Beyond the Checklist: Healing, Connection, and Capacity-Building Through Digital Preservation Peer Assessment

A white paper prepared for the Institute of Museum and Library Services for the Digital POWRR Peer Assessment Program, July 2025

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1. Executive Summary

The *Digital POWRR Peer Assessment Program* was designed to address a longstanding gap in the digital preservation field: how to meaningfully support practitioners at under-resourced institutions who often feel isolated, underprepared, and overwhelmed by the scale of digital stewardship. Building on over a decade of work by the Digital POWRR Project, this program went *beyond the checklist* - focusing not just on tools and frameworks, but on healing, connection, and the human experience of digital stewardship.

Over the course of four years, the program supported 36 participants across two training phases and six cohorts. Each phase spanned roughly one year, with additional time allocated for ramp-up, evaluation, and iterative improvements between phases. Participants were paired in small, intentionally matched groups to engage in self-assessment, peer evaluation, and community-building. Using tools such as the NDSA Levels of Preservation, the Digital Preservation Coalition's Rapid Assessment Model, and the NEDCC Peer Assessment Framework, participants were guided through reflective, pragmatic digital preservation planning within a scaffolded, emotionally supportive structure.

What emerged was more powerful than anticipated: participants consistently described the experience as one of professional renewal. They felt "seen," "less alone," and, for the first time in some cases, "safe to try." These emotional outcomes: confidence, validation, belonging - were not incidental. They were central. By fostering psychological safety, modeling vulnerability, and emphasizing mutual care, the program created the conditions necessary for sustainable learning and real-world application.

This white paper documents the program's structure, tools, and key lessons learned, while lifting up participant voices and reflections from mentors. It concludes with forward-looking recommendations for funders, administrators, educators, practitioners, and future implementers, urging the field to view digital preservation not just as a one-off technical challenge, but as a worthy investment in the people who perform this work.

This program has resulted in several culminating resources that strive to empower other practitioners, funders, and advocates. The case studies written by project participants provide much-needed insight on the work needed to start and sustain digital preservation, while also filling a gap amongst the community for published case studies. The reflections from the cohort facilitators provide insight into the time needed to invest in the people performing this work. And finally, the *Navigating Uncertainty* framework was developed to help practitioners assess their readiness and capacity by centering the human experience of stewardship work. Together, this work reflects a broader shift in the field: from compliance to care, from isolation to collaboration, and from burnout to belonging.

2. Introduction and Context

In 2014, Digital POWRR's *From Theory to Action: "Good Enough" Digital Preservation Solutions for Under-Resourced Cultural Heritage Institutions* white paper gave voice to a silent crisis: for many professionals at under-resourced institutions, digital preservation felt overwhelming, inaccessible, and emotionally paralyzing. "Faced with what seems to be an enormous undertaking," we wrote, "many peers... find themselves too overwhelmed to take the first steps."[1] That early work emphasized a pragmatic, incremental approach, urging institutions to embrace "good enough" preservation strategies and resist the trap of waiting for perfect solutions.

In the years since, the POWRR team has developed workshops, multi-day training institutes, and cohort-based programs rooted in that original ethos. Yet even as participants gained technical knowledge and confidence, it became clear that technical tools alone were not enough. Organizational misalignment, unclear mandates, emotional fatigue, and the isolating nature of the work often posed greater challenges than the technology itself. These issues are not unique to POWRR participants. As Blumenthal et al. (2020) observed in their qualitative study of digital stewardship practitioners, many feel "disempowered" by institutional disconnects and a lack of long-term support for their work, despite being deeply invested in preservation goals.[2]

These challenges informed the design of POWRR's next major initiative, the POWRR Peer Assessment Program. This distance-learning program was launched to support practitioners in taking those next steps. Grounded in peer learning, structured mentorship, and hands-on engagement with assessment tools, the program offered a practical, supportive framework for building digital preservation capacity, particularly for those working without formal training, institutional infrastructure, or a sense of professional belonging.

What we didn't anticipate was that the very intentional emotional scaffolding built into the program - trust, flexibility, community - would do more than just support learning: it would become the learning. Participants consistently described feelings of comfort, relief, and renewed confidence. They shared that the program helped them feel "seen," "less alone," and "safe to try." Many described it as the first time in a professional context that they felt capable instead of intimidated.

These reflections prompted a deeper realization: although we did not set out to create a model grounded in any specific facilitation theory, the program's design naturally mirrored many principles of supportive and human-centered learning. By emphasizing psychological safety, permission to begin, and mutual validation, the POWRR Peer Assessment Program created conditions where participants could not only learn, but also recover - from burnout, professional isolation, and the persistent fear of "doing it wrong."

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[1] Jaime Schumacher, Lynne M. Thomas, Drew VandeCreek, Stacey Erdman, Jeff Hancks, Aaisha Haykal, Meg Miner, Patrice-Andre Prud'homme, and Danielle Spalenka, *From Theory to Action: "Good Enough" Digital Preservation for Under-Resourced Cultural Heritage Institutions*, working paper (Northern Illinois University, August 27, 2014), https://huskiecommons.lib.niu.edu/allfaculty-peerpub/1056/.

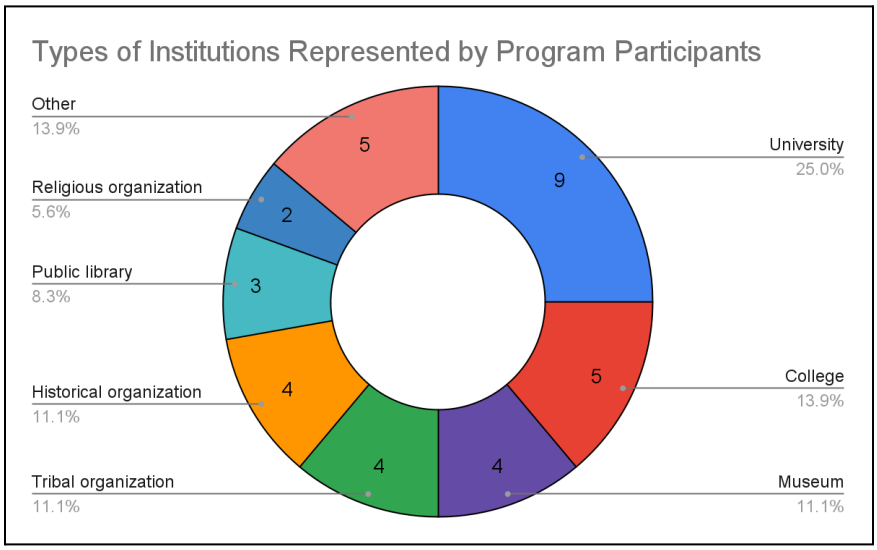
[2] Karl-Rainer Blumenthal, Peggy Griesinger, Julia Y. Kim, Shira Peltzman, and Vicky Steeves, "What's Wrong with Digital Stewardship: Evaluating the Organization of Digital Preservation Programs from Practitioners' Perspectives," *Journal of Contemporary Archival Studies* 7, no. 1 (2020), https://elischolar.library.yale.edu/jcas/vol7/iss1/13/.

This white paper explores how that happened. It documents the structure and outcomes of the POWRR Peer Assessment Program, reflects on the unanticipated emotional depth of its impact, and offers a new lens for understanding digital preservation training - not just as a technical challenge, but as a deeply human endeavor.

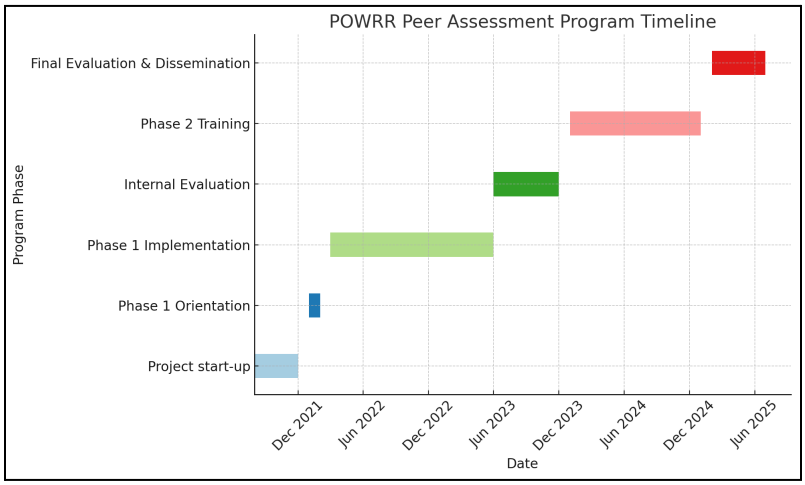
3. Program Overview

The POWRR Peer Assessment Program was developed as a distance-based professional development initiative aimed at helping cultural heritage practitioners build digital preservation capacity through reflection, peer connection, and structured assessment engagement. Grounded in over a decade of lessons learned from the Digital POWRR Project, the program offered an alternative to traditional top-down training: one that was community-centered, paced for sustainability, and built on mutual validation rather than evaluation.

Over the course of the program, 36 participants were selected across two training phases. As shown in the chart below, these participants represented a diverse range of institution types, including universities, colleges, museums, tribal organizations, public libraries, and other cultural heritage entities. This diversity was intentional: the program prioritized support for practitioners working in under-resourced settings, regardless of institutional size or type, in order to reveal shared challenges and foster peer learning across contexts.



The Peer Assessment Program was originally proposed as a three-year initiative but received a one-year extension from the IMLS to accommodate the principal investigator's job change and subsequent grant transfer between institutions. While largely invisible to participants, this transition involved significant administrative coordination that lengthened internal timelines. The overall structure spanned four years, unfolding as follows:



The program officially launched in August 2021 with internal planning and development. Recruitment for Phase 1 began that fall, and three initial cohorts started training in early 2022. Each cohort followed its own timeline and completed the program by mid-2023. Drawing on participant feedback and evaluation data, the project team made structural and curricular revisions to strengthen the experience. Phase 2 began in January 2024 with three new cohorts, all launching simultaneously under a streamlined format. That phase concluded in January 2025 with final participant showcases. The program wrapped up in mid-2025 with final evaluation activities and the development of this white paper.

While refined between two different training cycles, both phases followed the same general structure:

Program Structure

Recruitment and Cohort Formation: Participants were selected through open calls with the assistance of regional partner organizations, including the Association of Hawai'i Archivists, Northwest Archivists, Inc, Amigos Library Services, Midwest Archives Conference, and the Sustainable Heritage Network. Selected participants were then assigned to small cohorts of six to ensure mutual support and shared learning over time.

Program Curriculum/Structure: In **Phase 1**, the overarching curriculum was intentionally kept loosely structured, with mentors given wide latitude to adapt pacing and content to meet participant needs. While this flexibility allowed for responsiveness, it also led to confusion and uneven engagement. Participants expressed a desire for clearer expectations and more baseline instruction, noting that they weren't always sure where to begin.

In **Phase 2**, we introduced a more structured approach to address those needs. Each month was anchored by a specific topic (e.g., storage, policy, metadata, advocacy), accompanied by curated readings, discussion prompts, learning modules, and videos . This clearer scaffolding helped participants engage more deeply with the material and feel a stronger sense of progress and cohesion. As one participant reflected, *"Having a monthly topic and focus was a really helpful addition. It kept us on track and made the program feel more grounded."*

To support reflection, goal-setting, and accountability throughout the program, each participant was given a personalized POWRR Plan template at the outset. Originally developed by Stacey Jones and Jaime Schumacher for usage in Digital POWRR's multi-day training Institutes, the template was adapted and personalized for use in this peer-based program. This working document served as a scaffold for capturing assessment results, articulating short- and long-term goals, and tracking implementation activities across the year. Participants were encouraged to update their plans regularly, using them as a guide during monthly check-ins and as a foundation for their final case study. (The *POWRR Plan* template is included in **Appendix A**.)

Self-Assessment Activities: The first portion of the program focused on building foundational knowledge and establishing a shared vocabulary for digital preservation. Participants completed two self-assessments using the NDSA Levels of Digital Preservation and the Digital Preservation Coalition's (DPC) Rapid Assessment Model (RAM) to better understand their institutional context and identify actionable priorities.

Peer Assessment Activities: In the second portion of the program, participants transitioned from self-assessment to peer assessment, applying what they had learned in a collaborative setting. Using the Northeast Document Conservation Center's Digital Preservation Assessment Framework, each participant conducted a peer assessment of another institution's practices, choosing between two formats: a traditional model involving structured interviews, analysis, and a written report, or a co-assessment model, which emphasized informal discussion and shared note-taking with fewer reporting requirements.

This flexibility allowed participants to engage at a level aligned with their capacity, while still offering meaningful external feedback and reflective dialogue. Regardless of format, participants consistently reported that the peer component helped them see their own work more clearly, deepened their understanding of assessment frameworks, and strengthened their confidence in articulating needs and setting priorities. One participant noted, *"Just knowing what to really address and what specific tools to ask for helped a ton."*

Mentorship, Project Deliverables, and Community Dialogue: Each cohort was supported by a mentor - an experienced digital preservation practitioner - who facilitated monthly check-ins, supported progress, and modeled vulnerability and encouragement. Each phase of the program concluded with participants presenting their journeys and insights during public showcases: live, virtual, cohort-based events that created space for celebration, mutual recognition, and community accountability. Participants also authored individual case studies documenting their institutional context, challenges, and progress throughout the program. These case studies have been compiled into a companion volume to this white paper and were guided by the flexible framework in **Appendix B**, which synthesizes program insights and offers a snapshot of each institution's digital preservation journey.

These reflections served not only as capstone deliverables, but also as a growing body of institutional memory and peer-shared learning. To acknowledge the time and intellectual labor

involved, each participant received a $3,000 stipend to support their engagement and help offset the demands of participation, particularly the final writing and presentation components.

Implementation Phase and Tech Start-Up Support: The final portion of the program was designed to support implementation, giving participants time and structure to begin acting on the goals they identified through their self and peer assessments. After reflecting on their institutional context, defining priorities, and developing concrete goals within their customized POWRR Plans, participants were encouraged to take manageable, early steps toward sustainable digital preservation work.

Each participating institution received a very modest microgrant of $870 to support immediate, practical digital preservation needs. These funds enabled participants to take action during the program - but only after identifying clear needs and goals through the assessment process, ensuring that purchases were purposeful, contextual, and directly tied to their digital preservation priorities. Purchases varied widely depending on local priorities and capacity. Some institutions invested in essential hardware, such as external hard drives, RAID systems, or network-attached storage devices to consolidate and secure scattered digital files. Others acquired environmental monitoring tools to assess and stabilize storage conditions for physical media. Several participants used the funding to purchase software, redundant cloud storage, computer workstations, or peripherals like write-blockers: concrete investments that supported safer transfer from external media and helped establish more sustainable, trustworthy digital preservation workflows. Others used it to support platform research, digitization, metadata audits, file migrations, or consultant-assisted planning efforts. By addressing real needs with flexible support, the Tech Start-Up Fund served as a low-barrier catalyst for meaningful implementation and momentum.

Evaluation and Feedback Mechanisms: Evaluation was an integral part of the POWRR Peer Assessment Program's design. Participants completed a pre-test at the start of the program and a post-test and program evaluation survey at the end, allowing us to measure growth in confidence, knowledge, and perceived readiness to engage in digital preservation work. In Phase 1, participants also completed a mid-point check-in to reflect on their experience and suggest future adjustments that could enhance support and engagement for the second phase of the program.

Cohort mentors were also part of the evaluation process. In addition to regular project team check-ins, they were invited to reflect on their experiences through written feedback and facilitated discussions. Prior to the start of the program, mentors received dedicated training in group facilitation, and their feedback helped shape structural refinements between phases.

Assessment Models

Digital preservation assessments provide a critical starting point for practitioners and institutions navigating complex digital stewardship challenges. Used effectively, assessments offer structure for prioritization, tools for planning, and language for articulating needs across organizational boundaries. They can also provide clarity and confidence in environments where the scope of the work can otherwise feel overwhelming.

The POWRR Peer Assessment Program introduced participants to three key tools as part of a scaffolded learning progression: two focused on self-assessment, and one designed for structured peer-based evaluation. The NDSA Levels of Preservation and the DPC Rapid Assessment Model (RAM) helped participants reflect on their institution's current practices, capacities, and gaps. These self-assessment tools provided a foundational understanding of digital preservation readiness. Building on this knowledge, participants then engaged with the NEDCC Digital Preservation Peer Assessment Framework: a structured tool that guided collaborative evaluation, facilitated deeper analysis, and supported the development of actionable recommendations. Each tool offers a distinct but complementary lens, and all are grounded in community-developed best practices.

NDSA Levels of Preservation

Developed by the National Digital Stewardship Alliance (NDSA), the **Levels of Digital Preservation** model is a foundational framework that offers clear, actionable guidance for safeguarding digital content over time. Structured around five core functional areas - Storage, Integrity, Control, Metadata, and Content - the model outlines four levels of increasing maturity. Each level represents a series of progressively stronger practices aimed at minimizing risk and building capacity for sustainable digital stewardship.

The Levels are format- and platform-agnostic, emphasizing practical steps over prescriptive standards. This makes the tool widely accessible, especially for organizations with limited staffing, funding, or technical infrastructure. It is often used as a first-step diagnostic, helping institutions take stock of their current practices and identify targeted improvements that are feasible within their existing context. As one participant noted, *"The NDSA Levels of Preservation provided an excellent higher-level benchmark while also helping to create a more immediate "to-do list" of activities…. the Levels were the perfect place to start and the list of activities generated from that served as the foundation for all of [organizational] work in 2024 and 2025."*

The tool's origins reflect this ethos of accessibility and pragmatism. Released in 2013, version 1.0 was developed by NDSA members from across the digital preservation community to bridge the gap between aspirational standards and real-world constraints. The authors intentionally avoided jargon and judgment, designing the Levels as a "middle path" between informal guidance and rigorous certification frameworks like ISO 16363. The model's modular design enables progress in some areas while acknowledging limitations in others, providing flexibility without compromising clarity.

In the POWRR Peer Assessment Program, participants used the Levels early in the curriculum as a self-assessment tool to gauge institutional readiness and pinpoint areas for improvement. Many found the framework intuitive and empowering, especially in conversations with IT partners or administrators. As one participant shared in the final program evaluation, *"it would be a good tool to use when talking to IT to help explain and show how just storage does not equal digital preservation."*

The NDSA Levels are not only a planning tool, they're also a shared language. As demonstrated in the DLF's 2022 blog post "How Do You Use the NDSA Levels of Digital Preservation?", practitioners

across a wide range of institutions, from small community archives to large research libraries, have adopted the Levels as a way to:

- Prioritize needs and create achievable goals
- Support grant applications by articulating risk and readiness
- Communicate across departments using common terminology
- Train staff and onboard new team members
- Revisit progress over time through repeated assessments

This wide range of uses speaks to the tool's versatility and staying power.[3] While newer tools like the DPC's Rapid Assessment Model or the NEDCC's Peer Assessment Framework expand the lens to include organizational or relational dimensions, the NDSA Levels remain a trusted, technically focused benchmark for building foundational digital preservation capacity.

DPC Rapid Assessment Model (RAM)

The **Digital Preservation Coalition's Rapid Assessment Model (DPC RAM)** is a maturity model that helps institutions assess and benchmark their digital preservation capabilities across a spectrum of technical and organizational domains. Originally developed in collaboration with the UK's Nuclear Decommissioning Authority (NDA), RAM was designed to be flexible, broadly applicable, and easily understood; attributes that have quickly made it a mainstay in the digital preservation field.

RAM comprises eleven thematic areas, six focused on organizational capabilities (e.g., governance, policy and strategy, legal basis, IT capacity, continuous improvement, and community engagement), and five focused on service-level activities (e.g., ingest, bitstream preservation, content preservation, metadata, and access). Each area is rated on a five-level scale from 0 ("no awareness") to 4 ("fully optimized"), with built-in examples to guide institutions without prescribing rigid requirements. The model emphasizes continuous improvement, inviting regular reassessment to track progress and reframe priorities over time.

One of RAM's distinguishing features is its adaptability: it can be used by organizations of any size, sector, or digital maturity level. Unlike more traditional models geared toward academic libraries or memory institutions, RAM was developed to accommodate a variety of organizational contexts, including those outside the cultural heritage sector. This flexibility makes RAM an ideal entry point for institutions just beginning their preservation journey, as well as a useful benchmarking tool for more advanced programs. As one participant remarked in the final program evaluation, *"The structure and layout of the DPC-RAM meshed well with my brain and allowed me to evaluate [my organization] as a whole... It was incredibly useful to analyze where our repository is now and what needs to be done."*

RAM also shines as a communication and planning tool. Its visual radar chart offers a snapshot of strengths, weaknesses, and target areas, which can be shared with stakeholders to advocate for

[3] "How Do You Use the NDSA Levels of Digital Preservation?" *Digital Library Federation*, July 14, 2022. https://www.diglib.org/how-do-you-use-the-ndsa-levels-of-digital-preservation-2/.

resources or inform strategic planning. Practitioners often use RAM collaboratively with colleagues, which not only balances individual bias but also builds broader institutional investment in preservation goals. As one participant remarked, *"The DPC-RAM visualization sheet has been an illustrative guide in conversations with my Systems Librarian and Library Director to establish starting points and targets."* The DPC continues to support RAM users through updated guidance, benchmarking opportunities, translations, and workshops like the "RAM Jam," which helps organizations compare approaches and learn from one another. In this way, RAM is not only a self-assessment model but a gateway into a vibrant and supportive international community of practice.[4]

Compared to other tools like the NDSA Levels of Preservation or the NEDCC Peer Assessment Framework, DPC RAM stands out for its balance between organizational and technical dimensions, its user-friendly design, and its grounding in real-world use cases. For participants in the POWRR Peer Assessment Program, it provided a vital intermediate step between rapid self-assessment and deeper peer-to-peer evaluation. And as one participant reflected in their final evaluation, *"DPC-RAM and NDSA Levels - they are relatively quick and easy to do on a regular basis. Repeated evaluation can demonstrate progress or highlight areas that may be neglected over time."*

NEDCC Digital Preservation Peer Assessment Framework

The **Digital Preservation Peer Assessment Framework** used in this program was originally developed by the Northeast Document Conservation Center (NEDCC) through a 2016–2018 grant from the National Endowment for the Humanities (NEH). That project aimed to fill a critical gap in the field: while many institutions needed guidance for evaluating their digital preservation practices, few assessment models were specifically tailored to the realities of under-resourced organizations or peer-based support.

The work from the original grant produced two complementary guides:

- The **Digital Preservation Assessment Handbook**, designed for professional consultants and trained assessors conducting formal evaluations and delivering structured reports; and
- The **Digital Preservation Peer Assessment Guide**, which outlined a more informal, collaborative approach, encouraging practitioners to assess one another's institutions through shared dialogue and mutual insight.

The peer guide offered detailed prompts across multiple thematic areas—including policy, staffing, metadata, storage, workflows, and access—paired with idea banks and facilitation tips. Its goal was, in the words of the NEDCC handbook, "to help institutions document digital preservation successes, recognize areas needing further growth, and identify challenges that stand in the way of that

[4] Jenny Mitcham and Paul Wheatley, "Going for Gold or Good Enough? The Role of DPC RAM in Raising Organizational Maturity," *iPres 2022: 18th International Conference on Digital Preservation* (Glasgow, Scotland, September 2022), https://doi.org/10.5281/zenodo.7103273.

growth."[5] While comprehensive in scope, the peer guide was not designed with a year-long, cohort-based program in mind. It lacked implementation scaffolding such as templates, timelines, or structured pacing guidance. This created challenges in early phases of the POWRR program, particularly for participants who were new to assessment work or unsure how to begin. To address this, POWRR facilitators adapted the tool and built additional support structures around it as needed. Participants could choose between two formats for completing their peer assessments:

- A **traditional model**, involving interviews, institutional research, and a formal written report; or
- A **co-assessment model**, which emphasized informal conversation and shared documentation with fewer reporting requirements.

Both formats allowed participants to apply their growing knowledge in a collaborative setting and receive valuable outside perspectives on their digital stewardship practices. As one participant remarked, *"It was so helpful to be able to do a co-evaluation with another librarian whose work is very similar to my own. We were definitely paired well!"* Beyond technical evaluation, the process often opened up space for honest, nuanced conversation. As one participant noted, *"Peer interviews provided a space to openly discuss, deconstruct, and analyze challenges... and was the only assessment model that allowed for discussion of professional wellness as a vital component."*

Compared to the other tools used in the program, which emphasized quick diagnostics or broad organizational readiness, the NEDCC framework was more in-depth, qualitative, and exploratory. It asked participants not only to evaluate workflows and infrastructure, but also to engage in thoughtful conversation about constraints, priorities, and aspirations. This often created space for reflection that felt both validating and energizing. As one cohort mentor observed, assessment can serve as both a planning tool and an antidote to overwhelm, offering direction, language, and focus amid complexity. And participants found it helpful for longer term planning, with one stating *"The NEDCC module was instrumental in allowing us to create a strategic plan for the next 5 years, along with setting more immediate goals for during and after the program."*

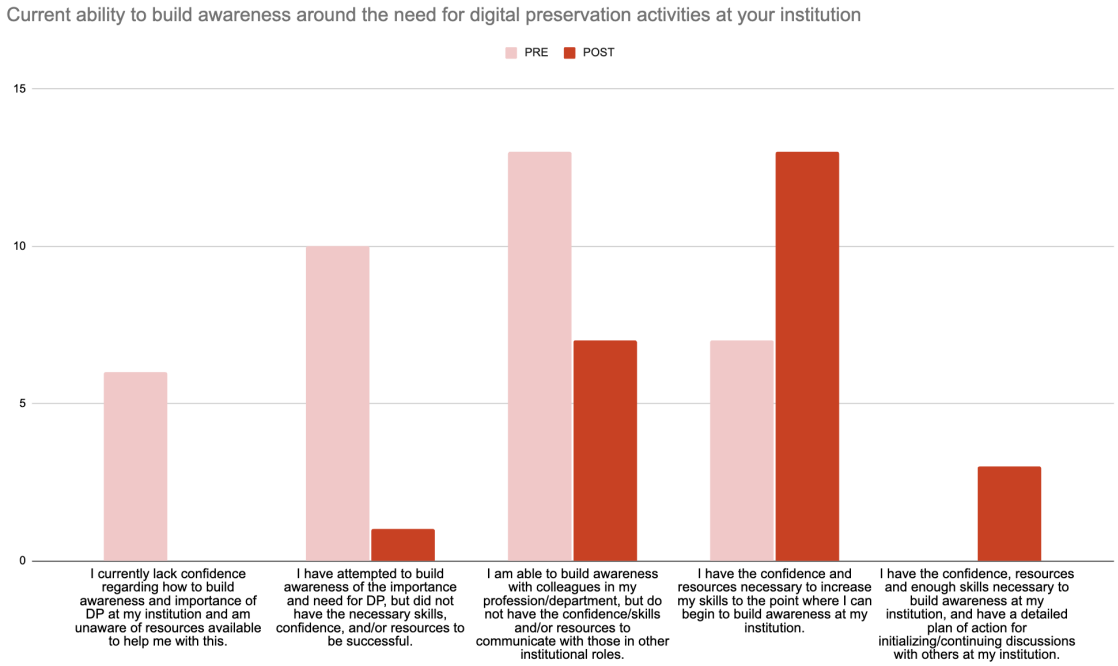
Together, these three assessment tools offer multiple entry points for reflection and planning, allowing participants to better understand their institutional context, set meaningful goals, and begin to build a path toward sustainable digital preservation practices. Each framework brings a unique lens, whether it's the tiered structure of the NDSA Levels, the organizational focus of DPC RAM, or the practical guidance of the NEDCC's toolkit. Together, they help scaffold a clearer, more grounded path toward sustainable digital preservation practices. Rather than prescribing a single route, they empower practitioners to chart progress in ways that align with their resources, values, and long-term vision.

[5] Northeast Document Conservation Center (NEDCC), *Digital Preservation Assessment Handbook*, rev. June 2024, 5, https://www.nedcc.org/assets/media/documents/nedcc-DPA-hndbk-6.24-web.pdf.

4. Key Outcomes

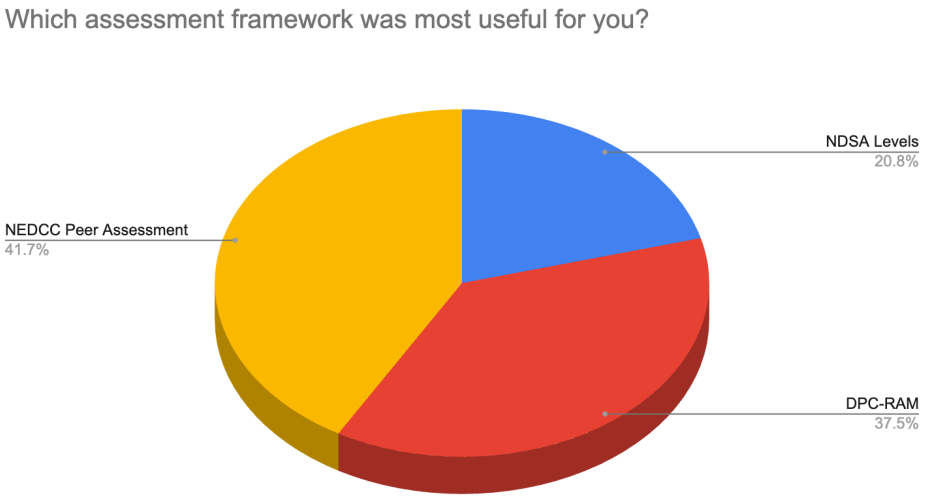
The POWRR Peer Assessment Program was designed not just to impart knowledge, but to foster confidence, catalyze action, and create lasting institutional impact. While each participant's journey was unique, several consistent outcomes emerged across both phases of the program.

Growing confidence and readiness. Evaluation data show a clear increase in participants' confidence and perceived readiness to engage in digital preservation. In pre- and post-program surveys, participants rated their knowledge of digital preservation concepts and their ability to advocate for local needs. Across the board, participants reported feeling more equipped to identify priorities, make informed decisions, and communicate effectively with colleagues and administrators. As one participant reflected in the program evaluation, *"At the beginning it was this huge, complicated problem that I didn't know how to tackle… I am now able to view it as multiple steps… Even a small change is progress in the right direction*." This growth was not incidental. It stemmed from a deliberately scaffolded structure that emphasized psychological safety - a climate in which participants felt secure taking risks, voicing uncertainty, and being honest about gaps in knowledge - alongside incremental progress and mutual support. Participants were not asked to prove mastery, but instead were encouraged to reflect, explore, and experiment – with a mentor and cohort there to validate their process. The following graph demonstrates a meaningful shift in program participants' ability to advocate for digital preservation needs locally, from their time entering the program, vs. the program's conclusion.

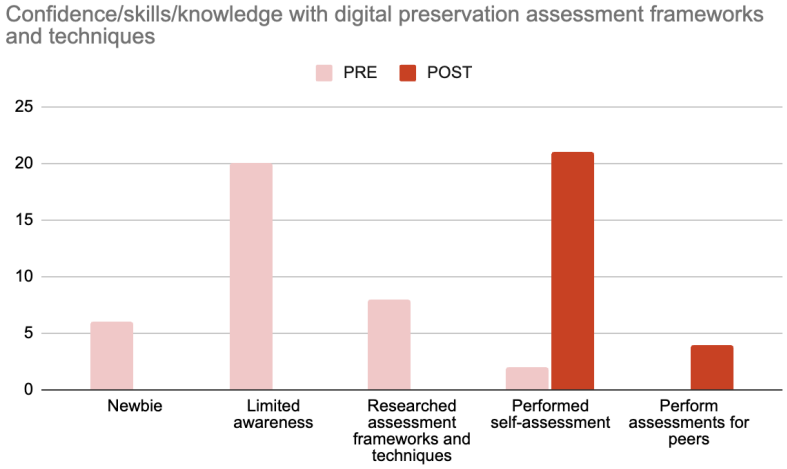


Meaningful engagement with assessment tools. Participants gained hands-on experience with three key frameworks: the NDSA Levels of Preservation, the DPC Rapid Assessment Model (RAM), and

the NEDCC Digital Preservation Peer Assessment Guide. While all three tools were seen as valuable, the NEDCC framework emerged as the most useful overall, despite the time investment required to complete it. When asked which tool was most beneficial in the final survey, the responses were as follows:



Many participants emphasized that the act of peer exchange – not just using a tool, but applying it in conversation with a real partner – brought new clarity to their own practices. As one participant noted in the final program evaluation, *"The peer assessment really helped me and my partner examine where our institutions were lacking and find ways to improve our work in digital preservation."* Overall, a significant shift was gained with working with assessment tools as a result of program engagement:

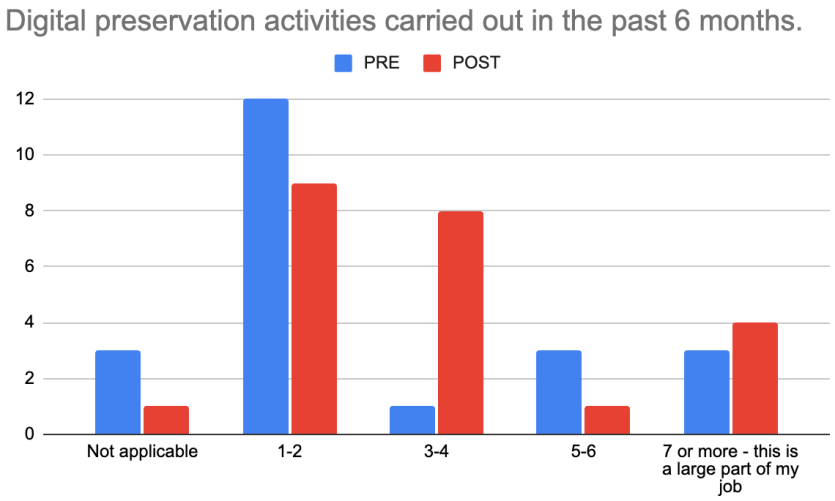


Early institutional changes and actions. Institutional impact was evident even in the short term. Through the self-assessment and peer assessment process, participants identified actionable gaps and opportunities. Each created a customized *POWRR Plan* to document their findings and chart a path forward. With the help of the Tech Start-Up Fund, all participants implemented at least one concrete change during the program. Examples of early actions included:

- Purchasing external storage or servers to consolidate dispersed files
- Setting up shared drives or accounts dedicated to preservation storage
- Conducting format inventories or metadata audits for digital collections
- Drafting new policies or internal workflows for digital stewardship
- Initiating cross-departmental conversations with IT or leadership to secure buy-in

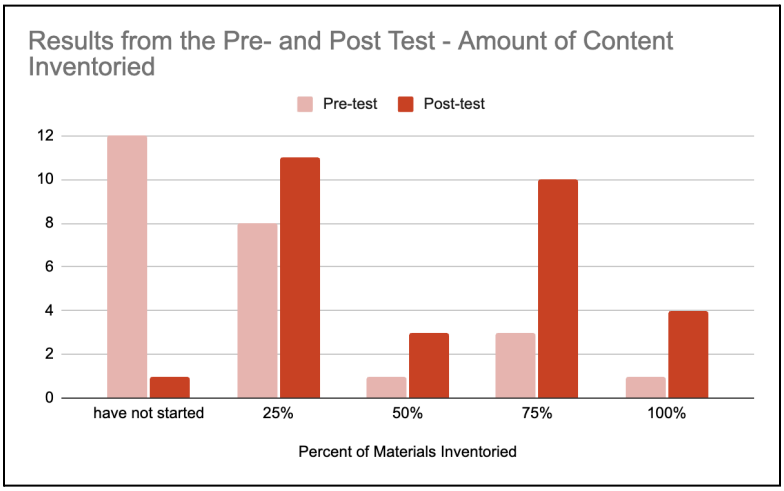
For many, these tangible steps represented a breakthrough. As one participant shared in their case study, "*Between the knowledge gained and the support received, this program has given me the confidence to start implementing changes … to advocate for digital preservation … and to claim a professional identity as an archivist.*" Even small changes felt monumental because they were tied to a larger plan, and participants no longer felt alone in making them.

This shift from hesitation to action is also reflected in pre- and post-program surveys. In the pre-test, most participants reported carrying out only one or two digital preservation activities in the previous six months. By the end of the program, there was a modest increase in reported activity, with more participants indicating they had undertaken three or more tasks. While the program was not long enough to allow for full implementation of all self-identified goals, the fact that any measurable progress occurred during this compressed timeline is an encouraging sign. It suggests that increased confidence, peer support, and a clear path forward can empower practitioners to take meaningful steps, even before full-scale implementation begins.

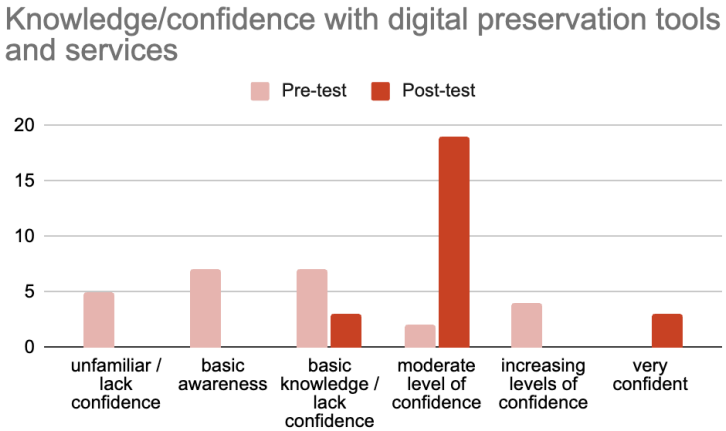


One specific area where this transformation was clearly visible was in digital content inventorying. At the start of the program, most participants reported having inventoried none or only a

small portion of their digital materials. By the end, however, a significant number had moved beyond the 50% mark—and several reached full inventory completion. This growth signals more than just progress on a checklist item; it reflects a deepened capacity to understand, manage, and preserve digital holdings.



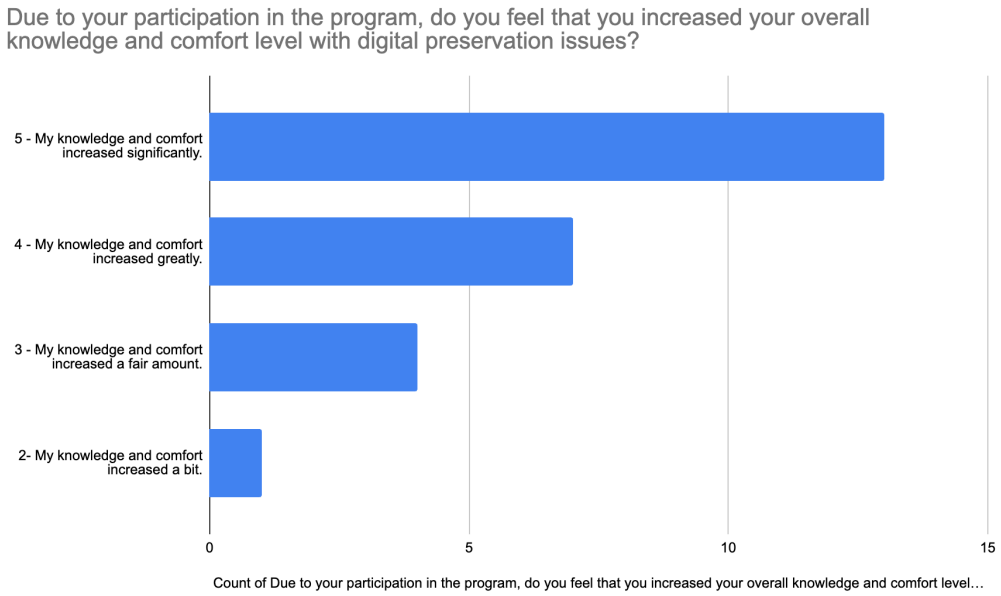
Increased confidence with digital preservation tools and concepts was also observed. While the program was not designed to offer in-depth technical training, it did provide participants with the context and vocabulary needed to better understand the technical landscape surrounding digital preservation tools and services. The shift from confusion to comprehension helped participants identify which tools might serve their needs, how to evaluate them, and where to seek support. In the pre-test, most participants placed themselves in the lower tiers of familiarity or basic awareness. By the post-test, the majority reported at least a moderate level of confidence, with some progressing to the highest tier. This growth in understanding laid the groundwork for more informed decision-making and more sustainable action.



More than the sum of its parts. Ultimately, the key outcomes of the POWRR Peer Assessment Program cannot be measured solely in completed assessments or equipment purchases. The most powerful impacts were relational and emotional: confidence where there had been anxiety, clarity where there had been overwhelm, and connection where there had been isolation. These outcomes are what make sustained digital stewardship possible.

As one participant put it in the program evaluation, "*I also feel less alone … we are all just doing what we can with the resources we have. … It really does take a village in order to be successful*." In other words, participants didn't just gain technical knowledge, they gained a supportive network, a sense of direction, and a renewed belief in their ability to do this work for the long haul.

This growth in confidence and capacity is reflected in post-program survey data as well. As shown below, nearly all participants reported a substantial increase in their knowledge and comfort with digital preservation issues, with the majority selecting "4" or "5" on a 5-point scale. No one selected the lowest rating. This underscores what we witnessed anecdotally throughout the program: that peer-supported learning, coupled with structured self-assessment, creates a uniquely empowering environment for meaningful progress.



5. Lessons Learned

Over the course of designing and delivering the Peer Assessment Program across two distinct phases, a number of important takeaways emerged. These insights reflect both the successes we observed and the challenges we encountered, and they have directly informed our thinking about potential future iterations of this program - or other peer-based initiatives seeking to build community, confidence, and capacity in the digital preservation space. What follows is a summary of key lessons related to program structure, attrition, facilitation, scheduling, and the conditions that best supported meaningful participant outcomes.

Structure and flexibility. In Phase 1, an intentionally open structure allowed mentors to adapt pacing and content to the needs of each cohort. While this flexibility was appreciated, it sometimes led to confusion, disengagement, or uneven progress. In response, Phase 2 introduced a monthly topical curriculum with clearer expectations and discussion prompts. This scaffolding increased cohesion and helped participants stay on track, but some still desired more formal instruction. These experiences suggest that future iterations might benefit from a blended model that combines peer dialogue with more structured instructional content.

Plan for attrition and transitions. While yearlong participation was the goal, staff turnover and shifting roles were common. The program team aimed to be flexible and responsive when participants needed to change jobs, adjust their focus, or even step away from the program entirely. In several cases, mentors took on more active roles to sustain momentum when participants lost their original peer partners. One Phase 2 cohort experienced four job changes over the course of the year, yet still most completed the program, largely due to strong facilitation, mutual support, and resilient relationships. Several participants credited the program with helping them transition into new roles with greater confidence.

In hindsight, the project director now sees that a larger instructional team could have increased the program's capacity to absorb such transitions. Additional mentors or co-facilitators would have allowed for more distributed support, succession planning, and custom content creation. Future implementers may wish to plan not only for participant attrition, but for the staff-side capacity required to hold the program through moments of disruption.

Facilitation matters**.** The mentor's role was critical in shaping each cohort's experience. While some mentors fostered especially close or communicative relationships with their groups, others navigated more variable dynamics or adopted a lighter-touch approach; sometimes due to participant needs, group chemistry, or competing responsibilities. The most successful cohorts often had mentors who were proactive, responsive, and consistent in maintaining meeting momentum and emotional support.

This was especially true in Phase 2, where one cohort composed entirely of small, community-based institutions benefited from a mentor with direct experience working at and consulting with similar organizations. Participants noted that this familiarity helped foster trust and made it easier to surface real-world concerns. The mentor's empathy and tailored support helped

participants feel less isolated in their challenges, creating a space where even novice practitioners could problem-solve together and "figure things out" without fear of judgment. This underscores the value of thoughtful facilitation training, early troubleshooting mechanisms, and dedicated support for mentors throughout the program.

Many participants noted that the monthly cohort meetings created a space where they felt safe asking questions, sharing uncertainties, and learning from peers in a nonjudgmental environment. These small groups allowed for both vulnerability and collective problem-solving, especially when facilitation emphasized openness, encouragement, and peer affirmation. That said, this dynamic was not consistent across all cohorts. In groups where facilitation felt more formal or less responsive, participants were sometimes less forthcoming, which underscores the importance of creating emotionally safe, welcoming environments in any peer-based program. Intentional facilitation strategies, such as validating uncertainty, prompting inclusive discussion, and explicitly modeling vulnerability can go a long way in establishing trust.

Scheduling challenges. Scheduling cohort meetings remained a persistent challenge across both phases, especially given participants' diverse time zones (including a cohort with four participants in Hawai'i). In some cases, participants were unable to regularly attend meetings, which contributed to feelings of disconnection and impacted their engagement with the program. While optional open office hours and cross-cohort events were offered, participation was limited. These challenges highlighted the importance of designing asynchronous or hybrid engagement options whenever possible, and of setting clear expectations for time commitment early in the program.

Prioritize intentional partner matching - while acknowledging that not every match will be perfect. One of the program's most consistently praised elements was the thoughtful pairing of participants into peer assessment partners. Considerable time was spent reviewing participant applications and institutional profiles to identify complementary matches based on organization type, size, capacity, and goals. Many participants noted how well their partnerships worked and how much they gained from the experience.

In Phase 1, participant cohorts were initially organized around three regional sponsor organizations— the Association of Hawai'i Archivists, Northwest Archivists, and Amigos Library Services. These are all membership-based organizations that serve smaller and under-resourced institutions, and we hoped that partnering with them would help us reach motivated participants who could benefit from the program. While this approach provided a useful starting point, it also revealed limitations. Sponsor affiliation did not always translate into active engagement, nor did it guarantee alignment in institutional context or peer fit. In some cases, participants joined through these reserved seats but were not fully prepared for or interested in the collaborative, peer-based model, which led to uneven participation and attrition over time. Based on this experience, we adjusted our recruitment strategy in Phase 2, opening the application more broadly and relying on sponsor organizations primarily as outreach partners rather than as participant pipelines.

By Phase 2, we refined our matching process to focus more deliberately on participant compatibility. We gave greater weight to factors like organizational role, digital preservation responsibilities, and shared institutional challenges. This approach yielded stronger cohort dynamics and more effective partnerships, regardless of sponsor affiliation. In fact, some of the most successful pairings in Phase 2 occurred among applicants selected from the general pool, rather than those connected to a cohort sponsor.

For example, one Phase 2 cohort included two participants located close enough to meet in person, which allowed them to tour each other's institutions and build a deeper collaborative relationship. Another pair bonded over mutual frustrations with institutional support, offering each other accountability and emotional reinforcement throughout the program. In Cohort 3, which focused on small institutions such as historical societies, museums, and public libraries, participants found shared context in their resource constraints and collection types, especially among those stewarding genealogy materials. These matches made participants feel “seen,” and empowered them to co-develop workflows that felt both feasible and relevant.

That said, not all matches were equally successful. In some cases, differences in communication style, workload, or engagement levels made it harder for pairs to connect deeply. In others, unexpected job loss or changes led one member of a pair to leave the program, leaving their partner without a collaborator. While mentors were encouraged to step in and provide additional support, this was not always a seamless solution, especially in the context of peer-based work. These dynamics highlight both the value of intentional matching and the need for contingency plans, such as mentor backup support, optional re-pairing, or flexible assessment formats when partnerships face disruption.

Conditions for success. Participants who experienced the most transformative outcomes typically had a combination of internal and external supports: significant personal motivation, a well-matched and communicative partner, rapport with their cohort mentor, sufficient time and flexibility in their job to engage meaningfully with the program, and a peer environment that fostered trust, encouragement, and shared accountability. These findings reaffirm that successful outcomes in cohort-based programs depend not only on content delivery, but also on relational dynamics, intentional design, and supportive working conditions.

In particular, many participants noted that having access to support at the moment they needed it, whether from a partner, a mentor, or a cohort member, was what enabled them to move from reflection to action. The opportunity to be vulnerable with trusted peers, to voice doubts without fear of embarrassment, and to hear “you’re not the only one” proved just as impactful as any training content. This reinforces the idea that capacity-building is not merely a technical journey, but a deeply human one, and that programs rooted in care, connection, and shared effort can unlock change that lasts far beyond the formal end date.

Investing in care. These reflections do not undercut the program’s success; they help surface an important truth: even peer-based, non-hierarchical models require sufficient infrastructure - both logistical and emotional - to be effective. Administrative coordination, intentional cohort design, skilled facilitation, and built-in time for reflection all contribute to an environment where care can be

practiced meaningfully. Care is not free. It takes time, labor, and forethought to hold space for both relational and instructional needs. Investing in those capacities from the outset is not a luxury, but a foundational requirement for sustaining programs that value people as much as process.

8. Recommendations

The lessons of the POWRR Peer Assessment Program extend beyond the boundaries of our cohorts. They offer insight into how digital preservation training and assessment can be reimagined—not just as a technical exercise, but as an act of mutual care, emotional restoration, and collective responsibility. Below, we outline recommendations for different audiences based on what we've learned.

For Funders and Policymakers

Invest in peer-based and community-centered models. Our findings show that emotional safety, trust-building, and shared accountability are key to sustained engagement with digital preservation, not luxuries, but infrastructure. Research presented at iPRES 2024 reinforces this urgency, emphasizing that digital preservation expertise is needed well beyond libraries and archives. It's equally critical in self-funded community organizations, independent artist practices, and other grassroots contexts. As the study notes, "digital preservation knowledge and practice is necessary in all domains and professions but is often presumed to take place only within the context of the memory or research institution."[6] It further notes that many professionals outside traditional heritage institutions are highly qualified yet the "training and sociotechnical support infrastructure for this professional domain is conspicuous by its absence." This underscores the need for peer-based models, not just for skill acquisition, but as a support network that bridges across cultural heritage, arts, and community-based contexts, ensuring that psychological safety, trust, and shared accountability become the infrastructure needed to sustain long-term digital stewardship.

Support not only the development of skills, but also the conditions under which those skills can be retained and applied. A critical barrier to long-term digital preservation isn't always just a lack of training, but a lack of organizational scaffolding, including dedicated time, compensation, and mental space for staff to apply their new skills. The Digital Preservation Coalition's Handbook emphasizes that "Carefully designed staff training and continuous professional development (CPD) activities can play a key role in successfully making the transition from the traditional model of libraries and archives to the digital or hybrid model."[7] Complementing this insight, Ithaka S+R's 2022 report on digital preservation systems found that many preservation initiatives developed with "soft money" lack long-term stability and intrinsic staffing support. They argue that without dedicated internal expertise and staffing, even tools and systems that are technically effective may fail to endure.[8] This underlines why funders should support programs that embed time for reflection, stipends, or release time for staff, and funding beyond pilot projects, so that newly acquired skills are retained, institutionalized, and scaled over time.

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[6] Laura Molloy, "Low-Resource/No-Resource: Lowering the Barriers to Sustainable Digital Preservation in the Contemporary Art Professions," *Proceedings of the 18th International Conference on Digital Preservation (iPRES 2024)* (Ghent & Flanders, Belgium, September 16–20, 2024), accessed July 24, 2025, https://ipres2024.pubpub.org/pub/yrvrepm9.

[7] Digital Preservation Coalition, "Staff Training and Development," in *Digital Preservation Handbook*, Institutional Strategies, accessed July 24, 2025, https://www.dpconline.org/handbook/institutional-strategies/staff-training-and-development.

[8] Oya Y. Rieger, Roger C. Schonfeld, and Liam Sweeney, *The Effectiveness and Durability of Digital Preservation and Curation Systems*, Ithaka S+R (July 19, 2022), accessed July 24, 2025, https://sr.ithaka.org/publications/the-effectiveness-and-durability-of-digital-preservation-and-curation-systems/

Support the creation of an integrated training institute for digital stewardship. Funders could help establish a mission-driven, non-membership-based entity offering tiered digital preservation training and certifications - accessible globally to any practitioner, regardless of affiliation or institutional size. This institute would not replace the many valuable training opportunities already in existence; rather, it would serve as backbone infrastructure to support and amplify them. In particular, it could partner with existing initiatives, like the Digital POWRR Project and others, by providing centralized administrative support (e.g., grant management, logistics, fiscal sponsorship), allowing instructors and program developers to focus on what they do best: teaching and mentoring.

Why this approach matters:

- **Practitioners are dispersed and underserved.** Digital preservation professionals span libraries, archives, museums, information science, records management, digital curation, and community archives, yet lack a unified, accessible training infrastructure. This disciplinary diversity underscores the field's fragmentation: practitioners must often cobble together skills from disparate sources without shared credentialing, scaffolding, or professional pathways. A well-resourced, integrated training institute could offer a unifying (but not exclusive) foundation for skill-building, identity formation, and community support across the field.
- **Fragmented training landscape.** Today, many digital stewardship educators, including independent instructors and mission-aligned nonprofits, must handle grant writing, logistics, and fiscal administration alongside their other work. This duplication of effort pulls time and energy away from curriculum development and delivery. A central support hub could relieve some of this burden, enabling collaboration while preserving pedagogical diversity.
- **Advanced training remains scarce.** While introductory content is more available (such as the DPC's free *Novice to Know-How* course) intermediate and advanced training options remain limited, especially for practitioners outside major research institutions. The Digital Preservation Coalition offers high-quality resources, but its deeper professional development programming is largely restricted to members. DPC cannot, and should not be expected to meet the full spectrum of global training needs on its own.
- **The Rare Books School provides a proven model.** Since moving to the University of Virginia in 1992, RBS has offered multi-tiered, non-credit continuing education with immersive, expert-led instruction and fellowship support, demonstrating how a field-specific institute can sustainably serve a diverse discipline while coexisting with other training efforts.[9]
- **Suggested model components:**
    - Tiered offerings (introductory workshops, immersive seminars, and advanced certificate programs)

[9] Rare Book School, "About RBS," *Rare Book School*, accessed July 24, 2025, https://rarebookschool.org/about-rbs/.

- Peer-based learning cohorts and mentorship opportunities
- Collaborative partnerships with existing training providers to support delivery, experimentation, and community connection
- Hybrid delivery: combining in-person immersion, online modules, and self-paced segments
- Fellowship and sliding-scale fee structures to support under-resourced participants
- Independent governance (e.g., a board of stewards, funder consortium, or university affiliation) to ensure sustainability and field relevance

This vision is not about centralization for its own sake: it's about building capacity, reducing administrative burden, and supporting a diverse ecosystem of educators and learners. A well-resourced training hub could help programs like POWRR and others like it not only survive, but thrive.

For Institutions and Administrators

Recognize that staff in digital preservation roles often bear hidden emotional burdens, from fear of failure to the isolation of being a "lone voice." Organizational acknowledgment and support can help prevent burnout. The 2021 NDSA Staffing Survey found that respondents "overwhelmingly perceived digital preservation at their organizations to be understaffed," and described significant stress resulting from dispersed responsibilities, inadequate resources, and the need to continually advocate for their work.[10] Institutions must respond not only by ensuring that digital preservation responsibilities are appropriately resourced, through adequate staffing, time allocation, and support, but also by embedding emotional and structural supports that affirm the value of the work and the people doing it. Conversely, institutions that invest in holistic support, recognizing the emotional and relational dimensions of stewardship, are much more likely to retain skilled practitioners and build resilient, future-ready programs.

Honor practitioner expertise and judgment. Digital preservation work requires more than adherence to technical standards, it demands contextual awareness, reflection, and the ability to make informed, adaptive decisions in complex environments. As Trevor Owens argues in *The Theory and Craft of Digital Preservation*, "Digital preservation is not about universal solutions. Instead, it is about crafting the right approach for a given preservation context… Machines alone cannot accomplish digital preservation. Digital preservation requires the work of craftspeople who reflexively approach digital preservation problems in situ and develop approaches that match the resource, material, and conceptual constraints of a given setting."[11] To enable this kind of thoughtful, responsive practice, institutions must not only provide training and resources, but also actively involve practitioners in strategic planning and decision-making. Input from those closest to the work - those who understand

[10] National Digital Stewardship Alliance, *2021 NDSA Digital Preservation Staffing Survey Report* (Baltimore, MD: Council on Library and Information Resources, 2022), 6, https://doi.org/10.48609/8f5d-kv37.
[11] Trevor Owens, *The Theory and Craft of Digital Preservation* (Baltimore: Johns Hopkins University Press, 2018), 72, ProQuest Ebook Central, http://ebookcentral.proquest.com/lib/uaz/detail.action?docID=5339543.

both the tools and the stakes - can lead to more realistic, sustainable preservation strategies. Even when additional resources are limited, purposeful cross-departmental coordination and respectful collaboration can strengthen organizational capacity.

Ultimately, digital preservation must be recognized as a core institutional function and not a side project or technical afterthought. In times of financial strain, this will require difficult trade-offs and a clear-eyed understanding of what's at risk. But by elevating practitioner perspectives and valuing the intellectual and creative dimensions of the work, organizations can foster a culture where digital stewardship is seen as essential to their long-term mission.

Foster relational capacity and psychological safety. Digital preservation work rarely fits neatly within a single department. It spans IT, archives, special collections, digital scholarship, and beyond, yet many practitioners are tasked with the work without clear authority, decision-making power, or cross-departmental support. Administrators should establish governance structures and reporting lines that reflect the interdisciplinary nature of preservation and equip practitioners to collaborate, advocate, and lead. Just as important, institutions should acknowledge the emotional and interpersonal dimensions of this work. A culture of psychological safety not only improves morale, it also strengthens institutional memory, encourages learning, and supports long-term planning. Embedding structures for peer mentoring, cohort models, or intentional relationship-building into professional development plans can help practitioners, especially those in isolated roles, build confidence, connection, and resilience.

For Educators and Trainers

Design for permission and progress, not perfection. Build structured supports that normalize starting small, acknowledging uncertainty, and celebrating incremental growth. These cues foster psychological safety and long-term engagement.

- Build structured supports and small, achievable goals that affirm starting points rather than celebrating only mastery. Structuring incremental tasks sends a signal that experimentation and uncertainty are normal.
- This approach aligns with adult learning science: learners perform better and persist longer when they see relevance, autonomy, and low affective risk in the task design.[12]
- Encouraging reflection, such as journaling progress or discussing "next small step" helps embed a growth mindset that sustains engagement long after a training or workshop ends.

Embed flexibility and reflection. Human-centered learning environments create space for participants to move at their own pace, revisit ideas, and respond to life circumstances without fear of judgment.

- Design for human-centered learning that allows time for participants to revisit ideas, accommodate life circumstances, and integrate learning on their own schedule.

[12] C. Lyn Currie, *"Facilitating Adult Learning: The Role of the Academic Librarian,"* Reference Librarian 33, nos. 69–70 (Spring/Summer 2000): 219–31.

- Research on andragogy (*the method and practice of teaching adult learners*) suggests adults are more motivated and effective when learning aligns with their lived experience, allows for self-direction, and can be applied immediately.[13]
- Techniques such as micro-reflections, optional revisit sessions, and asynchronous check-ins align with core principles of Dialogue Education, an adult learning framework developed by Jane Vella. Vella advocates for adult learning experiences based on mutual respect, psychological safety, relevance, and learner engagement; precisely the kind of supportive scaffolding that helps participants reflect, feel confident to ask questions, and make incremental progress.[14]

***Center facilitation, not expertise*.** Over time, we observed that facilitation styles rooted in empathy, active listening, and peer affirmation played a vital role in sustaining participant engagement. The facilitator's primary task is not to lecture but to hold space for shared inquiry, vulnerability, and co-creation. You don't need to know all the answers, you need to invite exploration.

- This approach aligns with established adult learning theory. For example, Steven Brookfield identifies six guiding principles for effective adult learning facilitation: voluntary participation, mutual respect, collaborative spirit, action and reflection, critical reflection, and self-direction, which emphasize creating collaborative, self-directed, reflective, and respectful learning environments over relying on didactic instruction.[15]
- Emerging best practices in adult learning highlight that trust-building, emotional safety, and inclusive dialogue are as critical to learning outcomes as content delivery.[16]

Cultivate psychological safety throughout. Learning environments built on psychological safety, where learners feel free to ask questions, explore uncertainty, and risk failure, are more likely to foster innovation, engagement, and collaboration.[17] In psychologically safe groups, individuals experience less fear and more openness, which leads to higher performance and deeper learning. Facilitation strategies that validate uncertainty, invite incomplete ideas, and allow for "epistemic distancing" (e.g. stating, "I might be wrong, but…") encourage experimentation and build trust in adult learning groups.[18]

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[13] Rebecca Wilson and Christopher Sneddon, "Adult Learning Theory," *JAHSE:PRE*, Journal of the Academy of Health Science Educators Pre-Print Repository, University of Utah (n.d.), accessed July 25, 2025, *"Adult Learning Theory"* chapter.
[14] *"How Useable Are Adult Learning Principles Across Cultures?"*, Missio Nexus (April 5, 2023), accessed July 25, 2025.
[15] C. Lyn Currie, *"Facilitating Adult Learning: The Role of the Academic Librarian,"* Reference Librarian 33, nos. 69–70 (Spring/Summer 2000): 222..
[16] *"Step 2: Creating Psychological Safety,"* in *Pathway 1: Establishing Inclusivity and Belonging*, Instructional Moves, Harvard Graduate School of Education, accessed July 25, 2025, https://instructionalmoves.gse.harvard.edu/inclusivity-and-belonging/step-2-creating-psychological-safety.
[17] Megan S. Jones, Amanda E. Cravens, Jill Zarestky, Courtney Ngai, and Hannah B. Love, "Facilitating Psychological Safety in Science and Research Teams," *Humanities and Social Sciences Communications* 11 (December 2, 2024): Article 1632, https://doi.org/10.1057/s41599-024-04037-7.
[18] Karina D. Torralba and David Puder, "Psychological Safety Among Learners: When Connection Is More Than Just Communication," *Journal of Graduate Medical Education* 9, no. 4 (August 2017): 538–39, https://doi.org/10.4300/JGME-D-17-00195.1

For Practitioners

You don't have to do this alone. Seek out peer communities, mentorship, and collaborative models. Digital preservation is rarely a solo act, and the Digital POWRR community remains an open, supportive space. Reach out to program staff or past participants if you're looking for solidarity, ideas, or even just a sounding board.

Start where you are. Progress doesn't require perfection - what matters is taking the first step. Begin with honest reflection: What's already working? Where do you feel stuck? Then look for small wins and incremental goals that feel achievable within your current context. You don't need a fully developed program or a dedicated team to begin assessing and improving your practices. Even small shifts in awareness or documentation can create ripple effects over time. Sustainable digital preservation is a journey, not a destination, and starting from exactly where you are is not only valid, but powerful.

Advocate for structural support. Help your organization recognize that digital preservation work crosses departments and domains. Assessment can be a powerful tool to spark these conversations as it provides a shared language for communicating needs, gaps, and goals. The case studies that accompany this white paper offer real-world examples of how practitioners used assessment to build momentum, secure buy-in, and make meaningful progress, even in challenging environments. Use these examples as advocacy tools when administrators may question the value of this work or hesitate to allocate time, resources, or authority.

For Future Implementers

Whether designing a new peer-based training program or embedding these values into existing workplace practices, the principles of this model are adaptable across a wide range of contexts, from regional consortia and academic libraries to community archives and national institutions. Core design elements like cohort-based learning, peer validation, role clarity, and structured flexibility can be tailored to meet local needs. Even in more hierarchical or siloed environments, elements such as cross-functional dialogue, iterative feedback loops, and lightweight peer consultation can foster inclusive and transparent planning. These values not only support practical outcomes but may also reduce burnout, encourage shared ownership, and strengthen long-term professional development across digital stewardship teams.

Models that reflect these values already exist in the field, offering potential frameworks that can guide future implementation. One example is the *Consensus Driven Digital Preservation* model developed by POWRR team member Jay Gattuso while at the National Library of New Zealand. Though originally submitted for the iPRES 2022 conference, the paper was never formally presented (though plans are underway to expand and publish this model alongside insights from the POWRR Peer Assessment Program.) It outlines a robust, role-based institutional workflow in which preservation actions are shaped through clearly defined responsibilities and iterative consensus among curatorial,

technical, and managerial stakeholders.[19] The model emphasizes cross-functional collaboration without eroding professional boundaries - each role contributes its specialized knowledge while working toward shared decisions through structured dialogue. This consensus-based approach not only clarifies ownership and accountability but also honors the intellectual and ethical dimensions of preservation work. While designed for a national library context, the model echoes many of the same values that emerged in our peer-based program: mutual respect across domains, shared accountability, and purpose-driven decision-making grounded in collective care.

To support successful adoption, future implementers should consider building in facilitation support, onboarding resources, and adaptable templates, particularly for teams new to digital preservation or collaborative planning. Together, these approaches reflect a broader evolution in the field: toward collaborative, consensus-oriented models that are both technically effective and emotionally sustainable.

[19] Jay Gattuso, *Consensus Driven Digital Preservation: An Organisational Approach* (paper accepted for iPres 2022, withdrawn), unpublished manuscript.

9. Conclusions & Next Steps

As a culminating outcome of this project, we developed *Navigating Uncertainty: A Human-Centered Assessment Compass for Digital Preservation Practitioners* to reflect the emotional complexity, relational labor, and uneven resource landscapes that shape digital stewardship work. Designed as both a conceptual framework and a practical guide, this model invites practitioners to explore their readiness, values, and constraints through a more holistic lens. It complements existing tools like the NDSA Levels and DPC-RAM by highlighting the human dimensions of sustainability: resourcing, trust, care, relationships, and community. Rather than prescribing benchmarks, *Navigating Uncertainty* encourages reflection, connection, and shared meaning-making as essential components of any assessment process.

Throughout the program, participants consistently described the importance of being emotionally validated in the face of overwhelming and under-supported work. They reported feeling "seen," "not alone," and "safe to try" digital preservation, even when conditions were imperfect. This emotional grounding proved just as important as technical instruction or peer feedback. The program's key outcomes suggest that confidence, connection, and clarity can emerge not from rigid standards, but from compassionate, people-centered engagement.

These findings echo a growing body of work that highlights emotional and interpersonal challenges in digital stewardship. The Digital Preservation Coalition's recent *Mental Health and Wellbeing in the Digital Preservation Community* survey reports that practitioners experience high levels of stress due to "unrealistic workloads, fragmented roles, and the ongoing advocacy burden of digital preservation" with about 70% facing unrealistic expectations and nearly 60% reporting burnout.[20] The report also emphasizes the significant role of organizational culture and leadership in either amplifying or alleviating these effects, calling for systemic support rather than leaving the burden solely to individuals.[21] These concerns resonate deeply with participants in the POWRR Peer Assessment Program, whose reflections revealed that feelings of isolation, uncertainty, and institutional invalidation were often more pressing than technical challenges. Grounding the *Navigating Uncertainty* framework in this human-centered context, supported by field-wide evidence, underscores the necessity of designing digital preservation initiatives that recognize practitioners as whole people, not just system operators. As the DPC report concludes, "If we are to be successful in our work, we need to reach a place where the people of digital preservation feel valued, supported, and fit to take on the challenge."[22]

This paper is part of a growing movement to reevaluate what success looks like in digital preservation. Stephen Abrams, in a sharp and much-needed contribution, argues for a more expansive, human-centered approach to assessing digital preservation success. He observes that current assessment practices fixate on technical process metrics and "trustworthy" systems under managerial

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[20] Digital Preservation Coalition. *Mental Health and Wellbeing Survey: Executive Summary*. York, UK: DPC, 2024. https://doi.org/10.7207/dpcmhws-2024.
[21] Ibid, 4.
[22] Ibid, 7.

control, without sufficient attention to real outcomes for stakeholders.[23] In his view, "trustworthiness" alone is an inadequate proxy for success, as true success must be gauged by the beneficial impact on users and communities.[24] Abrams calls for "multivalent" evaluation that incorporates the perspectives and experiences of all actors in the preservation ecosystem: not only managers, but also content producers and end users.[25] He argues that since the ultimate goal of preservation is to enable future use, user experience and community outcomes should be central metrics of success, rather than merely the presence of robust infrastructures.[26] This emphasis on outcomes and stakeholders aligns with this paper's focus on the emotional, relational, and labor dimensions of stewardship, reinforcing the conclusion that successful digital preservation is as much about people and values as about technology.

We hope that both the insights from this program and the *Navigating Uncertainty* model serve not just as validation, but as a catalyst. A catalyst for shifting how we train, support, and evaluate digital preservation work, centering people, not just systems. We invite funders, administrators, and practitioners alike to act on these findings: to embed care into infrastructure, to create space for emotional honesty, and to build capacity through community, not isolation. Sustainable preservation requires more than technical solutions - it demands that we recognize, support, and invest in the humans who carry it forward.

[23] Stephen Abrams, "Multivalent Evaluation of Digital Preservation Success," *Journal of Documentation* 81, no. 3 (2025): 749–751, https://doi.org/10.1108/JD-12-2024-0313.
[24] Ibid, 749-751.
[25] Ibid., 752–753.
[26] Ibid., 754–755.

10. Acknowledgements

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Phase 1 – Project Team

PI/Project Director: Stacey Jones (University of Arizona)

Facilitation Trainer/Evaluator: Stephanie Gerding

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- Cohort 2 - Sam Meister (Future Access for All)
- Cohort 3 - Nick Krabbenhoeft (New York Public Library) & Sam Meister (Future Access for All)

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- Patrick Wallace (Middlebury College)

Cohort Sponsors

- Northwest Archivists, Inc
- Association of Hawai'i Archivists
- Amigos Library Services

Phase 1 – Participants

Cohort 1

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Phase 2 – Project Team

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Cohort Sponsors

- Sustainable Heritage Network
- Midwest Archives Conference

Phase 2 – Participants

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Appendix A: The POWRR Plan

POWRR Plan

{Cohort Number/Name}
{Dates}
{Person's Name}

Description

The POWRR Plan is a customized cloud-based document for each participant of the POWRR Digital Preservation Assessment Program. This is the primary deliverable of the program and contains several different written components. The purpose of the POWRR Plan is to guide you throughout the program as we:

- Document knowledge acquired during the program;
- Document the current state of your digital preservation activities through self and peer assessments;
- Define your organization's needs and set goals accordingly;
- Determine what particular challenges and advantages will guide your decisions;
- Create an action plan with goals and activities defined at 3, 6, and 12 months.

Your **final** POWRR Plan document will contain (**or link out to**) the following components:

- A summary of your 2 short self-assessments (NDSA Levels & DPC-RAM);
- Your peer assessment report or co-assessment;
- Short and long term goals and implementation activities, and how you were able to address short term goals while participating in the program;
- Your finalized institutional case study, which will synthesize your content from the above.

Your POWRR Plan will initially be viewable by yourself, your cohort members, and project staff. If you would like to share it with co-workers or other outside people, the sharing settings can be adjusted.

Section 1: Organizational Profile & Gap Analysis

This section is meant to help you gather vital information about your current workplace and its collections. Below are some prompts to get you thinking about some important data points that you will want to have for your self-assessments, peer assessment and your final case study. Please feel free to add additional information if you think there are other components that should be included.

Organizational Profile

- Type of institution, mission/vision, principal service/user group
- Organizational structure
- Statistics, (such as annual budget, endowment (if any), enrollment (if educational institution), size of faculty (if applicable) and number of staff, number of staff involved with digital collections/preservation work, number of volumes in analog collection, etc)
- Description of department(s) and personnel responsible for digital content. Describe your level of technology support.
- Estimate of level of familiarity or current employee skill sets with digital preservation and technology
- Who are your stakeholders? Do you serve the public? Do you engage in outreach to these groups/individuals?
- Where do you get your funding? Do you have a budget for digital collections?

Survey of Digital Materials

- Description of materials (digitized and born digital materials)
- Major formats currently in use
- Description of any digital materials on external media/carriers that require stabilization (flash drives, CDs, floppies, etc.)
- Description of any audiovisual materials requiring reformatting (eg. U-Matic tapes, audio cassettes, etc.)
- Extent of digital materials (estimates are fine - eg. 1 TB, 500 GBs, etc)
- Media used for materials storage (eg. external hard drives, network servers, cloud storage, etc.)
- Current digital repositories, services, tools, etc. in use.
- What collections are the highest priority for preservation? Why?
- What is “in scope” for preservation? Is anything out of scope?
- Who are the biggest users of your collections?
- Do you have any existing digital preservation practices for particular formats? (i.e. a transfer workflow for external media, migration of one file type to another, etc.)
- What kinds of metadata do you collect?
- Do you have appraisal procedures for digital materials?

Obstacles/challenges to achieving digital preservation goals - please note initial obstacles identified and later capture any new obstacles that come about from participating in the program - or note if old obstacles have been overcome.

- What is your staffing situation and outlook?
- What is your budgetary situation/outlook?
- Please list other issues that present challenges for your work

Strengths/advantages to leverage - please note initial strengths identified and later capture any new strengths that come about from participating in the program.

- What are you proud of? What are people excited about?
- What successes do you have in house that you can build on?

- What skills and resources do you have in-house?
- What differentiates you from other cultural heritage institutions?

Section 2: Self-Assessment Results

NDSA Levels - https://ndsa.org/publications/levels-of-digital-preservation/

(Cohort facilitators may ask their cohorts to use the NDSA's Assessment tool, which is available online as an Excel spreadsheet: https://osf.io/8ctpu/)

At beginning of the program - please write a paragraph summary of your final results, and your impressions of using this tool.

- First impressions of the framework
- Questions about it for cohort discussion
- Self-assigned scores
- Notes from cohort discussion of the Levels
- Any changes in scoring based on discussion

At close of the program

- Changes in score due to implementation activities

DPC-RAM- https://www.dpconline.org/digipres/dpc-ram

(Cohort facilitators may ask their cohorts to utilize DPC's worksheet to record scores, which is available as an Excel spreadsheet:
https://www.dpconline.org/docs/miscellaneous/our-work/dpc-ram/2005-dpc-ram-worksheet

At beginning of the program - please write a paragraph summary of your final results, and your impressions of using this tool.

- First impressions of the framework
- Questions about it for cohort discussion
- Self-assigned scores
- Notes from cohort discussion of the Levels
- Changes in scoring based on discussion

At close of the program

- Changes in score due to implementation activities

[Other self assessment framework]

(Cohort facilitators may have their cohort complete other self-assessments, which can be recorded here)

Section 3: Peer Assessment/Co-assessment

NEDCC's Digital Preservation Peer Assessment Handbook -
https://www.nedcc.org/assets/media/documents/nedcc-DPA-Peer-5.16.pdf

Use this space to record….

- Notes about your peer match
- Decision on if you will be doing a full peer assessment or the co-assessment option
- Notes about the process of completing the peer assessment. What was fun about the process? What was hard?

- Link to your peer assessment report in Google Drive, or another accessible location

Section 4: Action Plan Summary

What are some distinct, achievable, goals? You can pick some small ones as well as bigger ones.
What are the steps you would need to undertake to achieve your goals? What kinds of specific tasks or activities would you need to complete to meet these goals? Those tasks can be as simple as setting up a meeting with a stakeholder, changing the wording on a policy document, or watching a webinar. Try to take your big goals and sketch them out on a timeline - perhaps you can come up with tasks you can undertake gradually over the next 3, 6, and 12 months to get you to completion.
You can see some sample goals and Tech Start-Up Fund purchases from Phase 1 here.

3 Months -

- Goals
- Tasks/Activities (while in the program)

6 Months

- Goals
- Tasks/Activities (while in the program)

12 Months

- Goals
- Tasks/Activities (after the program)

Longer term (perhaps 5-10 years in the future)

- Goals
- Tasks/Activities

Tech Start-Up Fund

- Materials required to implement short term goals
- List of potential materials
- List of purchased items

Successes & Failures (complete at end of the program)

- What goals were you able to accomplish?
- What goals were you unable to accomplish?
- Did any activities lead you to a dead end?

Section 5: Institutional Case Study

Participants will take information gathered in the above sections, and cut and paste into the final case study document framework below, leaving the headings intact. Feel free to add more material as you see fit. You may also put your final case study in another cloud-accessible document and just put the link below.

This framework is similar to the one that SAA uses for their Case Studies Series. To see examples of case studies published by the SAA, see both the Campus Case Studies and Trends in Archives Practice for examples relevant to digital stewardship work.

Your finalized case study will be published as part of the POWRR Peer Assessment Program's final report to the IMLS, but you are welcome to revise and publish it with SAA or another content provider.

Case Study Framework -.

1. Institutional Background
2. Collections Overview

3. Current Challenges
4. Goals & Implementation
5. Analysis - lessons learned, ongoing challenges, future plans

Appendix B: Case Study Framework

Digital POWRR Peer Assessment Program Case Study Framework

The case study document is a *compilation* of everything you have written and learned throughout your participation in the POWRR Peer Assessment Program. You shouldn't have to do a lot of original writing; you should be able to draw upon all the work you have created thus far. Please pull written content from the reflections you wrote when doing the NDSA and DPC-RAM self-assessments, as well as from your peer assessment report, and your action plan summary and results.

A model case study you can look to for guidance is Meg Miner's "Digital Preservation Strategies for a Small Private College." The following sections and prompts are provided as a structure that you can follow. If you have additional information you would like to include, that is okay too! We mostly want to see a summary of your time in the Peer Assessment Program - what you learned from using the assessment frameworks and from your cohort, what changes you were able to make to local practices, and what plans/ideas you have for the future. There is no minimum or maximum length for the case study, but it will likely be 5-10 pages depending on how wordy you wish to be.

1. **Background Information–** in this section, provide some background information on your organization – staffing, funding, history, etc. Talk about your role in the organization, and how you became aware of digital preservation as an issue you needed to work on and learn more about. You should also talk about what led you to apply to the POWRR Peer Assessment Program.
   2. Collections Overview – what kinds of collections does your institution have? Provide details about the scope and size of your digital collections. What types of access or preservation platforms are you currently using? Do you create metadata for some/all of your digital materials?
   3. Current Issues and Challenges – talk about your experiences in the peer and self assessment processes, and what you learned. What are the big challenges you have faced in trying to implement a digital preservation program? What is within your control, and what is outside of your control?
   4. Goals & Implementation – what goals did you set as a result of going through the peer and self assessments? What advancements or improvements were you able to accomplish during your time in the peer assessment program? What are your future goals, and steps you need to take to get there?
   5. Final Analysis - this is your conclusion, and you can use it to discuss any lessons learned during your time in the program, any ongoing challenges you will have to continue working through, and any future plans you have for digital stewardship work (or recommendations if you no longer work for the organization). You can also talk about your personal experiences working with the NDSA Levels, DPC-RAM, and NEDCC Peer Assessment models.

Some potential questions to explore: What do you think these models helped you with? What was your favorite? How do they compare? Which was most helpful, and which was least helpful? Were they lacking anything? What were the challenges in using these models? Do you have suggestions for improvement?