Attachment 4: Work Plan

The Peripheral Manuscripts Project: Digitization and Discoverability of Pre-1600 Manuscripts in the Midwest
Indiana University Bloomington

Project Timeline - Overview

Project Activity	Person(s) Responsible	Year 1 July 1, 2025 - June 30, 2026				Year 2 July 1, 2026 - June 30, 2027				Year 3 July 1, 2027 - June 30, 2028			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Virtual Partner Meeting	Dalmau, Ensley, Hebbard, Noonan	X											
Site Visits	Hebbard, Noonan	X	X										
Bi-Weekly Project Meetings	Dalmau, Ensley, Hebbard, Noonan	X	X	X	X	X	X	X	X	X	X	X	X
MOU Agreement and Signatures	Dalmau, Ensley		X	X	X	X	X	X	X	X			
Digitization	Dalmau, Ensley			X	X	X	X	X	X	X	X		
Item Description	Hebbard, Noonan, Johnson, Sela, Ensley, Graduate Student Metadata Assistants				X	X	X	X	X	X	X		
Repository Hosting	Dalmau						X		X		X		X
Advisory Board Meetings	Advisory Board, Hebbard, Noonan	X	X	X	X	X	X	X	X	X	X	X	X
Partner Quarterly Updates	Noonan	X	X	X	X	X	X	X	X	X	X	X	X
Annual Assessment Work	Dalmau, Ensley, Hebbard, Noonan, Advisory Board				X				X				X

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Activities Detail

Virtual Partner Meeting (Dalmau, Ensley, Hebbard, Noonan)
Following the format we developed for the initial iteration of this project, we will hold a virtual meeting with partners and project personnel from all institutions (50+ participants). Given the size of the group and the topics we hope to cover and to minimize Zoom fatigue, we will schedule these meetings for 2 hours per day across 4 days in a two-week span. At each meeting, we will dedicate a slot for partner's to present lightning talks about their collections so that by the final meeting, we all have a shared understanding of the value of each collection as well as the impact of these collections in aggregate. In addition to partner-led lightning talks, we will also cover the following:

- Day 1: Welcome / Project Introduction / Individual Introductions / Project Protocols focusing on timeline, communication, MOUs, etc.
- Day 2: Digitization Goals and Workflows
- Day 3: Description Goals and Workflows
- Day 4: Delivery Systems & Repository Hosting

We will provide "exit" forms after each meeting to all participants to collect feedback on that day's meeting as well as additional questions or comments. We will review responses ahead of the next meeting and make adjustments to address the feedback shared. We will also design a post-meeting survey for partners to provide additional information that will help the core project team finalize the schedule for site visits and digitization.

For a more detailed overview of topics and content that will be covered during these virtual meetings, see Attachment 8, Documentation Item 2. This FAQ was prepared for partners in our project's first round to summarize the topics discussed during our July 2020 Virtual Partner Meeting. We will adapt and update this document in this new project round, but many of the topics addressed will remain similar.

Site Visits (Hebbard, Noonan)
The goal of the site visit is for the Project Team to assess each item identified for digitization and to begin the process of metadata enhancement. For a complete list of partner-reported pre-1600 manuscript holdings, see Attachment 8, Documentation Item 1.

Before the site visit, partners will be asked to complete an Initial Item Inventory Form listing each item proposed for inclusion. The inventory forms will generate a unique identifier for each item in the project, and allow us to track that item through the site visit assessment and initial description, transport, digitization, and return transport. Partners are also requested, time permitting, to begin

scanning any records relating to the items to be digitized (bib files, vertical files, donor records, dealer descriptions, exhibit labels, correspondence, etc.) prior to the site visit. The project team will create shared folders for each Partner to collect these records. In order to protect potentially sensitive information, these folders are only visible to the Project Team and the Partner concerned.

During the visit, PIs Hebbard and Noonan will:
- Reference the spreadsheet generated by the Initial Item Inventory Form and fill in any missing information;
- Identify, discuss, and inventory any additional items that fit our project selection criteria;
- Flag conservation or fragility issues that have not already been noted on the inventory form;
- Discuss any additional questions partners have about project procedures and timelines;
- Begin item descriptions by taking measurements and noting first words to ensure each item is identifiable when it is delivered for digitization;
- Collect (via scanning or photography) institutional records related to the items being digitized that have not already been provided to the project team.

Site visit duration will depend on the amount of material being contributed.

Bi-Weekly Project Meetings (Dalmau, Ensley, Hebbard, Noonan)
The core Project Team will have bi-weekly meetings, and invite other attendees, especially digitization team members, to provide updates and to consult on scheduling and planning as relevant (particularly item delivery or return). The team has developed an agenda template covering each aspect of the project (digitization updates, description updates, item delivery and return schedules, ongoing activities, and upcoming deadlines and activities, upcoming presentations, and communication with partners), and these meetings are used to monitor progress of project activities at a high level, address concerns or questions that periodically emerge during project work regarding digitization or description, and assign other project work (such as grant reporting, partner communication, social media promotion, etc.) to the appropriate parties, as the need arises.

MOU Agreement and Signatures (Dalmau, Ensley)
Working closely with Indiana University and University of Iowa General Counsel, Dalmau and Ensley will adapt the MOU templates and materials care agreement (Attachment 8, Documentation Item 3) created as part of the CLIR grant for this project, which will likely result in three MOU templates: 1) IU as Digitization Hub, 2) University of Iowa as Digitization Hub, and 3) Partner Digitization. For the CLIR grant we have solid versions of 1 & 3, which will provide a basis for the MOUs needed for this project. In keeping with prior protocols, we will share IU/UIowa counsel-approved drafts of the MOUs with the partners for their feedback at the start of the project with opportunities for partners to more closely review the MOUs at the time of signing. It has been our experience

that MOU review and signing often involves back-and-forth between partners and digitization hubs before MOUs are executed. Dalmau and Ensley will need to coordinate communication between partner representatives and counsel at our respective institutions along with coordinating with each university's risk management office to secure insurance certificates for partners. Once MOUs have been filed, transportation of materials for digitization at the hubs may commence.

Digitization (Dalmau, Ensley, IU Digitization Team, University of Iowa Digitization Team, Partners)

The digitization work consists of steps pre- and post-digitization along with image capture with the hubs responsible for the bulk of this work: 1) review and finalize the existing digitization guide (Attachment 8, Documentation Item 4) to ensure consistency of capture across hubs and partners who are managing digitization in-house, 2) determine and procure digitization supplies that will be needed (i.e., color bars, supports for codices, etc.), 3) provide packing guidelines for materials that will be transported for digitization, 4) refine in-take procedures to comply with care agreement and insurance requirements, 4) work with key personnel to schedule delivery of materials, 5) assess materials upon arrival against detailed inventory provided by partners which includes condition assessment, 6) prepare and queue materials for capture (camera/overhead/flatbed, depending), 7) record technical metadata for each item, 8) conduct visual quality control, 9) complete post-processing of images (cropping, as-needed), 10) upload digital archival files for automatic quality control, 11) review and run scripts for automatic quality control, 12) upon completion of auto-QC, stage images files for PI/subject experts to review, 13), re-capture if needed per quality review feedback, 14) store digital archival files in digital preservation environment (until ready for ingest), 15) provide copies of digital archival images for partners, 16) coordinate the pick-up of materials, and 17) conduct assessment of materials before packaging according to the care agreement and insurance requirements as part of the pick-up process.

Dalmau and Ensley with input from each hub's digitization team will be responsible for most of these steps with the IU digitization team solely responsible for steps 11 and 12. The IU and University of Iowa's digitization teams will also provide guidance for partners conducting in-house digitization. The IU digitization team will coordinate with partners conducting in-house digitization for steps 10-13. Hebbard, Noonan, Dalmau and Ensley will continually review the digitization schedule across all three years, working with partners to adjust as-needed.

Digitization Timeline

This is subject to change based on partner needs and site visits. The timeline distribution takes into account quantity of materials per partner, especially with respect to codices, which take longer to image.

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Hub 1: Indiana University	Year 1 July 1, 2025 - June 30, 2026				Year 2 July 1, 2026 - June 30, 2027				Year 3 July 1, 2027 - June 30, 2028			
Collection	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Berea College Art Collection			X	X								
Bluffton University			X									
Cleveland Public Library			X	X								
Concordia Historical Institute							X	X				
Indiana State Library			X									
Saint Meinrad Archabbey								X	X			
Washington University in Saint Louis					X	X	X					

Hub 2: University of Iowa	Year 1 July 1, 2025 - June 30, 2026				Year 2 July 1, 2026 - June 30, 2027				Year 3 July 1, 2027 - June 30, 2028			
Collection	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Augustana College					X	X						
Benedictine College					X	X						
Conception Abbey						X	X					
Grinnell College						X	X					
LaSalle-Peru Township High School						X	X					
Loras College			X	X	X							
Marquette University							X	X				
Mayo Clinic History of Medicine Library							X	X				
Mount St. Scholastica							X	X				

Partners Digitizing In-House	Year 1				Year 2				Year 3			
	July 1, 2025 - June 30, 2026				July 1, 2026 - June 30, 2027				July 1, 2027 - June 30, 2028			
Collection	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Chazen Museum of Art, Univ. of Wisconsin-Madison			X									
Eskenazi Museum of Art (IU)			X									
Lilly Library (IU)			X	X	X	X						
Missouri Botanical Gardens			X									
Ohio State University		X	X	X	X							
Nelson-Atkins Museum of Art				X	X	X						
University of Iowa		X	X	X								

Item Description (Hebbard, Noonan, Johnson, Sela, Ensley, and Graduate Student Metadata Assistants)

Hebbard and Noonan will coordinate the description work for all project items. Metadata creation will take place in the Online Cultural and Historical Research Environment (OCHRE), hosted by the University of Chicago [https://voices.uchicago.edu/ochre/]. OCHRE is an online, collaborative graph database system that allows us to create flexible ontological frameworks to describe our project items; to indicate relationships between items within our data set; to query the dataset; to engage in data visualization and mapping; to link our data with other databases on the semantic web, such as the Virtual International Authority File [www.viaf.org] and the citation management tool Zotero [www.zotero.org]; and to present, publish, and archive our dataset. The OCHRE team, Sandra R. Schloen (OCHRE developer; Technology Director for Digital Studies, Humanities Division, and Manager of the OCHRE Data Service, University of Chicago) and Miller C. Prosser (Associate Director of Digital Studies, Humanities Division, University of Chicago), have been invaluable interlocutors for the project team as we sought to best exploit OCHRE's flexibility in the structuring of our data. During the project's first round, our metadata taxonomy was uploaded into OCHRE and templates have been created that provide the description team with the essential fields that should be completed, if applicable, for codices, fragments, documents, and host volumes. Hebbard and Noonan will provide description team members with access to and training in OCHRE and will ensure that everyone is familiar with our project's metadata guide (Attachment 8, Documentation Item 5) and style guide (Attachment 8, Documentation Item 6) to which we will expect all records to conform.

Once a partner's collection is digitized, that collection (or a portion of it) will be assigned to a member of the description team (Hebbard, Noonan, Johnson, Sela, Ensley, or a Graduate Student Assistant) to complete the record's first draft. This draft record will be based on pre-existing historical metadata, when available, and enhanced by original research when needed to meet the descriptive goals of the project. Once the draft record is completed, it will be passed to a second member of the description team (Hebbard, Noonan, Johnson, Sela, or Ensley) for review (note: Graduate Student Assistants will not be asked to complete second round reviews of item records). This second round of review will offer a substantive evaluation of the item's proposed dating, localization, and contents; it will also ensure that all required fields have been completed for each item, that the style guide has been consistently followed, and that no typos exist in the record. Any questions that emerge during second round reviews will be referred to an additional reviewer (generally Hebbard or Noonan) for consultation. For sample draft records (for two codices, two leaves, and a document) created in our project's OCHRE database and produced in our project's first round, see Attachment 8, Document Item 7.

Once all item records for an institution have passed through the second round of review, drafts of those records will be shared with their home institutions for a final round of review. In this third round, we will ask partners to review the records for accuracy, particularly in regards to the measurements and provenance histories of collections and individual items. After partner institutions approve their collection's item records, those records (and their accompanying images) will be ready to upload into the project repository. The first items will be ready for description by the third quarter of year 1. For most collections, we aim to complete item descriptions within six months after digitization; larger collections, such as that held by Loras College, will likely require nine months to complete. All items will be described by the third quarter of the project's third year.

Repository Hosting (Dalmau)
As description is completed for each partner repository, the IU team will be responsible for preparing files for ingestion into the IU-hosted digital repository. This includes finalizing the meatada mapping, setting up new collections in the repository for each partner, deriving metadata from the richer, more complex OCHRE records, generating image derivatives (JP2 for IIIF-compatibility), and batch ingesting the content per the repository's requirements. Each of these major steps will require a feedback loop between partners and the project team. Our goal is to incrementally upload content as collections are completed starting in grant year 2 through the end of grant year 3.

Advisory Board Meetings (Board, Hebbard, and Noonan)
Our newly formed Board will meet quarterly, and all meetings will take place via Zoom. During the project's first year, the Board will evaluate the project's data structure and repository that were created in our first round to consider how both aspects of our project could be improved in our second round. We will also ask Board members to provide feedback on how we plan to communicate project

goals and outcomes with both project partners and the broader public, to ensure that our work is meeting project partner's institutional goals and is being shared effectively with other national and international stakeholders. In years 2 and 3, the Board will provide oversight of our round 2 grant activities. They will additionally help with community building among past and current project partners as well as outreach to potential future partners in order to help the project team identify resources or support that would benefit regional collections of all kinds and institutional contexts.

Partner Quarterly Updates (Noonan)

To maintain and strengthen lines of communication among project partners, we will circulate quarterly project reports for partners to ensure that everyone is aware of ongoing grant activities. Because partners only engage with the project in short bursts (during their site visits and when their items are transported to and from IU Bloomington or U of Iowa), some partners will experience gaps of 12 months or more between their direct interactions with project team members. To keep project partners connected with the progress of our project, quarterly partner communication will provide all partners with updates on our digitization and description process, remind them to check out any recent blog posts, and alert them to any potential presentation or publication opportunities that might pertain to their involvement in our project.

Annual Assessment Work (Hebbard, Dalmau, Noonan, Ensley, and the Advisory Board)

On an annual basis, the project team, in consultation with the Advisory Board, will conduct a round of self-assessment to ensure that our digitization and description work aligns with our project's stated goals and to identify any project workflows that might need refinement to ensure project work proceeds in an efficient and timely manner. This self assessment will be conducted through: designated project team meetings focused on review of the prior year's activities, solicitation of feedback from project partners who were actively involved in that year of the project, and review of project metrics to ensure that we are meeting the digitization and description benchmarks required to complete our project within the timeframe of the grant. Self-assessment work will be timed to take place in advance of NEH grant reporting requirements to ensure that our annual reports offer a full and thorough overview of our project's work during the prior year.