

Planning a Community of Practice for Digital Readiness in Wisconsin

Overview

Wisconsin Library Services (WiLS), in partnership with the Wisconsin Historical Society and the Recollection Wisconsin statewide digital collections consortium, requests a grant of **\$22,547** from the NHPRC to plan and seed an Archives Collaborative that will empower small, rural, under-resourced, and under-represented cultural heritage institutions in Wisconsin to provide online public access to their archives and historical records. WiLS, the Society, and Recollection Wisconsin will work together to gather information about digital collection development needs, goals, and gaps among the Society's more than 410 local history affiliates. We will then undertake a community-driven strategic planning process to design an Archives Collaborative intended to increase the capacity of these small repositories to create, manage, and share digitized historical resources.

The Society's local history affiliation program, established in 1898, was the first such program in the nation. Any non-profit community organization in Wisconsin primarily concerned with the past — local, county, and specialized historical societies as well as private historic preservation groups — can become a Society affiliate at no cost. More than 300 (75%) of the local history organizations affiliated with the Society are all-volunteer endeavors with budgets under \$50,000; many are open to the public only seasonally and/or one or two days each week. These repositories hold a wealth of significant archives and historical records — ranging from glass negatives used to instruct farmers in innovative alfalfa cultivation methods in the 1920s (New Berlin Historical Society) to 16mm films depicting playwright and novelist Zona Gale (Museum at the Portage) — yet in most cases, these materials are accessible to only the most dedicated and flexible of researchers who can visit these sites in person.

A robust online presence is essential for a cultural heritage organization of any size to reach new audiences and build awareness and support within and beyond its local community. As participation in the affiliate program has grown over the past decade, the Society's capacity to support the digital collection development needs of affiliates has not kept up with demand. For instance, the "Introduction to Digital Projects" workshops offered by Recollection Wisconsin at the annual Local History and Historic Preservation Conference since 2012 are filled to capacity each year. The Society offers an annual mini-grant program for affiliates; more than 60% of mini-grant applications include requests for funds to purchase software and hardware for digital collection projects.

In late 2019, the Society will embark on a three-year plan to re-envision the current affiliate program. At the same time, ongoing planning for a new Wisconsin history museum emphasizes opportunities for residents throughout the state to connect with stories from communities in all 72 counties through new technologies and virtual programming. Now is an ideal moment to plan to foster the skills and infrastructure necessary to provide access to digital collections from community-based memory organizations in all parts of the state.

Since 2005, the Recollection Wisconsin consortium has offered training, consulting, and guidelines for creating and sharing digital collections, as well as centralized access to digitized cultural heritage resource from Wisconsin libraries, archives, museums, and historical societies. This work has shown us that under-resourced repositories need intensive, ongoing support in order to build and maintain sustainable, interoperable digital collections. We know these repositories need modern workflows, tools, and systems to share their archives and historic records online and evolve their public services to meet 21st-century user expectations. However, they are faced with numerous barriers to what we describe as **digital readiness** – having

adequate knowledge, tools, resources, and infrastructure to provide online public access to archives and historical records, and the confidence and commitment to contribute to the broader archives community focused on this work. Beyond the general lack of time and money that are near-universal challenges in this sector, Recollection Wisconsin and the Society have observed the following digital readiness obstacles challenging many affiliates:

- They are invested in proprietary collections management software that is not well-aligned with contemporary standards and best practices for digital collections creation and access.
- They rely on volunteer labor and a high rate of volunteer turnover, coupled with inconsistent training for volunteers and minimal documentation of volunteer-driven digitization workflows.
- They face demand from community members, donors, or other stakeholders to digitize archives and historical records before basic intellectual and physical control over the physical materials has been established.

These obstacles are not effectively or sustainably addressed simply by offering these organizations more training workshops, webinars, or how-to documents. Deliberately building a community-led collaborative around digital readiness will forge a strong network of shared expertise that will extend well beyond the guidance and support any one of the grant partners are currently equipped to offer. Our proposed Archives Collaborative is a statewide **Community of Practice** to facilitate peer-to-peer learning and mutual support among small, rural, under-resourced, or under-represented Wisconsin cultural heritage institutions. As defined by the U.S. Department of Health and Human Services, a Community of Practice (COP) is “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.”¹ Building a COP around digital readiness will:

- Reinforce and complement instructor-led training and professional consulting offered by Recollection Wisconsin and the Society;
- Encourage effective use of limited resources by sharing equipment, expertise, and documentation;
- Foster ongoing collaboration through shared projects and open communication; and
- Provide pathways for more local history affiliates to share their archives and historical records online with a broad public audience through Recollection Wisconsin.

The institutions undertaking this planning grant have a considerable record of successful collaboration and statewide reach as leaders in community memory work. WiLS is a 501(c)(3) membership organization that provides consulting, project management, and other services to Wisconsin libraries and cultural heritage organizations. Since 2005, WiLS has served as project manager for the Recollection Wisconsin consortium, a collaborative statewide digital library program and, since 2016, our state’s Service Hub for the Digital Public Library of America. The Wisconsin Historical Society and WiLS are both governing members of the Recollection Wisconsin consortium, along with Marquette University, Milwaukee Public Library, University of Wisconsin-Madison, University of Wisconsin-Milwaukee, and the Wisconsin Department of Public Instruction. Other community-driven collaboratives managed by WiLS include a Small Library Strategic Planning Cohort, which works with libraries in small Wisconsin communities to develop affordable strategic plans and the statewide Public Library System Redesign (PLSR)

¹ “Establishing a Community of Practice to Enhance Training and Technical Assistance,” Compassion Capital Fund National Resource Center for the Department of Health and Human Services. Accessed via *Strengthening Non-Profits: A Capacity Builder’s Resource Library*: http://strengtheningnonprofits.org/resources/guidebooks/Establishing_a_Community_of_Practice_to_Enhance_TTA.pdf

process, which coordinated nearly 100 library professionals and other stakeholders to investigate improvements to regional public library system services.

Founded in 1846, the Wisconsin Historical Society is one of the nation's leading American history research centers. The Office of Programs and Outreach is the umbrella for many facets of the Society's public engagement work, including publishing books and magazines, supporting K-12 students and teachers, and offering traveling exhibits, as well as providing expert professional advice to local historians through the affiliate program described above. The Office of Programs and Outreach also partners with the Wisconsin Council for Local History, an independent organization that promotes communication and cooperation among local history groups and advises the Society on local history programming. The Council's board includes members from ten geographic regions and six members at large who represent the variety of local and regional historical organizations in Wisconsin.

Plan of Work

Planning work funded by this grant will be completed in two phases: information gathering and strategic planning.

Phase One: Information Gathering (July-September 2019)

We will develop and administer a **web-based survey** of the 410 Society affiliates to assess their current digital readiness status. The survey will be adapted from elements of the Northeast Document Conservation Center's Digital Preservation Peer Assessment template.² As we distribute and promote the survey to affiliates, we will also introduce the general concept of a Community of Practice. In addition to giving a "state of the state" picture of digital capacity, the

² Digital Preservation Peer Assessment, Northeast Document Conservation Center <https://www.nedcc.org/preservation-training/digital-preservation-assessment-training#resources>

survey will identify repositories' collecting strengths, which will inform plans for future collaborative work to digitize content around common themes or formats.

We will invite Society affiliates to participate in six in-person, facilitated **community conversations**. We will piggyback these events on the Society's regional meetings for affiliates hosted annually in August and September and with meetings of regional interest groups that have formed among affiliates in several parts of the state. We will use these sessions to gather more detailed information about specific digital readiness challenges, undertake a community mapping activity to identify available strengths and resources, and solicit feedback on draft COP scenarios.

Phase Two: Strategic Planning (October - December 2019)

The results of our information-gathering efforts will inform the work to collaboratively design a participant-led COP. We will convene and facilitate three **strategic planning sessions**, attended by 15-20 leaders from representative institutions (identified from the survey and community conversations) and other stakeholders. The first and third meetings will be convened virtually; the second and longest planning session will take place in person in conjunction with the Society-sponsored Wisconsin Local History and Historic Preservation Conference in October. Participants will be provided with the survey data and a draft of the digital readiness metrics prior to the first strategic planning session.

The strategic planning sessions will result in the creation of the following documents to guide and organize the work of the Collaborative:

- Mission, vision, and values statements that will communicate the purpose of the Collaborative, specify what it aspires to achieve, and define its core beliefs;
- Strategic goals and objectives that establish definable and achievable outcomes; and

- A process and timeline for regular, ongoing assessment, review, and reset of action steps and priorities.

All Society affiliates will have the opportunity to review and provide feedback in an online commenting period before these documents are finalized and shared with the community.

Project Products

- *Digital capacity report* - Based on the information gathered from the survey and community conversations, we will produce an in-depth, data-driven “state of the state” report on the current digital capacity of our target repositories.
- *Digital readiness metrics* - The survey data and community conversations will allow us to establish a baseline of digital readiness, benchmarks for reaching that standard, and metrics for community-based memory institutions to evaluate their digital readiness status. We envision these metrics as a tiered set of practical actions, modeled on the National Digital Stewardship Alliance’s Levels of Digital Preservation.³ For example, getting to “Digital Readiness Level 1” could encompass basic physical and intellectual control over the materials intended for digitization; Level 2 might include understanding minimum best practices for digitizing content and sharing it online; Level 3 could entail steps to support sustainability, such as adopting a digital collections policy and documenting workflows.
- *Community of Practice action plan* - This implementation plan will include:
 - A summary of the mission, vision, values, goals, and objectives developed during the strategic planning process;

³ Levels of Digital Preservation version 1, National Digital Stewardship Alliance
<https://ndsa.org//activities/levels-of-digital-preservation/>

- Identified communication channels and formats for engagement (e.g. email list, virtual meetings, online chat, in person, asynchronous, etc.) to encourage equitable access to participation;
- Priority topics, tools, or concepts for skills development in the first year of the COP, strategies for supporting those skills (e.g. peer-to-peer coaching, live demos, recorded tutorials, etc.), and identified community members with expertise in those skills;
- Preliminary proposals for one or more multi-institutional digital projects centered around a common theme or content type, designed to provide opportunities for participants to “learn by doing” through collaborative work;
- A statewide “community map” of expertise, equipment, and other available resources; and
- A contact list of committed and potential COP participants.

Personnel Qualifications

- *Vicki Tobias, Curating Community Digital Collections Program Coordinator, WiLS*

Vicki Tobias is the Program Coordinator for Recollection Wisconsin’s Curating Community Digital Collections (CCDC) initiative, an IMLS-funded project that pairs Wisconsin information school graduate students with libraries, archives, and historical societies to receive training and work with professional mentors on digital preservation projects. She is also an Associate Lecturer in the iSchool at the University of Wisconsin-Madison, where she teaches courses in archives and digital libraries. Vicki will oversee the planning process, including coordinating communications among partners and participants, drafting all grant products outlined above, and organizing all in-person and virtual events.

- *Bruce Smith, Community Liaison and Service Specialist, WiLS*

As team lead for WiLS consulting services since 2013, Bruce Smith has facilitated community-driven strategic planning processes for more than 40 libraries around the state. Bruce will act as lead facilitator for the three strategic planning sessions.

- *Emily Pfothenhauer, Community Liaison and Service Specialist, WiLS*

As Program Manager for Recollection Wisconsin since 2011, Emily Pfothenhauer has extensive experience in guiding cultural heritage organizations through all aspects of digital collection creation and management. She is the Principal Investigator for the IMLS-funded CCDC project and for Recollection Wisconsin's NEH-funded effort to digitize at-risk oral history recordings from small repositories. Emily will design the digital readiness survey, establish digital readiness benchmarks, and will review all grant products.

- *Janet Seymour, Interim Director of Outreach, Wisconsin Historical Society*

Since 2006, Janet has advised and supported affiliate members of the Wisconsin Historical Society as the Field Services Representative for the northern half of the state. She chairs the Society's Statewide Engagement Team, which is conducting listening sessions in 45 communities throughout the state as the Society plans for a new history museum. As a staff liaison to the Wisconsin Council for Local History, Janet will work with the Council to identify key regional participants for the strategic planning process and will help plan and facilitate the six regional community conversations.

- *Kristen Leffelman, Milwaukee Outreach Coordinator, Wisconsin Historical Society*

Kristen Leffelman has worked with the Society's Office of Programs and Outreach since 2014, facilitating public history programming and outreach in partnership with local

memory institutions, educators, and community organizers. Kristen will assist in the design and distribution of the web survey and will help plan and facilitate regional community conversations.

- *Shannon Harris, data analyst (independent consultant)*

WiLS will contract with consultant Shannon Harris to review survey questions, analyze collected data, and review the final digital capacity report. Shannon is a data scientist specializing in data analysis and applied statistics. She is dissertating (ABD) at the University of Wisconsin-Madison in the School of Education, and has consulted on numerous research and evaluation projects, including NSF, NIH, and DoE grants.

Performance Objectives

- More than 400 archival repositories in Wisconsin will have the opportunity to share their digital collection development needs, goals, and gaps and participate in the design of future strategies to address those needs.
- At least 90 community memory leaders and stakeholders will engage in relationship building and collaborative planning with peers, regionally and statewide.
- At least 6 local history organizations in different parts of the state will commit to actively engage in the implementation phase of the planned Community of Practice.
- All grant partners, Society affiliates, the Wisconsin library and archives community, and the broader archives community will have access to the digital capacity report and digital readiness metrics.