



CARLI

Consortium of
Academic and Research
Libraries in Illinois

GUIDELINES FOR THE PROMOTION OF DIGITAL COLLECTIONS

Best Practices for Promotion and Marketing

CARLI Created Content Committee

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1. Introduction

Planning for digital collections should include thinking about their use and long-term sustainability in addition to production considerations. Simply creating and providing access to the collections is not enough, as users may not serendipitously stumble across them on the library website or by other means. Therefore, promoting your library's digital collections is essential to helping users discover them. Attempting to promote all collections to a general audience on a single platform, however, is not the most effective approach.

Questions to ask at the outset are: Who do you want to reach, and why? Along with your available resources (budget, personnel, etc.) and the collection content itself, identifying the goals and audience for your digital collections will guide you in selecting promotional strategies and maximize the likelihood of a positive outcome for your efforts.

It's important to look at the collections individually, as you're likely to have different goals and audiences for each. If these details were not defined during the project planning phase, or if they've since changed, they need to be addressed before undertaking a promotions initiative.

1.1. Goals and Objectives

The goals and objectives for promoting a digital collection should be realistic and measurable. These intended outcomes will begin to shape the approach you take.

In defining your goals, reflect on why the items in the collection were digitized (or if the items were born digital, why the collection was created): To preserve rare or fragile items? To increase access to special collections? To raise awareness of unique hidden gems in your library or archives collection?

Then consider what you hope to accomplish through promotion: Is there a collection you're seeking to promote for a particular reason? Are you striving to integrate digital collections into the curriculum? Is your aim to increase engagement with and use of the collection on an ongoing basis? Are you trying to boost foot traffic by encouraging user interaction with the physical objects represented digitally in the collection? Is your intention to expand awareness of your digital collections as a whole within your library, institution, and/or statewide consortium? Are you using digital collections to draw attention to your library/archives in general?

You may wish to refine these goals with specific objectives—for example, setting a target number of users to reach via a selected social media platform by a certain date or within a certain timeframe. After your promotional campaign is launched, you can review if and how well these objectives are being met, then adjust or revise your strategy accordingly.

It may take some trial-and-error and persistence to achieve your goals and objectives. As with all library resources and services, though, promoting digital collections is really an ongoing process.

1.2. Audience

By trying to promote your library's digital collections to the world at large, you may miss the audience for whom a collection holds the most interest. Because digital collections tend to be specialized, an emphasis on promoting to similarly specialized communities is recommended.

One way to start is to look at your library's existing and potential audiences—those among your primary constituency who already use the library's resources and services, and those you haven't yet found a way to reach. Within those audiences for academic libraries, subgroups may include undergraduate and graduate students, faculty, staff, administrators, alumni, donors, visiting researchers, board of trustees, friends of the library, and members of the public in surrounding communities. Evaluate which digital collections might be of use in fulfilling the information wants and needs of those groups.

At the same time, recognize that your primary constituency may not be the best matched audience for a given collection. While your regular users may also be able to make use of the collection, open access online resources offer the opportunity to engage others who would otherwise be reluctant or unable to visit your library.

If digitizing a special collection, examine the collection's origins and your library's motivations in acquiring it: Was the collection donated or purchased? Who was the donor, or what was the source of the collection? How and why was it acquired? Was it acquired as a single collection, or does it consist of items assembled after the fact? How has the collection been used, and by whom? The answers to these questions may be helpful in determining an appropriate audience for the digital collection.

If seeking to promote a digital collection that's been around for a while, use any existing data at your disposal that might indicate a prospective audience. For example, analyze web traffic to the collection and make note of frequent referrer sites.

Other factors to consider when identifying an audience for the collection you wish to promote:

- If the content fits with a course or major offered at your institution, you can promote the collection to the faculty members and students involved with the course or in that department/program.
- If the focus of the collection is related to the history of your institution, then alumni, current administrators, or your institution's public relations office may be the most appropriate audiences.
- If the collection contains primary sources or other educational content suitable for K-12 students, try contacting teachers at area schools or a statewide educational association.
- If the collection deals with area history, you may want to reach out to local and regional historical associations.
- If the subject of the collection is more geared toward hobbyists or professionals in a specialized field, identify and contact local, regional, national, or international organizations in that field.

Reaching out beyond your primary constituency is often justifiable: “global” language is increasingly part of institutional mission statements, generating positive attention for your library and institution is always a plus, and building external relationships can pay off in various ways.

If you identify more than one audience for a collection, prioritize the audiences and roll out the promotion in stages to each group. Likewise, if you identify more than one collection for the same audience, promote one collection at a time so as not to overwhelm prospective users.

Once you've identified the audience, then you can evaluate the communication strategies available to you to determine the most effective way to connect with that audience. Learn as much you can about the audience's communication habits. For example, observe how members of the group communicate with each other. Do they prefer to receive information electronically, in print, or in person? Do they use of social media, and if so, which platform? If possible, conduct marketing research into their attitudes and behaviors to create a user profile and identify trends, which will help to make informed decisions as to how to proceed. You may also want to use more than one strategy to try to reach the same audience.

Regardless of the promotional method chosen, keep your message short, simple, to the point, and tailored to the audience. Beyond making them aware of the digital collection's existence, succinctly point out its value to that audience—for example, added features such as lesson plans would increase a collection's potential usefulness to K-12 teachers. Include a direct link to the collection and add an image or two (preferably color) to stimulate interest. Use language and images that are relatable and culturally sensitive. Invite a response or questions by including personal contact information. Rather than one-way informational, view this communication as the first step in establishing a two-way connection with a group of users.

If your library does not have a preexisting relationship with the target audience, consider whether there are intermediaries who might be able and willing to share information about the digital collection. For example, library employees who are parents of school age children (or the education department at higher ed institutions) can help to make inroads with a K-12 audience.

Plan the timing of your promotion wisely. Publicizing plans for a digital collection at the beginning of the digitization process might elicit input or assistance from your prospective audience, but unless (or even if) you communicate updates throughout the process, it could cause problems—for example, prematurely announcing an expected launch date if unanticipated delays arise. More often it's better to wait until the project nears its end or is completed. For college and university libraries, the academic calendar is another concern: Is your audience more likely to pay attention to your message at the beginning, middle, or end of the semester? (In fall, spring, or summer?)

Consider not only how to attract an audience of users, but how to retain them. The digital collection content is the product, but both interface and technical features can enhance its marketability: search, navigation, and display mechanisms and options, etc. These features are sometimes limited by the software or platform used but try to guarantee ease of use and minimize frustration to foster more positive interactions with the collection. Providing high quality metadata, proofreading and correcting OCR text transcriptions, and linking to related resources (catalog records, other digital items or collections) can further improve the user experience. Make information about rights and permitted uses as clear, noticeable, and convenient as possible—requiring users to direct inquiries to an office adds an extra layer (which could potentially lead to their misusing or not using collection items), but ensure prompt, friendly replies if this step is necessary.

Other ways to encourage audience retention: Even if you're outside the prospective user group, thinking about how you search and use the collection can remind you of details that

might otherwise be overlooked. Offer companion tutorials and search guides, as well as instructional sessions if the audience is institutional or local. Perform additional curation that will benefit your target audience—for example, setting up custom queries to isolate and bring forward subsets of the collection. Developing collection-based projects with your audience

can strengthen buy-in while also increasing collection value; examples might include supplemental research essays or teaching support materials. Keep an eye open for ways to facilitate interdisciplinary collaboration among user groups as well. Push out promotions again if the collection is enhanced with new content or improved features, to revive and renew interest and use.

If you find the right audience for your digital collection, they can help to publicize the collection by word of mouth or their own social networks. Bear in mind that successful promotion might lead to additional work, at least temporarily (for example, an increase in requests for hi-res scans if only lo-res access images are publicly available). Be prepared to expect the unexpected, as it's impossible to predict everyone who might use the collection and every way it might be used.

2. Social Media

Social media is an effective way to promote digital collections, and chances are that your library or institution already uses one or more platforms for general communication or promotional purposes. Before launching a platform for your library or archive, it is important to develop a plan. Part of this plan should be determining the amount of resources that can be allocated to social media activity. Social media is most effective when it is treated as an ongoing program, rather than as tool used sporadically for promoting certain projects. As such, it requires continuous activity, and therefore, staff time.

There are several things to consider when planning a social media program. The preparatory steps for instituting a library social media presence are as follows:

1. Define your goals
2. Define community/target audience(s)
3. Choose a platform that best aligns with audience(s)
4. Secure administrative buy-in, research institutional policies
5. Define a team (collaborative/individual)
6. Create a team policy including frequency of posting and engagement (time spent on likes, comments, follows).



7. Ensure team has adequate time resources/release to meet posting schedule and respond to comments
8. Create a style guide that covers voice, content. (Link to our Tumblr style guide)
9. Develop a voice appropriate to the platform, the collection, and the audience. Keep voice consistent and engaging.
10. Do you want to try to generate audience feedback or are you satisfied with one-way communication?

This document provides guidelines for some of the above steps, but more in-depth guidance can be found other books and resources, such as those by Solomon¹ and Swanson².

2.1 Audience

Social media platforms allow you to build an audience through a variety of interactions.

At the local/institutional level, start by integrating social media feeds into your library's website. For academic libraries, find out which campus-affiliated groups (students, faculty, alumni, other institutional departments and offices, etc.) are using the same platform, then follow their accounts. Engage them through interactions supported by the platform: liking posts, commenting, re-blogging or retweeting, and so on. Beyond your institutional audience, consider similarly engaging local businesses and organizations, as appropriate for the digital collection you're promoting, to build community relations and support.

Grow your audience at the regional, national, and international levels by networking, collaborating, and exploring partnerships with other institutions, consortia, associations, and organizations—not only those in the library and archives fields, but also hobbyist and professional groups as befits the digital collection. Start with those in your surrounding area or statewide—other institutional members of CARLI or the Chicago Collections consortium, for example—and expand your geographic scope from there. As above, follow and interact with other accounts. Organize and participate in cooperative activities. Use tagging to highlight topical elements (Chicago history, rare books, conservation) as well as library and archives-specific tags (*librariesofinstagram*, *libraryshelfie*, *bookfacefriday*, etc.).

¹ Solomon, L. (2011). *Doing social media so it matters : A librarian's guide* (ALA editions special report). Chicago, Illinois: American Library Association.

² Swanson, T. (2012). *Managing social media in libraries : Finding collaboration, coordination and focus* (Chandos social media series). Oxford: Chandos Pub.



2.2 Social media platforms

2.2.1 Facebook

Facebook (<https://www.facebook.com/>) is a social media platform run by Facebook Inc. that allows users to create posts that are added to their account page and shared with friends. Accounts can be created via email signup and is free.

Functionality: Images and video can be added into text posts for more context, captioned, tagged, and organized into albums. Posts can be made publicly available without membership and while it is easy to share materials to friends or the public, one must be a member to do so. Viewers and followers can respond via their own comments, likes, images, and other media within the same thread.

Demographics: As of 2017, Facebook has 2.2 billion active users.³ According to the Pew Research Study of Social Media, 81 percent of adults 18-29 use the platform, followed closely by 78 percent of 30-49-year olds and 65 percent of 50-64-year olds.⁴

Ease of use: Users just need to create a free account to be able to start sharing materials. Adding items to Facebook can be as easy as dragging materials into a post, as long as your items have no privacy concerns. Managing public comments and privacy settings are the main challenge using Facebook.

Analytics: Facebook provides a free analytics service called Facebook Audience insights which offers lots of information about Page Likes, demographics, device accessed, and location.

Automation: A third-party external service or app, such as Post Planner, must be used to automate Facebook posts by day and time.

Privacy: While a Facebook account and page can be set up and restricted for specific followers/friends, this can limit the amount of how much an item can be shared.

³ “Number of monthly active Facebook users worldwide as of 4th quarter 2017”
<https://www.statista.com/statistics/264810/number-of-monthly-active-facebook-users-worldwide/>

⁴ “Social Media Fact Sheet” <http://www.pewinternet.org/fact-sheet/social-media/>



Facebook Pros and Cons

Pros

- Ease of use for both posting and sharing.
- Ubiquitous and very well-known platform.
- Commenting can be used to add context, crowdsourced information, or allow for archivists to interact with the public.
- Older demographic who use the platform.

Cons

- Privacy settings and data sharing can be tricky.
- Youngest generation is moving away from Facebook.
- Optimizes images and adjusts quality a bit, so no high-resolution images.

2.2.2 Twitter

Twitter (<https://twitter.com/>) was launched in July 2006. As of October 2017, it has 330 million users.⁵

Setup: Twitter is free, and an email account is required to register an account. Twitter can be used through the web site (Twitter.com) and via mobile devices through the free Twitter app.

Posts: Posts on Twitter are called “tweets.” A tweet can include text, a link, and an uploaded image or video. Tweets typically have a 140-character limit. Currently Twitter supports PNG, JPG, and GIF formats. Like other social media platforms, there are differences between the website and mobile app. The app supports MOV and MP4 videos and the web supports the MP4 video format with H264 format with AAC audio.

Interaction: Twitter users follow other users, followed users’ tweets will appear in a “feed.” Twitter users can like, reply, retweet, and retweet and comment on other users’ tweets. These actions will be visible to a Twitter users’ followers. Users can also tag other user accounts in tweets. This will alert that user to your tweet, and in some cases their followers as well.

Privacy: Twitter users may make their accounts private, in which case all actions (tweets and any interactions with other accounts) are visible only to their followers, who have been approved by the user.

⁵ Q3 2017 Letter to Shareholders. Twitter. 2017-10-26.



Automation: It is easy to auto-post from a program such as Tweetdeck or Hootsuite, wherein you are able to pre-load content.

Demographics: According to Pew Research Center's *Social Media Use in 2018 report*⁶, 24% of U.S. adults say that they use Twitter. 23% of men use the app, and 24% of women do. 40% of adults aged 18-29 use it, and 27% are of adults aged 30-49 do. 19% of those aged 50-64 use the app, while 8% of people aged 65+ use it. In summary, Twitter users are young: the majority are under age 50, and nearly half are under age 30.

Analytics: Twitter provides analytics for activity and impressions for up to the last six months. Analytics page provides monthly summaries, and exports detailed data for custom date ranges in a CSV file. The data includes overall impressions, follows, likes, retweets, replies, URL clicks, profile clicks and other actions, by tweet. The data is not broken down further, such as by user demographics.

Twitter Pros and Cons

Pros:

- Tweets can include links, and therefore may be used to direct users to a specific web page.
- The ~140-character limit applies to tweets featuring uploaded videos and images, so it is simple to annotate images.
- The Twitter website offers full functionality; you do not use a mobile device to use it.

Cons:

- Although users tweet images and videos, Twitter is primarily a platform for sharing text. This should be considered when evaluating Twitter as a tool for promoting digital collections. Twitter users may not be as interested in visual content as another platform's users, so if you have very limited resources, it may be more worthwhile to invest your time in a more visual platform, such as Instagram or Facebook.
- Communication is restricted by the 140-character limit, other platforms such as Facebook and Instagram do not have these text limits.

⁶ Social Media Use in 2018. Pew Research Center. 2018-03-01. http://assets.pewresearch.org/wp-content/uploads/sites/14/2018/03/01105133/PI_2018.03.01_Social-Media_FINAL.pdf



2.2.3 Tumblr

Tumblr (<https://www.tumblr.com/>) is a free blogging and a social media platform owned by Verizon that is based primarily around the sharing of image and video.

Functionality: Posts can be created with images, text, links or video. Tumblr feeds often favor image, due to how the feeds are structured. Items can be shareable without an account via URL, but there is no commenting. Share/like is the extent of interaction.

Descriptive metadata must be added manually via a post, there's no specific fields or controlled vocabulary.

Demographics: According to Statista, there were 23.2 million users for Tumblr in 2016, with a projection of 26 million by 2018. 21 percent of 18-24-year olds use Tumblr and have been the main demographic over the past few years reaching. Older users have not gravitated to Tumblr. Only 7 percent of users 30-59 use it and 2 percent and age 60+ use the platform.⁷

Ease of use: Users can create a Tumblr account for free via email sign up. Adding items to Tumblr can be as easy as dragging materials into the browser window and clicking publish.

Analytics: A Google Analytics account or another more robust analytics tool is necessary for stats. Otherwise Tumblr offers activity logs about likes and shares for the past 30 days.

Automation: Normal accounts in Tumblr can schedule posts in advanced by date and time.

Privacy: Pages can be publicly available or set for private which requires members must to know a password to view the content.

Tumblr Pros and Cons

Pros

- Easy to add and share materials.
- Scheduling posts is east and free.
- Engaged younger demographic.

Cons

- Metadata is treated as regular text as opposed to searchable field-based entries.
- Older demographic is less engaged.

⁷ “Tumblr - Statistics & Facts” <https://www.statista.com/topics/2463/tumblr/>



- No albums or collections can be created.
- Optimizes images and adjusts quality a bit, so no high-resolution images.

2.2.3 Flickr

Flickr (<https://www.flickr.com/>) is an image hosting site owned by SmugMug. While there are social aspects to Flickr, its main functionality is to serve as a repository for photographers to display their works. There are free accounts for Flickr, but to remove advertising, enable the auto uploader, expand storage space, or add analytics- the paid PRO account is necessary.

Functionality: Image posts, captions, and albums can be created in the Flickr dashboard. Descriptive metadata must be added manually via a post, there's no specific fields or controlled vocabulary, but technical metadata from the image is ingested automatically during upload. Users may comment on items and share items via URL, but the social feed component of the platform is far more in the background.

Demographics: According to their website, Flickr has 75 million registered photographers and over 90 million monthly users.⁸

Ease of use: Free accounts are easily created via email, but a PRO account requires a credit card on file at the cost of \$50 per year. Users can add photos (and embedded EXIF metadata) with a few clicks or dragging the materials in bulk into the browser window.

Analytics: Flickr offers analytics for collections/each item via the paid Pro account. This involves how many views an item gets and what day they were viewed, but only information from the past 30 days is available.

Automation: Pro accounts can use an auto uploader that can upload photos directly from your computer automatically, but since the feed is not a temporal one, there's no specific timed upload of materials.

Privacy: Images, albums, and accounts can be available publicly or privately. Private accounts will keep materials from easily being shared and membership to those accounts must be approved by the owner.

⁸ "Working at Flickr" <https://www.flickr.com/jobs/>

Flickr Pros and Cons

Pros

- Well known, highly used photographic platform.
- Retains embedded technical metadata.
- Higher quality images can be hosted.
- Easy to add, create galleries and share materials.
- Different licenses can be applied to different content.

Cons

- Development and new features have been slow because it's an older platform.
- Simply images, not a lot room for posts/textual info.
- Social feed is lacking. As it is not the main focus of the platform, viewers need to go to a specific area of the Flickr site to see content from accounts they follow.

2.2.4 Instagram

Instagram (<https://www.instagram.com/>) was launched in 2010 and is owned by Facebook. It has 800 million users as of September 2017.⁹

Setup: Instagram is free, and an email account is required to register an account. Instagram is used through mobile devices through the free Instagram app, and through the web site with limited functionality (Instagram.com).

Posts: An Instagram post consists of an image or a video. A user can add comments to images or video post, and comment on other users' posts. The recommended formats for images are JPEG or PNG, for video it is MOV or MP4. The mobile app can access a device's camera, so that users can capture and upload a photo or video within the app. Instagram Stories is a feature that allows users to share their photos or videos with their followers, and these "stories," disappear after 24 hours, unless they are saved as "highlights." Users can add effects to their stories and annotate them in ways not available to images and videos that are shared as regular posts. Users can also create "collections" of saved posts, which are visible only to them.

⁹ "Strengthening Our Commitment to Safety and Kindness for 800 Million." Instagram. <http://blog.instagram.com/post/165759350412/170926-news>

Comments cannot include hyperlinked text, only hashtags are linked. Hyperlinked text is only possible in a user's profile.

Other image and video features can be downloaded separately and integrated into the app, such as Layout, which allows a user to size and arrange several images inside a single post.

All posts must occur through the mobile or desktop app; posting is not possible through the Instagram website.

Interaction: Users can comment and like their own posts or others' posts. Users can send a post to a specific user or users, as well as tag other users in a comment. When someone is tagged, the post is available on their profile page, but is not integrated into their feed for their followers to see.

Privacy: Instagram users may make their accounts private, in which case all posts are visible only to their followers, who have been approved by the user.

Automation: Currently there is no recommended automation tool for Instagram.

Demographics: According to Pew Research Center's *Social Media Use in 2018* report¹⁰, 35% of U.S. adults say that they use Instagram. 30% of men use the app, and 39% of women do. 64% of 18-29-year olds use it, while 40% of people aged 30-49 do. Use of Instagram continues to decrease with age: use occurs among 21% of 50-64-year olds, and 10% of 65+ year olds. In summary, Instagram users are typically younger than other platform users, and Instagram is extremely popular among social media users under 30, with 64% of them using the app.

Analytics: Instagram native analytics tool can only be activated by linking a Facebook and converting that account and your Instagram account to a business profile. Otherwise, the number of followers, and likes and comments per post can be tracked manually.

¹⁰ Social Media Use in 2018. Pew Research Center. 2018-03-01. http://assets.pewresearch.org/wp-content/uploads/sites/14/2018/03/01105133/PI_2018.03.01_Social-Media_FINAL.pdf



Instagram Pros and Cons

Pros

- Instagram is ideal for sharing visual content, and that includes images and videos from digital collections.
- Added features, such as Layout, offer varied ways to present visual content, which is not possible on other social media platforms.
- Given its user demographics, Instagram is an effective way to connect with college-age users, which may be included in your target audience.
- It is easy to provide contextual information in the comment section for each post.
- Unlike Twitter, there is no character limit.
- The interface is simple, and it is easy and quick to interact with posts in your feed, through likes.

Cons

- You cannot include URLs in posts, so cannot direct users to a specific web page, such as a digital collection landing page, as added contextual information. Instagram is not effective for driving traffic elsewhere.
- Users cannot easily share posts with their followers, as it is a two-step process to do so rather than Facebook and Twitter's one-step share and retweet functionality. As a result, reach is more limited.
- Use of Instagram requires a mobile device.

3. Digital Collection Aggregation and Sharing

A way to disseminate collections, expand your audience, and increase visibility is to share them with larger collections. These may be consortial, regional, or national digital collections, or they may simply be a catalog of digital resources. Sharing typically occurs in two different ways: by (1) sharing metadata, and (2) sharing the objects themselves.

3.1 Sharing metadata

In sharing metadata, another repository will copy and recreate the item-level metadata that describes your digital objects. This is typically known as “harvesting” and it applies to metadata only; the digital objects are not copied. The repository will then store that metadata in a record, to which is added a URL that resolves to the original metadata record. The new record is indexed along with the other metadata records that the harvesting repository already

stores. (The process of adding records to a repository that were obtained through harvesting or another method is known as “aggregation.”) When a user accesses one of these harvested records, they will click through to be taken to the original metadata record, in the repository from which the metadata was harvested. There they can view the original metadata and object.

A common way to share metadata is through the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH)¹¹. This protocol enables harvesters to request information from repositories in XML structure over HTTP. Many institutional repositories, digital libraries, digital archives, and the software that they are built on are OAI-compliant. Those that are also called OAI repositories. OAI-PMH requires that metadata be in the Dublin Core standard.

Sharing metadata does not simply entail the use of an OAI repository. The information in your metadata records must be sharable as well. Is your metadata hyper-local? Was it created only with institutional users in mind? Will the content be interoperable with records in a different state’s repository? What about a different country? Adhering to best practices for sharable metadata

(https://www.carli.illinois.edu/sites/files/digital_collections/documentation/guidelines_for_sharable_metadata.pdf) is necessary for the discovery of your collections through other portals.

3.1.1 OAIster

OAIster (<https://www.oclc.org/en/oaister.html>) is a catalog of open access material aggregated through OAI-PMH. It was developed in 2002 at the University of Michigan, and since 2009 has been managed by OCLC. Repositories select and harvest content to be added to the catalog themselves, through the WorldCat Digital Collection Gateway. The catalog is freely accessible at oaister.worldcat.org and content is also indexed in OCLC WorldCat.

A benefit to sharing your metadata with a catalog such as OAIster is that it increases the exposure of your collection. Your content can now be discoverable outside of your institution’s digital collection portal, plus, your audience expands to include all users and potential users of OAIster. Also, the resources required to share metadata with OAI are few; the WorldCat Digital Collection Gateway is free, and the metadata that you want to share has likely already been created.

¹¹ Open Archives Initiative Protocol for Metadata Harvesting. 2018-04-04. <https://www.openarchives.org/pmh/>



However, there are downsides of OAIster, the first being its size. Its catalog currently includes over 30 million records, so discoverability is an issue, as it is with any large catalog.

Discoverability depends on metadata, and as a catalog that aggregates from over 1,500 institutions, its metadata quality and standards-adherence can vary. Also, OAIster's collection is extremely diverse: it's only requirement is that the material it describes is open access. This puts further burden on the metadata so that records may be sorted by material type and genre. As a result, material can be hard to find, and effort may be better put towards an aggregation platform that offers better discoverability.

3.1.2 Digital Public Library of America (DPLA)

Like OAIster, the DPLA (<https://dp.la/>) is an aggregated collection of metadata records for open access digital material across the country. However, there are a few key differences: (1) DPLA focuses on cultural and historical resources, (2) DPLA is a digital collections portal, rather than a catalog, and includes visual elements such as thumbnails in each record, and (3) DPLA uses service hubs, state and regional-level organizations which administer the cleanup and normalization of harvested metadata. As such, there is an intermediary level that performs the actions needed for metadata to be indexed and retrieved optimally in DPLA.

To share metadata with DPLA, organizations must first share metadata with a hub. The hub for Illinois is the Illinois Digital Heritage Hub (IDHH), which harvests and aggregates content from CARLI Digital Collections and the Illinois Digital Archives. Collections that are included in CARLI Digital Collections are, with the owning institution's approval, automatically aggregated by DPLA on a recurring basis. See DPLA Information and Documentation (<https://www.carli.illinois.edu/products-services/contentdm/dpla>) for more information about the IDHH and DPLA.

3.2 Sharing Objects

Institutions may choose to share digital objects, including the file and descriptive metadata, with another organization. This differs from the above model in that a copy of the digital file, along with the metadata, is stored and hosted in another organization's repository.

This option is especially useful if your organization cannot host digital collections. Or, it is possible that your institution can host digital collections, but the repository software is out of date, has a poor user interface, is under-used, or has poor functionality. In this case, sharing content with another organization that devotes more resources to their system development or to promotion will be a benefit.



3.2.1 Copyright

Copyright status should be considered when sharing content. Digital object sharing is different than metadata sharing, in that a digital object is copied and hosted in a new location. If, for example, you secured permission from the copyright holder of a photograph to include the image in your institution's digital collection, you will need to secure permission again for that image to be included in another organization's digital collection. The section on copyright in "Digital Projects 101: A Resource Guide" (see: https://www.carli.illinois.edu/products-services/contentdm/digital_projects_101) will provide more information about copyright considerations for digital collections.

3.2.2 CARLI Digital Collections

CARLI Digital Collections (<http://collections.carli.illinois.edu/>) is a repository for digital collections contributed by CARLI members. It uses CONTENTdm software, and is free for CARLI members to contribute, which they do by uploading content (digital files and metadata) through the CONTENTdm project client. For more information about CARLI Collections and how to contribute content, see the Digital Collections (CONTENTdm) documentation (<https://www.carli.illinois.edu/products-services/contentdm>).

In addition to being an "on-ramp" for DPLA via recurring aggregation by the Illinois Digital Heritage Hub, CARLI Collections is supported by a standing CARLI committee, the Created Content Committee, which considers approaches to promoting its collections and providing resources for its contributors.

3.2.3 EXPLORE Chicago Collections

EXPLORE Chicago Collections (<http://explore.chicagocollections.org/>) is a portal for accessing digital objects and archival collection finding aids. It is administered by Chicago Collections, a membership organization of Chicago-area museums, libraries and cultural heritage centers. Contributors ingest digital objects (files and metadata) via the EXPLORE Chicago Collections Metadata Hopper, a web application developed by Chicago Collections that works within EXPLORE.

Chicago Collections promotes its resources through a variety of methods and has standing committees for supporting the use of its portal and re-use of its content through exhibit building, cooperative reference, research and education.



4. Partnerships

This section focuses on developing partnerships for the purpose of promotion. Other reasons to explore partnerships might be for the purpose of fundraising or collection development, both of which are outside the scope of this document.

4.1 *Businesses*

Libraries seldom have the staff and resources needed to advertise their digital collections at a large, while businesses often devote significant resources to advertising and may have large existing customer bases. Some businesses may be interested in partnering to develop or promote a product related to your digital collection, allowing you to take advantage of these resources.

Consider exploring partnerships at a local level first, especially if your collection has a local focus. For example, if you have a photograph or postcard collection of the city or surrounding area neighboring your institution, you might find area businesses interested in developing prints, mugs, or calendars of images from the collection. In exchange for helping to develop a product (e.g. access to high-res images, metadata, etc.), you may be able to persuade the business to include a QR code, either on the product itself or in their advertising, to your collection. Not only is this one way to build partnerships between your institution and the local community, it is likely to be one of the best way to reach the core audience for such collections.

If you have a collection with broader appeal, you may be able to find a regional or national business partner. These businesses are much more likely to have a wider reach. If you've already invested in promotion through other means, like social media, these businesses may seek you out directly to promote a product that is already in development. If you have an idea for a product that might fit well with a business' existing product line, it may be worthwhile to contact them directly in order to gauge their interest.

Your relationship with the business will necessarily lend some legitimacy to the product, but that also means your reputation will be on the line. Even if money never changes hands, it may be a good idea to draft a memo of understanding with the business. This memo will define the responsibilities and expectations of both parties, defining how your digital collections will be used to develop and promote the product.



4.2 Other Cultural Heritage Institutions

Some of your collections may share a focus with similar digital collections at other institutions. In fact, you may already be collaborating with other institutions on collection development or hosting. Consider approaching these institutions to explore the possibility of pooling your promotional efforts. This could be as simple as coordinating a hashtag campaign or as complex as sharing a social media presence.

4.3 Scholarly Organizations, Conferences, and Publications

Your digital collections may have a particular topical focus of interest to a narrow group of scholars and researchers. Often the best way to reach these groups is directly through their conferences, journals, and listservs.

Investigate what conferences your target audience attends and consider submitting a proposal. Your paper or presentation might simply be an overview of the collection and how to use it or it may involve original research of your own that showcases the collection in some way. Alternatively, you could try to contact the conference organizer or area chair to inquire about giving a brief presentation at the next business meeting of the group or offer to organize a workshop that runs in parallel to the conference.

Also, try to determine the major journals that are read within the discipline. Many of these journals have sections that feature news or other announcements. Contact the editor and inquire whether they would be willing to publish an announcement about your project, then offer to send updates as the collection grows. You might also try to submit a paper to the journal, featuring your collection in some way. Depending on what sort of relationship you form with the editor, you might eventually explore the possibility of a special issue featuring scholarship related to your collection.

Many scholarly groups have their own communication channels. These might be listservs, Facebook groups, or Twitter hashtags. If permitted by the community's standards, make use of these channels to send relevant updates, such as information about recently added collections or calls for participation.

As with making faculty partnerships, it's always a good idea to try to engage scholars and researchers in development, whenever possible. Seek their input about collection development (e.g. "What do we have in our collection that we haven't digitized yet that you think we should?"), try to involve them in activities like tagging and other metadata work, or solicit their help with developing contextual materials, such as online exhibits and essays. This is not

only an opportunity to take advantage of their expertise but gives them a sense of ownership of the collection, which will make it that much more likely they will continue to use the collection in their research and share it with their colleagues.

5. Contextualization

5.1 Digital exhibits

Digital exhibits offer the ability to promote and curate larger amounts of materials and expand the reach of existing physical exhibits. Choosing the right platform that works best for your institution can depend on various factors such as content, resources, and technical expertise. A number of platforms can be used to develop new digital exhibits such as Omeka/Omeka S, Wordpress, Scalar, and Drupal, all of which can help libraries digitally curate and enhance their outreach.

5.1.2 Omeka/Omeka S

Created by George Mason to enable the curation of digital exhibits, Omeka (<https://omeka.org/>) is an open-source digital exhibit platform built in PHP.

Omeka.net offers their own hosted versions of sites which are free, but there is a self-hosted version available that offers a more customizable version of the platform that can be expanded through custom code and plugins.

A newer version of the Omeka platform called Omeka S has been recently released offers new features such as IIIF integration, multisite functionality, and more connections and operability to repositories like Fedora or D-Space. Both the classic Omeka Classic and Omeka S platforms are still being developed as of Mar 2018.

Omeka/Omeka S Pros and Cons

Pros

- Low learning curve/user friendly out of the box.
- Dublin Core and custom metadata schema compatible.
- Multisite installation, so you can manage all sites in one install (in Omeka S).
- Less frequent core updates mean less management.



Cons

- Questions about how long Omeka Classic is going to be supported.
- Smaller ecosystem means less development for plugins.
- Less aesthetic options/themes available out of the box.

- Both platforms have scalability questions. Omeka Classic requires one install per exhibit which requires more maintenance, while Omeka S is a new implementation that will need more stress testing as more sites get developed in a multisite implementation.

5.1.3 Scalar

Scalar (<https://scalar.me/anvc/>) is an open-source platform designed in PHP/Javascript for the exploration of digital humanities created by Alliance for Networking Visual Culture. Materials can be added individually or added via various repositories, like the Internet Archive or your own locally-hosted server, and added into frameworks that Scalar calls digital books. These digital books allow users to organize materials and create pages that can be populated with exhibit content and customized for a specific look.

Scalar Pros and Cons

Pros

- Built around semantic web publishing.
- Supports Dublin core metadata.
- Easy to use for page creation.
- Integration with existing repositories and IIIF compliant allows materials to be pulled and shared across platforms.

Cons

- Limited out of the box themes and looks.
- Digital book structure means site creation can require different curatorial outlook.
- Much smaller platform which has less ways to extend the functionality through plugins or themes.

5.1.4 Wordpress

Wordpress (<https://wordpress.com/>) is an open source platform and content management system built in PHP/MySQL. There are two versions of this platform. Wordpress.com offers a free hosted way to create a blog site that can organize and showcase materials, users are not

able to expand the functionality of the site or extensively customize the look of their sites. The more expansive version of this platform, which requires your own webhosting plan or server, is available for download via Wordpress.org, can be customized via custom code and via plugins that expand the functionality of the platform.

Wordpress Pros and Cons

Pros

- Large amounts of themes and plugins to expand functionality. (Wordpress currently powers 27 percent of the web which means lots of development.)
- Flexible design options and data models.
- Average learning curve for building pages and sites.
- Multisite installation, so you can manage all sites in one install.

Cons

- Less searchable and metadata options available out of the box.
- Maintenance of sites/plugins can be complex and time consuming.
- Learning curve for expanding a site is larger because there's so many options.

5.1.5 Drupal

Drupal (<https://www.drupal.org/>) is an open source content management system built in PHP available as a free download from Drupal.org. Sites can be hosted with paid hosted solutions, such as Acquia, or via your own in-house hosting via a database and web server that runs PHP. Drupal uses expansions called modules and visual frameworks called themes to enhance overall functionality and allows users to build sites in expansive ways.

Drupal Pros and Cons

Pros

- Flexible framework to build sites/exhibits
- Can be expanded to use Dublin Core metadata
- Extensive amount of module/theme development
- Can function as its own API to enhance its connections to other repositories and applications.

Cons

- Higher learning curve/technical expertise necessary to build sites with
- Higher amount of IT support to install and maintain.

5.2 *Physical exhibits*

Physical exhibits can be created and installed in conjunction with the debut of a new digital collection or can be used to revisit older collections that users may not know about.

Not all digital collections will be equally suited to presentation in exhibit form. Consider the following: Does the collection have sufficient visual appeal? Can the original objects be displayed? If not, are you able to produce high quality reproductions?

The exhibit need not be static, limited to objects or images in cases. Try to have a computer positioned nearby, set up so that exhibit viewers can access the digital collection. Enable your audience to interact with the exhibit if at all possible, especially in a way that gives them something to take away (a physical or digital object they create, a QR code linking them to the exhibit site, etc.). Document your exhibit and create a digital archive to allow access even after the show's over.

Although physical exhibits will most easily reach a local audience, take a look at your institutional calendar when planning the dates for your exhibit. Note when major events are scheduled at your institution—overlap with these other activities may draw increased foot traffic from visitors. Also, publicize the exhibit through area media outlets to reach a wider audience beyond your institution.

6. Curriculum

Developing curriculum around digital collections is one of the most direct ways to promote your digital collections and demonstrate the value of digitization to your institution. This section offers suggestions for making partnerships with teaching faculty, integrating digital collections into K-12 classroom instruction, and tips for developing lesson plans and other classroom materials.

6.1 *Seeking partnerships with teaching faculty at your institution*

With increasingly limited resources, it is more important than ever to justify the value of digitization by framing such work in terms of institutional goals and mission. While in some cases the mere act of preservation is reason enough to justify this work, more often we are building collections to support teaching and scholarship. This section discusses building collaborations with teaching faculty at your institution to incorporate digital collections into coursework.



Go to them: Despite your best efforts, faculty and staff may not be aware of your digital collections. Reach out to relevant departments and volunteer to give a brief presentation during their next faculty meeting or during an informal brown bag. Although you can arrange these events at your library, it's best to make it as easy as possible for faculty to attend--go to them, don't expect them to come to you. This is an opportunity to present the work you've been doing and signal that you're actively seeking partnerships.

Make contact: If you've given a presentation to your target department, you may have already made contact with interested faculty. If not, investigate faculty research interests by visiting their departmental home page and identify any overlap with your collection. You can then contact individual faculty members directly to gauge their interest in a partnership. Whenever possible, try to involve your subject specialist, who can make the necessary introductions.

Collaborate: You're likely to be more successful incorporating collections into the curriculum if faculty and staff feel some sense of ownership. Try to engage partners through participatory collection-building or the development of contextual and interpretive materials. At the start, don't be afraid if the parameters of the collaboration seem poorly defined, but also be careful to adjust expectations based on available resources.

Remember that many of the departments you may be working with will be looking for ways to quantify their value to the University and students in the face of budget cuts. Increasingly, these faculty are expected not only to teach, but to graduate students who can find jobs. With this in mind, find ways to frame a collaboration that will make these cases easier to make. One way to do this might be to involve students in the creation of online exhibits or contextual essays that you publish on your site, which they can include in their portfolios.

Facilitate and participate: Discuss classroom activities with your faculty partner but remember that your role is as a facilitator. Respect their expertise. Offer to teach a brief instruction session in how to use the collection and participate in classroom activities, if invited. This can also be a great opportunity to get some feedback on how your collections are being used.

Build frameworks, not projects: Instead of working on one-off projects, focus on collaborations that have the potential for continued growth. These are more likely to be better investments in your time and effort, since you will not be starting from scratch each semester. Work with partners to build a framework that can be re-used in succeeding semesters, then find ways to improve and expand the model from semester-to-semester.

6.2 Incorporating digital collections into K-12 curricula

Standards: Teachers have increasingly less flexibility when defining their curriculum. Be aware of this fact and make an effort to tailor lesson plans to existing standards. This includes not only Common Core (<http://www.corestandards.org/>) and the Illinois Learning Standards (<https://www.isbe.net/Pages/Learning-Standards.aspx>), but subject-specific standards, like the National Curriculum Standards for Social Studies (<https://www.socialstudies.org/standards>). When developing lesson plans and classroom materials, clearly identify what standards are being met. That said, it is not necessary (or desirable) to rigidly adhere to these standards or to try to incorporate all of them into a single lesson. Aim to design curriculum that will be used and is useful, not curriculum that checks off as many standards as possible.

Collaboration: Many teachers are required to earn continuing education credits. Contact your College of Education to explore the possibility of working with these students on an internship or practicum. When designing new curriculum, it is also better to work with a practicing teacher, especially one who may be able to help test your lesson plans.

Many departments will also have faculty responsible for coordinating teacher education for their discipline, e.g. English or History. Talk to the relevant subject specialists in your library or the department head to identify these individuals and approach them about pursuing a partnership.

Keep in mind that K-12 educators are often overwhelmed with existing commitments, making it more challenging to form long-term partnerships, such as those you might form with teaching faculty at your institution. If you plan to approach a teacher for help developing lesson plans or classroom activities, narrowly define your request, in order to be respectful of their time. Try drafting some lesson plans and asking for feedback, rather than expecting a teacher to develop the lesson plan for you.

6.2.1 Workshops, Seminars, and Institutes

The NEH offers grants for Summer Seminars and Institutes for teachers. These programs provide one- to four-week opportunities for K-12 educators to explore a variety of topics related to education in the humanities. Any university or college can host an Institute or Seminar, but program organizers must have experience with K-12 curricular needs. More details, including how to apply, can be found here:

<https://www.neh.gov/grants/education/summer-seminars-and-institutes>



6.2.2 Use Existing Models

Library of Congress Classroom Materials (<http://www.loc.gov/teachers/classroommaterials/>) contains classroom-tested materials produced by teachers that make use of the Library of Congress' primary source collections. This includes lesson plans, presentations, activities, digital exhibits, and more. Materials can be searched by common core, state, and organizational standards and further narrowed by grade.

7. Other Media

Take note of how other resources and services have been successfully promoted at your library or institution, both in print and electronically.

Traditional, everyday means of communicating information to users can be put into service. Often overlooked are bibliographic records in the library catalog that describe and enable discovery of digital collections and/or the items contained within. The in-person pitch, whether in a seminar or workshop, or more informally during one-on-one interactions, is a simple yet effective way to promote your collections. Recruit other library employees (beyond digital collections and outreach personnel) to help: For academic libraries, subject specialist liaisons as well as instruction and reference librarians can be especially useful in reaching out to target audiences.

Events, such as inviting an expert to present a public talk incorporating items from the digital collection, are another means of face-to-face promotion. Other possibilities include: public workstation screensavers; library blogs; newsletters; bookmarks; brochures; fliers; posters with tear-off tabs or QR codes; signs (indoor and outdoor); sidewalk chalking; bulletin boards; electronic billboards; banner ads; direct mail; email list distribution; booths at campus fairs; press releases, public service announcements, feature articles, and interviews with campus or local newspapers, radio stations, and TV stations; articles in journals (library or discipline-specific); presentations at meetings and conferences; advertisements with area media outlets or professional publications.

If professionally-designed promotional materials are outside your budget, then create your own in-house. Better yet, enlist the assistance of graphic design and/or marketing students. This approach benefits not only your library, but also the students by complementing their classroom education with practical real-world experience. (If students are your target audience, insights from group members are an added bonus in an already win-win situation.)



8. Assessment

Ongoing assessment of digital collection promotional efforts is necessary to determine the overall effectiveness of these efforts as well as determining if promotional methods are aligned with stated goals. Through a combination of quantitative and qualitative measures, an institution can, to varying degrees, determine if promotions are increasing the amount of exposure to a particular digital collection and the depth of user connection to these collections. In cases where these measures do not meet expectations, it is necessary for the institution to reevaluate promotion goals and methodology and how effectiveness is defined and measured.

8.1 Quantitative Measures

Quantitative measures of promotion efforts will generally focus on objectively countable “amount” measures. The most important is collection use in the form of collection views or “hits” at the collection or item level which can be collected via CMS software or server logs. These statistics can also be gathered from any related “digital exhibition” platforms or systems that may aggregate or harvest metadata from your collection. Additionally, institutions that have implemented promotion via social media can collect “amount” data using the particular analytics features built in to each platform (see section 3.3). In some cases, an institution will need to integrate a third-party tool such as Google Analytics to measure quantitative data from platforms such as WordPress, Drupal, and other content management systems and digital exhibition systems.

Using analytic functionality available from your library’s chosen promotion platform, important measures such as page visits, likes, shares, retweets, etc., should be identified that reflect use goals outlined at the beginning of your promotion efforts. Baseline measurements of these facets should be recorded and documented at the outset of promotional efforts. Periodical measurement of these facets should then be taken at various times throughout the promotion process. By comparing these measurements in terms of success criteria, an institution can have at least a foundational starting point in assessing the impact of promotional efforts through easily definable quantitative measures.

8.2 Qualitative Measures

While there is also a need for qualitative baseline measurements, these measures can be harder to define and measure than quantitative measures. In general, these measures tried to define the impact or depth of conversations or connections to a collection rather than numerical hits or other contacts. In the realm of social media these measures can include “mentions” or other references by third-party accounts. It can also be measured by references

by other libraries or collections on their own sites or social media platforms. The depth of social media promotional effectiveness can be analyzed by looking at the depth of social media feedback through comments and other written feedback on social media posts.

Qualitative measures are possibly easiest to measure when implementing promotional effects through curriculum integration, physical exhibitions, and partnerships. These methods allow for targeted user feedback through surveys or comment forms or face to face conversations with users at point of contact. In addition to user community feedback, heightened community awareness can be measured through mentions in institutional or local news or other local promotional resources. Promotion teams can consolidate and analyze this data and as in the case of usability studies, the volume of this input does not need to be great in order to provide substantial and significant feedback. This type of data collection can also be collected when implementing collections into curriculum. Not only can the amount of integration be measured, assessment can be done in courses in workshops to measure the impact of collection on learning outcomes.

8.3 When Measures Don't Meet Expectations

Step 1: Review Goals

After a period of implementation, assessment can begin with a review of goals and expectations of your promotional efforts. Were goals realistically stated? Was there a realistic timeframe? Can goals be defined more specifically or accurately? If goals are determined to be unrealistic or need to be defined in an alternative manner, this will need to be done before continuing with assessment.

Step 2: Determine Reasons for Lack of Success

- Was promotional platform appropriate? It may be the case that the initial platform chosen was not aligned with goals or target communities and it may be necessary to try different approaches or implement other means of promotion.
- Was staffing appropriate (lack of buy-in, lack of expertise)? Again, this can be generally related to the promotional platform chosen. It may be required to reevaluate staff expertise, motivation, or simply the availability of staff resources to determine if staff characteristics are properly aligned with desired outcomes and the platform chosen the achieve these outcomes.
- It may be the case that everything that could be said about a collection has been said and it may be time to move on to promoting a different collection.

- It may be the case the anticipated audience doesn't exist to the extent that was expected at the outset of promotional efforts. If this case it may be necessary to redefine the target audience or choose another collection with a more significant target audience for promotion.

Step 3: Evaluate Return on Investment (ROI)

An accounting of how much staff and other library resources have been expended on promotional efforts must be compiled. The team must compare this expenditure to measured quantitative and qualitative returns in terms of stated goals, and determine the acceptability of this return on investment?

APPENDIX A: Other Resources for Digital Collections Promotion

Search Engine Optimization

"Metadata, Schema.Org, and Getting Your Digital Collection Noticed", American Library Association, July 11, 2014. <http://www.ala.org/tools/article/ala-techsource/metadata-schemaorg-and-getting-your-digital-collection-noticed-3> (Accessed April 4, 2018). Document ID: 10343965-65d4-7fc4-8574-12cb91c23c87

Wikipedia

Galloway, E. & DellaCorte, C. (2014). Increasing the Discoverability of Digital Collections Using Wikipedia: The Pitt Experience. *Pennsylvania Libraries: Research & Practice*, 2(1), 84-96. doi: <https://doi.org/10.5195/palrap.2014.60>

“Wiki Markup Cheatsheet.” Wikipedia. Accessed 2018-04-04.
https://en.wikipedia.org/wiki/File:Wiki_markup_cheatsheet_EN.pdf

APPENDIX B: CARLI Member Survey: Digital Collections Promotion

Created Content Committee Annual Project: A Survey of the Use of CARLI Digital Collections (2015) includes data from CARLI member institutions about promotion and marketing of their digital collections.
https://www.carli.illinois.edu/sites/files/files/2015CreatedContent_SurveyUseDigitalCollections.pdf