunities to partners and collaborators.		Guy Berthiaume Martha Whitehead	Add funding opportunities to communications activities Publicize funding opportunities as they become available	