

AUDIOVISUAL PRESERVATION

PROJECT OUTSOURCING:

NAVIGATING THROUGH THE CLIENT/VENDOR RELATIONSHIP TO ACHIEVE YOUR PROJECT GOALS

By

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Introduction

For many people, one of the most daunting tasks involved in starting a video preservation project can be the selection of a vendor. To those unaccustomed to working with obsolete video formats or with the technologies of preservation and restoration, even knowing what questions to ask a prospective vendor is not easy.

The following guidelines are intended to help you organize the information you will need to select and develop a successful relationship with a vendor.

Define Your Project

You should be able to communicate the answers to the following questions to your vendor in order to make decisions regarding processes, destination formats, and extent of effort.

1. What is the purpose of the project?
 - *For example: preservation, distribution, access, editing, multiple, or other*

2. What are the overall end uses envisioned? And for each derivative object?
For example:
 - *Preservation master: long-term storage*
 - *Access master: digital file served locally*
 - *Access copies: for streaming with ability to burn to DVD/Video at will*

Or

 - *For presentation at a meeting next week*

Or

 - *For editing and broadcast*

3. Is there an organizational or project-specific vocabulary that has developed? If so, have you created a glossary or style sheet?

4. What is the extent of the total collection/preservation effort? For example, is this a one-time project, a pilot, phase one of three? Also, if the elements being reformatted are part of a larger collection, what is the prioritization scheme for the entire project?

5. What is the funding available for the project? Is it through grants or is it internally funded? If internally funded, are the funds available now or are they slated for release in the future?
6. Are there any existing organizational infrastructures and policies that you must align your project with or that may affect your choices? If so, how will they affect your ability to maintain quality control, use of destination format, and support and service for the end user?
7. What are the available resources for managing the original and destination content/media, including I.T. staff, storage capability, and more?
8. What is your desired level of involvement in the project?
9. What are the parameters and criteria that you will use to judge the final product? How does each potential vendor's proposal compare to these criteria? How will they meet your goals?

Basic Information to Communicate to Your Vendor

1. Where is the media now?
2. What is the nature of the content?
 - *For example: talking head, live performance, short or feature-length film, video art piece*
3. What is the current status of the project?
 - *For example: gathering information, fund-raising, ready to go*
4. What is your role in the project and who, if anyone, are the other members involved from your organization?
5. What are the shipping and billing logistics?
 - *For example: direct, third party, multiple incoming and outgoing shipping and billing addresses*

Technical Questions to Ask Yourself

1. Do you have expectations about how the content will sound or look?
 - a. If so, what are they based on?
 - b. Have you seen any of the actual footage reproduced?
 - c. Is it in alignment with what can be expected for a particular format and its storage history?
2. Do you know the storage history or any part of it?
3. Has there been any surveying, inventorying, or cataloging of the media to date?
 - a. If so, is it available in electronic or paper form?
 - b. In either case, can you offer information on formats, quantities, and lengths?
4. Have you chosen your destination formats?
 - a. If so, can you explain your choice?
 - b. Do you know your options for the destination format?
 - *For example: type and number of audio channels in relation to the source; codecs for digital file formats; resolution options; metadata embedding*
5. What level of monitoring do you require during the transfer?
 - a. Should the transfer be monitored 100% of the time, without the operator working on anything else?
 - b. Are you comfortable with spot-check monitoring, allowing the operator to transfer multiple tapes at a time?
 - c. Are you comfortable with transport monitoring only, or no monitoring at all?
6. What information and/or metadata do you expect from the vendor?
 - a. Are you expecting a condition report? If so, what information should it include?

- b. Do you require metadata from the reformatting process? If so, which metadata fields and in what format? Does this comply with your organization's existing infrastructure?
7. Do you know what the program length is?
8. Do you need the entire tape reformatted, even if the program appears to be over? Or would you like to stop the transfer after some predetermined amount of "black"?

Questions To Ask a Prospective Vendor

1. What can you tell me about your processes and methodologies?
 - a. Shipping guidelines
 - b. Receiving
 - c. Media Tracking/Work System
 - d. Equipment, tools, supplies used
 - e. Metadata capture
 - f. Preparation
 - g. Treatment methods, tools, and capabilities
 - h. Reformatting infrastructure—equipment, cable, signal routing
 - i. Staff expertise and skill set
 - j. Quality control and assurance
 - k. Management structure
 - l. Communication structure
2. What aspects of your infrastructure accommodate the specific purpose, goals, and end uses of the project?
3. Do you have any involvement or experience with similar projects?
4. What are the storage and security conditions in your facility?

5. What is the communication structure throughout the project?
 - a. Who will be the primary contact and how often will that person communicate?
 - b. Can you define the terminology that you use in your literature, questionnaires, verbal communication, or documentation for projects?
6. Can you offer technical explanations of your processes?
7. Can you provide definitions of metrics, particularly of subjective phrasing used in communication and documentation, such as: "Picture is good, shedding is high"?
8. Will you explain the consequences and/or compromises associated with the decisions that I may have to make in terms of processes, costs, and effect on goals, for example?
9. Are you able to meet my expectations and goals in terms of workflow and procedures (e.g., generating a condition report, monitoring the transfer)?
10. Can you provide reference texts (printed or online) that will be useful to me as I make decisions?
11. What is your standard practice for quality control and quality assurance? For example, in a project that requires maximum efficiency, how do you mitigate any increased risks to quality?

To-Do List

- Define metrics so that you can compare apples to apples
- Define your goals
- Define your project's current status
- Use samples as a means of testing and choosing vendors
- Revisit complex aspects of the project with vendors before making a final choice. Rushing to make a final decision should never take precedent over ensuring the project's success.
- Define your role in the project
- Gain an understanding of the process
- Know who your contact is
- Define a common terminology and use it consistently

- Make your assumptions explicit
- Define expectations
- Develop a path of communication
- Listen
- Ask questions and confirm your understanding of their answers
- Document pertinent information
- Set up status meetings (for medium to large jobs)

Things to Remember

1. The client-vendor relationship functions best as a partnership.
2. Currently, there are no standards for preservation and reformatting. Do not assume that all vendors are operating with the same set of processes, equipment, tools, or expertise.
3. There are many ways to get from point A to point B, each with its own potentially major implications for your goal.
4. Vendors must often base estimates on very little information about the media and their conditions. This can result in wildly variable quotes and proposals, depending on the assumptions made by the vendor regarding media lengths, condition, workflow, processes, quality control, and more. It is important to take this into consideration in evaluating proposals and in maintaining perspective throughout the duration of a project.
5. Even seemingly small processes can have a major impact on pricing. Small parameters can branch out into multiple destination formats and quality control or they may dictate the workflow in a way that affects labor time and cost. A vendor should be able to identify and explain these variables to you and how they may affect your overall budget.

Client Checklist

Pre-Planning

- Strategy including statement of purpose, end use, storage, access and metadata formulated
- Representative statement of objectives or statement of work with which to proceed drafted
- Statement of objectives or statement of work clearly defines the structure for response and itemization for offering pricing to maintain consistency and clarity.
- Statement of objectives or statement of work clearly states who questions should be directed to and over what period of time questions are allowable.
- Plan for integration of destination media/formats and metadata into existing infrastructure is known
- All relevant information regarding the source media has been gathered and reviewed
- A timeline to accommodate client-vendor review, Q&A and samples has been drafted

Response to request for proposal and vendor evaluation

- Consistent and established criteria are being used to evaluate vendors
- The pricing itemization and structure are equivalent and understandable between proposals
 - The pricing breakdown is understandable and can be evaluated at a granular level*
- There is a clear sense of the vendor's
 - expertise
 - management
 - engineers
 - operators
 - library sciences
 - chemistry/material sciences
 - bench technician
 - history
 - arts
 - equipment
 - known quality level
 - well maintained

- preventative maintenance & integrity testing
- methods and processes
 - proven
 - safe
 - maintain integrity
 - preservation oriented
- storage facilities
 - temperature and humidity controlled
 - secure
- tools
 - worksystem that defines work, tracks media and reports project status
 - proper tools and supplies for preservation work
 - demagger
 - calibration and alignment media and tools
 - high quality transport/head cleaning supplies
 - project management tools

Any process and pricing differences between multiple proposals are understood
“multiple proposals” could be from the same vendor or multiple vendors

Comparable and various samples have been sent to and processed by vendors, and reviewed internally as part of the proposal (if appropriate)
“various samples” could be from the same vendor or multiple vendors

Relevant questions and answers posed to the vendor have been documented and reviewed as part of the proposal. The documentation consists of internally generated questions as well as questions which draw from the proposal, community discussion, texts, tutorials, sample documents and case studies.

Pre-Production

Contact info, shipping and billing address have been communicated to the vendor

Purpose and end use have been clearly communicated to, and reiterated by the vendor

The people that are involved in the project and their roles are identified and known

It is known who in the vendor’s organization we will contact at which relevant points in the process

The vendor knows who they should talk to regarding various aspects of the project in my organization

The vendor’s terminology has been clearly communicated and understood

Internal terminology has been clearly communicated to, and understood by the vendor

Specifications have been clearly communicated or have been accepted for parameters including (*these are common oversights outside of the more salient specifications*)

Labeling

File Naming

Metadata fields

Metadata method of delivery

Condition report and documentation existence and layout

Compiling source to destination

digital file method of delivery

housing of source and destination media

quality control

extent of processing (*drop out compensation, noise reduction, no processing, etc...*)

Test/Reference signal use and layout (*Bars, Tones, Black, Silence, etc... in what order and for how long*)

Time Code

Audio source to destination channel relationship and track allocation (*single channel to dual mono, 2 channels or 4 channels, hi-fi audio tracks vs. linear tracks, etc...*)

multi-destination handling ((1) 3 hour tape to (3) 1 hour tapes – overlap, documentation, labeling, etc...)

All relevant questions have been asked, responded to and are well understood

Any and all final specifications are in written form, have been reviewed and agreed upon by all parties

Any visual specifications (labeling, slates, etc...) have been confirmed through visual example and sign-off by both parties

Any tests or sample creation prior to production beginning has been agreed upon and defined

The processes adequately achieve the purpose of the project and end-uses defined

Any and all timeline or deadlines are known by and agreed to by both parties

Proper methods of shipment, including packing, information to enclose, shipping address and who's attention to make it to have been established

A shipping manifest of the elements being shipped has been created

All available relevant metadata has been provided to the vendor in electronic form if possible

Period of time for client quality control checks, "warranty" period and appropriate vendor staff to speak with regarding quality control failures and re-work has been established

Length of time, if any, vendor is expected to keep a backup copy has been established

Production

The frequency of updates regarding project status has been established

Internal points of contact have been identified for responding to vendor questions that may arise in the production process regarding unexpected findings

Post Production

Internal quality control criteria and processes have been established

Receipt of elements has been confirmed against the original shipping manifest and the vendor shipping manifest