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In-house vs. Outsourced Digitization: Similarities, Key Differences and Pitfalls to Avoid

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In-house digitization vs outsourced digitization

Similarities, key differences and pitfalls to avoid

Oct 29, 2019





Intro



Research interest

- Digitization efficiency
- Project management
- Team management
- Team training
- Outsourcing and vendor relations
- Metadata management and remediation

Experience

- Project management of large-scale digitization projects
 - Outsourced
 - In-house
- Metadata management
- Metadata remediation
- Training and workshop development



Digitizing archival manuscripts on
PhaseOne camera



Agenda



1. Definition

- In-house projects
- Outsourced projects
- Small scale
- Large-scale

2. Similarities

- Stakeholders
- Team
- Goals
- Training
- Grants

3. Key differences

- Vendor selection
- Digitation technology
- Workflows
- Timeline
- Communication

4. Pitfalls to avoid

- Outsourced
 - Establishing vendor relations
 - Defining scope and expectations
 - Buffer time and timeline
 - Learn vendor's internal workflows and production specifics
 - Vendor's outsourced production site
 - Cost and invoices
 - Communication
- In-house
 - Preparation of materials
 - Prioritization
 - Interruptions
 - Procrastination
 - Workflow development
 - Technology

5. Takeaways



In-house

Digitization happens:

- on-site
- with institution staff
- utilizing institution technology
- materials never leave premises
- more control
- usually less expensive w/ resources on hand



Outsourced

Digitization happens:

- on vendor's premises
- with vendor's staff
- utilizing vendor's technology
- materials get shipped to vendor
- less control
- digitization is more costly but requires less institution involvement



Mixed

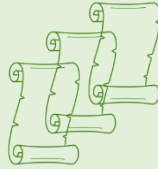
Combo of in-house and outsourced digitization

- Mixed materials
- Insufficient staff
- Untrained staff
- Lack of special equipment
- Uses resources optimally without unnecessary investments

Definition

1





Small scale



Large scale

Definition

1

Description

- Smaller collections | fewer digital objects
- Materials may be curated for a special occasion or research effort
- Individual attention to items
- Rich metadata for each item

Cons

- Time-consuming
- Labor-intensive

Description

- Large archival collections | thousands of digital objects
- Collections get digitized as a whole, no curation of items
- Minimal description
- Reuse of metadata from Finding aid
- Quick and efficient turnover

Cons

- Potential issues w/ archival material
- Users may struggle finding individual objects online due to minimal metadata





Similarities

2



Stakeholders

- Articulate the project
- Make a case why the project is important
- Examine and select archival materials
- Find and manage budget
- Select team
- Set the goal



Team

- Project manager
- Staff selection
- Timeline
- Get the work done!
- Hiccups and road blocks
- Prioritization
- Iteration



SMART Goal

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**ime-bound





Similarities

2



Training

- Initial staff training
- On the job training
- Monthly refreshers for more efficiency



Grants

- Grants for digitization of historical material
- Grant funders do not have preference over digitization approach
- Suitable for in-house and outsourced projects





VENDOR SELECTION

Key differences

3

- Applies to **outsourced** projects
- Goals
 - Reliable and experienced vendor
 - Flexible vendor
 - Affordable vendor
 - Vendor with top edge technology
 - Easy and open communication
- Role of stakeholders
 - Review vendor portfolios
 - Interview vendor's clients for references
 - Negotiate favorable contract terms
 - Check if vendor outsources
 - Stay on budget
- Role of team
 - Help with negotiating contract terms





DIGITIZATION TECHNOLOGY

Key differences

3

- Applies to **in-house** projects
- Goals
 - Reliable top edge digitization technology
 - High quality digital surrogates
- Role of stakeholders
 - Ensure the institution has technology to meet the project needs
- Role of team
 - Proficient with technology
 - On-going trainings for updates





WORKFLOWS

Key differences

3

In-house

Outsourced

- Segmentation by processes

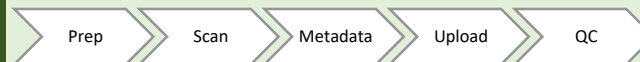


- Segmentation by processes



- Segmentation by material type

Photograph collection



Oral histories collection



- Segmentation by batches

Batch 1



Batch 2



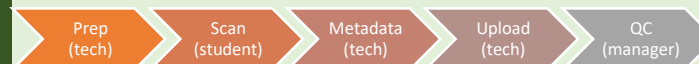
Batch 3

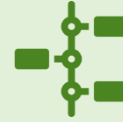


Batch 4



- Segmentation by roles





TIMELINE

3.4



Key differences

3

In-house

- Easy to develop
- More flexibility
- More control
- Reprioritizations happen easily
- Easy updates

Outsourced

- Less control
- More rigid
- Hard to change
- Difficult reprioritizations
- Difficult updates





COMMUNICATION

3.5



Key differences

3

Outsourced

In-writing

- Email
- Basecamp
- Shared documentation

Verbal (remote)

- Monthly conference calls

Features

- Structured communication
- On agreed schedule
- Less frequent
- Feedback lag
- Occasional miscommunication

In-house

Face-to-face

- One-on-one staff meetings
- Standing team meetings
- Popping meetings
- Verbal in-person communication

In-writing

- Email
- Trello
- Shared documentation

Features

- Smoother communication
- More frequent
- Instant feedback





Pitfalls to avoid

4



OUTSOURCED

- Establishing relations w/ vendors | contract, terms, timeline
- Defining scope and expectations
- Buffer time | timeline
- Learn vendor's internal workflows and production specifics
- Vendor's outsourced production site
- Cost and invoices
- Communication





IN-HOUSE

Pitfalls to avoid

4

- Preparation of materials
- Prioritization
- Interruptions
- Procrastination
- Workflow development
- Technology





Takeaways

5



Outsourced

- Don't be shy to negotiate favorable terms with vendors – you are the client and you pay for the service!
- Build a partnership with the vendor – this is an investment for future collaboration and more productivity of your department

In-house

- Build a reliable team of professionals who can efficiently handle all digitization challenges
- Have a digitization plan
- Look for digitization grants to boost your department productivity and implement best practices from past projects into new ones



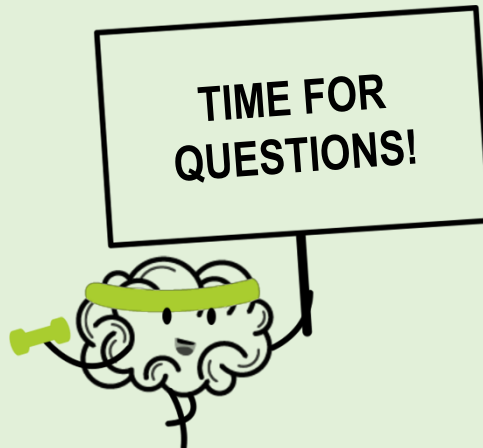


Thank You

Q & A



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