
On the Agenda

Open Meeting June 3 2004: Framing a national digitization policy Take the plunge into digital Canada!

The CIDL 2004 Open Meeting will be held June 3rd at the Fairmont Winnipeg. The purpose of the meeting is to advance a national digitization policy for Canada in which memory organizations, at all levels and from all regions, will play a unique role.

Along with the policy debate will be discussion on the need to ensure a coherent approach to funding for the development of Canadian digital content.

For information on the Open Meeting, visit the CIDL Web site under "CIDL Activities" :
<http://www-dev.lac-bac.gc.ca/cidl/040021-400-e.html>

Correspondents in this issue:

Tim Au Yeung, University of Calgary Information Resources, on Symposium 2003
Profile @ CIDL : Alex Eykelhof on The Bibliocentre
Julie Arie, Saskatchewan Provincial Library, on Access 2003
Peter D. James, University of Winnipeg, on UNB Electronic Text Centre
Sharon Reeves, Library & Archives Canada, on Theses Canada
CIDL Steering Committee 2004-2006
Our Roots National Editorial Board

Top of Page

Preservation of Electronic Records:

View of the Symposium from three perspectives

**Tim Au Yeung, Manager, Digital Object Repository Technology
University of Calgary Information Resources**

(Symposium Ottawa 2003: Preservation of Electronic Records: New Knowledge and Decision-making)

As we advance into the era of e-knowledge and e-culture, cultural heritage institutions are suddenly spurred to action to address the issue of preserving the inherently short-lived.

...Cowboy mentality

The digital preservation question – overshadowed as it is by rapidly outdated digital standards and formats, by the cowboy mentality of many of the digital world's innovators, and handcuffed to the limitations of institutions already stretched to the breaking point with their existing physical collections – is particularly alarming for those of us whose responsibility it is to ensure that knowledge is not lost.

To counter this growing concern, the Canadian Conservation Institute, the Library and Archives Canada, and the Canadian Heritage Information Network teamed to host a symposium on the preservation of digital records and other objects this past September: "Preservation of Electronic Records: New Knowledge and Decision-making."

Participants from around the globe put forward and struggled with formulating solutions to a number of digital preservation issues that confront the archives and library community.

In particular, the discussion focused on electronic records and objects: authentication; the development of preservation strategies and standards; and preservation of archival records, audio-visual materials, CD ROMs, just-in-time websites, and digital products.

Here, I go over some of the discussions held from the perspectives of librarians, archivists and technologists who grapple with both the problems and the proposed solutions.

In a paper entitled "A strategy for archiving websites at the Library and Archives Canada," Senior Advisor (Transformation) Susan Haigh and Senior Project Officer (Government On-line) Roselyn Lilleniit described activities at LAC aimed toward the efficient and effective provision of long-term on-going access to significant Canadian government websites.

...Canadian government websites

This pilot project to explore possibilities for the harvesting of Canadian websites began in 2003. Although a large number of technical obstacles arose, the pilot resulted in a short list of sites suitable for capture, and permission was obtained from some website owners for on-going capture.

Haigh and Lilleniit also reported that Library and Archives Canada is a member of the Internet Preservation Consortium, an international organization whose goal is to explore ways to implement effective harvesting of Internet content. Priorities of this group include the development of a new "smart crawler," exploration of various national legislative needs, and solutions to a number of challenging technical concerns.

Deborah Woodyard represented another member of this consortium, the British Library, with "Digital preservation strategy at the British Library: application of the Preservation management of digital materials' handbook".

Woodyard gave a practical example of how the handbook can be used to provide a "digital library infrastructure" in a library setting so as to develop coherent digital preservation strategies and best practices.

Recommendations were extracted from the handbook and applied to current British Library practices regarding the entire "life-cycle" of digital resources. Progress was analyzed and assessed, information was passed on to management staff, and implementation started where feasible and appropriate. Both the strengths and the weaknesses of the handbook were discussed.

... trustworthy evidence

A number of speakers addressed the issue of ensuring that electronic records are able to serve as trustworthy evidence of actions and decisions, and to fulfill their purpose of transmitting reliable information over time. Electronic records can be so easily manipulated and are so fragile. Their authenticity is constantly at risk, especially when they are transmitted through time and space, and are migrated from an obsolete system to a new one.

The speakers gave an overview of the theoretical and methodology aspects of authentic electronic records preservation from the creation, maintenance, and appraisal of records to their transfer to the custody of an archives/preserver and their subsequent preservation over time. Luciana Duranti, University of British Columbia, reported on the findings of the first phase of the InterPARES project (International research on Permanent Authentic Records in Electronic Systems).

The InterPARES project developed conceptual requirements for assessing the authenticity of administrative records generated or maintained in document management systems or databases. Duranti's paper set the stage for discussion about the preservation of digital records with the implicit reminder that there is no point in preservation if the records cannot serve as trustworthy evidence.

... lessons from archivists ...

Terry Eastwood, University of British Columbia, assumed in his "Appraising Digital Materials for Preservation as Cultural Heritage" the fundamental necessity for authenticity, and asserted the central role that appraisal plays in the preservation of digital materials. He outlined lessons from archivists' experience in appraising electronic records that can be applied to digital cultural heritage preservation in general.

Bruce Walton, Library and Archives Canada, in "Accessibility and Authenticity in Digital Records Preservation" addressed the question of effectively preserving digital records once they are in the custody of the preserver so that their authenticity is maintained. He discussed the preservation methods currently available and recommended the conversion of records to a standard format such as XML, and relying on the procedural and technological context of the record keeping system for record authenticity.

Howard Quenault presented a case study describing current efforts to preserve digital records and archives by systems development at his bailiwick the Public Records Office Victoria, Australia through the Victorian Electronic Records Strategy (VERS).

Finally, a number of speakers focused on the technical aspects of digital preservation including issues related to CD technology and standards. Examples are: Peter Adelstein (U.S. Image Permanence Institute) "Preservation of

Electronic Records: Status of ISO Standards;" Basil Manns and Chandru J. Shahani (Library of Congress)
"Longevity of CD Media: Research at the Library of Congress."

There were also practical activities in media refreshing and reformatting such as Hannah Frost (Stanford University Libraries) "Waiting to Happen: Lessons from Preserving Disaster-afflicted Electronic Media in an Archival Collection." From the Northwest Territories Archives Technical Services came Norm Glowach and John Poirier with "Computer-based Sound Recording Preservation and its Application in Small Communities."

... failure rate of CD-ROMS ...

As with the library and archives perspectives, the technical perspective was informed by activities done locally while acknowledging the lack of standards and proven methods available at a global level. As Adelstein pointed out, there has been little experimental work done to establish the lifespan of a writeable CD so that even the manufacturers are uncertain as to the actual longevity of a CD-R.

In contrast, the Library of Congress has gone to the effort of addressing the failure rates of commercial CD-ROMs within its own collection by testing error rates on a longitudinal basis. Ad hoc activities like those reported by Frost and Glowach/Poirier reflect how institutions conducting preservation activities are limited to a trial and error approach to digital preservation rather than falling on tried and true methods.

... far more difficult is the task of preservation ...

While these two papers represent activities where strategies like reformatting and migration can succeed as long as the information is recoverable, far more difficult is the task of preservation when the artifact is tied to the properties of the specific technology and devices themselves as in the case presented by Ulrich Lang of the Museum of Modern Art in Germany, *Volatile Memory*.

While it is clear from the presented papers that much activity is occurring because the need is very pressing, the guidance for institutions on issues of digital preservation is still being formulated and true solutions remain to be developed.

The collections are growing rapidly as creators embrace the digital world. This activity is generating cultural artifacts that cannot be contained by a physical surrogate, and that must rely on the technical context to convey their meaning.

In order for institutions to succeed in the task of preserving this information, the methods and strategies must provide for identifiable windows of activity, clear resource requirements, and tasks that staff in the institutions can master and perform with certainty.

The Symposium papers showed that none of these requirements are in place in the current solutions for digital preservation. If anything, the Preservation of Electronic Records Symposium represented the beginnings of a dialogue in Canada on the need for the concerted, deliberate preservation of electronic records and digital objects.

Canadian Conservation Institute:

http://www.cci-icc.gc.ca/main_e.shtml

University of Calgary Information Resources:

<http://www.ucalgary.ca/IR/>

[Top of Page](#)

Profile @ CIDL The Bibliocentre

Alex Eykelhof, Technology Advisor The Bibliocentre

The Bibliocentre has delivered library services to a large, dispersed community for over 30 years. Initially, we delivered paper-based products, but over the years, as computing technology became more prevalent and affordable, The Bibliocentre also developed and offered digital services. These services, -- text-based at first with phone lines as the primary mode of delivery and computing stations that resembled Studebakers the only tools around -- were pretty much all you could get. And digital certainly didn't replace paper as the media of choice.

But enough history. The Bibliocentre, as well as the rest of us, has moved past the Iron Age of computing and into the current fibre-optic delivered giga-age – gigabits, gigabytes and gigahertz. The computer is now a multimedia creation and delivery vehicle with virtually no limits on its virtual delivery. It's a television, a radio, a book, a jukebox, a movie theatre, and much, much more.

The Bibliocentre continues to keep up with the demand for new multimedia services with video on demand, layered access to government documents, and a host of metadata initiatives that enable access to the physical and virtual resources of the Ontario Community Colleges as well as other institutions. There are many factors that contribute to our success in the delivery of services.

Identify Audience

It is critical to identify the audience for the success of any access project. When we know who will view the videos or read the books, we can specifically address the content to that group, and establish taxonomies and classification schemes that focus on their learning and research requirements.

The primary audience for Bibliocentre services has been Ontario colleges, so the curricula have defined the nature of the digital object. More recently, Bibliocentre started to provide services to other institutions, notably public schools and universities (plus other colleges across Canada). This led to some blurring of the lines among those services as the codification and research needs diverge. Perhaps we can think of this as a 'classification' struggle.

Flexibility in Bandwidth Delivery

Video requires more Internet bandwidth to deliver than graphics, and graphics need more bandwidth than plain text. That said, most home-users still work with 56 kilobit per second modems and cannot handle full motion video or heavy graphics. Some flexibility is necessary at the delivery end to accommodate both high bandwidth and low bandwidth users.

From a technological perspective, the easiest solution is to provide multiple streams. This enables the modem users to select the lower bandwidth delivery and those using faster services can opt for the higher bandwidth. There is of course a limit as to how much bandwidth can be streamed over the Internet. Through experience, we learned that the practical limit here is about 200 – 300 kilobits per second. That is, we can play a video over the Internet that uses approximately one fourth of your computer screen. Animation requires less bandwidth than live action because there is less movement on the screen.

One alternative that enables higher bandwidth for the community is the Virtual Private Network or VPN. This is a leased line operating in a closed loop among a number of partners. It provides them with guaranteed bandwidth inside the loop and is ideal, albeit expensive, for the delivery of full screen, full screen video to the member institutions.

Metadata and Context

Metadata provides access to the content whether it is a video object or another type of digital matter. Like a small treasure, it can be discovered within the parameters of the rights agreements for the object; however, the user should have the ability to identify additional relevant information as if by kismet. The search engine can find additional results corresponding to the initial query, but a little more is needed to give the searcher a context within which to make sense of the outcome. One way to do this is with additional material that precedes or follows a video clip. Another is to add clickable points on the screen to provide notes or other meaningful information.

Technology, Philosophy, Experiment

Any multimedia project is one part technology, one part philosophy and one part experiment. No matter how sophisticated the technology there is no guarantee that the results are relevant to the constituency that the project is intended to serve. That's why an understanding of the needs of the community, whether it be an academic institution, a country, or a fishing village, is critical.

For The Bibliocentre, integrating digital objects into the learning landscape is a challenging and exciting journey and we are pleased to be making it in the company of great friends and colleagues.

The Bibliocentre, Centennial College:

<http://www.bibliocentre.ca/>

[Top of Page](#)

Access 2003: Extending our abilities

Julie Arie, Information Resources Management Specialist (Databases)
Saskatchewan Provincial Library
2003 CIDL Bursary Recipient

Access 2003 was an opportunity to discuss current library standards at a national level with other people working on similar projects. The BC Electronic Library Network, Simon Fraser University Library, University of British Columbia Library, and University of Victoria Libraries jointly hosted the event in Vancouver. Over 200 people attended this 11th Access conference.

What are the Access conferences all about?

Access focuses on technology – technology specific to libraries, technology springing up in libraries, and technology about to impact libraries. The crowd is a collegial group that seem to attend year after year in increasing numbers.

One of my key roles at the Saskatchewan Provincial Library is standards research and development for interoperability among library and communications systems. I liked the conference as a less technical person. Sure, there were people there who program applications and design new standards. But, there were ways for a librarian with my skills to participate as well. I talked to people about program management and usability issues.

While Yahoo! may have been popular at first with its subject categories ...

Tim Bray, CTO, Antarctica Information Systems gave a great keynote on web architecture planning as well as what's new in searching. While Yahoo! may have been popular at first with its subject categories, Google is now in front due to one piece of metadata: reference counting; or, how many people point to any one resource.

This popularity of Google seems to show that people want to know how popular a subject is rather than where or how the subject fits their search. Should libraries bring popular things to the top?

Day One included: e-resource management, portals, Learning Objects, digital content and digital preservation. Wrapping up a very full day of information was a vendor panel that was asked to speak on open source and vendor products.

On Day Two, the “birds-of-a-feather” sessions allowed people to find “like” people. It was an excellent chance for those who are the only ones in their organization (or city) working on certain types of projects. Glen Newton (CISTI), Brian Jorgensen (The Alberta Library), Sona Kothari (Red Deer College) and I talked about remote patron authentication: standards, tools, software, open source versus vendor products, and issues around implementation.

We also all work on providing access to restricted/protected resources, and with our chat we helped each other with the various snags. Newton presented on the Shibboleth Project (open source authentication) and we followed up on points raised.

Other topics that day included open source software for libraries (both integrated library systems and interlibrary loan systems), metadata, usability and metasearching, implementing authentication software (open source), openURL, and network security.

Are you getting all your e-mails....

The final day held sessions on digital libraries, digital theses, as well as “Cliff Notes” – an annual talk by Clifford Lynch (Director, Coalition for Networked Information) that walks folks through interesting technology trends on his radar. A sampling: the monoculture of Microsoft as a vulnerability, a zone lacking in diversity; the changing perception of the Internet as a communication tool – are you getting all your e-mails?

Since returning from the conference, I have heard a lot of people talk about this. It's like a purple car: you don't see one until someone points it out, and then that is all you see for a time.

One of the numerous unique features of this conference is that there are no concurrent sessions. Everyone hangs out in the same room throughout the entire conference! This led to conversations between sessions as no one was rushing off to a different room. I also noticed that most of the speakers stayed for most, if not all, of the conference. This was a great chance to discuss more.

I came home energized and excited! There was material used at the conference that I am applying to current projects, and I have passed along some of my gained expertise to others. In 2004, Access will be in Halifax, and 2005 it will be in Edmonton. I look forward to attending both!!

Access 2004 Halifax: Beyond Buzzwords:

<http://library.acadiau.ca/access2004/>

Saskatchewan Provincial Library:

<http://www.lib.sk.ca/>

[Top of Page](#)

Creating electronic texts and images

Electronic Text Centre, University of New Brunswick Libraries

Peter D. James University Archivist University of Winnipeg

2003 CIDL Bursary Recipient

The Electronic Text Centre at the Harriet Irving Library is a Canadian leader in the field of electronic texts and images providing education and leadership to the New Brunswick and Canadian communities in the creation and use of electronic text and electronic scholarly publishing.

We came from all over North America for the Centre's seventh annual Summer Institute. We were university librarians from Nova Scotia, New Brunswick, Quebec, Ontario, Manitoba, and Alberta; faculty and educationalists from schools and government; and people engaged in the field of digital creation in Canada and the United States.

We came to build skills in the world of electronic texts under the direction of David Seaman, Director of the Digital Library Federation of the United States and former director of the University of Virginia Electronic Text Center.

The UNB Centre's Director, Alan Burk, welcomed us; and, Lisa Charlong, the Centre's leader in SGML/XML Initiatives, was instrumental in setting up the weeklong workshop, providing tours of the Text Centre, and facilitating our learning experience.

The Institute got going early the first morning with introductions, and David Seaman began the instruction with a description of the various standards that are at the heart of the production of electronic text: SGML, its offspring XML, and HTML. The course was premised on the use of XML as the current standard descriptive tagging instructions for electronic texts.

He pointed to a number of advantages of XML: simple and flexible, it loses little of SGML's descriptive abilities while being more Web-friendly, and its inter-operability increases distribution across systems. To employ the jargon: it is cross-platform, software and hardware independent. In short, XML separates description from appearance, relying on style sheets (XSL) that can be read by web browsers for presentation.

... importance of using document type definitions ...

Seaman spoke of the importance of using document type definitions when marking-up documents, even though XML does not require a formal DTD. The value of a formal DTD, like the Text Encoding Initiative (TEI), is that it validates the tags and promotes conformity with universal standards.

On day two, Seaman concentrated on the presentation of Web material. The session included discussion of optimum versus practical capture and output of images and text, Optical Character Recognition, and metadata. He discussed project planning with an eye to costs and inputs.

... practical experience in the field was of real value ...

Seaman's practical experience in the field was of real value in explaining the choices project planners must address: consider the use of out-source data providers, engage them to also do the 'dirty' OCR work; factor in the use and pricing of equipment like scanners and digital cameras for projects, and related topics. He mentioned the advantages and disadvantages of several commercial capture and 'clean-up' packages. For project managers, he discussed issues like descriptive standards, rights management, contract staff versus employees, budgeting and related subjects.

... second guessing, and related agonizing ...

In this area, as in all his instruction, Seaman tempered his enthusiasm for his mission with practical advice and knowledgeable tips. We viewed exceptional websites, along with modest ones. For those who will begin to include digital and electronic text creation in their portfolios, it was gratifying to learn that many of the hesitations, second-guessing, and related agonizing that go into projects in 'new' areas, have been addressed by practitioners, and there is plenty of useful (and usable) instructional material on the web (like W3 Schools).

The classroom points Seaman made were reinforced when the group was invited to the Text Centre's Digital Imaging Centre for a demonstration of image capture and manipulation by the staff. The Imaging Centre provides material both for the Electronic Text Centre and for outside contracts. The scale of their operations justified expenditures on equipment and staff, many of whom were trained at the UNB campus.

... consistency is more important than accuracy ...

The bulk of the course was devoted to a hands-on mark-up workshop of correspondence files that make up part of the University's Charles G.D. Roberts fonds. The Text Centre will eventually produce an electronic collection of the correspondence of this Canadian writer and man of letters, and Institute participants have now contributed (however expertly) to that project. David Seaman introduced the group to the TEI, a DTD employed in the humanities.

The recurring mantra of this three-day workshop: 'consistency is more important than accuracy' (try telling that to your cataloguing colleagues) was offered by Seaman as both an invitation and a caution: part of XML's ease of use

is that the tags are not pre-defined, as in HTML, but this is also part of the difficulties one can encounter when constructing an XML tag set.

... emphasized project planning ...

A tag set can be well-formed (that is, it can possess correct syntax) but not valid when tested against a DTD. A valid XML document must be both well-formed and in conformity with a DTD. Tag set nesting, closed sets, case-sensitive language, attribute values, all the XML requirements that we had learned about at the beginning of the week, were now being brought into play in writing a tag set in conformity with the TEI DTD.

The TEI DTD is a predefined tag set used to describe the structural, administrative and descriptive elements of a document. Again Seaman emphasized project planning and management issues: value of element inclusion versus the cost of tagging; which elements of a document need to be tagged: names, dates, citations, variants, etc?

... shades of cataloguing courses ...

The importance of the TEI header as the location for bibliographic information was not startling to the librarians (shades of cataloguing course(s) at Library School), but the text elements of the DTD probably gave the class more trouble. Here we stopped being mere 'recorders' of information, and instead were participants in the creation of editorial content.

Should the names of residences be marked-up (Roberts issued many letters from, 'The Rectory' in Fredericton, but also lived in Toronto and New York during periods of his life)? Dates were obvious candidates for data searching, as were letter recipients, publishers and publications. Should we interfere with the content by noting spelling variations, provide footnotes about the people, places, events or items mentioned in the text of the letter? In short, we produced 'value-added' content to the document.

The set-up for the course, each participant at a networked station in a computer lab, lends itself to self-learning combined with team-teaching. In undertaking the mark-up tasks, we could call on the services of those with experience in literary genres, bibliographic work, students with background in historical and biographical research, and many with varied computer and electronic text skills.

At times the noise of 'ahhs', laughter and forehead smacking gave the air of a frivolous activity, but it was really people recalling earlier lessons, realizing element entry mistakes ('close that tag set'), and trying to make the lessons come alive on the page. This is where the classroom experience proved itself more valuable (and more popular) than on-line quiz instruction. The benefit of a hands-on course with an instructor present in the room became apparent when it came time to validate the marked-up documents against the 'Validator' (isn't that a hockey player?). Few of our documents escaped a single 'ERROR' message (the first that did won a hearty round of applause), and so again we learned from one another.

The setting for the course was the idyllic UNB campus. The Harriet Irving Library, housed in a colonial red brick situated on a hill overlooking Fredericton, welcomes visitors to a coffee bar on entering. The Electronic Text Centre was still in the construction phase of its new digs, but already taking shape as an airy, colourful set of rooms off a main conference area: one could also feel the buzz of activity that surely engulfs the space today. The Centre's Director, Alan Burk threw open his home and backyard for a pleasant barbeque during the week offering participants an opportunity to gain insights into electronic text work from Text Centre personnel in a social setting.

The Institute is a very rewarding experience. It coupled hard work with hands-on experience: I know that every participant came away from the course with a fuller understanding of the complexities and the great rewards promised by electronic text creation and distribution. I would like to thank CIDL for awarding me the Summer Bursary that gave me the opportunity of attending this Institute.

UNB Summer Institute 2004:
http://www.lib.unb.ca/Texts/SGML_course/Aug2004/
University of Winnipeg Library:
<http://cybrary.uwinnipeg.ca/>

[Top of Page](#)



The CIDL Steering Committee (2004-2006) held its first meeting January 27, 2004 at the Toronto Public Library. It was the day of the great 2004 Toronto snow storm! Above are newly elected members l-r: Vice-chair Frits Pannekoek (University of Calgary Information Resources), David McKnight (McGill University Libraries), Johanna Wellheiser (Toronto Public Library), Bill Maes (Dalhousie University Library). Incumbent Brian Bell of HALINET is chair, and Chris Petter (University of Victoria Library) also returns.

[Top of Page](#)

Our Roots National Editorial Committee Project marks Year 3 accomplishments



The National Editorial Board declared the local history site Our Roots a great success. Over 4,000 titles are completely digitized and available on-line in a searchable format at www.ourroots.ca. The Our Roots National Editorial Board met at the Library & Archives Canada on February 27, 2004. Front l-r: Claude Bonnelly (Co-chair), Jackie Bell (Our Roots grant writer), Alison Prentice (University of Victoria), Karen Turko (University of Toronto), Catherine Quinlan (University of British Columbia), Mary Bond (Library & Archives Canada), Mary Westell (University of Calgary). Back l-r: Marc Vallières (Université Laval), Frits Pannekoek (Co-chair), Ralph Manning (CIDL Secretariat), Gerald Pocius (Memorial University of Newfoundland), Guy Teasdale (Université Laval), Beth Stover (Canadian Institute for Historical Microreproductions), and Gerald Friesen (University of Manitoba).

[Top of Page](#)

Theses Canada Portal Update

Sharon Reeves, Head, Theses Canada

<http://www.collectionscanada.ca/thesescanada/>

Building on the success of the Theses Canada Portal, which was officially launched at the Ontario Library Association Super Conference on January 29, 2004, Library and Archives Canada has almost completed the development of an OAI harvester and repository. This exciting new development will permit LAC to harvest theses metadata and electronic theses directly from Canadian universities. Prior to the end of the 2003/2004 fiscal year, the harvester will be tested on metadata and theses from the University of Waterloo and Université Laval, both of which have well established electronic theses submission programs. This will provide the opportunity to resolve any problems with systems or workflow prior to making the option available to all Canadian universities sometime during the next fiscal year.

Related sites:

Université Laval Collection, Mémoires et thèses électroniques: <http://www.theses.ulaval.ca/>

University of Waterloo Electronic Theses Project : <http://www.lib.uwaterloo.ca/ETD/>

[Top of Page](#)

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[Top of Page](#)

New CIDL sponsorship category There are now three CIDL membership levels.

Full members have voting privileges and are eligible for nomination to the Steering Committee. The current annual fee for full membership is \$1,000.

Associate members can actively take part in working groups. The current annual fee for associate membership is \$300.

Sponsors are invited to feature their logo on the CIDL website with a direct link. Sponsors are also invited to exhibit their products at the CIDL Open Meeting, and other CIDL functions held from time to time.

All three levels of membership are welcome to participate in CIDL Open Meetings.

Visit the CIDL website: <http://www.collectionscanada.ca/cidl/>

or contact us at: cidl-icbn@lac-bac.gc.ca

OCLC Canada joined CIDL as a sponsor in 2003. OCLC Canada hosted a tour of their Winnipeg digitization and microfilming facility on June 2, 2004.

canada@oclc.org.

<http://www.oclc.org/ca/en/default.htm>

[Top of Page](#)