

# TEI Tite: Creating a Benefit of Membership to Support Standards Development

## *Introduction*

"TEI Tite: Creating a Benefit of Membership to Support Standards Development" is an Andrew W. Mellon Funded (\$35,000) project to investigate the suitability of TEI Tite as a platform for creating a new membership benefit through which the TEI would help members achieve significant cost reductions in contracts with keyboarding vendors.

The project was proposed by John Unsworth at the Board's face-to-face meeting in College Park (<http://www.tei-c.org/Board/bm23.xml>), although it had come up several times earlier in the year on the TEI-Board mailing list (see the threads beginning [here](#)). In Maryland, John Unsworth, Susan Schriebman, and Michelle Dalmau were assigned to the project. In January 2008, a TEI group consisting of Daniel Paul O'Donnell, John Unsworth, Peter Kaufman, and Perry Trolard were awarded a grant to continue work on the project (see <http://www.tei-c.org/Board/bm26.xml>; a copy of the successful application is attached).

The project conducted a survey in the Spring and Summer of 2008 (see the brief report in <http://www.tei-c.org/Board/bm29.xml>), and devoted the fall to the development of an RFP suitable for the program. The potential for the benefit and initial results of the survey were discussed at the members meeting in London.

## *Membership Survey*

The results of the membership survey indicated a strong interest in a member benefit that involved reduced rates for outsourced digitization.

The survey attracted 83 responses, 58% of whom reported that they were currently members of the Consortium (Question 1). Of these 84% reported that they converted print or manuscript material to computer-readable text (Q3).

Variation in the amount of digitised text processed by survey participants was very wide, ranging from 1 to 8,000,000 pages, with an average of 176,000 (Q5). A more meaningful number came from the 43% of survey participants (Q7) who currently outsource their digitization: these reported an average of 40,900 pages, with a range extending from 0-250,000 pages per year (these numbers were established by taking the lowest number in ranges provided by survey participants) (Q10). In answer to a question asking about volume of digitization they would be prepared to contract for via the TEI at different price points (Q11), 22 respondents provided figures for the lowest point (\$0.50): at this price the minimum predicted volume was 703,000 pages (303,000 excluding outliers) pages, or an average of approximately 32,000 pages/annum (14,500 pages/annum excluding outliers).<sup>1</sup> At \$1.00/page, 18 respondents providing answers estimated a volume of 333,500 pages/annum (133,500 excluding outliers) for an average of 18,500 pages/annum (7,855 pages/annum excluding outliers).

78% of the survey participants digitize print sources, 57% manuscript, and 28% microfilm

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<sup>1</sup> Many respondents gave relative or non-numeric answers to this question (e.g. "a lot", "most", "all", "?").

(Q14). About 40% of the respondents work with pre-19<sup>th</sup> century documents (Q15); a similar number work with non-roman character sets (Q17). The reported price-per-page varies wildly and may involve different definitions of "digitization" (Q16). 78% digitize material in languages other than English (Q18). 42% digitize newspapers; 53% other serials. Out of 68 responses indicating the markup language used for digitization, 41 mentioned a version of TEI, either on its own or in conjunction with other languages and standards (Q6). No other language was mentioned more than infrequently: HTML (2); MEP DTD (1); METS (2); OAI (1); EAD (2); Dublin core (1); Text Class (1); DJVU (1).

76% of respondents indicated that an appropriately priced digitization service would encourage them to outsource more digitization (Q12); 81% indicated that they would remain or become a member of the TEI if membership reduced the costs of digitization (Q4). About 64% of respondents who indicated that they had an existing workflow indicated that they would be willing to adjust this workflow and use TEI Tite in order to achieve digitization savings (Q8a). Not surprisingly, the most digitization would occur at the lowest possible price point offered (\$0.50). It fell off significantly after \$1.00 (Q11).

### ***TEI Tite as a Member Benefit***

The attached survey suggests a base volume for digitization from the TEI membership of between 133,000 and 300,000 pages/annum at a price of \$1.00/page (Q11). Many respondents gave non-numerical answers to the price-point question, and since a solid majority indicated that access to reduced-price digitization services would both encourage them to become or remain members of the TEI (81%--Q4) and increase their total volume of outsourced digitization work (76% Q12). It seems likely therefore that the actual volume of digitization work would be higher than this base figure.

The TEI has experience with other vendor-member arrangements, including a discount from SyncroSoft on the price of their OxygenXML editor. These benefits are both attractive to the TEI's membership and useful in cementing good relationships with important commercial members of the text encoding community. These relations in turn commonly have other spin-off benefits for the TEI and its membership: SyncroSoft, for example, is a regular and generous donor to our annual members' meeting and conference.

Given the interest in this benefit from among those surveyed, it seems likely that offering aggregation and volume discounts to our membership will prove a valuable benefit. The main question for the TEI is how this benefit might be offered in a sustainable way. Opinion among survey respondents was split fairly evenly concerning whether they wanted to have the TEI deal with vendors concerning turnaround times and quality control (Q22).

From the TEI's perspective, it is of course easier to have members deal directly with vendors according to an agreed upon contract; the more the TEI must intervene in the day-to-day operation of the benefit, the less attractive, and sustainable the benefit becomes. The ideal benefit would involve a "turnkey" style contract, in which the vendor is responsible for developing a method of collecting, billing, and returning work to participants, presumably through a web-based portal. In such a case the TEI's participation in the day-to-day operation of the benefit would be limited to supplying real-time membership information to the vendor and dispute resolution. A perhaps less attractive but still possible option would involve the TEI aggregating material for the vendors using a system such as the shopping cart system proposed

independently for our subscription and membership recruitment. In such a case, there would be some initial startup costs as we developed our initial portal and some maintenance costs, albeit probably involving relatively little marginal increase over the cost of maintaining the member database.

Ultimately, the question of these approaches is something that we need to use the Request for Proposals period to answer. Having the TEI conduct the aggregation is almost certain to be cheaper for the TEI member (increasing volume and the attractiveness of the benefit); through the RFP process we need to discover how large a difference in price we are discussing and to what extent the increase in volume and membership would offset any additional paid staff we would be required to take on to administer the benefit.

### ***Request for Proposals***

The attached RFP represents the work of the Mellon-funded team to develop a proposal that balances the interests of the membership in the benefit against the need to reduce TEI administrative involvement to a minimum if the benefit is to prove sustainable. It asks vendors to provide costs for two scenarios: one in which they vendor works directly with individual members, at an agreed-upon discount over their usual contract rate; the other in which the vendor works with digitization material aggregated by the TEI—using its own or a vendor-provided web-portal.

The project has retained legal counsel to review the RFP, review successful bids, and recommend language for a TEI agreement with members (around IP issues in particular).

### ***Going forward***

At this stage, we are presenting the results of our survey and RFP drafting work to the Board for information and asking for approval in principle of the approach we propose taking and our draft RFP. The next stages under our Mellon funding involve completing the technical requirements and getting a legal opinion on the contract. After final approval of the RFP and program, the project would then issue the RFP, draw up a list of finalists, and after quality-control testing, announce a preferred vendor. The goal is to have the benefit ready for release to our membership by the November 2009 meeting in Ann Arbor. The grant provided by the Mellon foundation is sufficient to cover all costs associated with the program through the selection of a final vendor.

The TEI has been granted a one-off no-cost extension to the grant to cover the 2009 calendar year. If we are to be in a position to finish this work within the allotted time, we will need to work with dispatch throughout the year. Assuming approval in principle at the meeting on February 9, this is the timeline we intend to follow:

#### Timetable:

Presented to Board for Information/Approval in Principle	February 10, 2009
Legal review of RFP, finalising technical language	February 11, 2009
Final Board Approval of RFP for distribution	March 10, 2009
TEI RFP distributed to vendors	March 11, 2009

TEI deadline for receipt of vendor questions	March 25, 2009
TEI deadline to provide responses to vendor questions	April 10, 2009
TEI deadline for receipt of vendor proposals	April 24, 2009
TEI announces short list of vendor finalists, start of testing	May 15, 2009
TEI testing period ends for vendor finalists	June 15, 2009
TEI announces vendor selection	June 30, 2009
TEI works with vendor to implement program	July 1, 2009
Program ready for announcement	November 1, 2009
Final invoices and receipt due for payment	December 10, 2009