




Building a Digital Readiness Community of Practice

Midwest Archives Conference
Friday, May 14, 2021
1 - 2 pm





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Building a Digital Readiness Community of Practice

<https://recollectionwisconsin.org/cop>

NHPRC-funded project

- Planning Grant - July-December 2019
- Implementation Grant - October 2020-September 2021

Partners: WiLS, Wisconsin Historical Society, Recollection Wisconsin, & Launch Committee



What is Digital Readiness?

Having the knowledge, tools, resources and infrastructure to provide online public access to archives and historical records.




What's this “Community of Practice”?

“It’s a way to learn by working together...a group of people who share a common concern, set of problems, or passion about a topic and deepen their knowledge and expertise in this area by interacting on an ongoing basis.”

Etienne Wenger, Richard McDermott and William M. Snyder,
Cultivating Communities of Practice (2002)

Goals & outcomes

- preservation and access
 - resources and support through our Community
 - systems and procedures to guide digitization efforts
 - increased opportunities for connections and engagement
 - increased confidence and competence
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Our inspiration

- Why digital readiness? Why community of practice? Why now?
- Digital projects life cycle - from planning to preservation -- **it's not just about scanning stuff!**
- Experiences understanding Wisconsin local history practitioner needs
- Information gathering during planning grant
 - Survey
 - Community conversations
 - Strategic planning
- We've got a white paper!

<https://recollectionwisconsin.org/cop>



Launch Committee

Chris Allen -

Kenosha County Historical Society

Ben Barbera -

Milwaukee County Historical Society

Bonnie Byrd -

Waukesha County Historical Society

Michelle Gobert -

Forest County Historical and
Genealogical Society; University of
Wisconsin - Extension

Jennifer Gurske -

Madison Trust for Historic
Preservation

Joe Hermolin -

Langlade County Historical Society

Cheryl Kern-Simirenko -

Stanley Area Historical Society

Janean Mollen-Van Beckum -

History Center of Washington
County

Tammy Schutz -

Barron County Historical Society

Katie Stilp -

Appleton Historical Society, Appleton
Public Library

Robin Untz -

Lake Mills-Aztalan Historical Society



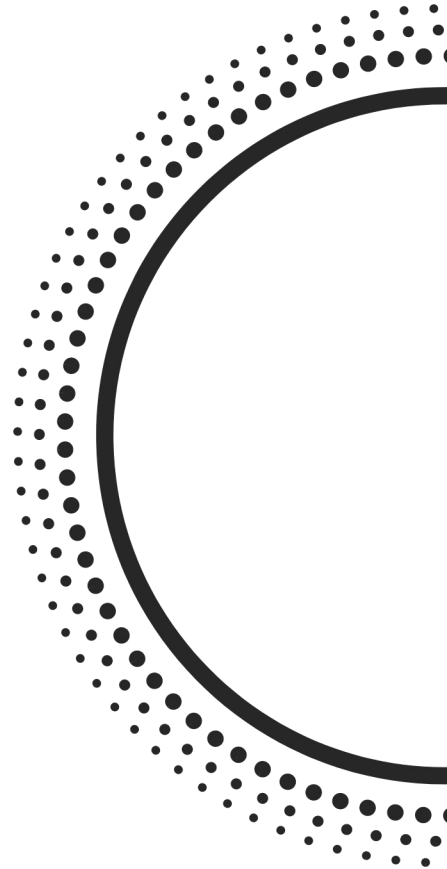
**What digital readiness questions
or needs do you have?**

Answer in Chat.



Digital Readiness Tools and Resources

- Digital Readiness Levels
- Digital Projects Toolkit
- Implementation Guide
- Glossary
- Case Studies
- Digital Readiness Fairs



Digital Readiness Levels

- Based on the NDSA Levels of Preservation
- Provide an accessible starting point for any organization.
- 7 functional areas, in 3 tiered levels
- Organizations can start or end anywhere on the levels
- Drafted by Emily and Vicki, revised with input from community members
- “Check As You Go” questions to emphasize the recursive nature of the levels’ activities

Digital Readiness Levels



Focus Area	Bronze	Silver	Gold
Plan and Prioritize	Set goals for your digital work that fit your organization's mission and policies. Revise existing policies to include digital work, or adopt a separate digital mission statement.	Identify content you want to share in digital format based on your organization's goals, mission and policies. Identify potential partners, resources, tools and platforms to meet your goals.	Make a plan for your digital project with timelines, roles, activities, goals and required resources. Share with partners participating in your project.
Obtain Permissions	Create and use permission forms and donor agreements, or modify existing ones, that include specific language for the use of born-digital or digitized collections.	Assess collection for copyright status. Identify collections items with other access restrictions or concerns, including items with privacy, ethical or cultural considerations.	Assign rights statements or Creative Commons licenses for collection items to be publicly shared online. Develop and share your organizational takedown policy and, if applicable, a statement on harmful content.
Digitize	Identify standards and procedures to be used to digitize physical materials or process born-digital content.	Undertake digitization or born-digital processing work either in-house or with an appropriate vendor or partner using identified standards.	Use or advocate for a quality control checklist to review digitized or born-digital content to confirm it meets identified standards.
Describe	Create and maintain a collection-level inventory of digital content. Identify metadata standards to be used for digital collections.	Using identified standards, create descriptive metadata for collection items to be shared online. Adopt a consistent file-naming convention.	Create expanded item-level metadata, using controlled vocabularies and a data dictionary.
Share	Gather and evaluate digital content. Organize and move content and associated descriptive information to a centralized location using a consistent folder and file organization scheme.	Review access goals and options for providing access to content. Choose a system or platform that meets your goals.	Make item-level metadata and content available for discovery and repurposing. Follow accessibility standards for online content including alt text, transcripts and other accessibility best practices.
Store and Maintain	Store two copies of each unmodified archival file and related metadata. Check storage media annually and refresh as needed.	Store three copies of each archival file and related metadata. One copy should be stored off-site. Check and refresh storage media on a regular schedule.	Plan for future storage needs as your collection grows. Use software tools to check file integrity.
Evaluate	Identify primary users and ways to engage them in your digital collections.	Collect usage data. Consider using analytics tools, social media, or research inquiries to gather use stories.	Share your story with other practitioners to build community around digital work. Use data to inform future collection development work, outreach and programming.

Check As You Go



As you move towards a new level in any of the focus areas, consider the following questions:

Is it documented?

- Are new directions and decisions represented in existing policies, such as a collection development policy or a rights and reproductions policy? Do policies need to be revised or do new policies need to be created?
- Are new procedures or processes written down, such as steps for using a scanner or standards for how to describe content? Is there enough information provided that someone new to the organization would be able to carry out these processes on their own?
- Are partnerships or arrangements with other parties, such as a digitization vendor or a content contributor, documented in some way, like a contract, Memorandum of Understanding, or letter of commitment?

Is it sustainable?

- Is there a plan for how this work will continue to be supported by staff and/or volunteers from year to year?
- What work needs to be done to maintain relationships with partners or collaborators?
- Is funding committed for any recurring costs, such as a cloud storage service?
- Are best practices and widely-adopted standards being used, so that digital work is “future proof”—that is, it’s compatible with commonly-used platforms and systems?
- Is there an exit strategy for any tools or partnerships? For instance, can content be removed from a platform if necessary?

Is it appropriate, relevant and/or accessible?

- Are new digital initiatives in line with the organization’s mission and values? Do digital initiatives reflect community needs and respect community priorities?
- If information is available publicly, is it violating any privacy, copyright or ethical considerations?
- Can all potential users access the content? What can be done to improve accessibility for people with disabilities?

Is it working?

- Are we doing what we set out to do? What were our goals and have we achieved them, partially or fully?
- What have we learned and what will we do differently next time?
- What lessons learned would be helpful to other organizations?
- Have we communicated our project decisions and progress to stakeholders and partners, including any funders?

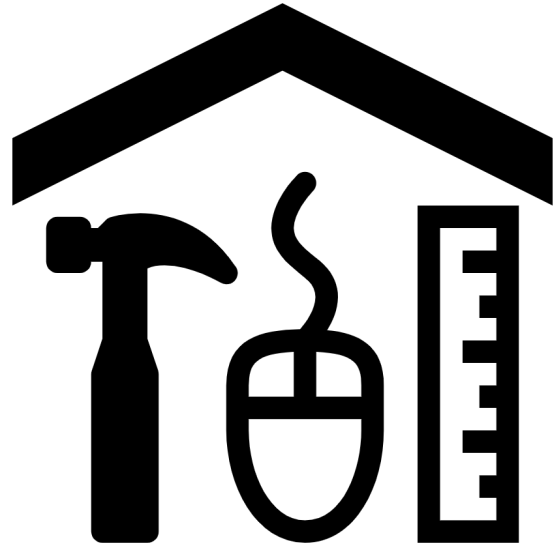
ACKNOWLEDGEMENTS

The Digital Readiness Levels was made possible by a grant to Recollection Wisconsin from the National Historical Publications and Records Commission (NHPRC). Many thanks to the Digital Readiness Community of Practice Launch Committee and other experts who reviewed and provided feedback on drafts. The structure of the Levels is adapted from the [National Digital Stewardship Alliance Levels of Digital Preservation](#).



Digital Projects Toolkit

- Recollection Wisconsin website
- One stop shop for all things digital readiness



Digital Readiness Glossary

The Glossary below includes many commonly used archives, digital collections, and organizational terms and acronyms. Don't see a term, phrase, or definition you think should be included? [Send us an email](#) to let us know!

Terms below are listed alphabetically. Scroll to the term you're looking for, or click the magnifying glass icon in the upper right corner of the table below to search. You can also scroll to the right to see the sources of definitions.

<input type="checkbox"/>	Term	Definition	Source of definition (if ...	Related to
1				
2	3-2-1 Rule	The 3-2-1 rule informs digital preservation and storage strategies. Maintain three copies of your digital files on two different storage media with at least one copy stored off site. <i>See: Storage Diversification, Digital Storage</i>	Recollection Wisconsin Digital Projects Toolkit	Storage Diversification Digital Storage
3	AASLH	AASLH stands for the American Association for State and Local History.	AASLH (American Association for State and Local History)	

<https://recollectionwisconsin.org/toolkit/digital-readiness-glossary>

digital projects CASE STUDIES

short accounts from Wisconsin organizations of all sizes
on their work selecting, digitizing, cataloging, and
sharing their historical resources for online access.

Digital Readiness Case Study in Brief: Richard I. Bong Veterans Historical Center

March 2021

About the organization

Located in Superior, Wisconsin, the Richard I. Bong Veterans Historical Center (BHVHC) preserves and honors the memory of Major Richard I. Bong and all veterans of World War II and subsequent conflicts, and provides educational resources for community and beyond. The BHVHC opened to the public in September 2002 and maintains a remarkable collection of historic records and artifacts that document Wisconsin veterans and their military service. Briana Farnth serves as the BHVHC curator of collections and participates in Recollection Wisconsin governance committees.

Digital Readiness Challenges and Opportunities

Participation in Creating Community Digital Collections (CCDC): Work completed through CCDC was an important and welcome opportunity to advance their digitization program. Volunteers now follow more detailed guidelines for scanning and cataloging their materials.

Community support: Staff often rely on Recollection Wisconsin's digital projects resources including Metadata Essentials and the Digital Projects Toolkit.

Content management systems: They are migrating their digitized content out of BaseCamp and into CollectiveAccess, a free, open-source content management system for cataloging and sharing museum and archival collections. Concerns about ongoing sustainability and support from PartnerPerfect motivated this change.

Oral histories and listening to war: The BHVHC's wartime oral histories are included in Listening to War, Wisconsin's Wartime Oral Histories, an NEH-funded project which brings together first person accounts of Wisconsin veterans and civilians. The project provides an opportunity to reach new donors by demonstrating how the public might interact with BHVHC collections.

Content warning statements: It's important to prepare patrons for sensitive or harmful topics and language they might encounter in a collection or exhibit, especially war-related material. They include a disclaimer to prepare users for the content. This Toolkit contains language that is effective and is presented as a crisis in the original document. The metadata contains the content which they were created but do not represent the views of the Richard I. Bong Veterans Historical Center."

Lessons Learned

Legacy projects: Sometimes it's better to live with less-than-ideal components of a legacy digitization project. A much better use of time and resources could be to focus on current and new projects and adopting the guidelines and best practices.

Working with volunteers: Volunteers have varied skills sets and different work styles so it is important to have good training materials and a strong support system to guide their work.

It's more than just a policy: Information included in their digital preservation policy provided a good jumping off point for conversations about digital work with different stakeholders.

Slow and steady progress: Focusing on one or two small tasks like developing, implementing, and documenting a file-naming scheme or documenting a scanning process as a training tool for volunteers. Over time, small goals will become part of a larger, more sustainable digital program.

For more information about our Digital Readiness Community of Practice, visit <https://recollection.wisconsin.org>



Digital Readiness Case Study in Brief: Madison Trust for Historic Preservation

January 2021

About the organization

Since 1916, the Madison Trust for Historic Preservation has focused on advocacy for and education about Madison, Wisconsin's historic properties. The organization is managed by a Board and one part-time staff member and has relied on a volunteer board of trustees and community volunteers invested in local history preservation. See the Full Case Study online for more on the organization and the digitization initiative.

Digital Readiness Challenges and Opportunities

Creating and sharing resources and knowledge: Initial project analysis and planning efforts helped inform additional grant applications. Documenting decisions, processes and data will make future grant applications easier and demonstrate how they will build upon previous successes.

Expanded access: Madison Trust will provide public access to their digitized materials through Recollection Wisconsin. Increasing awareness of their organization and collections. This step will require a more in-depth exploration of copyright status for some materials, publicizing the digitized collection and thinking about ongoing costs for collection maintenance and preservation.

Digital preservation and storage: An analysis of digital preservation principles will be undertaken, along with how they apply to Madison Trust. For now, their digitized materials are stored on two external hard drives backed up by Backblaze, a cloud-based backup and storage service.

Secure, stable funding: The Trust is a small cultural heritage organization with a limited budget. Multiple small grants supported initial equipment purchases and staff but they hope to identify and secure more sustainable funding for this work.

Content participation in the Digital Readiness Community of Practice: This group provides a support network for local history practitioners to connect, support and learn from each other. Resources and recommendations such as these are also available in the Digital Projects Toolkit.

Lessons Learned

Digitization projects serve many purposes such as supporting virtual reference service for organizations without (or unable to use) a public-facing space.

Before you ever start scanning, there's a lot of work that goes into a digitization project, decisions and planning that help a project run smoothly and provide "proof of concept" and foundation information for funding requests.

Small grants can be used to seed different project components. For example, small grants might pay for a scanner, support a few hours' scanning staff each week or provide for digital storage space on an external hard drive.

Working with students and volunteers carries unique and gratifying challenges. Having clearly written guidelines and training materials will help facilitate the work and partnership.

For more information about our Digital Readiness Community of Practice, visit <https://recollection.wisconsin.org>



Digital Readiness Case Study in Brief: Lake Mills Aztalan Preservation Society

February 2021

About the organization

Since 1941, the Lake Mills Aztalan Historical Society (the Museum) has been dedicated to preserving and sharing local pioneer and ancient Native American history. Lake Mills Aztalan Historical Society's Museum comprises seven pioneer buildings. Robin Lutz serves as the Museum Board president and curator. See the Full Case Study online for more on the organization and digital readiness initiatives.

Digital Readiness Challenges and Opportunities

Intellectual control: When Lutz was appointed Board President in 2015, the Museum's physical and digital collections were scattered in various locations and with multiple external vendors. She facilitated the return and digital organization of the materials, accurate and up-to-date inventories will help ensure continued intellectual control over the collections.

Digital readiness plans: A holistic approach to digital readiness will focus on creating an accurate inventory of digitized content, organizing and reusing digital files, and documenting and implementing digitization best practices. These activities will set the stage for future digitization projects. Tools and templates are available in the Digital Projects Toolkit.

Building a community of practice: Previous positive experiences in connecting with other local history practitioners inspired Lutz to join Recollection Wisconsin's Digital Readiness Community of Practice. Her main goals for participation are to help build and share with her local board members and volunteers, a network of contacts and resources to support their ongoing digital work.

Sustainable leadership: Increasing learning opportunities for volunteers will empower them to more fully engage with digital collections projects and remain engaged with the Museum as they move into leadership roles. Access to a wider network of practitioners and training materials will help their organization recruit, engage and hopefully retain skilled volunteers.

Documenting decisions and procedures: Creating and sharing project plans and key decisions, workflows, file naming standards, and/or file storage plans may help future staff and volunteers understand past decisions and continue the work with greater ease.

Lessons Learned

The initial planning stage of any digitization project should always include figuring out where previous projects may have left off by connecting with past project leaders and volunteers, breaking down projects documentation, and locating the digital files.

Digitization projects serve many purposes, including creating digital content to increase online engagement but also an opportunity to build community engagement around shared local history.

Planning for future projects means empowering others to learn and participate in digital work so they are ready to step in and take the lead.

Lutz's experience leading the Museum in a volunteer capacity is a good reminder that this work is sometimes slow, never finished, and always worth it. Incremental progress is still progress.

For more information about our Digital Readiness Community of Practice, visit <https://recollection.wisconsin.org>



DIGITAL READINESS FAIRS

Free and virtual

Open to anyone interested in digital historical collections

What's digital readiness? What's a community of practice?

Connect with us to find out!

Choose the fair nearest you or whichever works best for your schedule:

June 29, 2021

9:00 am - 12:30 pm

Virtual Host:
Appleton Public
Library

July 16, 2021

9:00 am - 12:30 pm

Virtual Host:
Crandon Area
Historical Society

August 3, 2021

9:00 am - 12:30 pm

Virtual Host:
Pioneer Village
(Barron County)

August 18, 2021

1:00 pm - 4:30 pm

Virtual Host:
Kenosha County
Historical Society



Details & registration information:

<https://recollectionwisconsin.org/fairs>



About Lake Mills Aztalan Historical Society

- Since 1941 - celebrating 80 years of preserving history!
- **Our mission?** Preservation and education of the local and Indigenous community history, up to modern day
- Volunteer-based, non-profit organization
- Reliant on donations, grants, fees/rent/admissions and fundraising
- Artifacts and archives local and throughout Jefferson Co., Wisconsin
- Photos, maps, records, manuscripts, artwork, family histories, documents, tools, household items, Indigenous artifacts and much more!

Early challenges

- How to stay relevant in a digital world?
- Continuing our mission through the use of digitization
- “Willing and able” volunteers
- Lacking:
 - organization of physical archives
 - control of archives
 - a method to distribute the workload and successfully process the work





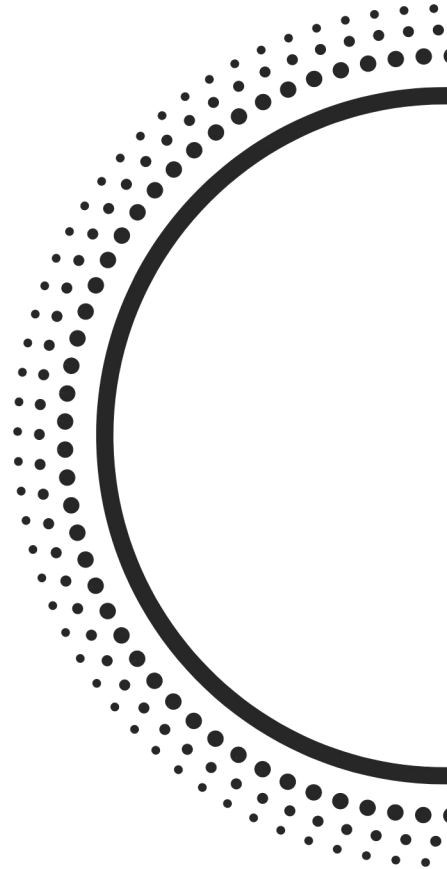
First Steps

- New Board members invested in the Society -- new energy, skills and knowledge!
- Create a digital presence
- Website updates
- Social media
- Programs, education, outreach

Reality

We needed a plan to be successful!

- Establish an approach to digitization
- Be able to recruit volunteers to do the work
- Train them for successful results





Opportunities

- Participation in **Curating Community Digital Collections (CCDC)**
<https://recollectionwisconsin.org/digipres>
- We're a *digital readiness case study!*
- Making connections through WiLS, Recollection Wisconsin, other historical societies, museums and archives
- Launch Committee member - Digital Readiness Community of Practice

A Step Back

- See the bigger picture to find a solution and fill the gap
- Take a mental and organizational step back
- Create a *digital preservation plan*
 - Simple spreadsheet for accession records of digital archives
 - Provide guidelines for scanning, naming and documenting
 - Establish processes for sustainability of the digitization work and archives
 - Lay out best practices for storage, protection, control and use of digital archives



Regroup and Move Forward

- More prepared for implementing digitization
- Recognized the gap which kept us from taking the first steps
- We're at the grassroots stage of digitization -- it's an okay place to be!
- We are not alone in not knowing what to do next
- Opportunity to use our experience and growth to help others

**What digital readiness questions
or needs do you have?**

Answer in Chat.





Plan, Plan, Plan!

A Case Study in Fixing Past Mistakes

Janean Mollet-Van Beckum
Curator of Collections and Exhibits
The Tower Heritage Center



History of the Photo Digitization Project

A decorative graphic in the top right corner consisting of a thick black arc and a dotted pattern of small black circles that follows the curve of the arc.

- WCHS was beginning the transition from volunteer to professionally run organization
- Started around 2003 by volunteers with little planning
- The collecting mentality was “take everything!”
- The thought behind the project was twofold:
 - to have a complete record in PastPerfect, not specifically for preservation or access
 - to be able to accept “loaned” photos, digitize them, and return the originals to the donor (part of the “collect everything” mentality)

Current Status of the Project

- Currently have over 17,000 individually cataloged photographs
- Project scanning completed in 2018
- Several copies of the scans were kept - this isn't good if they are all updated!
- Current archivist started a data migration plan, but more issues to mitigate before continuing...



Problems are Multiplied

- Former archivist deleted photos, and reused the numbers
- Few of the deleted photos were removed from either of the DVD sets or donation records, only PastPerfect
- The DVD sets do not match as the few photos that were deleted were sometimes removed from one set of DVDs, but not the other
- We also have a printed set of photographs for use by the public, these have not been kept up to date



Problems are Multiplied

- Some files are corrupt & need to be rescanned
- Some were loans we may not have access to an original photograph
- The original numbering system no longer works for us
- All of this has be reconciled before data migration can take place



Lessons Learned

- Had to step back and start planning for a fix as well as the future.
- PLAN, PLAN, PLAN! Look ahead when possible and be flexible as technology/knowledge changes.



Why a Community of Practice Matters

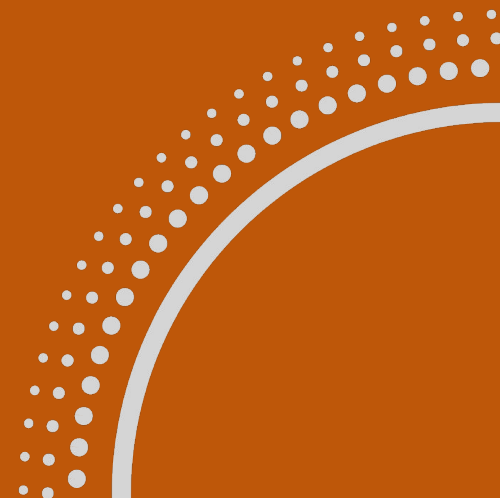
- Access to peers and experts
- Access to easy to understand language that is not overwhelming
- Access to shared resources
- Examples to guide projects
- With help from a CoP, some problems could have been avoided sooner



Final thoughts...



Questions?



Thank you and keep in touch!

- Digital Readiness Community of Practice:
<https://recollectionwisconsin.org/cop>
- Recollection Wisconsin: <https://recollectionwisconsin.org/>
- Wisconsin Historical Society History Outreach Program:
<https://www.wisconsinhistory.org/Records/Article/CS4033>
- Lake Mills Aztalan Historical Society:
<https://www.lakemillsaztalanhistory.com/>
- Tower Heritage Center: <https://thetowerheritagecenter.org/>

