

Sustaining Digitized Special Collections Case Study Interview Guide

Overview

The goal of the case study phase of the project is to allow us to understand more deeply how digitized special collections are faring post-launch, by speaking with those who are responsible for creating, maintaining and otherwise supporting them post-launch. This approach will allow us to understand the motivations behind creating the resource, as well as the strategic choices made by those responsible for managing it.

Ithaka S+R has extensive experience in using this methodology, in particular, through the original Case Studies in Sustainability project conducted in 2008-9.¹ While the survey phase may help point out some potentially interesting projects to study further, the interview process will allow us to learn the nuance behind the decisions taken, helping to explain, we hope, some of the reasons a project can languish, as well as the drivers that can help it succeed.

¹Nancy Maron et al, *Sustaining Digital Resources: An On-the-Ground View of Projects Today* (2009). The full report and twelve case studies are available here: http://www.ithaka.org/ithaka-s-r/research/ithaka-case-studies-in-sustainability/report/SCA_Ithaka_SustainingDigitalResources_with_CaseStudies_lower%20res.pdf

We have based our burden estimates on past experience in interviewing people about the digital resources they manage. While our past work did not focus on digitized special collections, these are similar enough in nature, and managed by people in similar professional positions, so that we feel we can accurately estimate the time the interview process will take.

We are anticipating up to 4 interviews per project, with:

- Project leader
- Department head
- Institutional Director
- Funder or other source outside the institution

That said, there are many predictable contingencies: our final selection of interviewees will be those we identify as being the most relevant people to speak with about each project we are profiling. Some may accept our invitation; some may not.

As the survey results will certainly contain valuable information specific to this study, we fully expect to customize the interview guides further to take this into consideration. We will tailor the interview guide to the interviewee we are speaking with, for example, in order to probe more deeply on questions they have answered on the survey. If specific themes emerge from our analysis of the survey data, we may choose to question subjects on these themes. Please note that in some cases, we intend to ask the same question of different stakeholders, as this enriches our understanding of the dynamics of the project.

Further, while we will ask interviewees some foundational questions to get the interview started, we will also have done our own background research, and will invite them to provide us with and background documents that may be of service to this project. Depending on how much advance material we are able to work with, we may be able to probe further. Some types of documents we will seek and/or request include:

- Reports, presentations, whitepapers on the digitized special collection
- User analysis studies
- Web traffic statistics/analytics
- User surveys (and results)
- Any other impact measurement studies

The sections below, then, represent a rough outline of the general topics we will cover with the interviewees. We reserve the right to refine and modify this as needed in light of our survey findings and as a function of the actual projects and interviewees we identify.

Privacy Statement

Thank you very much for your willingness to participate in this study. I would like to inform you that this information is solicited under the authority of the Museum and Library Services Act of 2010, as amended. Your participation is entirely voluntary and your decision whether or not to participate will in no way adversely affect your institution. Your cooperation is extremely valuable in obtaining much needed information to ensure the completeness and accuracy of the case studies. Any information you designate as “confidential” during the course of this study will be protected from disclosure to the extent permitted by law.

Questions for Project Leaders

Motivating factors

- Describe the digitized special collection, and the motivations for creating it.
- Is there anything especially innovative about it? What is unique about it?

Value proposition

- What value does it create for users? If this were not available, what would users do instead?
- How has the product/service evolved over time? What changes have been made to the original plan?
- Tell us more about how you study users, what you know about the makeup of your audience, and how you use this information?

Governance and leadership

- Tell us about the organizational environment of the collection: who you report to, what departments or institutions are involved in its management.
- Tell us about the governance structure for the digitized special collection. Is this managed as a separate entity, or as one project among many in a department?
- As the leader of the project, tell us about what role this particular project plays in your work? Is this the only project you manage, or is this one piece of your workload?
- Describe the roles of others who also work on this project.

Costs

- What are the main cost drivers for this resource?
- Where have you been able to creatively manage these costs?
- How do institutional contributions play a role?

Revenue generation

- Tell us more about the revenue generating activities you have tried or want to try.
- What has worked, and what has not?
- Have there been specific obstacles that have hindered revenue generation?

Impact measures and accountability

- How is “success” measured for this digitized collection? Who measures it, and how often is it tracked?
- What steps have you taken to reach these targets? Which tactics have worked and which have not, and why?
- Are there consequences if targets are not reached?

Questions for Department Heads

- Tell us about the place this resource has within the entire department you manage.
- Are decisions about the resource made at the department level, or by a specific project leader?
- (if relevant) Describe for us the department-wide practices for understanding audience and usage
 resource enhancement
 preservation
 outreach to students and teachers
- (if relevant) Describe for us how the costs of this resource are shared within the department/institutions. What activities are shared? What costs is the project expected to cover directly?
- How does this project compare– in terms of its costs – to others in the department
- How does this project compare– in terms of the revenue it generates – to others in the department?
- What do you see as the greatest value or impact of this resource? Is the impact of this resource measured in a way that is different to others in the department?
- Do you see other examples of resources within your department that seem especially robust/successful? Tell us about them and what you find exceptional about them.

Questions for Institutional Directors

- Tell us about your vision for the role of digitized special collections for your institution. Do you see this as a priority area? Why/why not?
- Tell us more about your institution’s stance on revenue generation; specifically as it relates to your digital resources/digitized special collections?
- Does your institution engage in partnerships with other institutions concerning digitizing special collections? If so, tell us about those that have worked best/least well and why.
- If digitized collections are a priority in the future, tell us how you imagine this activity will be funded going forward?
- What do you see as the most important problems to solve concerning sustaining the digitized special collections your institution holds?

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