

**Preservation and Access Committee
April 2018 - March 2019
Report to the Annual General Meeting**

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Submitted by

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Chair, Preservation and Access Committee (PAC)

The PAC Annual Report is organized according to the following categories:

1. Preservation and Access Platforms
2. Digitization and Canadiana Collections
3. Member and Stakeholder Engagement
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 - A. Mandate
 - B. PAC Members – 2018-2019

The PAC was formed in May 2018 in response to the expanded mandate of CRKN as a merged organization that offers digitization, access, and preservation services and activities for heritage content. Reporting to the CRKN Board of Directors, the PAC assists the Board in its activities by reviewing and making recommendations regarding the Canadiana access and Trustworthy Digital Repository (TDR) platforms and their associated services and capabilities.

The PAC held its first meeting by teleconference on June 14, 2018 and subsequently met six more times over the course of 2018-2019.

1. Preservation and Access Platforms

In 2018-2019, the PAC oversaw significant changes to the platform infrastructure which preserves and makes accessible the Canadiana collections. Over the year, there was a significant removal and cleanup of code from the access platform and the PAC prioritized development work to pay down technological debt before incorporating new enhancements.

With guidance from the PAC and Platform Technical Task Group (PTTG), a technological roadmap was developed in August 2019 outlining the steps required to separate the preservation and access platform and integrate two key community-supported, standard tools, Archivematica and IIIF. Planning for two formal projects took place in 2018-2019 to further streamline and modernize platform infrastructure by separating preservation and access functions and migrating digital object storage to the industry-standard Swift platform.

Trustworthy Digital Repository

As part of the merger between CRKN and Canadiana.org, the Center for Research Libraries (CRL) granted provisional Trustworthy Digital Repository (TDR) certification to CRKN. Throughout 2018-2019, CRKN worked with CRL to provide updated information on roles and responsibilities and other information to secure a permanent transfer of certification.

In January 2019, CRKN undertook a systematic assessment of its infrastructure, operations and policies relating to TDR certification in order to identify any changes needed to ensure ongoing compliance with certification requirements. This assessment also provided a project plan for CRKN to identify continuing improvements to its ability to provide trustworthy preservation of digital materials.

The initial assessment found no significant technical or operational deficiencies which would call into question CRKN's ability to provide trustworthy preservation at or above the levels offered by its predecessor. The assessment did identify a

significant amount of documentation and policy review that must be undertaken in order integrate Canadiana.org's former trustworthy preservation activities into the combined organization, and to reflect the change in governance and operations management under CRKN.

Portal Management

The Canadiana platform includes several portals hosting thematic and third-party content. Throughout 2018-2019, the PAC reviewed all unmaintained portals and developed a plan to decommission portals. Through this decommissioning, the committee ensured that members and stakeholders were notified of changes to the portals and that content was archived. The Canadiana Discovery Platform was archived, as was <http://rdf.canadiana.ca/>. The Canadian Heritage Information Network (CHIN) linked open data project was transferred to CHIN for future hosting and maintenance. These updates have resulted in significant technological efficiencies as well as the ability for hardware maintenance and updates.

2. Digitization and Canadiana Collections

Canadiana Collections

Over 2018-2019, close to 400,000 pages of content were added to Canadiana Online and approximately 140,000 pages of archival material were added to the Héritage collection.

Increasing Discoverability and Metadata Updates

With the goal of increasing the discoverability of the Canadiana collections, over 78,000 MARC records were created and made available on CRKN's website. Due to strong interest from CRKN members, staff also began work on creating Knowledge Bases and Related Tools (KBART) files for Canadiana Online

Under the guidance of the PAC, in 2018-2019, CRKN took the first steps in investigating ways to decolonize the metadata of the Canadiana collections. As the collections have expanded in both content and ease of access, we acknowledge that we have ongoing work to do to ensure that these materials are culturally sensitive and have been assigned appropriate rights and usage statements.

Digitization Services

In addition to digitizing and preserving material for the Canadiana collections, CRKN provides digitization, hosting, and preservation services to members and stakeholders, including archives, government agencies, public libraries, museums and galleries. The PAC oversaw the development of a priority matrix to evaluate potential digitization projects as well as the implementation of a project tracking and capacity management framework.

Over the course of the year, CRKN's digitization team scanned 2.2 million pages for four clients: the Library of Parliament, University of Victoria Libraries, Numeris, and the City of Peterborough.

CRKN also provided hosting and preservation services to nine organizations in 2018-2019: the Canadian Association of Research Libraries (CARL), Geomagnetic & Space Weather Operations (Natural Resources Canada), Global Affairs Canada, the Library of Parliament, McGill University Archives, the Mississauga Library System, Numeris, Shortgrass Library System and South Mountain Library System.

In total, CRKN hosts over 7.3 million pages (39,776 documents) for these partner organizations.

3. Member and Stakeholder Engagement

The PAC integrates member and stakeholder feedback through a variety of means. The committee itself represents a variety of stakeholders and thus discussions and recommendations represent views of CRKN members, museums, public libraries and the research community. The PAC aims to develop the CRKN digitization, access, and preservation services to directly meet the needs of members and stakeholders.

Joint NHDS and CRKN Workshop on Documentary Heritage

In October 2018, as part of the CRKN Annual General Meeting, the PAC oversaw the programming for a Joint NHDS and CRKN Workshop on Documentary Heritage. The goal of the workshop was to highlight the digitization and preservation work of the NHDS and CRKN and to gather perspectives on how both organizations could evolve to meet the needs of our communities. The workshop opened with a keynote by Christina De Castell, CEO, Vancouver Public Library, followed by an update on the recent work of the NHDS and CRKN. The workshop also included two plans on content and discovery of documentary heritage and an interactive session on user needs. The workshop welcomed 124 participants and formed the basis for plans and future developments in documentary heritage.

Canadiana User Survey

In December 2018, a survey was sent to all former individual subscribers of Canadiana and promoted widely on the Canadiana and CRKN websites, as well as social media. 69 responses were received and the survey indicated that in general, users are happy with the Canadiana platform and collections. The survey indicated that search and navigation are the biggest challenges for users of the Canadiana platform and that users would like better download options and higher image resolutions. Users also stressed the importance of new content, particularly local newspapers. The findings from the survey were analyzed by the PAC and used as the basis of strategic planning tactics and approaches.

Access at No Charge

One of the major milestones for the PAC in 2018-2019 was the removal of the Canadiana paywall. On January 1, 2019, CRKN removed the subscription paywall to the Canadiana collections, allowing researchers to access 60 million pages of Canadian digital documentary heritage at no charge. This step was a significant deliverable of the CRKN-Canadiana.org merger. The response to the introduction of access at no charge was overwhelmingly positive and has directly contributed to increased usage and visibility of the Canadiana collections. Access at no charge is also the first step in making the Canadiana collections available as open access.

2. Task Groups

The PAC oversees two task groups:

[Heritage Content Priorities Task Group \(HCPTG\)](#)

The objective of the HCPTG is to develop principles and criteria that CRKN staff may use to evaluate and prioritize heritage content for digitization and ingestion, conversion and augmentation of the Canadiana collections. The HCPTG will recommend and prioritize plans for making current and future collections more accessible to researchers by means of enhanced metadata and improved collection arrangement. In addition, the HCPTG will make recommendations to the Preservation and Access Committee (PAC) and the Board of principles and criteria that CRKN staff may use in evaluating and prioritizing revenue generating projects of digitization, preservation and hosting undertaken for third-party clients.

The HCPTG was formed in January 2019 and held its first meeting in February 2019. In preparation for the development of a task group workplan, the HCPTG was provided updates on the historical and current Canadiana collection development process and policies and the digitization program.

The HCPTG will deliver a final report, including recommendations to both the PAC, and the Content Strategy Committee by September 2020.

[Platform Technical Task Group \(PTTG\)](#)

The objective of the PTTG is to evaluate and make recommendations on the development of the Canadiana access and preservation platforms. The PTTG will act as a resource for the implementation of metadata best practices on the platform and extending the assets of Canadiana content for end users and researchers. The PTTG will support the Canadiana technical team in meeting the requirements outlined in the Trustworthy Digital Repository (TDR) documentation and provide guidance on how to extend the TDR to support member and community needs.

The PTTG was formed in January 2019 and held its first meeting in February 2019.

The PTTG will function for a fixed duration, ending at the 2021 CRKN Conference.

5. Appendices

A. Mandate

The Preservation and Access Committee is established by the Board of Directors as a Standing Committee of the Board, pursuant to section 12 of the Corporations' By-Laws. The PAC is responsible for:

- Assessing the digital preservation and access requirements of members and other stakeholders and making recommendations on how the TDR should be leveraged to address these needs
- Recommending and monitoring a long-term strategy for the development, positioning and use of the TDR that follows from CRKN's strategic plan.
- Making recommendations for:
 - Extending the TDR to support additional formats and types of content and metadata
 - Developing new services, APIs and features to aid researchers and other users in discovering, accessing and making use of the content and metadata stored in the TDR
 - Integrating the TDR with other digital preservation and access systems
 - Developing features to provide content management, digital asset management or institutional repository services
 - Other enhancements or extensions
- Making recommendations on the prioritization of the development and enhancement of TDR features and capabilities
- Identifying opportunities to align and integrate the TDR platform with other digital preservation and access initiatives in Canada and internationally
- Creating and overseeing technical working groups as needed to evaluate specific standards, practices and technologies relevant to the development of the TDR, to be comprised of a combination of experts from member institutions, other stakeholders and staff
- Assessing the value and replacement cost of the TDR platform and its content; assessing short and long-term risks to both; and evaluating the adequacy of disaster prevention and recovery plans and resources
- Making recommendations on goals and standards for preservation, data security, service availability, support and issue resolution
- Making recommendations on standards for access and functionality including metadata standards
- Assuming such other responsibilities as from time to time may be delegated by the Board.

The Committee will take a consultative approach to its work, engaging members as appropriate, and will provide regular feedback to members through the channels outlined below in Lines of Communication.

B. Members 2018-2019

The Preservation and Access Committee (PAC) was formed in May 2018 with the following members:

Rebecca Graham
Chair
University Librarian
University of Guelph

Dana McFarland
Vice-Chair
eResources & Scholarly Communication Librarian
Vancouver Island University

Paul Durand
Specialist, Digital Collections Management
Canadian Museum of History

Sharon Farnel
Metadata Coordinator
University of Alberta

Émilie Fortin
Chef de la section Production numérique, préservation et conservation des collections
Université Laval

Mark Jordan
Head of Library Systems
Simon Fraser University

Ian Milligan
Associate Professor of History
University of Waterloo

Eric Schwab
Manager, Digitization & Preservation
Toronto Public Library

Johanna Smith
Director General, Public Services
Library and Archives Canada

Staff members Sascha Adler (Lead Application Developer), Clare Appavoo (Executive Director), Russell McOrmond (Lead Systems Engineer), Rebecca Ross (Director, Strategic and Engagement), Beth Stover (Manager, Digitization and Heritage Collections), and William Wueppelmann (Project Manager – Canadiana Platform) served as resource personnel to the Committee during 2018-2019.