**YUL: CONDITION ASSESSMENT**

Each set of materials under review for digitization should receive a condition assessment informed and led by the Preservation department.

*Example:* For the Yale-SOAS Islamic Manuscript Gallery project, a condition assessment of the manuscripts for selection from the Medical-Historical library covered physical attributes and condition.

*Example:* When material is selected for digitization at the Beinecke, the original object is given a quick assessment by the originating curator or cataloger to make a decision about the overall condition of the object and its suitability for digitization in its current state. If there is any question about its condition, a representative of the Preservation department is called in to examine the material and make a recommendation about whether to or how to stabilize the material to allow in-house digitization. If the material is judged to be too damaged or fragile for digitization in its current state, the item either will receive conservation treatment in the library or be sent to a specialist (e.g., North East Document Conversion Center – NEDCC) where conservation treatment will be performed and digital surrogates created.

### a. DECISIONS

- **OUTSOURCING**

A Best Practice regarding the choice of outsourcing materials for digitization should consider economic factors, the condition of the materials to be digitized, specialized needs for equipment, software, or staffing, and existing priorities that may divert tasks from in-house operations to vendor-supplied activities. Economic considerations should factor into strategic planning as well as project-based initiatives such that when Preservation conducts a condition assessment of monographs or serials, a determination can be made to seek robotic rather than manual scanning to reduce the costs involved. In other cases, vendors who have equipment too specialized or too expensive for a YUL digital collections program should be considered in general as well as specific planning. For guidelines on vendor selection used by HathiTrust, see: [University of Michigan digitization specifications](https://www.lib.umich.edu/hathitrust/digitization/digital-library-digitization-guidelines).

- **IN-HOUSE**

Providing digitization in-house is a viable option when one or several of the following criteria are met: material too valuable, rare, or damaged to leave its location, the amount of material is too numerous or too specialized to outsource in a cost effective manner, an established digitization method in-house exists, or trained staff and/or appropriate equipment are available. One of the benefits of digitizing in-house is that the institution maintains all the steps of the process and has complete control over the source material and of the end product. One of the most important steps in the process of in-house digitization is the evaluation of the appropriate scanning method. The decision should be made by assessing the type of material, its condition, and by considering the desired end use of the files generated. The desired end use of the files should also inform the decisions made about output size and color space of the image. The digitization methods most commonly recommended and their common uses are:

- book scanners – typically utilized for OCR capability or mass digitization projects
- rapid imaging - mainly employed in high volume projects ranging from general circulation to special collections material
- flatbed scanners – suitable for flat and non-fragile works, generally used for both general circulation and special collections material
- high resolution photography – often used for printed reproduction or to create surrogates of material where repeated digitization is not desirable or permitted

### b. DISTRIBUTION OF CONDITION REPORT

Those library units involved in the particular digitization effort should review the results of the condition assessment jointly and adjust plans as needed.

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**YUL: March 2012**