

Incorporating Digital Preservation into your DAM program

Educational Webinar Series – Session 3 of 3

Building a Strategy for Preserving Long-Term Digital Assets

March 30, 2022



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What's coming up in this third session

- People, process and technology
- Getting buy-in and building advocacy
- **Case Study:** BT and Lloyds Banking Group
- Panel discussion and Q&A
- Summary & resources



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Theresa Regli
Vox Veritas Digital

Today's speakers



Karen Sampson
Head of Archives & Museum
Lloyds Banking Group



Anne Archer
Head of Heritage and Archives
BT



Nathan Voogt
Commercial Director
Preservica



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Series overview

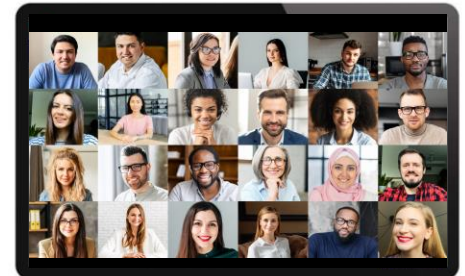
Preserving Long-term Digital Assets – McDonalds
(Recording Available)

Standards & Approaches for Digital Preservation – Yale University & Digital Archivy
(Recording available)

Building a Strategy for Preserving Digital Assets – BT and Lloyds Banking Group



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- Understanding and creating value
- Getting buy-in and building advocacy
- People, process and technology



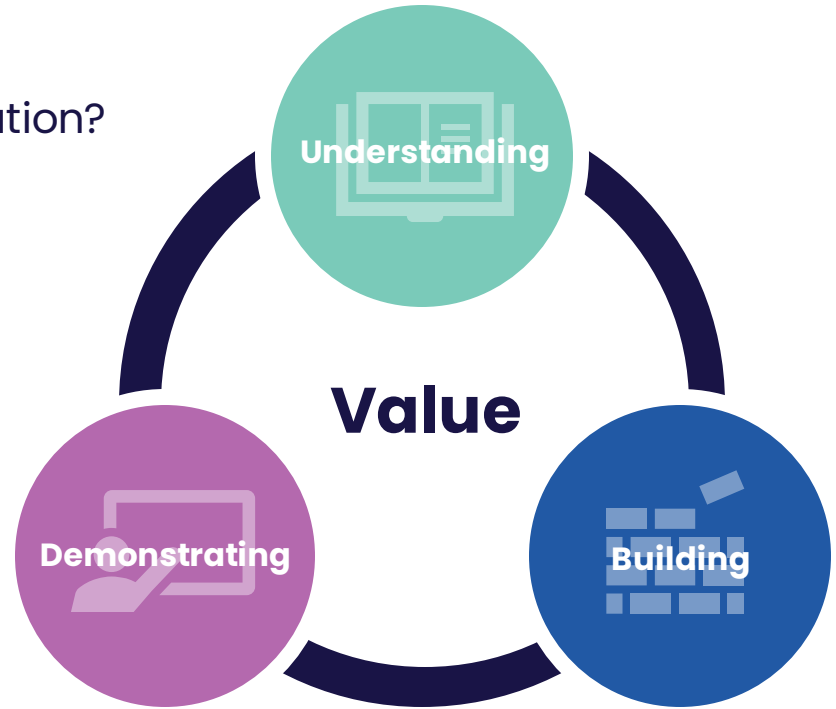
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Nathan Voogt
Commerical Director
Preservica

Organization Alignment

- What is the archival value to the organization?
- Securing budgets and funding
- Preservation project planning & support



Primary use cases...



Digital archiving and
preservation



Automated
content harvesting



Application
decommissioning

Core value...



Search



Access



Action



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Value & use of long-term digital assets

Authentic brand storytelling

Approved heritage assets for anniversary storytelling and engaging social media

Brand & trademark protection

Rapid access to “proof of use” assets for multiple brands, territories and jurisdictions

Product innovation

Inspire and document new product innovations, retro products & heritage brands

Corporate governance

Protect strategic decision making, board reports, shareholdings and M&A records

Employee engagement

Engage employees in the authentic history and culture of the business

Compliance & regulation

Rapidly meet “burden-of-proof” challenges for compliance and regulatory audits

Conveying the value of digital preservation to your stakeholders

“We need a standards-based preservation solution to”

...protect our brand value
and engage employees in
our heritage

...capture web and
social media history as
it's being made

...meet our mandate to ensure
the integrity & authenticity of
our permanent public records

...streamline our record
requests & boost transparency
with online access for citizens



...make collections available
online for students,
researchers and the public

...reduce our reliance on
unsecured online services like
YouTube, Flickr & Google Drive

...enable me to manage my
time effectively & efficiently

...get started with an out-of-
the-box cloud hosted solution
that does not require local IT

...take care of all the
essential steps needed to
safeguard our valuable
content over decades

...ensure our content can
always be read & used without
needing the original
application

Advocacy with stakeholders



Archivist

Organizational Leadership & Resource Allocators



- Budget holder and decision makers
- Responsibility for compliance and information disclosure

Information Technology



- Information security and privacy
- Infrastructure management and storage services

Heritage, Archives & Library Services



- Appraise, preserve, and provide access to assets
- Support research and use

Users & Communities of Interest



- Assurance that assets and collections are accessible
- Discovery, search and retrieval support

Non-Users

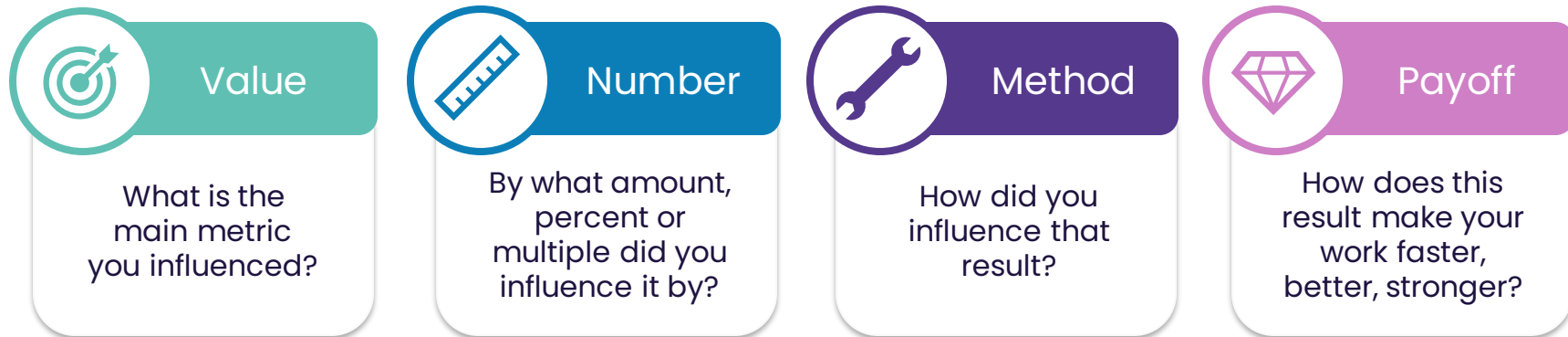


- Opportunity to become aware of collections
- Be represented in a non-discriminatory way that protects privacy

Engagement Programmes

- The importance of wider organizational engagement
- The role of advocacy as you build the case
- Creating networks & community involvement

4 Steps of results

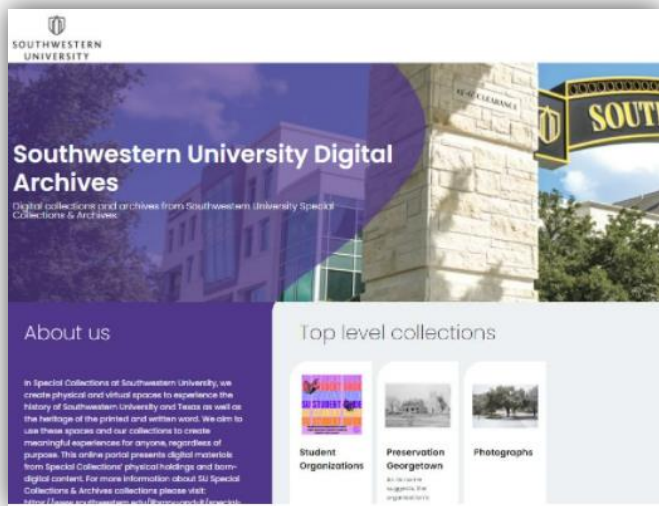


Using Starter to successfully build the case



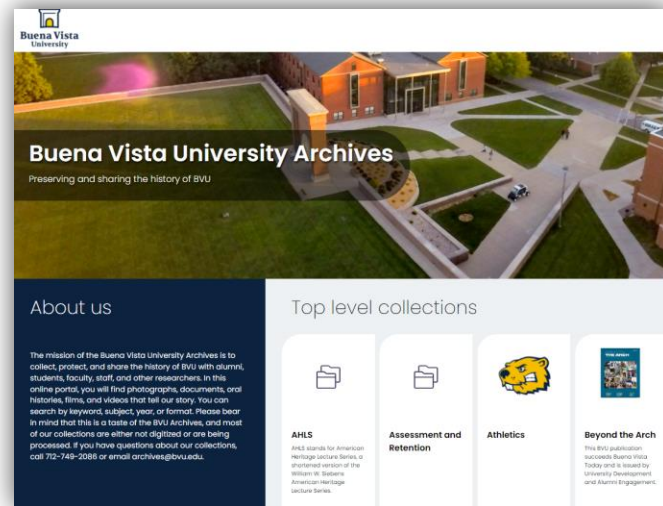
"With Preservica Starter, I was able to quickly and clearly demonstrate the value of digital preservation to our leadership and colleagues in other departments."

Megan Firestone – Head of Special Collections






"We can now say that we are moving toward digital preservation according to best practices. How many small institutions can say that?"

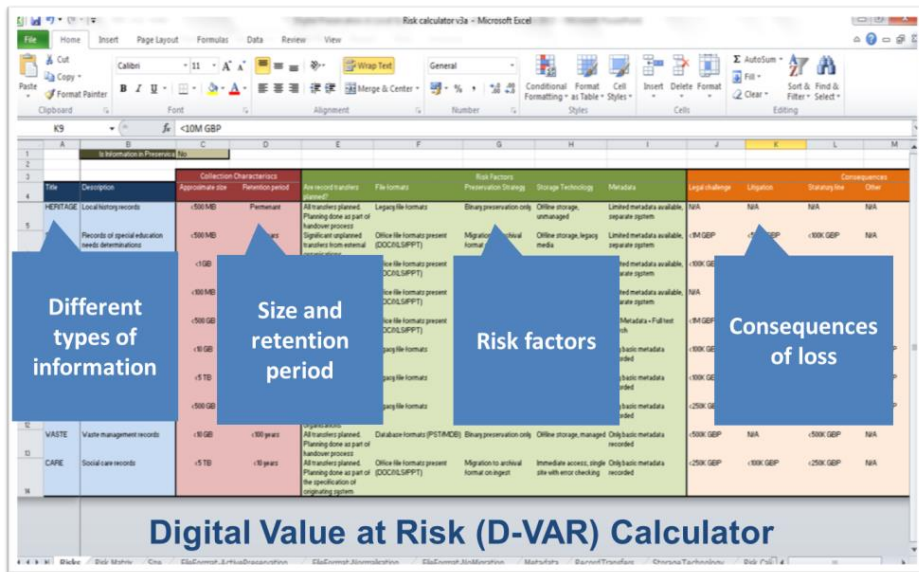
Joan Curbow – Librarian & Archivist



Preservation Appraisal and Value

-  The importance of appraisal
-  Understanding the value of your content
-  Identifying the risk to your collections

Digital Value at Risk – Calculator

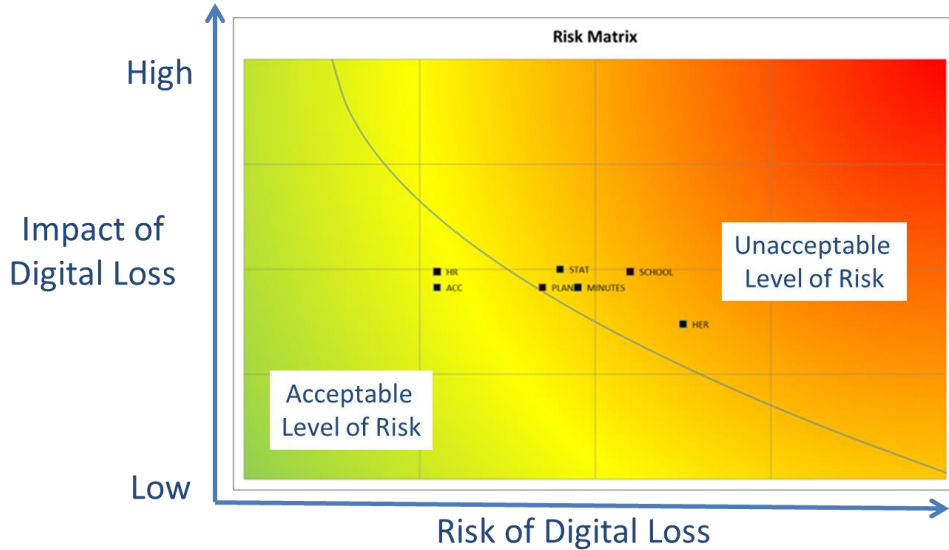


Step 1: Complete the Risk Matrix

Enter the types of digital information that are particular to your organization

Complete the Risk Factors and Consequences from the drop down menus

Digital Value at Risk – Calculator



Step 2: Generate a Profile

Shows for each type of digital information the degree of risk of digital loss and impact

Determine your level of acceptable vs. unacceptable risk

Business Case Template



Executive Summary

- Position Statement
- Background
- Recommendation

Introduction

- Objectives
- Business Drivers & Long-Term Info
- Expected Benefits

Program

- Solution Description
- Resources & Investment Plan
- Success Measurement

Appendices

- A: DVAR Calculator
- B: Risks Assessment
- C: Options Assessment
- D: Stakeholder Analysis
- E: Training Plan

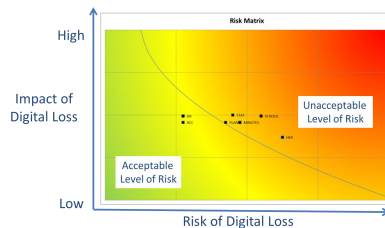
Summary & your next steps...

Three tools to quickly utilize and build the case for digital preservation

Use Starter & public access
to promote advocacy



Understand the value of
digital content at risk



Take inspiration from the
business case template



BT and Lloyds Banking Group

Case Study



Anne Archer
Head of Heritage and Archives
BT



Karen Sampson
Head of Archives & Museum
Lloyds Banking Group

Anne Archer & Karen Sampson

Head of Heritage & Archives, BT

Head of Archives & Museum, Lloyds Banking Group



Anne Archer leads the Heritage & Archives function at BT, with previous roles at Lloyds Banking Group and The British Museum. She is a Trustee of the Business Archives Council and was previously a Board Director of the Digital Preservation Coalition.



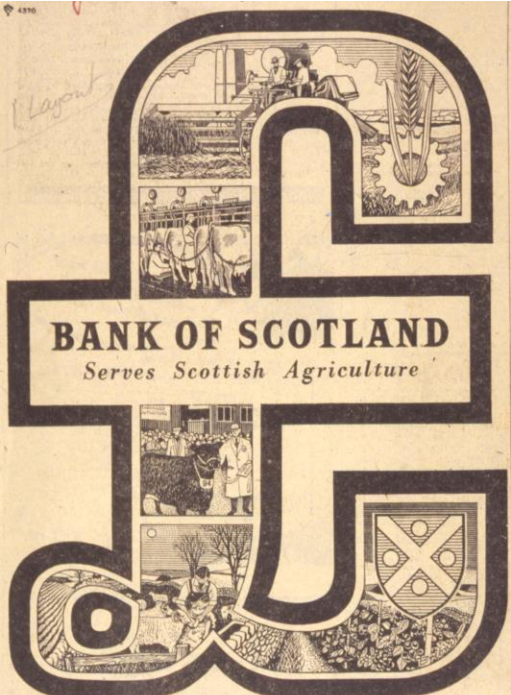
Karen Sampson is Head of Archives & Museum for Lloyds Banking Group. Until recently she was a Trustee and Secretary of the Business Archives Council. She currently sits on the UK Archive Service Accreditation Panel and is a judge for the DPC biennial digital preservation awards.



Lloyds Banking Group Archives

4370

Layout




BANK OF SCOTLAND
Serves Scottish Agriculture

SCOTLAND'S FIRST BANK
welcomes you everywhere in Scotland

For the additional convenience of its customers
the Bank will provide a Sub Branch at


STAND 359 ROYAL HIGHLAND SHOW

*"...and send the
account to me"*




It is becoming customary for a married woman to have her own bank account and accept responsibility for the management of her own monetary affairs. Most husbands welcome the change, for after all it is a tribute to their good judgment as well as to the intelligence of their wives.

Many women, married and single, use the services of Lloyds Bank. They appreciate its friendly atmosphere and quiet efficiency.

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look after your interests

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**THE
RIGHT
STEPS
TO TAKE
FOR OUR
FUTURE**



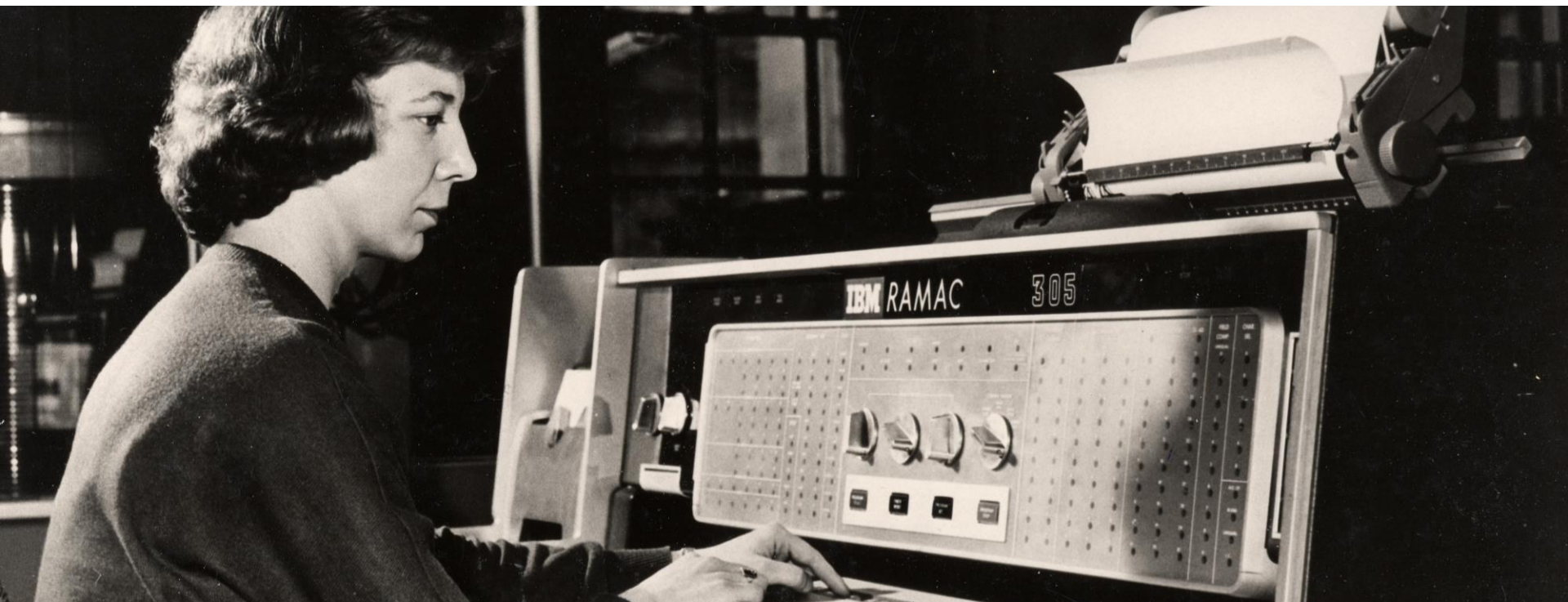
JOIN THE
HALIFAX
PERMANENT
BUILDING
SOCIETY

FUNDS OVER
£3,500,000

Head Office: Princess Street, Halifax.

ENOCH HILL, F.C.I.S.,
Secretary & Manager.

The Beginning: Lloyds Banking Group



BT Archives



The beginning: BT Archives





SEND YOUR GOOD WISHES BY

GREETINGS
TELEGRAM

SEND YOUR GOOD W

GREETINGS

Getting buy-in / policies



Persevere



Know when to give up!



Stop!

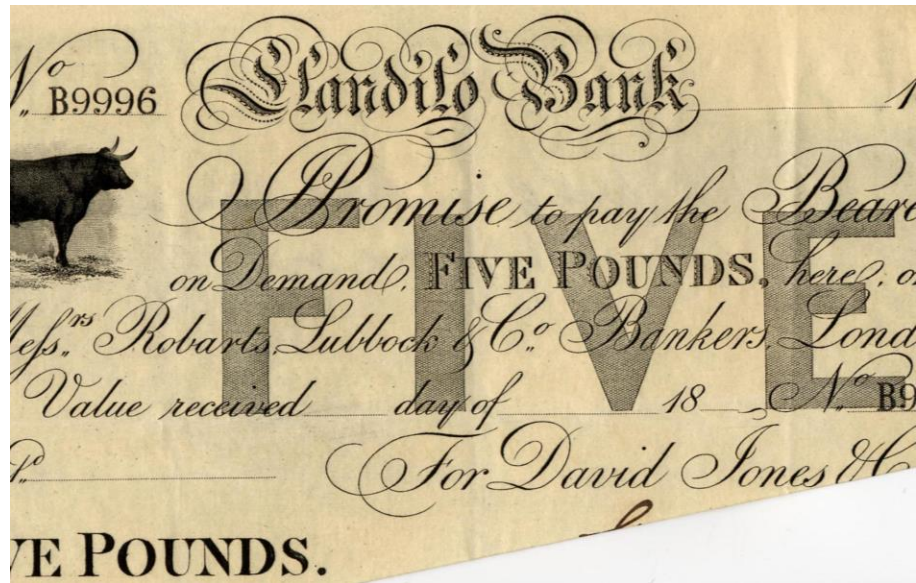
Think twice before making
any Trunk calls.



Know your specialist subject



Follow the money!



Summary



Questions and contact

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Heritage & Archives, BT

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www.bt.com/history

Karen Sampson, Head of
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www.lloydsbankinggroup.com/who-we-are/our-heritage.html



Panel

Questions?



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Theresa Regli
Vox Veritas Digital



Third session summary

- People, process and technology
- Getting buy-in and building advocacy
- **Case Study:** BT and Lloyds Banking Group



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Theresa Regli
Vox Veritas Digital

Thank you!

Digital Preservation 101 - primer

<https://preservica.com/digital-preservation-101>

Corporate & Business Archives

<https://preservica.com/corporate-enterprise-digital-preservation/corporate-business-archives>

Get started! FREE-forever Digital Preservation

<https://starter.preservica.com/>

info@preservica.com

@preservica
preservica.com

theresaregli.com



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Preservica Community Hub

Join & collaborate with over 2,000 archives & records professionals

- Enhance your digital preservation knowledge
- Build relationships & collaborate
- Quickly find answers to your questions
- Stay informed of industry news & events

Access the Hub via
your Starter account



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