Chögyam Trungpa Electronic Library and Archive (CHELA)

Feasibility and Implementation Study

Chögyam Trungpa Legacy Project

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1 INTRODUCTION

This report outlines the steps involved in creating an online repository for the teachings of Chögyam Trungpa Rinpoche. It focuses on the inclusion of audio and video recordings, as well as transcriptions of the audio material, which form the essential body of Chögyam Trungpa Rinpoche's original teachings

The working name for the online repository is the **Chögyam Trungpa Electronic Library and Archives (CHELA)**. CHELA means "disciple" and is derived from a Sanskrit word for a student.

A brief review of related film, paper documents, photographs, and personal objects is also provided, with recommendations for future inclusion. We also discuss how CHELA could become a portal for the study and practice of Chögyam Trungpa's teachings, either through direct hosting or links to discussions, downloads, book sales, foreign translation efforts, access for special needs, classes for new and established practitioners, etc.

In this report, we recommend an approach that will not only make the material available online but will also contextualize it, make it easily searchable, and encourage interest in these teachings. The process of creating the digital transcripts for such an online resource could also be a training ground for new transcribers who could also help to preserve and make this vast resource available. We also look at different options for structuring the organization and examine a membership model for the electronic library.

We are seeking seed funding of $49,000 at this time for a second phase, to complete budgetary projections for the project and to begin implementing the initial steps in our project plan. In this second phase, we would determine the software platform and partners and also identify the final project team for all aspects of the completion of the project.

2 PROJECT OVERVIEW

2.1 BACKGROUND

Twenty-five years after his death, Chögyam Trungpa remains an important and influential spiritual teacher of the 20th century and in the West altogether. He presented not only the entire nine yanas [stages] of the Tibetan Buddhist path, but also the Shambhala path of warriorship and compassionate action. His vision was that the Shambhala teachings, particularly in the secular presentation of the practice of meditation, could apply equally to practitioners from all of the world's traditional religious approaches, providing a fundamental ground on which all religious traditions could flourish. He himself was an artist, a poet, and many would say a warrior-statesman. He practiced and offered innumerable skillful means to wake people up, in fields as diverse as art, poetry, psychology, theater, and politics.

Chögyam Trungpa Rinpoche was also prolific. There are more than 2,600 unique audio recordings of his teachings in the Shambhala Archives, and more than 250 video recordings. Almost 1,300, or 50%, of these recordings have never been transcribed, and hundreds of others, which exist only as raw or partial transcripts, have never been edited or published. Thus, there remains a wealth of new material for current and future generations to use and study.

More than fifty books of Trungpa Rinpoche's teachings have been published in English and in twenty plus other languages. Almost twenty-five years after his death, Chögyam Trungpa's books continue to sell 50,000 copies a year in the English language, and a recent book, *Smile at Fear*, is a bestseller. This and many other indicators demonstrate that the audience for Chögyam Trungpa's teachings is expanding rather than shrinking.

2.2 VISION

April 4, 2012 will mark the twenty-fifth anniversary of the Parinirvana, or death, of Chögyam Trungpa, Rinpoche [1940-1987]. 2012 will be an auspicious year to celebrate the scope of Trungpa Rinpoche's contribution to the introduction of authentic Buddhist practice and knowledge in the West. The launch of the Chögyam Trungpa Electronic Library and Archives

(CHELA) in 2012 would be an outstanding achievement. If executed with skill and expansive vision, the online library could create a space of dharma emulating the vastness and openness of Trungpa Rinpoche's mind. This has been the guiding view of the Chögyam Trungpa Legacy Project, and we propose to bring that view to the online library. We want to establish a place that welcomes and invites everyone who feels a connection to study, practice and appreciate the dharma teachings and legacy of Chögyam Trungpa Rinpoche.

At the opening of the first Karma Dzong meditation center in Boulder, Colorado in 1972, Chögyam Trungpa described the intention as:

> *...A proclamation of open house. Those who want to practice are invited to take part in meditation, to go through the pain, go through the bliss, whatever you experience. Creating an open house situation is a gesture proclaiming that our aim and object are not related with dogma but on trying to encompass all areas of openness. That knowledge can be found throughout the teachings of Tibetan Buddhism or Buddhism in general --Sanskrit Buddhism, Pali Buddhism, or other schools of Buddhism. Since it is known that all dharmas are marked with emptiness, therefore all dharma is marked with openness, at the same time. There is tremendous room to work with chaos or confusion.*

This view is a guiding inspiration in the design of this project.

2.3 GOALS

The primary goals of the project are:

1. To design, develop, implement and maintain the online library to make available the original teachings of Chögyam Trungpa Rinpoche, in audio, transcript and video format, along with photographs and other supporting documents.

2. To, launch the website and online repository, with limited records, in 2012, the 25th anniversary of Chögyam Trungpa's death.

3. To make the Chögyam Trungpa Electronic Library and Archive financially sustainable
    through a combination of viable management, ongoing donations, membership
    subscriptions, downloads, and sales of other related products.

4. To reach the widest possible audience for the teachings of Chögyam Trungpa and to provide
    links to additional resources, such as webinars, home study curricula, discussion groups and
    other online resourcesfor the growing audience .

5. To create broad links with other dharma organizations and with other teachers to
    encourage a "web" of Western dharma teachings, of which CHELA would be a part.

2.4 GUIDING PRINCIPLES

The following principles were developed in modelling this project. These principles affect many
aspects of the project, from fundraising to governance and online web implementation. They
are implicit in our conclusions and recommendations and occasionally referred to specifically in
the study.

Summary of Guiding Principles:

**To achieve our broad goals, we want to create an online repository that provides
widespread, efficient, well-managed, user-friendly, accessible, and targeted access to
the teachings of Chögyam Trungpa Rinpoche, while respecting the sacredness of these
teachings and safeguarding them, as needed, from inappropriate use.**

Widespread refers to reaching the largest audience for the materials as a whole. It also refers to
holding a broad view, which should be reflected on the site.

Efficient means well-designed for easy access, and a container that can handle the volume of
data and the volume of users and deliver the data with ease, efficiency, and as few delays as
possible. Efficient also means using funds wisely, both in the implementation phase and in the
ongoing management of CHELA.

Well-managed means an organizational container for CHELA that withstands financial scrutiny from donors and regulators, and a reliable management team that can meet goals and deliverables, and can handle the challenges of the project.

User-friendly means that the online repository is useable and useful by many different clients. This also refers to providing responsive, quality online and phone service to clients.

Accessible means that the user can find what they're interested in, both through how CHELA is organized overall, its web interface, and various search tools and strategies provided.

Targeted refers to the user's being able to target and easily locate what they want in CHELA.

Respecting the sacredness of these teachings means that the look and feel of CHELA should convey elegance, clarity and wakefulness.

Safeguarding from inappropriate use means implementing access restrictions on materials that require a particular level of practice or study or have other prerequisites for viewing. We want restrictions to be low key, tasteful, and a seamless part of the site, and not off-putting to the public.

2.5 HIGH-LEVEL TIMELINE AND ACTIVITIES

Timeframe	Activity	Description
Fall 2011	Seed Funding	Secure $49,000 in seed funding for the project
Sept 2011 to June 2012	Stakeholder / Partner Consultations	Consult stakeholders, potential partners, other online repositories, and businesses for information and advice on how to establish best practices for data management, membership, governance, and other aspects of CHELA
Dec 2011	Initial Budget Projections	Develop budgets for implementation phase of CHELA, 2011 to 2014, as well as 2012 budget projections for cashflow, income and expense for the ongoing operation Ongoing - revised annually.
	Fundraising Plan	Develop and implement a fundraising plan for all phases of the project.
June 2012	Marketing and Business Plan	Develop and implement a marketing plan as well as plans to generate income from membership and sales of downloads and other products.
Sept 2011 to Sept 2012	Staffing Plan and Hiring	Define staff, consultant and advisory positions and conduct a job search for the key positions. All on board by September 2012.
	Standards and Protocols	Develop the standards and protocols for all aspects of the project, so that these are documented and applied consistently throughout all phases of the project
Sept 2011 to Dec 2014	Complete Digital Transcripts	Complete verbatim vetted digital transcripts of the content.
	Train Junior Transcribers and Editors	Train young transcribers as part of the transcript project
Jan 2012 to Dec 2012	Web Site and Platform Development	Design, implement, launch, expand, and maintain website and online repository: Timeframe: Engage web designer by Jan 2012. Engage software development team by January 2012. Launch modules for transcription and workflow: 2012. Launch first iteration of public website with minimal content: 2012..
	Complete Audio/Video Digitization	Working with the Shambhala Archives, complete the digitization of audio and video content for the repository.
2012 to 2014	Publish Online Content	Add online content in stages, in the form of audio recordings, verbatim transcripts and video recordings, to create a complete online repository of all audio, transcript and video teachings.
Ongoing	Digital Photographs	Working with the Shambhala Archives, digitize and put online the relevant photographs, estimated at close to 50,000 images.
	Additional content	Working with the Shambhala Archives, digitize and put online records in all other media.
	Educational and study resources	Develop links to educational and study resources for CHELA.
	Technology Sharing	Make the technology of CHELA available to other teachers and dharma communities who want to develop an online repository.

3   PROJECT DESCRIPTION

3.1 ENVISIONING THE LIBRARY

When the Chögyam Trungpa Legacy Project was established in 2006, we envisioned an online repository of Rinpoche's teachings.   We also envisioned the establishment of a physical facility where people would come to practice, study, and experience Trungpa Rinpoche's teachings. Our model was based on creating something akin to a Presidential Library in the United States. Beginning with Franklin Delano Roosevelt, every President has had a library established in his name after leaving office. These facilities generally include a museum that focuses on the president's life, vision, and achievements. There are often meeting rooms, classrooms, a theatre, and other facilities for meetings and conferences. At the John F. Kennedy Library in Boston, there is also an audio-visual archive, an extensive library, and a large oral history program, dedicated to collecting interviews and stories. At the Kennedy Library, there is also a smaller museum within the museum dedicated to Ernest Hemingway, because of his connection to Kennedy.

We visualized something very much like this for the Chögyam Trungpa Library, with the addition of one or more shrinerooms. It could be extremely powerful to practice in a space enlivened by the body, speech and mind relics of the Vidyadhara -- that is, all of the archival records and the personal and religious objects that belonged to Chögyam Trungpa Rinpoche. Mixing practice and study in such space would help to arouse sacred outlook.

Now, it seems that the two original goals, an online repository and the Chögyam Trungpa library, are coming together in how we envision the electronic Library and Archives. Many of the features of the physical library can and should be included in the online space that we create. Of course, there is no substitute for actually viewing and interacting with objects, art, and installations firsthand in a museum. However, we can create the Chögyam Trungpa Electronic Library and Archives with the view that we want to capture, embody and transmit as much of the power, dignity, and sacredness as we can in our virtual repository.

One advantage of an online repository is that the facility comes to you -- you can enter the Chögyam Trungpa Electronic Library and Archives through your computer in your own home or workplace, at any time of the day or night and anywhere in the world. People throughout the world can access audio and video recordings, read transcripts, and look at photographs and other items. Many viewers can also access the same records at the same time. In fact, in an online repository, you can potentially access material faster and more efficiently than you can in a bricks and mortar facility. You, your computer, and the online database become the librarian or the archivist who searches and retrieves material to read, listen to, and watch.

3.2 POTENTIAL USERS AND AUDIENCES

Using the Vidyadhara's own metaphor of an "open house," we need to ask: Who wants to enter this house?

The candidates to use CHELA include:

➢ *The Shambhala community* -- Every student and teacher in Shambhala is engaged with and inspired by the teachings of Chögyam Trungpa.

➢ *Senior students of CTR*: This is a large group within Shambhala, and there are also senior students who are now engaged with other Buddhist communities or in the world at large.

➢ *Other Buddhist Students and Teachers:* Buddhists in other communities and unaffiliated practitioners read Chögyam Trungpa's books, attend programs within Shambhala, and have an interest in Trungpa Rinpoche's teachings. Many Buddhist teachers have an interest.

➢ *Shambhala Media:* Media publishes books for the Shambhala community. They are a wholesale outlet and an online retail outlet for CTR's written, audio and video teachings.

➢ *Shambhala Publications and Its Readers:*Shambhala Publications has a long-term commitment to publishing the works of Chögyam Trungpa, and they are beginning to look at ways to grow their online presence.

➢ *Chögyam Trungpa Facebook Page:* More than 17,000 fans. Maintained by students in Shambhala. Quotes are posted several times a week and regularly receive a "thumbs-up" from several hundred facebook users. The fan base includes many Buddhist and non-Buddhist seekers from all over the world and all walks of life.

➢ *Ocean of Dharma Quotes of the Week:* Close to 12,000 people receive quotes via e-mail several times a week. Managed by Carolyn Gimian and maintained by Shambhala Publications. It is a diverse, committed online community.

➢ *The Chronicles of Chögyam Trungpa Rinpoche:* more than 9,000 unique viewers access this site every month.

➢ *University Students and Faculty:* Naropa University was founded by Chögyam Trungpa Rinpoche, and faculty and students there have longstanding interest in his work. Chögyam Trungpa's books have been used in university courses at many institutions. Some classics such as *Cutting Through Spiritual Materialism Meditation in Action* and *Shambhala: The Sacred Path of the Warrior* continue to have strong sales in these markets.

➢ *Foreign Students and Readers:* Chögyam Trungpa's books are published in more than twenty languages, and Shambhala centres around the world use his books and teachings as important resources. Other dharma centres and unaffiliated students on other continents are also interested in his work.

➢ *Western Psychotherapists and Health Professionals:* Chögyam Trungpa continues to be read and referenced in the psychotherapy community, and his books are used in related university courses.

➢ *Neuroscientists, mind/life researchers*, and those researching the nature of consciousness: Chögyam Trungpa's work is of interest to scientists and philosophers in these fields.

➢ *Artists and Art Historians:* Chögyam Trungpa's work is of interest to artists in many media. His writings about iconography and aesthetics are used by art historians.

> *The Mindfulness Community:* Not really a single community, this diverse group is interested in mindfulness meditation and its application in many areas and professions. Chögyam Trungpa's work is well-known to many of the leaders of this movement, and excerpts from his writings are included in many anthologies on mindfulness.

3.3 ACCOMMODATING DIVERSE INTERESTS

The diversity of those interested in Chögyam Trungpa's work should be taken into account in terms of how we design and build the online library -- its look and feel. Is it useable and useful for all or most of the communities of users? Can we avoid insider language and approach while still providing the depth for the committed and specialized audiences?　We want our core audience to be able to easily find or search for material of interest to them. So, if someone is interested in " the seminar in Boulder where Rinpoche gave a mind-blowing talk about the blue pancake" -- we'd like to help them. Or someone is searching for "material on Chandrakirti and Madhyamika" or "the six yogas of Naropa." We want them to easily be able to find what they want.

However, we also want to help the person who is thinking about starting to meditate and wants to find good talks for beginners. We don't want this newbie user to encounter a wall of jargon.

We also should think, in the longer term perhaps, about what we can offer non-English speaking audiences, and other specialized but important groups.

Finally, the income and access model that we adopt will influence whether potential users feel welcomed or excluded. We need to consider this in how we structure access. Altogether, we need to keep in mind that CHELA can help to create a new and wider audience for Chögyam Trungpa Rinpoche's teachings. So the indirect financial benefits of having this online resource are important to consider, although they may be difficult to quantify.

4 DIGITAL CONTENT

The Chögyam Trungpa Electronic Library and Archives will initially focus on the audio and video records of the teachings of Chögyam Trungpa Rinpoche, accompanied by verbatim transcripts of these recordings. Some photographs will be included in the initial development, with plans to import additional photographs and records from other media, including film, paper documents, and art work. A more detailed description of the contents of CHELA and plans for completing the digitization of the content appears in the Appendices.

4.1 AUDIO

Approximately 92% of the 2,677 audio recordings of teachings by Chögyam Trungpa Rinpoche have been digitized by the Shambhala Archives, and 95% of all the 1935 unrestricted records has been digitized. (See complete statistics in Appendix A.) This material will be included in CHELA. More information and recommendations on the audio collection are found in Appendix D.

The audio recordings are like the backbone or the foundation of CHELA. They present the entire range of teachings of Chögyam Trungpa Rinpoche. There is a vitality to the audio that can never be captured in print, and there is an intimacy to the recordings that is unique to the audio medium.

The teachings contained in these recordings represent an important collection of dharma, certainly one of the most important collections of dharma teachings given in the West. The range of topics is reflected in Chögyam Trungpa's literary work but also goes beyond that. Hundreds of seminars and single talks are not published, and even where published, the original talks often capture nuances that cannot be put into print.

Many unpublished seminars on the mahamudra lineage are recorded on audio, including seminars about its forefathers Tilopa, Naropa, Marpa, Milarepa, and Gampopa, as well as later teachings about the Karmapas and Jamgon Kongtrul. The unpublished seminars available on audio also present material on the battle of ego, working with death and dying, meditation and mindfulness, crazy wisdom, mandala principle, discipline and devotion, self-deception, the ten

bhumis, the four maras, karma and the nidanas, and many other topics. Additionally, there are weddings, funerals, vow ceremonies, business conferences, talks to children, meetings with staff at Vajradhatu, poets at Naropa, and caregivers to the elderly. The categories of the material are shown in Appendix A. All of this will be available in CHELA.

Additionally, there are 709 restricted recordings, representing 26% of the material, that will be available to students with the necessary prerequisites. In the restricted category there are also many unpublished gems.

4.2 VIDEO

Approximately 47% of the 261 video recordings of Chögyam Trungpa Rinpoche have been digitized by the Shambhala Archives. A small number of video recordings of other relevant events have not been catalogued. The small size of the overall collection will make it relatively easy to prepare the material for inclusion in CHELA. Specific information and recommendations on the video collection are found in Appendix D.

Although a relatively small collection of material, the video recordings are extremely important. All of the seminars given by Chögyam Trungpa Rinpoche in the first three years of Naropa were recorded on black and white video, and the material is in excellent condition. Additionally, there are other early seminars given in Boulder, Colorado and at Karme-Choling in Vermont, and a small number of talks at other locations, including two seminars in California. The colour video collection, which is about one third of the whole, includes two Shambhala Training public talks, a seminar on visual dharma from 1978, a vajra assembly conducted by Chögyam Trungpa Rinpoche, and a number of other ceremonies and talks

4.3 TRANSCRIPTS

It's hard to overstate the significance of completing the archive of the transcripts of all of the talks and other events related to Chögyam Trungpa Rinpoche. Unlike the audio and video collections, the transcripts are far from being ready to include in CHELA. Significant attention must be paid to transcription, for the success of CHELA overall. Therefore, as part of this study,

we gathered more detailed information on the state of the transcripts collection and the steps required to complete the transcripts. (See Appendices B and C.)

Presenting a large collection of written teachings or writings can be extremely powerful. The publication in 2003 of the first eight volumes of *The Collected Works of Chögyam Trungpa* had far more impact than imagined beforehand. To have all of the verbatim transcripts of his work available online would be equally valuable, and in some respects, it is more important than any other written record of his work.

It is of value to complete the transcript archive, for the following reasons:

➢ Many listeners cannot accurately hear or understand what Chögyam Trungpa is saying by simply listening to the audiotape. For people to make full use of the audio records, transcripts are essential.

➢ Transcripts are an invaluable resource for the editors and publishers of Chögyam Trungpa's teachings. They are used in connection with the audio tapes as the basis for sourcebooks, books and other publications. 40% of Trungpa Rinpoche's recorded teachings have not been transcribed, which represents a large body of material that remains to be edited and made available. Without accurate electronic transcripts of the material, it is extremely difficult to assess the value of the material and how it might best be presented and published.

➢ Those who wish to study Trungpa Rinpoche's teachings in depth will benefit from increased access to his work through the transcripts.A raw transcript may be a challenging read, even for the serious and seasoned student of Trungpa Rinpoche's work. Nevertheless, the unfiltered and uninterpreted access to his words be of benefit for those willing to invest the time.

➢ Transcripts allow one to study a large body of material in a short period of time. Although one also may have access to his teachings through the audio recordings, , one can only listen to audio at "real-time." Even a slow reader can peruse the transcript of an hour-long talk in half the time.

➢ If you want to find everything recorded that Chögyam Trungpa said about crazy wisdom or about his dog Yumtso or about tigers, you can't do so efficiently with just access to the audio tapes. With an electronic online version of the transcribed material, you can answer many queries in less than a minute. Keyword and subject tagging paired with full text search and hyperlinks to glossary definitions will take the power of text to a whole new level.

➢ Completing the transcription of all of the audio records is also a preservation strategy. Given the predictions for cataclysmic events connected with climate change, we need to have off site digital archival backups of the materials in the Shambhala Archives. Additionally, we may want to work with the Shambhala Archives to preserve the finally approved transcripts in paper and ink format. The ability to preserve Rinpoche's voice will be much more difficult than preserving written, printed records of what he said. Finally, with excellent and complete electronic versions of the transcripts, we could also investigate burning miniature copies of the transcripts in metal. This technology is being used for the Time Capsule Project.

State of the Transcripts

As stated above, there are 2677 audio recordings of Chögyam Trungpa's teachings to be included in CHELA. For these, there are 1395 transcripts. Just under 1,300 recordings, or approx. 48% of the total, have not been transcribed. Of the 1395 transcripts, only 100 of them are available electronically, in MS Word. 1222 are typed, and 93 are handwritten.

The majority of the existing transcripts are 30 to 40 years old. Some are faded and difficult to read. They are of variable accuracy. There are gaps in the transcripts, numerous errors and omissions, and many other problems. Even transcripts rated "excellent" contain annotations that words or phrases are inaudible, and some transcripts are missing a sentence, paragraph, whole page or section of a talk. The vast majority of the transcripts have notations in pencil or ink. A small number show editing marks on the original transcript.

With all of these issues, significant investment of time and money will be required to create a complete and accurate collection of transcripts online. At the same time, the challenge

presented by the transcripts is also an opportunity to train new transcribers. The proposal for the completion of this project is found in Appendix B.

4.4 CATALOG AND DESCRIPTIVE DATA (METADATA)

Lynn Friedman, a member of our team and a professional IT analyst, extracted relevant data on the audio, video and transcript collections from the Shambhala Archives database. She reviewed the data and identified some data integrity issues that crept into the Archives' system over time. We have addressed these issues in a copy of the data in order to produce the information for this report, and this "cleaned" data is a good starting point for the CHELA catalog and descriptive data (metadata).

Building on the design initiated by the Shambhala Archives, the relational database for the metadata connected with the online repository will ensure that individual recordings are linked to a timeline of events such as Seminary, Midsummer's Day, etc.. This will be useful for the staff and developers and also very useful for contextualizing the material and making it easily searchable for the public.

Our report and comments, with recommendations for updating the database in the Shambhala Archives, are attached as Appendix F.

5 WEBSITE AND TECHNOLOGY PLATFORM

How we design and implement the online repository is crucial to the success of CHELA. We may have an important collection of dharma teachings, but if the material is not properly presented, its value will be diminished.

5.1 LOOK AND FEEL

From the moment you access it, the website should feel spacious, clean, elegant and inviting. It should have the feeling of a beautiful art installation or an elegantly appointed room, not a collection of old stuff in an attic or basement. The look and feel of the website should be accessible, not esoteric. The language of the website should be easy for anyone to read and understand. Jargon and specialized vocabularies should be kept to a minimum and terms explained, where needed.

The website should be easy to navigate. Search capabilities should be built-in, easy to use and obvious.In terms of the goals articulated earlier, this fulfills the goals of *Widespread, User-friendly, Accessible, Targeted, and Respecting the sacredness of these teachings*.

We recommend that a web designer be brought in early in the process, as soon as possible. The digital asset management system will have a great affect on the accessibility and user-friendly qualities of the website. So the selection and development of this software system needs to be carefully considered and integrated with the web design. The web designer and software developer(s) need to work closely together.

5.2 TECHNOLOGY PLATFORM

For the purposes of this study, we evaluated a number of technology platforms and approaches to managing and accessing digital collections. Our full report and evaluation criteria are found in Appendix E.

Considering all factors, our recommendation is to use an open source platform in order to achieve the best balance of cost vs. functionality. Choice of which open source platform to use would be based on a number of business-driven factors, such as availability of programmers /

consultants familiar with the platform, and perception of the "momentum" that platform currently has in the marketplace. Whichever platform we ultimately choose, we need to be prepared to migrate to another platform in the future if a better option comes along – that is why migration strategy is such an important selection criteria.

The open source digital management platform that currently has the most "momentum" in the user community is **Fedora**, which provides rich tools for managing all digital content types. From their web site:

> *Fedora (Flexible Extensible Digital Object Repository Architecture) was originally developed by researchers at CornellUniversity as an architecture for storing, managing, and accessing digital content in the form of* ⁊⊞⁊⸿⫟⸿∅″⁻¹⫟*inspired by the Kahn and Wilensky Framework. Fedora defines a set of abstractions for expressing digital objects, asserting relationships among digital objects, and linking "behaviors" (i.e., services) to digital objects.*

Fedora is in use at a number of prestigious insitutions, such as the Jewish Women's Archive, the National Library of Australia, the Boston Public Library, the Athens Archaeological Society and many, many others. However, since Fedora's "out of the box" user interface is somewhat rudimentary, some "hybrid" platforms have emerged that marry the powerful "back end" of Fedora to a pretty and highly customizable "front end". Two of these are **Fez**, developed at the University of Queenland, Australia, and **Islandora**, developed at the University of Prince Edward Island, Canada.

5.3 PHASED DEVELOPMENT APPROACH

For the site development, we could work with either our own programmer, or engage specialized programming consultant. To get an idea of the potential cost of developing a site that meets our initial requirements, we worked with **Discovery Garden**, the developers of **Islandora**, to create a high-level quote, which is attached to this study as Appendix H. They would certainly be a strong contender for the contract.

The goal in the initial phase of implementing the data management system will be to produce a functional version that can be used by the transcription team and other staff members and consultants working on the design and implementation of CHELA overall. This will include software for transcription workflow, as well as a working database showing metadata for all events connected with the audio, video and transcript records.

While work is progressing on the transcription project, we will be rolling out the elegant front-end website for the public user. We may also need to develop a "working prototype" to show potential donors/investors.

5.4 HOSTING

CHELA will reside on a virtual server running the Red Hat Enterprise Linux operating system. It will be managed by Rackspace Cloud server support team. Our research points to Rackspace as an excellent choice for this type of application, providing excellence in technology and support. Our audio and video assets will be stored as cloud files. (Additional archival versions of the data will be stored elsewhere, in the Shambhala Archives and other locations.) The cloud files will keep the data safe and secure, while making them reliably available anywhere in the world with the optimal bandwidth for dependable streaming and downloads.

As CHELA grows, so will it's computing needs. By using a virtual server and cloud files, CHELA will be completely scalable. From a handful of users accessing just a few megabytes, to ten of thousands of users accessing many terabytes each month, we will not run out of space or lack computing power, and we will only pay for the storage and bandwidth we use.

6　BUSINESS MODEL

6.1　MEMBERSHIP AND ACCESS

Whether to charge for access to information and how to do so is an ongoing question for providers of content on the internet. News institutions have gone both ways on this question, and sometimes have gone back and forth, as in the case of *The New York Times*, which now offers limited access and charges for downloads beyond a certain number a month, with a flat fee for total unrestricted access.

Many content providers have found that users will go elsewhere to find free content, not bothering to access sites that charge membership fees. General users rely on the free online dictionaries and encyclopaedias, for example; however, specialized and academic users may be willing to pay for content.

We propose exploring the benefits of free access to streaming of public or general content, with voluntary membership, while charging for downloads of material and for some other special services. We would also have books and other materials on our site or provide "click through" links that would give us income from sales.

We think it would be worthwhile to investigate this model. If we decide to implement it, like the *New York Times* and many other information providers, we would always have the option of adding a fee for access, if warranted.

In the realm of dharma, a particularly successful model of mostly free access combined with membership is the online archive of lama Yeshe's teachings at lamayeshe.com. Voluntary memberships have provided more than $500,000 in funding for this site and related activities. Members receive some special benefits, which act as incentives.

Whatever model of membership we develop, it needs to include reciprocal membership and benefits to avoid competition and overlap with other repositories and portals to Chögyam Trungpa's work, such as the ShambhalaArchives,Shambhala Media, and the Chronicles of CTR.

6.2 PARTNERSHIPS

The Shambhala Archives, Shambhala Media, and other departments within Shambhala will be important partners. CHELA needs to maintain a close working relationship with the Shambhala Archives and with Shambhala Media, as well as with other departments and functions within Shambhala International. The Shambhala Archives will be providing major content for CHELA. CHELA will also be providing the Archives with digital and other assets (such as digital transcripts and printed copies of the transcripts.) Shambhala Media will be an outlet for downloads of many materials from CHELA, whether they provide the downloads themselves or a click through to another site.

We held informal discussions with both the staff and adminsitration of the Shambhala Archives. With their current budget and responsibilities, even with significant fundraising, the staff felt that development and maintenance of CHELA would not be feasible. Discussions with the co-director of Shambhala Media indicate that there is potential interest in managing the project by adding additional staff people. This should be explored further.

We recommend that, in addition to key partnerships within Shambhala, CHELA explore links to and partnerships with other organizations with similar goals.

Advantages of exploring links and partnerships:

➢ Creating greater awareness of our project, working together with other dharma groups, and being of service.   This includes talking with other Buddhist organizations that are in the early stages of designing or implementing online repositories, to see if there are ways we can work together. There are many Buddhist and small dharma groups in North America that do not have good archival preservation facilities or facilities for online preservation and access. Among the groups we might connect with: students of Kobun Chino Roshi; Sonoma Mountain Zen Centre (KwongRoshi); the Pema Chödron Foundation; Rigdzin Shikpo's Longchen Foundation in England; Pullahari Monastery in Kathmandu; and others.

➢ Finding financial support: the potential to find interested investors and donors. We need to connect with interested parties who might be interested in helping fund the project, beyond the membership of Shambhala. One example, from a past project of the Shambhala Archives, is the partners in their Audio Recovery Project (ARP). The ARP partners included Longchen Foundation in England, Pullahari Monastery in Kathmandu, Nepal, the Dharma Ocean Foundation, Naropa University, the Khyentse Foundation, and Sattdharma in Ojai, California.

➢ Learning from others' successes and failure with design and implementation of similar online projects: we are investigating the overall approach, including software, design, data platform, and business models, used by other web based repositories from whom we may want to learn and with whom we might eventually want to partner.

Some organizations to consult:

➢ The Tibetan Buddhist Resource Center in New York. They have been archiving, digitizing, and providing online access to tens of thousands of Tibetan Buddhist manuscripts from all schools. A connection with them is invaluable. They can certainly provide a great deal of information and background on how to undertake a large web-based project like this.

➢ The online archive of Lama Yeshe's teachings mentioned earlier, atlamayeshe. com. Another example of a successful online repository that we want to consult with and possibly link to.

➢ The Orient Foundation and related projects in England. They have been archiving oral discourses by Tibetan Buddhist teachers for many years.

➢ The online archive of Naropa University. We have obvious connections here. We want to consult with them about what they have done and how it might apply to our project.

➢ Suzuki Roshi online archive. This was designed some years ago, and is a very simple and successful web-based approach. It would be good to talk with them about what and how they accomplished this and what they would now recommend.

Note: We hoped to accomplish all consultations within the period of this study, but we're still in preliminary discussions with these organizations. We will have a meeting with the director of TBRC in September, and we're pursuing consultations with Lama Yeshe's group and Naropa. There may be many other organizations to consult with.

6.3 GOVERNANCE AND STAKEHOLDERS

Options for a governance structure need to be investigated at the front end of the project, and we will need good communication and agreement with stakeholders and advisors, so that we proceed with clear understanding and support from all parties.

The governance model adopted must respect the interests of the stakeholders listed in Appendix K. Many of these parties not only have financial interests but also are guardians of the dharma teachings of Chögyam Trungpa Rinpoche. All of the parties have a vital interest in and desire that this project go forward. In many cases, their contractual agreement to material being made available online must be obtained. Whatever income and membership model we finally adopt, it will have to reflect the investment and interests of our stakeholders and it will have to compensate primary stakeholders, including the Shambhala Archives, Shambhala International and the family of Chögyam Trungpa Rinpoche.

7 CONCLUSION

Based on this review of issues involved in feasibility and implementation, we are confident that the Chögyam Trungpa electronic Library and Archives is highly feasible. With funding, the initial launch of the library with the inclusion of limited records could be successfully accomplished over the next year, with additional components added over a two to five year period.

Not only is the project feasible, but it's an inspiring goal whose achievement will further the preservation and propagation of Trungpa Rinpoche's teachings. It will also help to foster a vibrant community interested in the teachings of Chögyam Trungpa Rinpoche as well as potentially providing the stewards for the legacy of Chögyam Trungpa in the future, through the training of transcribers and editors.

We are seeking seed funding of $49,000 at this time to complete budgetary projections for the project and to begin implementing the initial steps in our project plan.

We have attached a budget for the seed funding (Appendix J) and also a preliminary, high-level quote for the development of the digital management system (Appendix H).

Although we don't have final budget projections, it is already clear that designing and implementing CHELA, readying all the digital content, and launching a viable website and community all carry potentially heavy price tags. To raise the funds for the project, we need an overall development plan that will include ways to raise awareness of the project and interest in it. Building the community for the online repository is a necessary part of raising the funds for the project, and also will be the source of ongoing revenue once the site is launched.

There are many challenges to implementing this project. Some of them are financial, but the fundamental issues are about whether we can raise our gaze sufficiently to take the big view required to make this project successful. We feel that the challenges are worth engaging, and that the results will justify the investment of all of our resources: financial, energetic, and spiritual.

8 ACKNOWLEDGMENTS

We would like to thank the staff, administration, and volunteers of the Shambhala Archives and Shambhala Media for access to their collections and database, for their advice and consultation, and for their ongoing and dedicated work to preserve the teachings of Chögyam Trungpa Rinpoche.

Thanks to the IT advisory group that met with us at the outset of the project; to Robert Walker for his consultation on the transcript archive and for general advice and consultation; to Mark Leggott and the staff of Discovery Garden for consultation on developing a content management system and online repository; to members of the advisory group of the Chögyam Trungpa Legacy Project for consultation and support; to members of the administration and the Kalapa Council of Shambhala, and to Diana J. Mukpo and the Mukpo family for consultation and support; and especially to the donor who provided financial support for this project.

APPENDIX A: SUMMARY OF RECORDINGS OF CHÖGYAM TRUNGPA RINPOCHE

All Talks (With/Without Restrictions)	2677	
Talks with Audio	**2626**	**98%**
Not Digitized	223	8%
Digitized	2403	92%
Digitized - Remastered	1432	60%
Digitized - Not Remastered	971	40%
Talks with Video	**260**	**10%**
Not Digitized	138	53%
Digitized	122	47%
Black and White	167	64%
Colour	93	36%
Video Only	41	
Talks with Transcript	**1395**	**52%**
Handwritten	93	7%
Typed	1222	88%
Mixed	8	1%
MS-Word Only	72	5%
MS-Word (Total)	100	
Transcript Only	6	

All Talks - Counts by Restriction Type		
Unrestricted	**1968**	**74%**
Restricted	**709**	**26%**
Advanced Shambhala (Lodge)	168	
Vajrayana - PreTransmission	99	
Vajrayana - PostTransmission/Ngondro	166	
Vajrayogini	70	
Vajrayogini - Fire Puja	12	
Chakrasamvara	29	
Jambhala	4	
Manjushri	7	
Kasung	65	
Teacher / MI	89	

Unrestricted Talks	1968	74%
Unrestricted Talks with Audio	**1935**	98%
Not Digitized	92	5%
Digitized	1843	95%
Digitized - Remastered	1219	66%
Digitized - Not Remastered	624	34%
Unrestricted Talks with Video	**220**	11%
Not Digitized	111	50%
Digitized	109	50%
Black and White	165	75%
Colour	55	25%
Video Only	25	
Unrestricted Talks with Transcript	**1089**	
Handwritten	74	7%
Typed	941	86%
Mixed	3	0.3%
MS-Word Only	71	7%
MS-Word (Total)	95	
Transcript Only	5	

Unrestricted Talks - Counts by Category	1969
Administration	33
Amara Health	4
Children and Youth	22
Community Talk	70
DanaHome Care	2
Dekyong	6
Dharma Art	36
Dharmadhatu Conference	19
Empowerment or Enthronement	2
Funeral	20
GoldLake	3
Group Audience	24
Lineage Seminar	104
Maitri Project	18
Media Interview	19
Midsummer's Day	9
Mudra Theatre	36
Nalanda Translation Committee	194
Naropa Institute	114
Padma Committee	2
Poetry	6
Public Talk or Seminar	771
Ratna Society	4
Refuge/Bodhisattva Vows	66
Seminary - Event	10
Seminary - Hinayana Talk	113
Seminary - Mahayana Talk	95
Shambhala Day	8
Shambhala Training	25
Shrine Blessing or Dedication	11
Social Event	25
University of Colorado	38
Visiting Teachers	10
Wedding	49

Restricted Talks — 709 — 26%

Restricted Talks with Audio	**691**	**97%**
Not Digitized	130	19%
Digitized	561	81%
Digitized - Remastered	213	38%
Digitized - Not Remastered	348	62%
Restricted Talks with Video	**40**	**6%**
Not Digitized	27	68%
Digitized	13	33%
Black and White	2	5%
Colour	38	95%
Video Only	16	
Restricted Talks with Transcript	**306**	**43%**
Handwritten	19	6%
Typed	281	92%
Mixed	5	1.6%
MS-Word Only	1	0.33%
MS-Word (Total)	5	

Restricted Talks - Counts by Category   709

Chakrasamvara   29

ChakrasamvaraAbhisheka	2
Nalanda Translation Committee	27

Jambhala   4

Jambhala Talk	1
Nalanda Translation Committee	3

Kasung   65

Encampment	38
College of Denma	4
Kasung Event	23

Lodge / Advanced Shambhala   168

Empowerment or Enthronement	2
Kalapa Assembly Event	26
Kalapa Assembly Talk	36
Lodge Transmission	5
Lodge Event	38
Nalanda Translation Committee	40
Sangyum Ceremony	2
Shambhala Training - Graduate Levels	19

Manjushri   7

Manjushri Talk	6
Nalanda Translation Committee	1

Meditation Instructors / Teachers   89

Vajrayana - PostTransmission   166

Vajrayana Transmission	10
Tantra Group	55
Vajrayana Talk or Seminar	49
Ngondro Transmission	26
Nalanda Translation Committee	26

Vajrayana - PreTransmission   99

Seminary – Vajrayana Talk	99

Vajrayogini   70

VajrayoginiAbhisheka	14
Vajrayogini Talk	39
Nalanda Translation Committee	17

Vajrayogini - Fire Puja   12

APPENDIX B: PROPOSAL FOR COMPLETION OF THE TRANSCRIPT ARCHIVES

Methodology of the Study

For this study, we wanted to make realistic time estimates and recommendations for the completion of the transcript archive, with estimates of the various stages involved: initial transcription, correction, and final editing for paragraphing and punctuation. We also wanted to look at alternate technologies for transcribing or transferring written transcripts to electronic files. We did rudimentary evaluations of optical character recognition (OCR) for converting typed transcripts to electronic files and Dragon Speak, using voice recognition software for transcribing. (The transcriber repeated what was said on the audio tape – Dragon could not handle Chögyam Trungpa's voice.)

Consultants' Work and Recommendations

Robert Walker, an experienced transcriber of Chögyam Trungpa's work and an experienced student and teacher of dharma, was asked to transcribe a number of talks and check a number of transcripts, keeping careful records of his tasks and the time spent. As well, Robert did a preliminary evaluation of Dragon Speak and OCR. His final report is attached as Appendix C. Robert consulted with Carolyn Gimian throughout this process.

Based on Robert's recommendations, we developed the following workflow and estimation of the time required to complete the project.
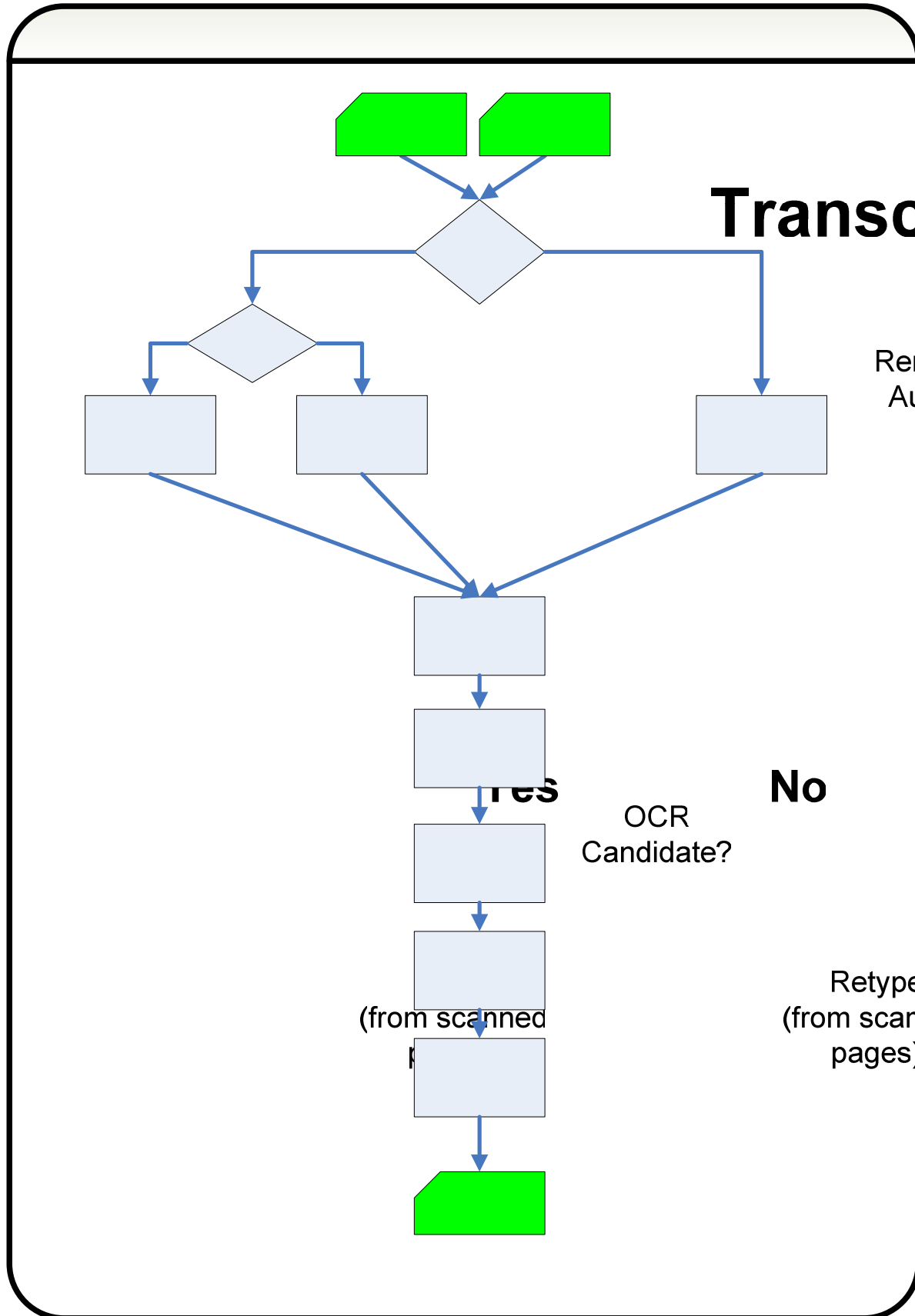
Remastered
Audio File
(MP3)

Yes

Sca
Tran
Avail

Yes   **No**

OCR
Candidate?

Retype
(from scanned   (from scanned
p   pages)

Accurac
(from

Time and Cost Estimates

As the reader can see, there are many stages in creating, correcting, and completing the transcripts for inclusion in CHELA. Our consultant provided detailed time sheets for the time it took to transcribe and check material. As a well-trained, experienced, excellent transcriber, he provided us with be our optimal expectations. A new transcriber might take considerable time to "get up to speed."

Based on these results, we estimate that with a trained staff, the project entails more than 12,500 hours of actual work involved in transcription plus a number of months for set-up and establishment of standards, training, and other tasks. A detailed budget and description of tasks and time involved is appended in Appendix I. In brief, with preparation and planning, a team with four members could complete the project in two years, plus several months for planning, establishing standards, and locating and training staff.   The start up period would be approximately one year, with limited staff working on preparation. If we conduct the transcript project with a paid staff, the cost of the entire project would be approximately $375,000 spread over three and a half years.

General Recommendations:

1. We recommend that CHELA implement and manage the completion of the transcript archive. At regular intervals, completed material would be provided to the Shambhala Archives, so they would have a complete electronic archive of all of the transcripts.We also propose that the Shambhala Archives should have a complete set of the transcripts in paper format, for preservation purposes. Additional preservation copies would be kept in other locations.

2. We recommend exploring various options for completing the work: a paid staff, a mix of paid staff and volunteers, and all volunteers with a paid coordinator.

3. Almost the entire effort to transcribe the teachings of Chögyam Trungpa Rinpoche has been volunteer to this point, and the result is that we have transcripts that require significant attention to complete and make them useable online. Since the death of Trungpa Rinpoche, a purely volunteer attempt with a part-time paid supervisor has not proved to be effective. The Archives has found that:

   3.1. At least 50% of the people who volunteer to transcribe do not complete the work they take on.

   3.2. Those who complete the work tend to take a very long time to do a very little bit of work. People do not make their volunteer transcribing a top priority, so a single talk may not be completed and returned for months.

4. Although some volunteer transcribers are excellent, many are not. We need to carefully select all paid and volunteer staff who work on the project.If there is a dedicated volunteer who is willing to work like a staff person -- putting in the same hours and with similar commitment -- then we'd love to have that person involved. Such volunteers are extremely rare in our experience, but we know of several, and we would try to interest them in this project! We'll be open to such people and seek them out, where we can.

5. We propose a staff of 3.75. It could be made up of four individuals working fulltime or close to fulltime, or there could be a larger pool of individuals job sharing. If we work with a volunteer work force, job sharing is more likely.

6. This project presents an opportunity to train new transcribers. We propose that half of the staff positions be filled by senior and experienced students with excellent background in transcribing and or editing. We propose that up to half of the staff positions be given to new and younger transcribers who show promise in transcription and possibly in editing.

7. We support our transcribers having access to assistive technologies such as OCR and speech recognition and encourage their use as appropriate. Our evaluations of them indicated significant limitations to their usefulness in our project. (See consultant's report, Appendix C.) However, we feel that we should continue to evaluate and use these where they are helpful. If something of this nature could reduce the time involved in the project and/or increase accuracy, we would be very open to it.

We have faith in our ability to bring this project to completion within the projected time period, if we have good senior staff, excellent transcribers, and sufficient funding. We would like to begin working with a director for the project in the late fall of 2011. Given the size of the budget and the time commitment, we suggest that we begin the project by raising $25,000 for initial work on standards, fundraising, and acquiring, evaluating, and training the staff. We would revise the total budget for the project, hopefully downward, based on our ability to involve committed volunteers. We recommend that we begin the project full force when we have at least 50% of the funds needed for the first year of transcribing. We feel that the results in the first six months will speak for themselves. It should be quite feasible to then raise the remainder of first year funding, as well as the second year funds to complete the project.

Suggested Timeline

Dates	Activities
September 2011 – January 2012	**Initial Fundraising**
Fall 2011	**Project Manager Hired (part-time)**
January 2012 – August 2012	**Fundraising Continues**
Fall 2012	**First Staff Training Period**
January 2013	**Project Begins Full-Force**
December 2014	**Project Completion**

APPENDIX C: CREATING USABLE TRANSCRIPTS

Robert Walker

Here are some summary notes about creating useable transcriptions of the Vidyadhara's audios and videos that don't distort the meaning, that would be comprehensible to teachers or others working with curricula, and that would be useful for editors.

➢ **Importance of developing an ear for the Vidyadhara's voice**

First of all, the most important skill in producing transcripts is developing an ear for the Vidyadhara's voice, familiarity with his vocabulary (with some Tibetan and Sanskrit), and enough comprehension of the meaning to be able to pick up words in context. Even doing basic transcription, I think that more time is involved trying to figure out individual words or phrases (which requires connecting with the meaning context as well as the Vidyadhara's preferred vocabulary) than typing speed alone. By working with a number of talks in a particular time period, a transcriber will discover an uncommon vocabulary that will help in making proper word choices. One word can change the meaning of a whole paragraph.

➢ **Mistakes and Unintentional Editing**

Having worked on many transcripts and checked the works of both myself and others, it's clear to me that mistakes are common. It's very easy to unintentionally edit – put in something that seems reasonable but isn't what he actually said – due to lapses in attention, but also due to misunderstanding or resisting the dharma that he is presenting. The Vidyadhara's teachings often "push one's buttons" or go against the grain of commonly held beliefs. It's quite possible, and not uncommon, to transcribe something, thinking that one has got it "right," when in fact he was saying something quite different, or the opposite.

➢ **Qualifications for this work**

So, this is not the kind of work that, to be done accurately, should be farmed out broadly, but should be **limited to transcribers and checkers with the time to do work with a number of talks**, preferably related to a particular time period. They will need **a good ear and some dharmic understanding. Knowledge of the time period in question would be a bonus.** Rather than having seven transcriptionists do one talk each of a seven talk seminar, it would be better to have **one**

transcriptionist and one checker per talk. That's just to address the "vocabulary" issue. In addition, **familiarity with dharma, particularly the Vidyadhara's dharma, is important.**

A good transcriptionist or checker should also be **able to connect with the meaning**, apart from deciphering particular words. Otherwise, it's too difficult **to know where to break off and start new sentences and where to make paragraphs**.

➢ **Punctuation and Paragraphing**

True, this is editor's work, but some baseline work at the level of punctuating the raw transcript is very useful, not only for editors but for other possible readers, such as someone evaluating the use of audio or video talks for curricular purposes. Long transcripts with little paragraphing are very difficult to make any sense of, and I think we do want transcripts that, while "raw," are also comprehensible, even before they are edited for publication.

➢ **Problems of Disappearing Text**

I just finished working on a talk that is extremely accurate, amazingly so, but which required a good bit of punctuation and paragraphing, maybe one correction every 2 lines or so. Also, the transcriptionist, in this and another talk, seemed to go missing every few pages, not transcribing whole lines and, in one case, not transcribing five or so paragraphs, leaving off and picking up in the middle of sentences. This was not a unique occurrence.

This could have been due to the transcriptionist "spacing out," but could also be due to the **tendencies of old word processing programs** (if this transcript was first made into a word processing file that has since been lost) to unintentionally "eat" bunches of text. I'm bringing this up to emphasize **the importance of checking**. I think this is what might have happened -- that some old word processing program ate text -- is because of my experience transcribing using crude word processing programs in the 1980s. On many occasions I had to re-do work because of just this issue. It's likely that this will come up from time to time with old transcripts, more than one would think.

➢ **Checking the Transcript Back to the Tape is Essential**

The point is: checking is essential, as important as the transcribing itself (though an excellent transcriptionist can make the checking much less work). Old transcripts, even good ones, cannot be trusted, unless they have been checked, and even then, an editor should be working with the original audio or video, in my opinion.

➢ **Comparison of Retyping Corrected Transcripts vs. Adding Corrections to Rough Word Processing Document**

Now – let's go back to that aspect of the transcript of having to correct punctuation, make paragraphing, or correct little errors every two lines or so. The fact is, even with this relatively minor level of work, **it would be more efficient to re-type the whole corrected document from scratch than it would be to add the corrections into a rough word processing document. I've timed it – it was true in the 1980s and it's true today**. Maneuvering the cursor to enter commas, eliminate "ums," change case or number, add a paragraph mark, takes more time than just retyping a corrected document.

Recommendation

1. My conclusion about this is: old, pretty-good transcriptions should be corrected and retyped from scratch. It doesn't matter whether they're word processing documents, .pdfs, or pieces of paper. My strategy would be: first correct them (by hand), then retype them. I think that would be the quickest and most accurate approach.

2. It would be good to limit the number of transcriptionists and checkers doing this work.

➢ **Uses for .pdfs of existing transcripts.**

This is **the only logical way to preserve the old raw transcripts**. We need to create .pdfs so that, if a raw transcript gets lost, we'll have something. This makes a lot more sense than massive photocopying. Also, even a bad transcript will give a rough idea of what a seminar is about, which is useful. **But the use of .pdfs in this way has nothing to do with transcription or editing.**

➢ **Usefulness of Optical Character Recognition Software?**

Having said all that about what kinds of transcripts are needed, what does this tell us about the use of optical character recognition software? My opinion is: almost useless. **Even sophisticated, accurate O.C.R. software will introduce enough errors into the resultant word processing document to still require checking and re-typing**. It would be better to just check and correct the raw page that would have been fed into the O.C.R. system and type directly into a word processor, skipping the O.C.R. step completely. For that matter, by the reasoning in the previous paragraph, even a 100% accurate O.C.R. system would have to be checked, and the subsequent corrections of

errors made by the original transcriber would be best entered into a word processing document by retyping the whole thing.

➢ **Dragon Sofware for Transcription?**

As for the use of the Dragon software – **it's not meant for literal word-by-word transcription but for dictating.** It would be great for taking notes – but transcription? I tried listening to talks and dictating what I heard, but it was just too hard. Often, I didn't know how to punctuate a line or where to put a paragraph mark until I was several lines down the page. It's possible to back up to do that using Dragon, but somewhat awkward. The biggest difficulty was that of listening and talking, with punctuation marks, at the same time. I don't know if that's a skill I could develop to a very high level.

But there's a bigger issue with Dragon: the hours involved in training the software itself and in training the transcriptionist to use the software. My own limitations as a "dictator" could, perhaps, be overcome. But the Dragon software itself would still have to be trained to the voice of the transcriber, for one thing, and to the unique vocabulary used by the Vidyadhara, for another. Such training would be ongoing.

The software has built into it many proper grammatical forms and usages that would not go along with a literal transcription of the Vidyadhara's. Correcting the Vidyadhara's grammar is the work of editors, not transcribers. Dragon would have to actually be "untrained," to some extent, for this purpose. It would also take hours to train the transcriptionist, and further hours to train the software to be useful in transcription, even if you could find a transcriber with the dictating and punctuating skills, and skill with the program. Perhaps David Rome could do it. On the whole, my belief is that there is almost no one out there who could use the Dragon software for our purposes effectively.

➢ **Conclusion:**

I think we need dharma students with good ears, skills with grammar at or near the level of editors, good typing skills, and familiarity with the Vidyadhara's teachings.

APPENDIX D: THE SHAMBHALA ARCHIVES AND ITS DIGITAL ASSETS

History

When a Buddhist teacher dies, one of the primary responsibilities of the disciples and successors is to gather together, preserve, and disseminate his teachings. Since April 4, 1987, the Parinirvana of the Vidyadhara the Venerable Chögyam Trungpa Rinpoche, many students have worked to do precisely this, in myriad ways. The Shambhala Archives was created as one vehicle to aid in these endeavours.

The Shambhala Archives was established in 1988 as the primary repository for the audio, video, film, and written teachings of Trungpa Rinpoche. Photographs, personal and religious belongings, correspondence, calligraphies and artwork, as well as minutes, notes and files from the departments of the organizations he founded were also brought together in the Archives. The process of gathering together these materials and establishing a facility to hold them was the focus of the Archives' work for a number of years. Material was gathered from organizations, departments, and individuals throughout the world. This function continues to this day, with new material related to the Vidyadhara's life and teachings being added to the Archives every year.

Beginning in the mid 1990s the main work of the Archives shifted to 1) cataloging the contents of the Archives and 2) the preservation copying of fragile and endangered audio-visual records. Over a number of years, early hand written catalogues were reviewed and entered into a database, materials were examined and catalogued, and a database of the audio and video records in the Archives was developed. This is the database still in use in the Archives today.

The first major preservation project undertaken by the Archives was the Video Recovery Project, in which 166 endangered black and white open reel video tapes made in the 1970s were transferred to new analogue formats. Access copies of the new video tapes were provided to a number of major Shambhala centres in North America and Europe. Almost as soon as these

copies were made, they became obsolete due to the advent of DVDs and other digital media, but nevertheless these transfers were essential to the future digitization of the collection.

Upon completion of Video Recovery, the Archives began researching the best standards and practices (within their financial reach) for the digitization of the audio tapes of the Vidyadhara's teachings. There were close to 2,700 hours of tape to be transferred. After several years of experimentation, the Archives launched the Audio Recovery Project to digitize, archive and enhance these sound recordings. New files were stored on CDs, DVDs, analogue tape (in the beginning), and several computer RAIDs. In addition to creating archival digital masters in 24 bit wav files, the Archives also created a number of other back-ups and access files. Audio CDs were made, MP3s of corrected audio were created, along with audio gold CDs of all the material, which were made as preservation copies to be kept in both the Archives and the Great Stupa of Dharmakaya in Colorado.

In addition to the preservation and access files/copies created for the Archives, more than twenty-five Shambhala centres, other dharma groups, the NaropaUniversity, individuals, and departments within Shambhala received a selection of 1,500 audio CDs. The sound quality of the ARP CDs was corrected and enhanced. All the major public seminars, talks at the Vajradhatu seminaries, a large selection of public talks and meetings, and other materials were included in these ARP libraries. Creating multiple libraries for centres was both a means to provide broad access to the materials and a form of preservation back-up.

Now, in 2011, 92% of all of the 2,677 audio recordings of the Vidyadhara have been digitized, and the Archives anticipates completion of the remaining 8% by the end of 2011.

There are many other important collections in the Archives related to the teachings of Chögyam Trungpa Rinpoche. These are discussed below. Overall, the contents of the Shambhala Archives are an extremely valuable asset that will be the basis for the Chögyam Trungpa Library and Archive. These assets, both digital and analogue, need to be preserved. The digitization of this material is still far from completion, but the investment the Archives has made in digitizing its audio collection will allow the online library to proceed much sooner.

When the Shambhala Archives was established, digital preservation was in its infancy. People were just beginning to acquire home computers. People listened to music on cassette tapes, and were just starting to play CDs. The Internet was not widely in use. In less than twenty years, online access has become not just a dream but the norm for accessing and using information. So an online archive is a necessity for making Trungpa Rinpoche's teachings available to the broad base of interested students. As well, the major way that people are now acquiring recordings is by downloading them from the internet. This is yet another obvious reason why an online catalogue and repository is needed.

In order to put material online, it goes without saying that one needs the digital assets that will be the basis for the online repository. The Shambhala Archives invested close to ten years and more than $300,000 to digitize its VCTR audio collection. Because of this investment and dedication, the basis for an online repository exists, at least in the audio realm.

The role of the Shambhala Archives has expanded as Shambhala International has matured and the work of SakyongMipham Rinpoche has also expanded. The Archives now has responsibility for preserving the teachings of many lineage teachers, organizations, and senior instructors.

Audio Recordings

There are 2,677 recordings of talks by and events related to Chögyam Trungpa Rinpoche in the Shambhala Archives. At last count, 2,403 had been digitized, 1,432 had been remastered with sound correction and enhancement, and 223, or around 8%, remained to be digitized.

The Archives protocol is that the digital archival masters are produced as 24 bit uncompressed wav files. The master digital archive of this material is on a RAID in the Archives. A number of archival back-ups of the master files are being saved in other locations on other RAIDS or hard drives. As part of this study and for our use now and in the future, we made additional copies of the master archival files.

Additionally, the wav file is saved on DVDs, Audio CDs of all the material are also made, and two sets of gold preservation audio CDs are made, for on and off site storage. MP3 files of the

remastered audio are made, along with audio CDs of the remastered material. (For further information, see Appendix D.) A number of MP3s still need to be made, along with a back log of gold CDs and DVD back-ups. The largest remaining task for the Shambhala Archives is the sound remasteringof 971 recordings.

Recommendations for completing the Digital Audio Collection:

1. With relatively little investment of time and money, the Shambhala Archives can complete the entire digitization of the Chögyam Trungpa Audio Collection. This should be accomplished as quickly as possible.

2. Approximately 40% of all the recordings have not had remastering, i.e., sound enhancement and correction, which is necessary before material goes online or is made available as downloads. We recommend that we work with the Archives to create a budget for this work so that the work can be completed in 2012, if funding is secured.

3. Once the recordings are sound enhanced, MP3 recordings of the enhanced material need to be made. This can be done by the Archives or by the Legacy Project as part of implementing CHELA.

4. As part of its preservation strategy, the Archives should complete the Gold Audio CDs and the Back-up DVDs. These are copies of uncorrected archival files and can be done whenever the budget exists for the work.

Video Recordings

The video recordings of Chögyam Trungpa are a precious resource. For many students, the ability to *see* him presenting the teachings is very powerful.

The records of the Shambhala Archives show a total of 261 video recordings of events related to Chögyam Trungpa, 166 black and white, and 95 colour recordings. There are some additional recordings of events that are not catalogued. There are digital files for 124 of these 261 components, all in DV 25, aka Quicktimeformat.Of these, 71 have been re-mastered and

published on DVD. There are still 53 components in raw digital form, notremastered for publishing. There are 137 component records that have not been digitized at all.

There is no back up of the digital video data in another format or on another carrier. The Shambhala Archives plans to institute tape backups. There is currently no off site back-up of the digital video.

The Shambhala Archives has not had sufficient resources to devote to digitizing the video tapes of Chögyam Trungpa. Funding and prioritization is needed.

All of the digitization could be accomplished within a year to 18 months, if the funds and staff are available and allocated.

Recommendations for Completing the Digital Video Collection:

1. We recommend funding the digitization of the video as a high priority.

2. The existing archival digital video files are not segregated on their own computer or RAID at this time, and in some cases, folders are intermingled with other speakers and non-archival projects. We recommend that the Archives purchase a RAID dedicated to the CTR video collection and put all existing digital video assets on this. A second off site hard drive array should have a complete back up of all the digital video.

3. The Archives needs to budget for and purchase tape backup.

4. CHELA needs to complete a review of archival digital formats to ascertain that DV25 is the best, cost effective digital archival format for our uses.

5. Based on the findings above, CHELA should work with the Archives to complete the digitization of all digital video to DV25 or whatever format is selected.

Transcripts

See recommendations, in Appendix B, for completing the digitization of the transcripts.

Other collections:

Most of the other records in the Archives have not yet been digitized.

➢ **Photographs:**

There are approximately 50,000 photographs related to the life and teachings of Chögyam Trungpa Rinpoche in the Shambhala Archives. There is at this time no complete item level catalogue of the photos, and less than 5% have been digitized. Standards for digitizing the photographs are still being developed. Once digitized, significant work to remove dust and enhance the images may be required for optimal use in an online repository. Permissions from photographers must also be obtained. The completion of the photo archive is a multi-year project. CHELA should work closely with the staff and volunteers in the Archives to complete this work. As an interim approach, material could be scanned, corrected, and put on-line in stages over a number of years. We recommend that a small number of photographs be included in the initial launch of CHELA.

➢ **The Ladrang Collection:**

A significant number of the personal and religious objects that belonged to the Vidyadhara, which are referred to as the Ladrang Collection, have been catalogued and photographed by staff and volunteers in the Shambhala Archives. Virtual exhibits of much of this material could be included or linked to in the online archive. CHELA should support the ongoing work of the Archives with the Ladrang Collection.

➢ **Paper Documents:**

The paper documents in the Archives, which include correspondence, minutes of meetings, and many other documents, are not catalogued at the item level. Almost no material has been digitized. It will take considerable time and effort to catalogue and scan this material. Much of it also has copyright and access restrictions that will have to be addressed. This is a multi-year project. CHELA should support the ongoing work of the Archives with the paper documents.

➢ **Film:**

The Shambhala Archives has a small collection of film footage, film elements, and finished films. We were not able to complete the catalogue of this material for the study.

➢ **Art Work:**

Several hundred calligraphies and paintings by CTR are in the Shambhala Archives, as well as posters, furniture designs and other visual art. We were not able to complete the catalogue of this material for the study.

Recommendations for Other Collections:

1. A modest number of photographs (250 to 500) should be included in the launch of CHELA. Photos are very popular and are in demand at the Archives. Additional photos should be added to CHELA as available.

2. Some virtual exhibits and photo galleries showing the personal, household and religious objects of Chögyam Trungpa Rinpoche should be included in CHELA, either from the launch or within the first two years.

3. A plan and budget for digitizing the film and art work in the Archives should be developed with the Archives and implemented after or simultaneously as the audio, video and transcript records are completed.

4. The digitization and the ingestion of paper documents should be considered part of the long term plan for CHELA, along with the remainder of the photo collection.

5. The first priority for paper documents should be the digitization of the original manuscripts of Chögyam Trungpa.

6.   Digitization of calligraphies and other artwork should receive high priority.

APPENDIX E: TECHNOLOGY PLATFORM COMPARISON AND EVALUATION

Lynn Friedman

For the purposes of this study, we evaluated a number of technology platforms and approaches to managing and accessing digital collections. Our evaluation criteria included:

Criteria	Description
Collection Management	Ability to upload content with either a batch process or individually; ability to edit metadata with a web-based interface (authorized users only)
User Management	Centrally managed OR self-managed registration and payment Nice to have: community management tools for mailing lists, donation history, renewal reminders, …
Content Model	Ability to represent the relationship between Events (aka Seminars), Talks and Items, as well as linking Talks to an authority table of Speakers and Locations
Browsing / Searching	Ability to combine full text search with structured search drilldown / refinement ("faceted" search)
Flexibility	Ability to easily configure as many aspects as possible of both the look and feel AND functionality of the site

Extensibility	Ability to obtain prebuilt add-ons, or build our own if necessary, in order to add the following functionality initially or in the future:
	• Workflow Engine (for transcribing, translating, editing, cataloguing)
	    o Enforcing defined stages, tasks and owners, showing a visual dashboard of progress
	• E-Commerce:
	    o Subscription Management
	    o Fee per download
	• Access Control
	    o Ability to indicate levels of restriction on individual talks and grant access levels to individual users
	• User-contributed content
	    o Engaging the user community to add content around the managed content, such as:
	    o Commentary, discussion, memories, insights
	    o Course Syllabi
	    o Reading Lists
	    o Photos
	• Multi-language interface
	• New Content Types
	• Virtual Classrooms

Cost	Total cost of ownership, including Licensing, initial Consulting/Customization time, and ongoing recurring maintenance and upgrade fees
Open Standards	Adherence to industry-recognized open standards for metadata (such as Dublin Core) and content (such as TEI for text markup)
Migration Strategy	Ease of exporting / migrating data to a new platform if necessary
Scalability	Ability to handle high volumes of searching/querying or content streaming

The options for digital archive technology platforms fall into three broad categories:

Category	Description	Examples	Pros/Cons
Proprietary Commercial Platforms	High-End Enterprise Systems aimed at large institutions	• ContentDM • Digitool/ ExLibris	Pros: • High level of functionality • Scalable for large collections • Paid support staff • Commercial quality documentation and support Cons: • High initial cost as well as ongoing licensing and maintenance • Low openness and extensibility
	Low-End systems for small/medium institutions	• PastPerfect	Pros: • Low cost • Ease of use • Easily generate a "canned" virtual exhibit Cons: • No web-based administration • Low flexibility to customize/extend Virtual exhibit functionality • No support for e-commerce, access control, and other "must-haves" in our evaluation criteria • Not scalable for high volume streaming
Open Source Platforms	Software made available for no cost in source code form so that it can be extended / modified	• Fedora / Islandora • DSpace • Omeka • Greenstone	Pros: • Lower cost (no licensing fee, but usually consulting fees for configuration / customization) • Low OS/platform cost (Linux) • Flexibility – ability to heavily customize • Wide selection of (free) prebuilt add-ons • Large user community for support • Commitment to open standards / ease of migration to other platforms Cons: • Out-of-the-box ease of use and look and feel sometimes lacking (academic / technical focus) • Customization comes at a cost (need programming skills)
Custom-Built Solution	Custom programming to marry a database back-end to a web-based front-end	---	Pros: • Get exactly the functionality you want, the way you want it • Start small, add functionality as you need it • Can built in open standards if you plan it that way Cons: • Heavily dependent on a programmer – no "out of the box" functionality • High cost of development and ongoing enhancements • No ability to leverage prebuilt add-ons

APPENDIX F: SHAMBHALA ARCHIVES DATABASE ANALYSIS AND RECOMMENDATIONS

Lynn Friedman

One of the major challenges in completing this study was assessing and describing the state of the CTR-related assets in the Shambhala Archives. While a dedicated staff and many volunteers have diligently entered cataloguing data into the Shambhala Archives Database for many years, over time a number of data quality and integrity issues have been introduced which creates obstacles to easily searching and summarizing the data.

In order to answer the questions posed by the study (see Appendix A), it was necessary to extract a subset of the data related to the life of CTR into a separate, temporary database, and "clean" the relevant data fields to get them into a state where accurate reports and counts could be generated. This was a time-consuming and mostly manual process. In order to be able to quickly move forward with the online digital repository, we recommend that this separate, "cleaned" database be used as the starting point for the online catalogue.

However, there is still a real and urgent need to address the information management issues in the Shambhala Archives, not only to secure continued and ease of access to the audio-visual assets for the 2300 CTR-related talks related to this project, but especially for the 1500+ (and growing) collection of teachings by Sakyong Mipham Rinpoche, at least 1000 by acharyas, shastris and other senior teachers, and at least 2000 from a rainbow of visiting lineage teachers such as the Dalai Lama, Khenpo Tsultrim Gyatso, Penor Rinpoche, Namkha Drime Rinpoche, Ponlop Rinpoche, Ato Rinpoche and too many others to name.

It should be noted that these types of data integrity issues are not unexpected for a database of this age, especially one maintained by many different people, many of them temporary volunteers. This is a common concern even in large commercial and academic databases. But in order to maintain a relevant and searchable data repository, an ongoing commitment of a budget and oversight needs to be established for information management governance as well as regular technology maintenance and upgrades.

Below is a summary of issues found in the Shambhala Archives Database:

Issue	Description
Outdated Technology	The database is a custom-built application currently running on version 9 of Filemaker Pro. This is at least 5 years behind the current version of Filemaker (version 11).
Uncontrolled Vocabularies	There are about 40 data fields whose values ought to be selected from a list of pre-approved terms in order to enforce consistency. In most cases, a list is presented for selection on data input, but a) the database design allows users to override the list and enter their own values; b) the list has become outdated, so it is no longer useful; or c) there is inconsistent understanding of the meanings of terms, so they are applied incorrectly. The multitude of terms used, including mistakes and misspellings, makes it impossible to do meaningful searching and reporting on the data. For example: you would not be able to find all the talks by Sakyong Mipham Rinpoche, because he is listed as a speaker in all of the following ways: • SakyongMipham • SakyongMipham Rinpoche • SMR • SRM (misspelling) • SAWANG • SORM Similarly, Lady Diana Mukpo is referred to as all of the following: • Diana Mukpo • Lady Diana Mukpo • Lady Diana • LDJM • LJDM *(misspelling)* • Mukpo, D. And it is difficult to get a list of all talks that took place at KarmeCholing, because it is referred to variously as: • KarmeCholing • KCL • Karme-Choling • Tail of the Tiger • TOTT

Broken Relationships (Widows and Orphans)	The Archive database was designed with a hierarchical structure that represents relationships between Events (such as Seminaries or Sangha Retreats), Talks, and Items (such as video, audio and transcripts for the same talk). This is a key feature of the database design that enables items to be put in their proper teaching context.However, in some instances, users have gotten around the requirement to link items to talks and have a result have created a number of "Widow" and "Orphan" entries:
	• Widows:
	   o 87 Events with no child Talks
	   o 123 Talks with no child Items
	• Orphans
	   o 28 Talks with no parent or nonexistent parent Event
	   o 1449 Items with no parent Talk
	   o 136 Items linked to invalid (nonexistent) Talks
	   o 136 Items linked to more than one Talk

Issue	Description
Inconsistent Titles	There are inconsistent standards for titles of events and talks, such as: • Whether to use "&" vs. "and" • Use/placement of "The" • Guidelines on use of punctuation • Conventions such as : "Buddhist Vihara, Talk At"
Inconsistent File / **Directory Names**	All digital files are stored on servers with RAID drives and backups. However, the way the directory structures are organized is not consistent (sometimes by year, sometimes by speaker, sometimes by subject matter), and the names of files, other than the files produced as part of the Audio Recovery Project, are extremely inconsistent: • nov 15 2007 SMR Address • Ngondro Talk1 Edited • 01 _1-01. Slate • 43 _3-01. Meditation Workshop- Sat. April 8th, 2006 Morning Therefore, the ability to find a particular talk on the drive, or to know what a talk is from the filename, is severely limited.
Blank Records	There are about 50 blank or mostly blank records in the database
Invalid Keys	In a relational database, all records MUST have one valid, unique key in order to ensure referential integrity. In our database, there are 4 records with duplicate keys, 77 records with no key, and 1 with an invalid key.
Missing Data	There are several key fields – such as Speaker, Date, Location, ItemFormat, Storage Location, etc. – that should be required and not allowed to be left blank. For example, 675 items (out of 34599) are missing the Format; 90 Talks are missing the Speaker.
Invalid Dates	Date is a key field for queries, and there are a few invalid dates that have been entered. There is not a consistent approach taken for unknown dates.
Numbers as Text	Numeric data such as Duration (for audio/video), NumberofTalks (for events) and Pages (for transcripts) are entered as text (e.g., "35 min" or "1 hour" or "1:55") instead of numbers. This limits the usefulness of the data – for example, we can't add up the number of hours of video we have.
Scratch / Temporary Data	Technicians have added temporary "scratch" fields to the database to hold copies of data being used to produce a report at some point in the past. These have been left in the database, and there is no indicator that these are scratch/old data and not real/current data, and so mistaken assumptions could easily be made.

Recommendations for Addressing Data Integrity Issues:

1. Establish Information Management Oversight and Governance Structure

❑ Information Management or "Head Librarian" function

This person (or group of people) should develop, document and most importantly, enforce information management standards and guidelines.

These standards and guidelines should undergo regular reviews and updates, to grow as new needs arise.

❑ Database Manager

The Archives needs access to a technical resource that regularly upgrades the operating systems and database software, as well as makes changes to the database design when necessary

2. Evaluate and Select Technology

There are several options for the "next generation" of the Archives database:

❑ Upgrade/Enhance the existing Filemaker database

Change the design "in place" to address the identified issues

❑ Develop a new database

A new database could be developed either in Filemaker or on another platform, such as Microsoft Access. Sometimes it's cheaper/easier to start with a "clean slate". Also, it is much easier to find database developers for Microsoft Access than for Filemaker.

❑ Migrate our data into PastPerfect

PastPerfect is a proprietary, commercial software package being used by the Archives to manage the Lhadrang and Photograph collections. The interface is very user-friendly, and it comes with many built-in features. However, there is limited ability to customize, so we would lose much of the specialized functionality we currently use to manage our audio-visual collection.

3. Design / Develop New Solution

No matter which technology direction is chosen, a process of design and development will need to occur. The goal of the design must be to address the identified issues without losing existing functionality. Even if the decision were to map our data into PastPerfect, a design would need to be done to decide how and where to map each piece of data.

4. Create and Document Information Management Guidelines

Concurrent with design and development of system improvements, the information governance group should design and document standards and guidelines such as:

- Standard procedures for new accessions
- Timeliness of adding / updating data
- Naming Conventions for titles, filenames, etc.
- Guidelines for contents of Descriptions and other open text fields
- Required data fields for various content types
- Controlled Vocabulary lists – meaning of each term, and when it is appropriate to use it – for example, what is a "Master" vs. "CopyMaster"?
- Procedures for requesting additions / changes to controlled vocabularies

5. Extract, Clean and Migrate the Data

The existing data will need to be "cleaned up" to adhere to the new standards. This can be done either before it is migrated, after it is migrated, or in an intermediate database / spreadsheet. Some of the data cleaning may be automated or semi-automated, but a great deal of it will need to be done manually.

6. Maintain and Evolve Information Management Guidelines

The guidelines and particularly the controlled vocabularies need to grow and evolve as new subject areas, speakers and formats are introduced into the mix. It needs to be clear to everyone who is accountable for this and what the process is for introducing changes.

7. Maintain and Upgrade Technology Platform

As mentioned earlier, the Database Manager needs to perform regular upgrades to the operating systems and database software, as well being available on an ad-hoc basis for changes to the database design when necessary.

APPENDIX G: THE CHÖGYAM TRUNGPA LEGACY PROJECT

In 2006, the Chögyam Trungpa Legacy Project was established with a mission to:

"preserve the teachings of the Vidyadhara the Venerable Chögyam Trungpa Rinpoche and to facilitate the practice, study, and application of those teachings by as broad a public as possible in order to foster wisdom and compassion throughout society."

The Legacy Project was established as a project within the central seat of governance in Shambhala and works closely with the Shambhala Archives on projects related to the Vidyadhara's teachings and legacy. An advisory committee helps to guide the activities of the Legacy Project and review its priorities. For more on the governance and priorities of the Legacy Project: chogyamtrungpa.com

From 2006 to 2008, the Legacy Project held consultations with members of the Shambhala community around North America and Europe. During the consultation period, interest in an online library and archive of teachings came up over and over again. Interested students inthe United States andother parts of North America, Europe, and elsewhere all expressed an interest in having online access to the Vidyadhara's teachings. Therefore, from its inception, the Legacy Project had as one of its main goals the establishment of an online library/archive of the teachings of Chögyam Trungpa Rinpoche.

APPENDIX H: DISCOVERY GARDEN QUOTE FOR TECHNOLOGY PLATFORM DEVELOPMENT

Phase 1 Development		$55,200	
Scope		**$2,400**	
	Define Scope	$1,200	*Phase 1 with focus on transcription, but need to be able to provide basic asset view/search to facilitate this as well. Phase 1 would be 2/3 of the work for the final repository.*
	Initial Project Plan	$1,200	*Mindmap of project based on Scope assessment and the building block used to develop technical and project management documents*
Design		**$3,600**	
	Framework Design (Wireframes)	$1,200	*Mockups for site functionality, focused on internal use - view/search, admin tools and transcription workflow*
	Interface Design (Theming)	$2,400	*Look and feel - simple, not for general public*
			Signoff
Project Mgmt		**$2,400**	
	Project Management Plan	$1,200	*incl ongoing project management through project*
	Technical Development Plan	$1,200	*Incl ongoing technical lead management*
Installation		**$3,600**	
	Server Setup	$1,200	
	Configure OS level comp/LAMP Apps	$600	
	Install Islandora Stack	$600	
	Configure Islandora Stack	$1,200	*Standard plus J2K*
Customization		**$43,200**	
	Interface Mods/Enhancements: Phase 1	$2,400	*Focused on Transcription input/management*
	Content Modelling: Transcriptions/Annotations	$4,800	
	Content Modelling: Document Images	$2,400	
	Content Modelling: Audio & Video	$4,800	
	Content Modelling: Entities	$3,600	
	Metadata Mapping/Editor - EAC-CPF	$2,400	*For Events/People/Locations - EAC-CPF*
	Metadata Mapping/Editor - Audio	$2,400	*For Talks - QDC (Dublin Core) and MIX*
	Metadata Mapping/Editor - Transcriptions	$2,400	*Transcriptions Markup tools - TEI Lite*
	Transcription Workflow System	$7,200	*Phase 1 piece, focus for the Organization*
	Audio integration/desktop tools	$2,400	*Addl tools for ease of audio listening/transcribing*
	Ingest Tools	$6,000	*Batch/individual ingest of audio/transcript images*
	Unit Testing	$1,200	
	Bug Fixing	$1,200	
Services		**$2,400**	
	User Training	$2,400	
	Consulting	$0	
Hardware		**$0**	

Phase 2 Development		$24,000	
Design		**$6,000**	
	Framework Design (Wireframes) - Phase 2	$1,200	
	Interface Design (Theming) - Phase 2	$4,800	*Look and feel improvements for public launch*
Project Mgmt		**$2,400**	
	Project Management Plan	$1,200	*incl ongoing project management through project*
	Technical Development Plan	$1,200	*Incl ongoing technical lead management*
Installation		**$2,400**	
	Install Islandora Stack: Phase 2	$1,200	
	Configure Islandora Stack: Phase 2	$1,200	*Streaming servers for high volume multimedia files*
Customization		**$13,200**	
	Interface Mods/Enhancements: Phase 2	$4,800	
	Collection Creation/Management: Phase 2	$2,400	*Ability to create collections of related content*
	Solr Integration	$3,600	*Fulltext / Metadata index and search*
	Unit Testing: Phase 2	$1,200	
	Bug Fixing: Phase 2	$1,200	
Development Subtotal (Phase 1 and 2)		**$79,200**	
Yearly Recurring Costs		**$12,240**	
Support	Ongoing Maintenance for 1 year	$12,240	*Maintenance upgrades, technical support*

APPENDIX I: TRANSCRIPTION TIME PROJECTIONS AND BUDGET

Estimates (Labour)			
Task	**Estimate (wks)**		**Assumptions**
New Transcription	71.4		*1000 talks (avg 1 hr duration) @ 2.5 hours per talk*
Checking/Retyping	321.4		*2700 talks @ 25 pages/talk @ 10 mins/page @ 35 hrs/wk*
Transcription Subtotal	**392.9**	**wks**	
Scanning hardcopy transcripts	6.0		
Training	24.0		*4 staff @ 6 wks each*
Standards / Process Development	10.0		*Standards, processes, trial runs*
Archival Printing of Final Transcripts	6.0		
Other Tasks Subtotal	**46.0**	**wks**	*Approx 1 person-year in other tasks*
Total Person-Weeks	**438.9**	**wks**	*Transcription + other tasks*
Total Years (4 people)	**2.4**	**yrs**	*4 people @ 46 wks per yr*

High-Level Budget Projections			
Category	**Budget**		**Assumptions**
Project Manager	$33,750	/yr	*Salary = $45,000/yr @ 3/4 time*
Senior Transcriber	$40,000	/yr	*Full-time*
Junior Transcriber	$32,000	/yr	*Full-time*
Transcriber in Training/Admin Asst	$29,000	/yr	*Full-time*
Subtotal Yearly Salaries	**$134,750**	/yr	*Per year*
Salaries for 2.4 years	**$321,391**		
Equipment/Travel	$40,000		
Contingency	$15,000		
Total Transcription Budget	**$376,391**		*NOTE: Does *not* include IT costs for site development*

APPENDIX J: BUDGET FOR SEED FUNDING

CHELA Seed Funding: October 2011 through March 2012		
Development Costs		**$14,000**
	Discovery Garden	$5,000
	Web Designer	$2,000
	IT Consultant (LF)	$1,500
	IT Consultant (other)	$1,500
	Equipment	$4,000
Transcription Project		**$13,200**
	Project Manager (RW)	$8,000
	Equipment	$2,500
	Scanning (labour)	$2,700
Project Oversight		**$14,500**
	Implementation Plan (labour)	$5,000
	Project Management	$5,000
	Development (labour)	$2,500
	Consultant re budget	$2,000
Stakeholder, Donor Consultations		**$6,000**
	Travel	$4,000
	Publications	$500
	Meeting Costs	$1,500
Contingency		**$1,300**
	TOTAL REQUEST	**$49,000**

APPENDIX K: STAKEHOLDERS

The folllowing stakeholders have been identified:

> *Diana J. Mukpo and the Mukpo/Levy family:* Lady Diana Mukpo, the widow of Chögyam Trungpa Rinpoche, owns all of the copyrights for his intellectual property. Lady Diana also owns many of the personal belongings of Trungpa Rinpoche in the Ladrang Collection of the Shambhala Archives. Her agreement and unreserved support is paramount in any scenario. Her family and heirs also have interests in the intellectual properties and in the appropriate use of the name, likeness etc of Chögyam Trungpa Rinpoche.

> *SakyongMipham Rinpoche and the KalapaCourt* have significant interests in the appropriate use of the teachings of Trungpa Rinpoche.

> *Shambhala International and Its Affiliates, Departments Etc.:* Shambhala International owns the majority of the real property in the Shambhala Archives that is the basis for the online repository, including the original audio, video, and film collections. Original copyrights to this material are owned by Diana J. Mukpo, but Shambhala has shared copyrights for many of the preservation, enhanced, and edited copies of the audio/visual documents. Shambhala owns the photograph collection and many of the paper documents. Their agreement is paramount in any scenario. Departments within Shambhala with related interests include:

> ❑ Shambhala Media: This division of Shambhala publishes books, audio, and video materials for the use of the Shambhala community and some for the general public. They are especially interested in selling downloads of the audio material.

> ❑ *The Shambhala Archives:* The Shambhala Archives is the repository for the original documents on which the Electronic Library and Archive will be based. They have invested time, energy, and financial resources (more than $500,000) in preserving these archival assets and in the creation of the digital assets that will be the basis for the Electronic Library and Archive. They need ongoing funding for their facility and to support future preservation work.

> ❑ *Kalapa Recordings:* This department within Shambhala Media edits audio and video by CTR for publication.

> *Shambhala Publications:* As publishers of the trade books of CTR, Shambhala Publications has interests that need to be considered.

> *Users of Chela:* All of the audiences discussed in the body of the study can also be viewed as primary stakeholders. CHELA needs to be developed to represent their interests as well.

All of the above parties have a vital interest in and desire that this project go forward. In many cases, their contractual agreement to material being made available online must be obtained. Whatever income and membership model we finally adopt, it will have to reflect the investment and interests of our stakeholders and it will have to compensate the Archives, Shambhala International and the family of Chögyam Trungpa Rinpoche.