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

Marina Georgieva | Visiting Digital Collections Librarian
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
1. Definition
   • In-house projects
   • Outsourced projects

2. Similarities
   • Stakeholders
   • Team
   • Goals

3. Key differences
   • Vendor selection
   • Digitation technology
   • Workflows

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
**Definition**

**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

- 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

- 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
1.2 PROJECTS

**Small scale**

*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

**Large scale**

*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
<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Team</th>
<th>SMART Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Articulate the project</td>
<td>• Project manager</td>
<td>• Specific</td>
</tr>
<tr>
<td>• Make a case why the project is important</td>
<td>• Staff selection</td>
<td>• Measurable</td>
</tr>
<tr>
<td>• Examine and select archival materials</td>
<td>• Timeline</td>
<td>• Achievable</td>
</tr>
<tr>
<td>• Find and manage budget</td>
<td>• Get the work done!</td>
<td>• Relevant</td>
</tr>
<tr>
<td>• Select team</td>
<td>• Hiccups and road blocks</td>
<td>• Time-bound</td>
</tr>
<tr>
<td>• Set the goal</td>
<td>• Prioritization</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Iteration</td>
<td></td>
</tr>
</tbody>
</table>
Similarities

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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

- 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
Key differences

DIGITIZATION TECHNOLOGY

- 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
Key differences

3.3 WORKFLOWS

**In-house**

- Segmentation by processes
- Segmentation by material type
  - *Photograph collection*
  - *Oral histories collection*
- Segmentation by roles

**Outsourced**

- Segmentation by processes
- Segmentation by batches
  - Batch 1
  - Batch 2
  - Batch 3
  - Batch 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
Key differences

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

• 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
Pitfalls to avoid

4

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