



# Cultivating a Statewide Digital Readiness Community of Practice

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# Land acknowledgement

As a settler, someone who is not Indigenous or native to this place, I would like to acknowledge that each of us in Wisconsin is occupying ancestral land that belongs to one or more of the twelve First Nations of Wisconsin. I am located in Madison, which is the ancestral home of the Ho-Chunk, a place their nation has called Teejop since time immemorial. We are grateful to the Ho-Chunk Nation for their stewardship of Teejop and respect the inherent sovereignty of the twelve First Nations of Wisconsin. As we live and work and hone our practice with our communities, we encourage each of you that are settlers or not-Indigenous to explore and learn about the communities and Native nations who lived, still live, and steward the land on which you live and work.



# Agenda

- Who we are (and why it matters)
- Foundations
- Digital Readiness Community of Practice
- Case study: Madison Trust for Historic Preservation
- Case study: History Museum at the Castle
- Conclusion
- Q & A

# Who we are

- **Kristen Whitson** - Recollection Wisconsin, Digital Projects Specialist
- **Kristen Leffelman** - Wisconsin Historical Society, Southeast Outreach Coordinator
- **Jennifer Gurske** - Madison Trust for Historic Preservation, Program and Technology Manager
- **Dustin Mack** - History Museum at the Castle, Curator

# What is Recollection Wisconsin?

# recollection



W I S C O N S I N

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# Wisconsin Historical Society Local History Outreach Program

The Wisconsin Historical Society's Local History Outreach Program manages:

- Outreach services and partnerships with local history, heritage, and cultural groups
- Speakers bureau, traveling exhibits, webinars, conferences, historical markers, and more
- Local History Affiliate Program

# Local History Affiliate Program

- First local history affiliate program in the nation, established by state statute in 1898
- Supports a network of 426 affiliated organizations
- All non-profit community history and cultural organizations, including publicly funded museums and tribal museums, can apply for affiliation
- Affiliates receive a number of benefits, namely staff support from the Local History Outreach team

# Who Are Our Affiliates?

- Affiliated organizations must send in an annual report each year
- Affiliates range from the municipal to the state level and include cultural groups and small museums and archives
- 75% are all-volunteer organizations with budgets under \$50,000
- Most of the rest have fewer than 5 paid employees
- Outside of county historical societies and statewide museums, it is unusual to see professionally trained public historians, curators, or archivists



# Where WHS, WiLS, & Recollection Wisconsin Meet

## The Challenge:

Local history organizations have high-quality and unique collections, but they are inaccessible to most of the public outside of the immediate area!

How can we meet local history organizations where they are to help them create digital collections and make them more accessible?

# Where WHS, WiLS, & Recollection Wisconsin Meet

The Solution:

Combine WiLS' and Recollection Wisconsin's digitization expertise with WHS's affiliate network to most effectively reach the smallest and most under-resourced organizations



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# First Discussions: Digital Readiness Challenges

- Groups may be invested in collections management practices that are not well-aligned with contemporary standards and best practices for digital collections creation and access
- They rely on volunteer labor with high turnover, inconsistent training, and minimal documentation of workflows
- They are asked by stakeholders to digitize historical records before basic intellectual control over physical collections has been established

# Next Steps: 2019 NHPRC Planning Grant

Goal: To plan and seed an Archives Collaborative that would empower small, rural, under-resourced, and under-represented cultural heritage institutions in Wisconsin to provide online access to their archives and historical records

# Next Steps: 2019 NHPRC Planning Grant

## Activities:

- Survey of affiliates (127 responses)
- Community conversations (5)
- Strategic planning sessions (3)

# What We Learned: 2019 NHPRC Planning Grant

- Local organizations were already digitizing content, but without guidelines
- Organizations were digitizing content, but it was not available online
- The primary users of content were staff or volunteers
- Organizations turn to peer organizations for support
- Organizations requested guidance on best practices and standards, copyright, at-risk media formats, and funding support



# From Planning to Implementation

## Goals:

- Form a Community of Practice to start identifying best practices and benchmarks for digital collection creation and management
- Provide a roadmap for public history organizations undertaking digital projects
- Improve public access to and engagement with digital community histories

# 2020 NHPRC Implementation Grant

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

# Digital Readiness Community of Practice

- **Digital Readiness:** “...having the knowledge, tools, resources and infrastructure to provide online public access to archives and historical records.”
- **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.”

# Digital Readiness Resources

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

# 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 and revised with input from community members
- “Check As You Go” questions 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](#).*



# Save the Date

# Digital Readiness Fairs

Free and virtual

- Open to anyone interested in digital historical collections
- Learn about digital readiness and meet others doing the same work
- Connect with Recollection Wisconsin and the Wisconsin Historical Society

**June 29, 9am-12:30pm**

Virtual host: Appleton Public Library

**July 16, 9am-12:30pm**

Virtual host: Crandon Area Historical Society

**August 3, 9am-12:30pm**

Virtual host: Pioneer Village (Barron County)

**August 18, 1-4:30pm**

Virtual host: Kenosha County Historical Society

**STAY TUNED FOR  
REGISTRATION INFO!**



[www.recollectionwisconsin.org/cop](http://www.recollectionwisconsin.org/cop)



# Digital Readiness Resources

- Digital Projects Toolkit + Implementation Guide
- Glossary
- Case Studies



# Madison Trust for Historic Preservation

Jennifer Gurske  
Program & Technology Manager

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# Madison Trust for Historic Preservation

- Local affiliate of the Wisconsin Historical Society
- Established in 1974
- One employee, one temporary employee
- We are a 501(c)(3) organization with about 320 members
- We celebrate and advocate for the preservation, restoration and reuse of historic places in the Madison, Wisconsin, area
- Archives consisted of 16 boxes and a large stack over oversize photos/ documents



# Our current place in the levels

## Digital Readiness Levels



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# Plan and Prioritize

We set goals based on our reasons to digitize:

- Save money by closing our physical office
- Easier access for Board of Trustees
- Public access to historical information
- Provide an inventory of our collection
- Establish new partnerships & collaborations
- Creation of a collection for future material to be added

# From Plan and Prioritize to Digitizing

How we moved from planning to actual digitizing:

- Small, achievable grants
- Establish community relationships
  - Student workers (UW-Madison iSchool)
  - Free/inexpensive workspace (Fiore Companies)
  - Community support (WiLS Community of Practice)
- Evaluation & recommendations from Recollection Wisconsin & UW-Madison iSchool students
- Prioritize material to be scanned
- Begin scanning!

# Facing Challenges

- Changing staff - keeping work product consistent
- Unknown material surprising us
- Out of date hardware in files
- Scanning oversize material
- Overseeing staff remotely
- Project timeline

# Project Outlook

- Involvement in the Digital Readiness Community of Practice
- Hiring staff has helped us stay consistent
- We've finished over half the material to be scanned
- Planning to upload our first set of material January 2022
- The levels are dynamic! It's ok to be gold in one category and silver in another

# Our current place in the levels

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# History Museum at the Castle

Dustin Mack  
Curator

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## History Museum at the Castle WI

Appleton,

- 4 fulltime employees
- \$325,000 operating budget
- 40,000 people served annually
- 2018 National Medal for Museum and Library Service
  
- Our mission is to inspire people to discover and appreciate the rich history of the Fox Valley through exhibition, education, and collections.



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# Museum as Test Subject

- The Project
  - Inventory cassette tapes in the Museum archive
  - Develop basic instructions and spreadsheet template
- The Results
  - Contents are accessible, ready for digitization
  - Created how-to resources for nonprofessionals



Jan Krahn, Museum Volunteer

# Lessons Learned

- Local history organizations are doing important work, and
- They need support to do that work

**Digital projects are more successful and sustainable when done within a supportive community context.**





# Cultivating a Statewide Digital Readiness Community of Practice

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