U.S. Naval Institute

Taxonomy, metadata, and digital asset management helps the U. S. Naval Institute bring naval history and archives to a new level of preservation and accessibility.

ON OCTOBER 9, 1873, a group of naval officers – Navy and Marine Corps– gathered in a lecture room of the U.S. Naval Academy for what would be the first meeting of the U.S. Naval Institute. The economy was bad. The Navy was falling behind conceptually, technologically, and tactically. Ideas weren't moving up the chain of command. The Navy and Marine Corps needed a nonpartisan, independent, open forum. This was true in 1873, and it remains true today.

As a nonprofit professional association, the U.S. Naval Institute (Naval Institute) is the preeminent thought leader in advancing the naval profession and preserving naval history. Since 1874, it has published its flagship publication, *Proceedings* magazine – a contribution-style publication curated by an Editorial Board made up of active duty Navy,

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Marine Corps, and Coast Guard officers and enlisted. Since 1987, it also has produced the bimonthly *Naval History* magazine focused on keeping naval history alive and telling the sea services history in a digestible and attractive way. The Naval Institute Press has been producing books on naval topics since 1898 in print format, eBook format, and more recently app format, publishing approximately 100-120 titles per year.

With a rapidly expanding collection of archives, including more than 450,000 rare photos (dating back to the mid-1800s), the Naval Institute oversees the largest private collection of naval photographs in the world. In addition, the collection contains more than 300 oral histories, and various types of video. Given this, the Naval Institute desired more powerful, sophisticated methods and tools to manage, access, and use this growing set of content.

A major objective was to digitize 140 years of *Proceedings* magazine and make this primary source history available to its membership. In most cases, these

After speaking with colleagues and attending industry conferences on digital asset management (DAM), the Naval Institute came to Technology for Publishing for

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- VICE ADMIRAL PETER H. DALY, USN (RET.), CEO AND PUBLISHER

archives were still in analog form, and putting them into digital form was of utmost importance for their preservation. The ability to effectively organize and use this deep well of historical content in new ways also was a key objective in the Naval Institute's vision for the future.

guidance and direction on how to best approach its challenge. It was clear that a digital asset management system would be necessary, but equally important was the need for a content taxonomy robust enough to define the broad pool of content managed by the organization.

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At the Naval Institute, major efforts such as this are investment opportunities for private donations from donors. To cultivate and receive major gifts require a longer project ramp-up and business case. Key, visionary donors stepped forward to support this project at a critical juncture. These true 'venture philanthropists', required the vigor provided by the Naval Institute and TFP.

While the initial inclination at the Naval Institute was to select and implement a DAM first, to begin the daunting digitization process that lay ahead of them, TFP first guided the team through a number of preparatory steps to ensure long-term success for the initiative.

"TFP invested in our success. They were every bit as diligent as I had hoped. They studiously focused on the right functional elements for the DAM. TFP also worked to understand all our assets and the depth and breadth of our considerable collection. They met and exceeded our already high expectations," notes Mary Ripley, Chief Digital Officer.

TFP helped the Naval Institute prepare an inventory of the expectations and requirements for the system, not just for the immediate goals, but also for future goals as the organization continued to grow. Specifically, once the DAM system was in place and content digitized, a vision for the expanded offerings and opportunities the Naval Institute could target was identified. This helped clarify the mission, scope, and priority of the work.

TFP's approach and methods when working with a content client on a new initiative is to first help the client clarify its content business objectives. Defining these specifically, by level of impact and priority to the business, is essential to developing a clear roadmap for a technical project.

U.S. Naval Institute's Content Business Objectives

- Centralize assets and knowledge through standardized ingestion and storage process.

- Promote discoverability of assets by staff, members, and authors through standardized organizational processes and cataloging to more fully capture and share knowledge.

- Increase productivity with greater discoverability of assets through standardized and consistent workflow, and revise the current process for finding assets, which is largely based on individual knowledge and experience.

- Maximize usability of vast institutional knowledge and assets by maintaining assets in appropriate formats for multichannel publication with rights and usage knowledge captured and available. This creates new revenue opportunities for content distribution, and audience development through multiple channels (traditional, digital, and social).

- Generate increased revenue by better serving constituents through improved processes to find, access, and order content.

Margot Knorr Mancini, CEO at Technology for Publishing states, "When we begin an engagement with a new client, we help them to understand the importance of a clear content strategy starting with content-specific business objectives that all agree on. It's an essential precursor to understanding where an organization plans to make money, save money or create opportunity, and taking the time to document it is critical. Many content and publishing organizations do not take the time to conduct this essential task, which often leads to competing efforts and projects, misspent budgets, and project failures. With the Naval Institute, they were already quite clear about what they needed to do, they were able to bring the right people and answers to the table for the discussion, and as a result we were able to move quickly with them."
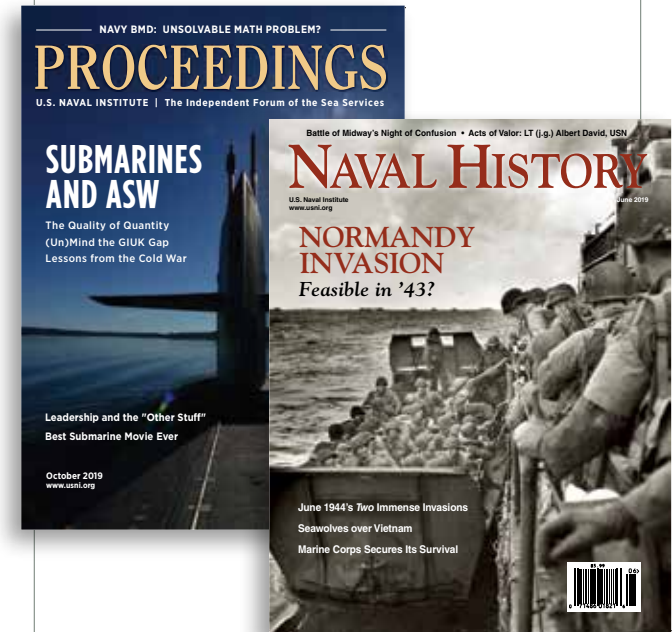
From defined content objectives, a technical roadmap was created to guide the project:

- Define a taxonomy and metadata model that best describes and organizes content for current and future use.
- Establish clear digital asset management requirements to procure a technology suitable to supporting the Naval Institute's needs.
- Use internal subject matter expertise to envision and plan for potential future uses of organized content.
- Plan for a pilot that vets and utilizes the new taxonomy and metadata within a procured DAM system.

TFP worked with the Naval Institute team to define and capture the requirements for the functional, technical, and operational elements of the desired DAM that would best serve them. This provided the substance necessary to submit a request for proposal (RFP) to DAM vendor candidates. TFP evaluated more than 20 initial vendors, reducing this to 10 for further review with the Naval Institute. Based on the requirements and information gathered from the ten potential

candidates, a final list of four solutions was targeted. These included a mix of well-established vendors and potentially riskier, newly emerging candidates.

In parallel with the work on DAM vendors, TFP and the Naval Institute worked on developing a taxonomy. Using its time-tested, library science driven methods for capturing terms for an effective taxonomy, TFP educated the team on taxonomy development methods and best practices to ensure all were working from a common level of knowledge. Helping the team understand what a taxonomy is and is not, as it is often misunderstood across the industry, was essential to working productively together.

Taxonomy development began with a series of questions about the broad categories of content the Naval Institute needed to define and manage, led by TFP's taxonomist, Donna Slawsky. Her

initial research focused on how the Naval Institute organized and found content, since these practices generally would provide the foundation for how the content

would be managed digitally, and it also focused on how they anticipated finding content in the future. Given that the Naval Institute team consisted of long-

standing staff along with newer staff who were less familiar with the content and the inner workings of the organization, the results blended the best of institutional

knowledge with fresh thinking and new ideas.

Following a series of interviews, gathered lists, and a review of a cross-sampling of content, the

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- MARY RIPLEY, CHIEF DIGITAL OFFICER

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Naval Institute taxonomy was drafted. This included an intriguing list with sections of terms such as Branches of Military Service, Bodies of Water, Ship Building and Design, Personal Names, and more. The draft went through a number of exhaustive reviews with teams of subject matter experts until it was finalized and approved. With this robust and well-defined taxonomy the Naval Institute was ready to vet DAM candidates. The data gathering exercise also helped capture the metadata required to ingest and store the various content assets to be managed.

At this point, the Naval Institute began to evaluate the DAM candidates, first by reviewing their technical features and their responses to the defined requirements, and then through product demonstrations. The solutions viewed ranged from large-scale on-premise solutions to cloud-based SAS options.

The team used an objective scorecard to evaluate all presented solutions and came to unanimous consensus on market newcomer MediaValet. This vendor seemed a good fit because of its build in the Microsoft Azure stack; its

subscription-based, low-cost-to-entry pricing model; intuitive browser-based interface; and strong commitment to working side-by-side with the Naval Institute in the ramp-up and implementation.

To vet the final candidate, TFP advised a pilot project to determine whether it was a good fit from both a solution and a vendor relationship perspective. As a new player in the DAM market, MediaValet was still expanding its product features and functions, and this gave the Naval Institute the opportunity to provide input and direction

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in line with its needs as it worked through its proof of concept. This measured approach to testing and ultimately to implementation allowed the Naval Institute team to learn about the system and applied use with minimal risk. It also allowed them to develop the best methods to ingest content assets and organize the process for the digital asset management, making adjustments as necessary along the way. The Naval Institute-MediaValet relationship has become a true partnership.

The Naval Institute leveraged its evolving DAM early on with several high-profile projects and successes. Since then, it has explored artificial intelligence with its audio oral history excerpts and continues to test and build out functionality and new features.

The planning and implementation of its taxonomy and metadata model, in addition to supporting a digital asset management system, has allowed the Naval Institute to more fully uphold its mission in new and exciting ways. Specifically, its ability to preserve naval history in a digital and intelligent form opens new avenues for sharing content.

"We found TFP to be a true learning partner in this endeavor, which set the groundwork for success in digitization and, later, other software implementations," said Vice Admiral Peter H. Daly, USN (Ret.), CEO and Publisher.

Today, the Naval Institute is up and running with 150,000 digitized assets (72 percent of the original target complete), 25 users in the system performing a multitude of tasks and functions, and plans to build both a media portal and a public-facing website, with more to come.

The Naval Institute leveraged its evolving DAM early on with several high-profile projects and successes.

- Edward Steichen Collection. Steichen was one of the most notable photographers of the 20th century. His work as the Director of the Naval Aviation Photographic Unit is the reason why we have photographs of combat in the Pacific during World War II.

- Robert de Gast Collection. His work covers almost every aspect of Navy life on and off ships during the mid to late-20th century.

- Licensing agreements with The Dallas Holocaust & Human Rights Museum, National Women's History Museum, and many others.

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