PARTNERING WITH THE PRIVATE SECTOR – A PERSPECTIVE FROM ANCESTRY.CA

WHO IS ANCESTRY.CA?

Ancestry.ca provides access to more than 230 million searchable Canadian family history records. Ancestry.com (parent company) is the world's largest online family history resource with approximately 2.7 million paying subscribers and more than 12 billion records across all its websites.

Since starting as a publishing company in 1983, we have been a leader in the family history market for over 20 years and have helped pioneer the market for online family history research. Our efforts to date have empowered our markets to capture the value of their genealogical heritage on a global scale.

We believe that most people have a fundamental desire to understand who they are and from where they came, and that anyone interested in discovering, preserving and sharing their family history is a potential user of Ancestry.ca. We strive to make our service valuable to individuals ranging from the most committed family historians to those taking their first steps towards satisfying their curiosity about their family stories.

The foundation of our service is based on established relationships with national and local government archives, historical societies, religious institutions and private collectors of historical content around the world. Through these valuable relationships, we have brought an extensive and unique collection of billions of historical records online, that we have digitized, indexed and made searchable. We have developed efficient and proprietary systems for digitizing handwritten historical documents. These digital records and documents, combined with our proprietary online search technologies and tools, enable our subscribers to research their family history, build their family trees and make meaningful discoveries about the lives of their ancestors.

We provide on-going value to our subscribers by regularly adding new historical content, enhancing our websites with new tools and features and enabling greater collaboration among our users through the growth of our global community. Our plan to achieve long-term and sustainable growth is to continue to serve the Archives and libraries, meeting their needs and addressing their concerns, as well as increasing our subscriber base around the world by serving our loyal base of existing subscribers and by attracting new subscribers.



INTRODUCTION – ARCHIVE CHALLENGES

The mandate of archival repositories is to simultaneously preserve and make available archival collections to serve a variety of patron needs. Genealogy researchers and family historians are a large part of the demand for record access. Due to financial cutbacks and resource constraints, many archives are losing funding. There are several recent trends creating competing demands for limited archive resources.

Record Access: The popularity of online search sites such as Google have set patron expectations very high for information access. Researchers are calling for faster and broader access to digital archival content, increasingly from the comfort of their home.

Digitization: Early digitization efforts have often focused on the less expensive activity of creating digital images from microfilm. Digitization frequently requires scanning from paper documents – a more costly, labour-intensive, and time-consuming undertaking.

Search: Increasing demand for 'searchable' access to records requires the expensive task of creating electronic indexes from scanned images. The manual creation of a database of key information from each individual record is time consuming, prohibitively expensive, and requires specialized technical expertise.

Reductions in Foot Traffic: Budgets historically have been tied in part to foot traffic into the archive's physical buildings. Today online traffic is now a key performance indicator for budget assessment in many archives.

Staff Resources: Staff members are increasingly asked to take on more responsibility. Manual lookup and retrieval requests for patrons are increasingly difficult to prioritize against a growing list of priorities in a way that satisfies stakeholders.

Promotion: In a very crowded cultural landscape archives large and small are challenged to promote their holdings, contribution to the education space, and other outreach efforts. They are typically underexposed when compared to Libraries, Museums and other better-funded programs.

PRIVATE SECTOR COLLABORATION

Collaboration with the private sector, including organizations such as Ancestry.ca, can help archives accomplish their goals for preservation, digitization, and record access. Often at no cost to the archive, a private sector partner will fund all of the digitization costs for genealogical records. These records can then be made available to both users of the partner website and patrons of the archive. Partners offer value-added tools for family history researchers, such as rich data indexes, efficient search algorithms, and educational tools. Partners further support the archive by directing users to the archive website for further information and access to other collections. Once published online, digital records can serve both the domestic and global communities.

The records of Canada hold a wealth of genealogical information for family history researchers. Archival holdings of some of Canada's most important collections have not been digitized and are often fragmented across multiple repositories. Researchers must travel to a number of national and local archives in order to piece together a full picture of their ancestors. Private sector partners, such as Ancestry, play an important role in digitizing these distributed collections and bringing them together online, allowing people to research many different types of records from across Canada and around the world at the same time.

COMMERCIAL PARTNER INTERESTS

Family history has grown from a hobby practiced by a select few to a passion for millions of people around the world. On an average day, more than 40 million searches are conducted on the Ancestry website alone and hundreds of thousands of of new discoveries are shared with friends, family, and a community of fellow researchers. At the core of excitement around genealogy is the deeply personal connection that researchers make with their own ancestors. Commercial organizations in the family history space focus their investment resources to enable as many of these personal discoveries as possible for their users. Historical records hold the key to these discoveries.

Name-Rich Records: Commercial partners focus heavily on name-rich historical records. Common examples of these records include census records, birth marriage and death records, immigration records, and military records among many other record types. Names are critical search criteria and one of the most important fields of data to be captured in any digitization project.

Large Collections: Researchers look to maximize their time when searching for their ancestors, which makes larger archival records collections of particular interest to commercial partners. Larger collections also allow partners to take advantage of cost efficiencies related to processing scale. The comprehensiveness of a collection is also an important consideration for partners.

Generating Audience Interest: Opportunities to generate public relations interest around a collection is also a factor for commercial organizations. Some collections include unique stories that can be shared with the public and drive traffic back to a commercial website.

TYPICAL COMMERCIAL COLLABORATION

Models for collaboration between archives and commercial partners have developed over the last decade of learning together across thousands of projects. In a typical collaboration with a partner such as Ancestry.ca, the partner will scan, index and fully digitize genealogical records or work with an archive's existing digital content. A copy of digital images and data indexes is provided back to the archive at no cost in return for the license to publish the collection on the partner website. Commercial partners have varying approaches to the digitization and publication process. The following describes the approach Ancestry.ca uses in collaborating with archives:

Creating Digital Images: Ancestry creates a digital image of each record. Collections from microfilm or microfiche are digitized offsite at Ancestry's facilities. Paper collections are digitized onsite at the archive to preserve availability for patrons and minimize transfer risk. In both cases, Ancestry employs a five-step imaging process including 1) inventory, 2) document preparation, 3) digitization, 4) quality assurance, and 5) image delivery.

Ancestry's process for creating digital images developed from years of experience working onsite with partners that include the National Archives and Records Administration of the United States (NARA), The National Archives of England and Wales, and Library and Archives Canada. Rigid industry standards and proprietary techniques are applied to hundreds of digitization projects each year.

Creating Digital Indexes: Ancestry creates a searchable database entry for each record in the collection. Key fields of information to capture are determined from years of experience working with similar records. The name of the individual, date, and place of the event are always included along with several other fields depending on the type of record. A five-step quality process for creating this data includes 1) field completion, 2) dictionary validation, 3) keystroke accuracy, 4) collection-specific checks, and 5) data normalization.

Ancestry has over a decade of experience creating name-rich indexes for historic documents. It is critical when working with historic documents to approach data quality from multiple perspectives. Our five-step data quality process has enabled successful discoveries for millions of people across billions of records each year.

Online Searching: Ancestry has developed additional tools to improve the success of a researcher's online search. Advanced search algorithms and variation dictionaries help users even when the name or location they enter is spelled differently than it is on the actual record. For many of the collections published on Ancestry.ca, researchers can add their own comments and corrections to the data as they view the digital image. Over time this added input from researchers provides additional viewpoints on difficult-to-read documents and enhances the overall usefulness and quality of the data for all.

Ongoing Access: Once a collection has been digitized it is published on the Ancestry.ca website, making the collection available to a broader family history audience. Patrons of the archive can freely view all of the collections digitized in a project when visiting the archive reading room. A copy of the digital image and index are provided to the archive to publish on their own website as well.

Ancestry has developed a secure portal page on the Ancestry website for archives to review reports of user activity for their collections. A public facing page on the Ancestry website is also created to highlight the archive in more detail and all of their collections available on Ancestry. This page can be used as a customized "start page" to share with patrons seeking to search these

collections on Ancestry. Each collection includes proper credit to the archive, the archive's logo, and a link to their website for more information.

Promotion: Ancestry works together with the archive to promote newly available digital collections utilizing our extensive marketing and promotional infrastructure. Ancestry understands the needs of online family historians and how to raise awareness of valuable collections. We do so through a variety of channels including email, print, social media, and the Ancestry.ca website. A significant number of Ancestry users are based outside of Canada. Promoting Canadian collections to these users has the potential to spark interest in Canada and our memory institutions globally.

Digital Collections: Where archives have already fully digitized a collection themselves, the index can be published on the Ancestry.ca website as well. Users who search these indexes are then linked over to the archive website to view the digital image of the record and learn more about the collection and other archive holdings. This creates additional traffic to the archive website and expands awareness of the collection throughout the family history community.

Developing partnerships to publish genealogical records online are welcomed by most Canadian genealogists. John Reid, one of Canada's foremost bloggers on genealogy and family history, made the following observation on partnerships on the Canada's Anglo Celtic Connections blog – June 7, 2013:

> *Some will argue that these are public documents we the taxpayer have already paid for. True, but we have not paid for digitization. No free public access currently available should be removed by this agreement. The agreement should provide for additional access which this government is not prepared to fund, an arrangement increasingly common in other countries.*
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> *Most of the digitized materials now freely available on the LAC website, after the end of an embargo period, are the result of just such an arrangement, They are mostly indexed censuses created in cooperation with Ancestry.ca. Without that cooperation its unlikely any of that freely available material would be appearing online.*
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> *Previous LAC experience with Ancestry.ca, and with The (UK) National Archives is that it has enhanced, not reduced any existing access.*
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> *Arrangements such as this have led to many more free access points to the newly digitized materials across Canada through academic and public library subscriptions, and the option of an individual subscription. If you want enhanced access through digitization why should the general taxpayer be expected to bear the burden?*

EXAMPLES OF ANCESTRY COLLABORATIONS

- Library and Archives Canada
- National Archives and Records Administration of the United States (NARA)
- The National Archives of England and Wales (TNA)
- Canadiana
- Nova Scotia Archives
- Newfoundland – Maritime History Archives
- Archives of British Columbia
- Archives of Ontario
- Ottawa City Archives
- Comox Valley Genealogy Society, Quebec Genealogy Society, Saskatchewan Genealogy Society, Beechwood Cemetery (Ottawa, Ontario)

CONCLUSION – VALUE OF COMMERCIAL PARTNERSHIPS FOR DIGITIZATION

Collaboration with commercial partners provides the resources to assist public sector archives and libraries in digitizing their historical genealogical collections. The investment provided by these partners increases access to records while streamlining patron access to research services. Joint promotional activities leverage a partner's outreach efforts to help raise awareness of archive collections. Collaboration will help archives and the general public realize the full potential and value of our genealogical heritage. Together, public entities and commercial partners can help more people discover, preserve and share their family history.