Guide to Developing a Request for Proposal for the Digitization of Video (and More)

by chris lacinak
audiovisual preservation solutions
www.avpreserve.com

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350 7th Avenue
Suite 1605
New York, NY 10001
917.475.9630
info@avpreserve.com

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THE REQUEST FOR PROPOSAL

ABOUT THE CLIENT AND PROJECT:
Draft 2 – 4 paragraphs providing relevant background information your organization and project in order to provide appropriate context.

1. **BRIEF DESCRIPTION:**
   Describe the relevant source materials such as formats, quantities, durations (total/average), and the nature or types of content. For Instance:

   The tapes in the collection are all NTSC, consisting of both unedited raw footage camera originals and edited masters. The format types and quantities are as follows:

   - *½ open reel: 46 tapes, approximately 25 hours*
   - *¾" U-Matic: 106 tapes, approximately 85 hours*
   - *VHS: 30 items, approximately 30 hours*
   - *SVHS: 2 tapes, approximately 2 hours*
   - *Betacam: 39 tapes, approximately 25 hours*
   - *BetacamSP: 660 tapes, approximately 550 hours*
   - *MiniDV: 1000 items, approximately 700 hours*

   Program lengths are estimated based on the best information available. However, you will note that we request pricing information based on increments of actual run time.

2. **TIMELINE:**
   Provide a detailed description of the relevant milestones and deadlines. For instance:

   RFP Distributed: yyyy-mm-dd

   Bidder Questions: yyyy-mm-dd

   Client Responses: yyyy-mm-dd

   Proposals Due: yyyy-mm-dd

   Award: yyyy-mm-dd

   Ship to Vendor: yyyy-mm-dd

   Ship Files to Client: yyyy-mm-dd

   Client QC Completed: yyyy-mm-dd

   Rework Completed by: yyyy-mm-dd

   Project complete: yyyy-mm-dd

3. **CLIENT POINT OF CONTACT**
   Identify the primary point(s) of contact for your organization. There may be only one or there may be multiple (e.g. technical, administrative). For instance:

   The primary point of contact for this project will be Jane Doe (ph: 555-555-1212, email: janedoe@janedoe.com). As the project progresses additional points of contact may be established as necessary and appropriate.

4. **COMMUNICATION PROTOCOL**
   Identify the relevant points and circumstances in which you expect communication to occur. For instance:

   Vendors are required to contact the client:
   a. *Within 24 hours of receiving the originals with confirmation of receipt at the item level.*

   b. *Weekly via phone and/or email, as agreed upon, to provide a project status.*

   c. *48 hours prior to shipping the deliverables with an item level detailed shipping manifest*

   d. *To receive written confirmation via email prior to deletion of backup files on vendor's storage system*

5. **CARE, HANDLING AND STORAGE**
   Identify expectations for care, handling and storage of your materials once they are in the possession of the vendor. For instance:

   The vendor must acknowledge and demonstrate the following care, handling and storage requirements:
   a. *All staff handling the original objects must be knowledgeable regarding care and handling of open reel and cassette based video media in the collection*

   b. *A source tape should be transferred only once and transported (or "played") as little as possible*

   c. *No tapes shall be left unattended during transport*

   d. *No tapes shall be left in a machine if it is not actively being transferred*

   e. *All machines used for transport and playback of media shall be and known to be in good working order and under a routine maintenance plan.*

f. *The vendor must demonstrate and store the source media in a storage environment maintaining:*

   i. *Temperature no greater than 68 degrees Fahrenheit*

   ii. *Relative Humidity no greater than 50%.*

   iii. *Secured entry*

   iv. *Shelving appropriate for video media, and the media must not be stored on the floor*

   v. *Low dirt, dust and particulate levels*

6. MEDIA ISSUES
Identify how you would like problematic issues to be addressed and what the expectations are in these scenarios. For instance:

Problematic tapes requiring repair, cleaning, baking, or other treatments shall be brought to the attention of CLIENT prior to action being taken. The issue and the proposed solution should be sent in an email along with any associated pricing information and shall be approved by CLIENT prior to taking further action.

7. REFORMATTING
Identify the practices, protocols and standards that you require/expect the vendor to follow with regard to setup, calibration, alignment, etc. For instance:

a. **REPRODUCTION SETUP**

Video and Audio setup must be performed for each tape to ensure alignment with source tape and optimal reproduction. If bars are present on a tape the luma gain as well as the chroma gain and phase shall be adjusted so as to meet the standard values of the bars using a calibrated waveform monitor and vectorscope. If tone is present on a tape the audio level shall be adjusted as early on in the signal path as possible so that the tone is at 0VU on a VU meter or -18 dBFS on a digital/peak meter – using calibrated precision meters.

If there are either no bars on a tape or the bars are misrepresentative of the content on the tape (i.e. there are clear chroma and luma errors) the luma and chroma shall be adjusted according to the content on the tape. References for adjustment may include skin tone, sky, known black and/or white objects, etc.

If there is no tone on tape the audio levels shall be adjusted so that content averages 0VU and -18dBFS with peaks not to exceed 0dbFS and with no added analog oversaturation or digital clipping. All level adjustments should be performed as early on in the signal path as possible.

All tracks of audio must be checked for existence of audio content. All audio content on all channels shall be transferred in full.

b. ***SIGNAL PATH***

All components in the signal chain must be tested and known to pass the audio and/or video signal without alteration (level or quality) at null.

Calibrated high quality distribution amplifiers or routers must be used for any signal splitting and distribution. No other substitutions may be used.

The most direct and clean signal path must be used at all times from source to destination. There may be no devices inserted in the signal path that are not being used. If there are multiple destination formats being used in the transfer the signal path must be routed in parallel. No daisy-chaining of devices may occur.

The highest quality signal format (composite, S-Video, Component, SDI, etc.) available for the source media type must be used throughout the entirety of the signal path from source through destination. Exceptions to this must be explained and requested prior to performing the transfer.

c. ***IMAGE AND SOUND PROCESSING***

I. *Preservation and Access Masters*

No image or sound processing such as dropout compensation, noise reduction, audio equalization, or limiting shall be used in the creation of the Preservation and Access Masters.

All Preservation and Access Masters shall maintain their source formatting, including interlacing, frame rate, aspect ratio and recording standard.

ii. *Access Copies*

The Access Copies shall be de-interlaced. Levels may be adjusted

d. **DESTINATION FILE FORMAT SPECIFICATIONS**
Identify the target format specifications in the necessary detail to avoid miscommunication. For instance:

A Preservation Master, Access Master, and Access Copy shall be created for each tape, according to the specifications detailed below.

I. <u>*Preservation Master*</u>

QuickTime wrapper (.mov extension)

Video encoded using 10-bit YUV 4:2:2 uncompressed codec with the FourCC 'v210'.

Audio encoded as uncompressed PCM, 48kHz.

Maintain the original aspect ratio, recording standard, interlacing, number of audio channels and auxiliary information such as original timecode and closed captioning.

ii. *Access Master*

QuickTime wrapper (.mov extension)

Video encoded using the FourCC 'dvc '.

Audio encoded as uncompressed PCM, 48kHz

Maintain the original aspect ratio, recording standard, interlacing, number of audio channels and auxiliary information such as original timecode and closed captioning.

iii. *Access Copy*

QuickTime wrapper (.mov extension)

Video encoded using the H.264 codec.

Audio encoded as uncompressed AAC, 44.1kHz, 256kbps

Aspect ratio of 4:3 (640 x 480) using a square pixel aspect ratio.

Bitrate of 5000kbps

Maintain the original recording standard, frame rate, number of audio channels and auxiliary information such as original timecode and closed captioning.

e. **TIMECODE**

The original timecode of the source tapes shall be regenerated and maintained in the destinations. When timecode breaks are encountered, timecode should continue in "jam sync" mode to enable continuous timecode. The original timecode, with breaks, should be documented in the auxiliary timecode track of the QuickTime wrapper.

If there is no source timecode, original program shall start at 01:00:00:00.

8. **HEAD AND TAIL CONTENT**
Preservation Master

All source head formatting, such as bars and tone must be included.

In the event that program ends prior to the end of media the tape shall be checked through the end of the tape to ensure awareness of any additional content. In the event that there is additional content, all content on the tape shall be captured. In the event that there is no additional content the file should contain the end of program followed by 10 seconds of additional tape playback.

Access Master and Access Copy

All non-program material at the head and tail of the tape, such as bars, tone or excessive black/silence should be removed to make for a better viewing and listening experience.

9. REFERENCE FILES
a. GENERATING REFERENCE FILES:

At the beginning of the project, 20 seconds of bars and tones representing each setup used for reformatting tapes shall be digitized using the following specifications:

- *The signal generator shall replace the playback device in the signal path*

- *The test signal shall be routed through the same signal path as the audiovisual signal from the playback device*

- *The signal generator shall use the same output format as the playback device it is representing*

- *The bars shall be SMPTE bars for 15 seconds followed by 5 seconds of black.*

- *The tones shall be 2 channels and shall consist of 5 seconds of 50 Hz, 5 seconds of 1000 Hz, and 5 seconds of 20kHz, all at -18dBFS, followed by 5 seconds of no tone. Note that the silence shall consist of the signal generator being muted, and shall represent the noise floor of the signal path post playback device.*

- *The file specifications shall match the preservation master destination format.*

The resulting files shall also be encoded using the same signal path/software and settings, matching the specifications for the access master and access copy files.

For instance, where two setups are used to transfer U-Matic tapes via S-Video, and VHS tapes via composite, (2) 20-second preservation master level files will be generated. If more workstations were to be used additional files must be generated for each one. In addition, access master copies and access copies will be generated, resulting in a total of (6) 20-second files – 2 preservation master level, 2 access master level, and 2 access copy level files.

Each "setup" shall be assigned a 4-character alphanumeric system ID containing no spaces and only lowercase characters. This will be used in filenaming below and incorporated into system metadata.

b. FOLDER, FILE NAMES AND EMBEDDED METADATA FOR REFERENCE FILES:

The files shall be placed in a directory structure using the following conventions and the Reference Files folder shall be placed at the root level:

Reference Files/

> *yyyy-mm-dd_VendorID_SystemID/*

> > *yyyy-mm-dd_VendorID_SystemID_PM.mov*

> > *yyyy-mm-dd_VendorID_SystemID_AM.mov*

> > *yyyy-mm-dd_VendorID_SystemID_AC.mov*

The filename shall be embedded into each file using the QuickTime comments field.

The VendorID will be established in further conversations between CLIENT and the selected vendor.

10. **DIRECTORY STRUCTURE AND FILE NAMING**
   Identify the naming and organizational conventions required. For instance:

Files shall be named as follows:

> *Preservation Master: sourceItemID_pm.mov*
> *Access Master: sourceItemID_am.mov*
> *Access Copy: sourceItemID_ac.mov*

The sourceItemID will be supplied by CLIENT.

The following directory structure shall be used for delivery of the resulting files:

> *projectID/*
> > *sourceItemID_pm.mov*
> > *sourceItemID_am.mov*
> > *sourceItemID_ac.mov*

The Project ID will be provided by CLIENT.

11. **METADATA**
   Identify your metadata requirements. Specify the fields, vocabularies, definitions, controls and provide example values. Also specify the form of delivery and formatting required. For instance:

a. ***EXTERNAL***

CLIENT will furnish basic descriptive and technical metadata associated with the originals. All data shall be verified to be accurate and match the media throughout the

reformatting process. Differences between furnished data and data and/or content on the originals shall be brought to the attention of CLIENT before dissemination of the data.

The metadata fields and structure required for capture and delivery by the vendor are defined in the attached schema titled "CLIENT_reformatting_metadata _spec.xls"

b. **EMBEDDED**

The following data shall be embedded into the designated field within the QuickTime container for each file. All information with the exception of Reference File will be provided by the client:

Information	QT field
Full Filename with extension	*Description*
Organization Name	*Producer*
"Reference File": Corresponding full reference filename	*Comment*
Source Item ID	*Information*
Rights Statement	*Copyright*
Title information	*Title*

12. VENDOR QUALITY ASSURANCE AND CONTROL
Document your expectations of quality assurance and control within the vendor's organization.

a. *Operators must fully monitor the whole (audio and video) of the program in its entirety using calibrated high quality video and audio monitors as well as audio meters and video waveform monitor and vectorscope. The monitoring environment shall be suitable for critical viewing and listening. The physical transport of the media shall also be monitored during the transfer, paying attention to instability in the transport and with immediate access to the source machine controls. The operator may not engage in any other activities or work on any other transfers during the transfer of this tape.*

b. *The operator will fully document the reproduction throughout the duration of the transfer noting the timestamp and description of any artifacts that appear. Any notable events such as program changes, periods of black, changes in timecode, etc. should be documented.*

c. *Audio and video of all destination files must be checked at the head, middle and tail for content matching, completeness, and quality differences.*

d. *The audio and video on 25% of the source titles must be checked against a destination at the head, middle and tail for content matching, completeness, and quality differences.*

e. *All slates, labels and metadata (embedded and in the database) shall be compared and checked for accuracy and completeness.*

f. *Any inaccuracies in the data furnished by CLIENT shall be corrected and noted as being changed in a comments section for the tape.*

g. *An MD5 checksum shall be created for every digital file created as early after the files creation as possible and after any purposeful changes to the file. The checksum value shall be documented in the metadata set for delivery. Once the files are on their delivery medium their checksums shall be verified prior to delivery.*

h. *Vendors must perform routine integrity testing and maintenance of equipment and systems to ensure proper performance.*

13. DELIVERY
Specify the methods and expected protocols for delivery of deliverables back to your organization. For instance:

a. *CLIENT will provide Hard Drives for delivery of content in batches.*

b. *Logistical details and coordination of hard drives and batches is dependent upon further discussions between the vendor and CLIENT.*

c. *All files shall be maintained on the vendor's storage systems while CLIENT performs quality control.*

d. *CLIENT will perform extensive quality control and agrees to do so within 45 days of receipt.*

e. *CLIENT will provide the vendor with written documentation of results. The Vendor shall resolve any quality control issues without additional charge and within 30 days of receiving the written documentation.*

f. *Shipping of the original tapes back to CLIENT shall take place after CLIENT confirms in writing that initial quality control is complete and all initial quality control problems have been resolved. Shipping should take place on Monday through Wednesday using 2nd Day delivery.*

14. RFP RESPONSE
Let the vendor know how they should respond to the SoW/RfP if they are interested. For instance:

Interested vendors should provide direct responses to the requirements stated herein, offering information on workflows, staffing, facilities, equipment, processes and protocols that demonstrate appropriate capabilities, acknowledgement and compliance.

15. VENDOR QUALIFICATIONS AND PAST PERFORMANCE

Interested vendors should provide the following:

a. *Resumes of all personnel that will be working on this project*

b. *Brands and model numbers of equipment that will be used on this project*

c. *Brief description and references for at least three similar projects that the vendor has performed in the past three years.*

16. PRICING INFORMATION

In the response and quote provided to this statement of work, the vendor shall fill out CLIENT_reformatting_pricing_worksheet.xls This should include the following for each range of run times listed in the spreadsheet.

- *Creation of the Preservation Master*
- *Creation of the Access Master*
- *Creation of the Access Copy*
- *Quality Control*

Any additional activities/costs not encompassed in the above bullet points.

The vendor should also provide a quote for the total cost as part of the narrative response, assuming that all estimated run times are correct and that there are no additional costs required.

17. QUESTIONS

Please provide questions in writing to janedoe@janedoe.com by yyyy-mm-dd. Responses will be provided by yyyy-mm-dd. All questions and responses will be shared with all bidders.