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.

This questionnaire was prepared for IMAP by Chris Lacinak. As former Vice President and Chief Technology Officer of VidiPax Lacinak spent years consulting with Corporate, Government, University and Nonprofit moving image and sound archives on a wide array of preservation and access issues. He is an Adjunct Professor for the NYU Moving Image Archiving and Preservation Program and consults for organizations including the Library of Congress, Stanford University and the Image Permanence Institute. His recent work includes projects addressing high efficiency reformatting, quality control systems, collection assessment and prioritization, metadata, systems and workflow integration, access strategies as well as file formats and compression schemes. Lacinak is also active in standards forming and relevant organizations including the Audio Engineering Society, Association for Moving Image Archivist, International Organization for Standardization, Moving Image Collections (MIC), Harvard University and Indiana University. He can be contacted via www.chislacinak.com.