Building a Statewide Digital Readiness Community of Practice

OVERVIEW

Wisconsin Library Services (WiLS), in partnership with the Wisconsin Historical Society and the Recollection Wisconsin statewide digital collections consortium, requests a grant of $80,300 from the National Historical Publications and Records Commission to implement an Archives Collaborative to support digital readiness in local historical societies and historic preservation organizations across the state of Wisconsin.

As defined by the U.S. Department of Health and Human Services, a Community of Practice 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 Our proposed statewide Digital Readiness Community of Practice (CoP) will foster the skills and infrastructure necessary for digital readiness in small and under-resourced public history organizations, including local, county, and specialized historical societies and historic preservation organizations.

We define digital readiness as having the knowledge, tools, resources, and infrastructure to digitize, manage, and provide online public access to archives and historical records. Deliberately building a community-led collaborative to support digital readiness in small Wisconsin repositories will improve access to historical records by:

- fostering an inclusive, equitable, and welcoming environment to facilitate peer-to-peer learning and mutual support around digital collections creation and management;

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- increasing awareness of standards, tools, and other resources available to support digital work;
- encouraging effective use of limited budgets and staffing by minimizing redundant effort;
- providing pathways for more small repositories to share their archives and historical records online with a broad public audience; and
- reinforcing and complementing instructor-led training and professional consulting offered by Recollection Wisconsin and the Wisconsin Historical Society.

From July 2020 – June 2021, we will bring together staff and volunteers from 11 local and county historical societies and other repositories focused on community history to form the core leadership of the Digital Readiness CoP. Four of these organizations will receive grant funds to host outreach events in their regions. Over the course of the year, these 11 repositories will work together with the grant partners to organize events, establish virtual community infrastructure, create a prioritized framework for digital readiness, convene working groups to develop support for priority areas, and plan for the ongoing sustainability and leadership of the CoP following the grant period. See Supplementary Materials for a map of participating repository locations.

The proposed project builds on the Archives Collaboratives Planning Grant awarded to WiLS by the NHPRC from July-December 2019. During the planning phase, WiLS, Recollection Wisconsin, and the Wisconsin Historical Society administered a survey to the Society’s local history affiliate groups (115 respondents) and hosted five community conversations (114 participants) to gather information about needs and challenges faced by small and under-resourced repositories when digitizing and providing online access to historical records.
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 organizations hold a wealth of hidden, historically significant research materials. Since 2005, the Recollection Wisconsin consortium has provided Wisconsin libraries, archives, historical societies and museums with training, consulting, guidelines, and infrastructure to create and share digital content. This work has shown us that local history affiliate groups and other similarly under-resourced repositories need intensive, ongoing support, tailored to local capacities, in order to successfully implement digital workflows, tools, and systems and evolve their public services to meet 21st-century user expectations.

We are drafting a white paper summarizing the findings of the survey and community conversations to be shared with the archives community in March 2020 along with our final performance report for the planning grant. Some key takeaways from this information-gathering process include:

- the importance of face-to-face events for building relationships and sharing knowledge;
- a desire to improve access to collections, accompanied by anxiety about online access issues including copyright and content ownership, and concerns that sharing resources online will result in decreased interest in physical collections or decreased visits to physical sites;
- a concern that organizations have digitized an abundance of historic materials without any concrete plan to provide online access or preserve the digital files;
- a desire to better understand how their organization’s digital work compares to peer organizations and whether or not they are “doing it right.” This type of community validation often carries more weight than “expert advice;”
- deep pride in community history and a high value placed on local history practitioners’ unique knowledge and expertise in collecting, researching, interpreting, and preserving historical resources;
- a desire to reach and engage new audiences, both visitors and volunteers; and
- an appreciation that volunteering for local history organizations is fun and social. For many individuals who volunteer with local affiliate groups, this IS their social community and they value the relationships and opportunities to connect around community memory work.

As part of the planning grant, we also undertook a strategic planning process. We invited 15 leaders from public history organizations around the state to participate in three facilitated planning meetings. This group worked together to craft a strategic plan including a statement of purpose and four strategic goals, summarized below. See Supplementary Materials for full strategic plan.

**Statement of Purpose**

*We are a supportive, inclusive, and connected community of public history practitioners that shares resources, expertise, and knowledge of the creation and management of digital collections in order to collect, preserve, and provide equitable access to diverse histories. We*
facilitate strong and responsive leadership and communication across our community and within our own organizations.

Our histories have the power to enrich and connect people and communities in new and meaningful ways. By coordinating our efforts, we can create a sustainable and relevant future for Wisconsin’s local history organizations and historic preservation groups through more effective and efficient development of digital collections.

Strategic Goals

- **Goal One: Leadership and Structure**

  The Digital Readiness Community of Practice (CoP) will have a sustainable leadership structure and communication strategy that will guide the launch and growth of the CoP.

- **Goal Two: Skills, Knowledge, and Capacity Building**

  Wisconsin’s public history organizations will have a road map for undertaking digital collections creation and management. They will have access to best practices, guidelines, and tools that accommodate a range of needs and resources, and they will understand how to use those resources to support local goals and capacities.

- **Goal Three: Access to Digital Collections**

  Wisconsin’s public history organizations will have platforms, tools, and knowledge to improve public access to and engagement with digital community histories.

- **Goal Four: Advocacy and Sustainability**

  Public history organizations will have the tools and resources they need to increase support for and longevity of digital collections work. They will understand strategies for approaching this work sustainably and ensuring continuity within their own
organizations by building strong cadres of volunteers, documenting policies and procedures, and developing succession plans.

PLAN OF WORK

Work to implement the Digital Readiness Community of Practice will take place from July 2020 through June 2021, guided by the strategic plan produced during the NHPRC-funded planning grant. This launch year will focus on addressing Goals One and Two of the strategic plan described above, while laying the foundation for future work on Goals Three and Four.

Staffing Support

According to Etienne Wenger, “Communities of practice develop around things that matter to people. As a result, their practices reflect the members’ own understanding of what is important. Even when a community’s actions conform to an external mandate, it is the community — not the mandate — that produces the practice. In this sense, communities of practice are self-organizing systems.”2 To that end, grant partners will ensure that priority-setting and decision-making remains in the hands of the CoP participants. WiLS, Recollection Wisconsin, and the Wisconsin Historical Society will play supporting roles, facilitating and advising but not leading the CoP.

This support role includes providing the necessary infrastructure for meetings and communications (conferencing software, email lists, website space), logistics support (setting meeting agendas and locations, notetaking), event planning, managing distribution of grant funds, and coordinating contact lists and communications. It also includes offering advice and

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expertise as appropriate, ensuring the CoP remains inclusive and accessible to all, and connecting new members and organizations to the CoP.

To facilitate this work, WiLS will hire a full-time Program Assistant for one year. This position will report to WiLS staff and work closely with the Launch Committee and event hosts. WiLS will begin the recruitment process for this position as soon as the grant award is announced, in order to hire and onboard the Program Assistant in July 2020.

Community of Practice Launch Committee

A Launch Committee will be convened at the start of the grant period to guide the work of the CoP in the first year and to establish the CoP’s ongoing leadership and structure. 11 of the 15 individuals who participated in the strategic planning process have committed to serving on the Launch Committee:

- Chris Allen, Executive Director, Kenosha County Historical Society
- Ben Barbera, Operations Manager and Curator, Milwaukee County Historical Society
- Bonnie Byrd, Executive Director, Waukesha County Historical Society
- Michelle Gobert, volunteer, Forest County Historical and Genealogical Society; Youth and Family Development Educator, University of Wisconsin-Extension
- Jennifer Gurske, Administrative Manager, Madison Trust for Historic Preservation
- Joe Hermolin, volunteer and Board of Directors President, Langlade County Historical Society
- Cheryl Kern-Simirenko, volunteer, Stanley Area Historical Society; Dean of Libraries, University of Akron (retired)
• Janean Mollet-Van Beckum, Curator of Collections and Exhibits, History Center of Washington County
• Tammy Schutz, Executive Director, Barron County Historical Society
• Katie Stilp, volunteer, Appleton Historical Society; Local History Librarian, Appleton Public Library
• Robin Untz, volunteer and President, Lake Mills-Aztalan Historical Society

Vicki Tobias of WiLS and Kristen Leffelman of the Wisconsin Historical Society will participate in the Launch Committee meetings in advisory roles.

Throughout the grant period, the Launch Committee will convene monthly virtual meetings as well as two in-person meetings in August 2020 and February 2021. In Quarters 1 and 2 (July – December 2020), the Launch Committee will focus on events, communication, and outreach activities. In Quarters 3 and 4 (January – June 2021), the Launch Committee will focus on evaluation and strategic planning for the future sustainability of the CoP.

Launch Committee activities, Q1 and Q2:

• Develop and implement a plan to provide open, inclusive, consistent, and supportive communication among CoP participants, between CoP leadership and participants, and between the CoP and the broader local history community in Wisconsin.
• Plan outreach events including a statewide Digital History Fair (October 2020) and regional Digital History Fairs (April-May 2021).
• Review draft benchmarks for digital stewardship activities, seek expert input, and finalize Digital Readiness Levels document.
• Share information about the CoP through local networks and engage potential new members.

Launch Committee activities, Q3 and Q4:

• Determine future leadership and governance structure for the CoP. This may take the form of an advisory board or other statewide governing body.

• Strategize sustainability for the CoP including exploring fundraising and grant opportunities, identifying and building strategic partnerships, and raising awareness of the CoP among key stakeholders.

• Identify two or three priority topics for curriculum development and establish and populate working groups to develop shared learning opportunities around these key topics.

• Continue to share information about the CoP through local networks and engage potential new members.

• Gather input from CoP participants regarding the progress of the plan’s implementation.

**Digital Readiness Levels and Working Groups**

One of the action steps articulated in Goal Two of the strategic plan is to create a core document that individual organizations can use as a road map for undertaking digital collections creation and management. Throughout the strategic planning process, participants emphasized a need for standards and best practices that are scalable to the capacities of their local institutions. They recommended approaching the introduction of best practices for digital stewardship in a tiered structure of benchmarks, in order to support consistency of practices across organizations, continuity within individual organizations, and retention of local control. An effective example of this tiered model is the StEPs program offered by the American Association for State and
Local History (AASLH), a self-paced assessment program for small and mid-sized history organizations to review their policies and practices and benchmark them against core standards in the museum field.

To support this goal during the planning grant, we drafted a preliminary Digital Readiness Levels document to delineate potential benchmarks for digital stewardship activities in Wisconsin’s local history and historic preservation organizations. The structure of this draft document is modeled on the National Digital Stewardship Alliance’s *Levels of Digital Preservation*, which defines four levels of preservation activities in five functional areas. Following the NDSA Levels, our preliminary Digital Readiness Levels outlines three levels of activities in eight functional areas covering all stages of the digital stewardship lifecycle, including policies, preservation, staffing, and evaluation. *See Supplementary Materials for draft Levels.*

During Q1 and Q2 of the implementation grant period, we will seek input on this draft document from the Launch Committee as well as a slate of experts in our network, including members of the Recollection Wisconsin Steering Committee and the Wisconsin Historical Records Advisory Board, as well as the professional mentors who participated in Recollection Wisconsin’s Curating Community Digital Collections initiative, an IMLS-funded project that paired Wisconsin information school graduate students with libraries, archives, and historical societies to receive training and work with professional mentors on digital preservation projects. We will

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3 Standards and Excellence Program for History Organizations (StEPs), American Association for State and Local History. [https://aaslh.org/programs/steps/](https://aaslh.org/programs/steps/)


5 Curating Community Digital Collections, Recollection Wisconsin. [https://recollectionwisconsin.org/digipres](https://recollectionwisconsin.org/digipres)
incorporate the expert input and work with the Launch Committee to finalize version one of Digital Readiness Levels by February 2021.

Then, in Q3 and Q4, the Launch Committee will use the Levels, in conjunction with the data gathered during the planning grant, to identify two or three priority topics as the first functional areas to begin developing guidelines, tutorials, virtual training events, or other resources to support CoP participants in implementing the recommendations. The Launch Committee will charge and populate a working group for each priority topic. The working groups will begin work in Q4 and continue beyond the grant period.

We will promote the Digital Readiness Levels to CoP participants, local history affiliates, and the broader Wisconsin archives community. Any organization will be able to use the Digital Readiness Levels to:

- evaluate their current and past digital work and set priorities for growth;
- plan for new digital stewardship activities;
- make decisions around staff training or continuing education opportunities; and
- feel confident that they’re “doing it right” by following standards and best practices utilized by peer institutions.

**Digital History Fairs**

We will plan and implement five public outreach events during the grant period, modeled on the New York City Digital Humanities Week (NYCDH) event series. These Digital History Fairs will increase awareness of and build support for the CoP, introduce and promote foundational digital concepts and the value of digital work within public history organizations, provide

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6 New York City Digital Humanities Week. [https://nycdh.org/dhweek/](https://nycdh.org/dhweek/)
participants opportunities to learn more about peer organizations’ digital work, and build community connections through social and learning activities. We will also use these events as an opportunity to promote project products including the Digital Readiness Levels and the resource directory. These free events will be targeted at staff and volunteers of public history organizations but will also be open to the general public.

Each Digital History Fair will feature:

- Presentations from Wisconsin local history organizations showcasing positive impacts and benefits of their digital work. These presentations will help build attendees’ confidence and excitement around digital work.
- Presentations from researchers, educators, or other users of digital collections. These presentations will help attendees build support for this work within their own organizations and communities by providing use cases for digital project development.
- Hands-on demonstrations of how to effectively use online portals to historical records, including Recollection Wisconsin and the Digital Public Library of America. These demonstrations will empower attendees to provide improved reference services for their own digitized collections and become more savvy searchers.
- Consultations with experienced practitioners on specific topics related to digital work, such as scanning, copyright, and storage. These one-on-one conversations will provide attendees an opportunity to seek advice from and build relationships with experts.

To maximize attendance and minimize travel costs for participants, the first Digital History Fair will take place during the statewide Local History and Historic Preservation Conference, in Rothschild, Wisconsin, October 30-31, 2020. This annual event offered by the Wisconsin Historical Society draws approximately 400 attendees from around the state including staff and
volunteers from local history affiliate groups, genealogists, reference librarians, students in library and museum studies programs, and other individuals interested in public history and historical records.

The remaining four events will all be scheduled in April or May 2020 in order to consolidate promotion of activities in a “Digital History Month.” Confirmed hosts for the four Spring Digital History Fairs are:

- Appleton Public Library (Appleton, WI)
- Barron County Historical Society (Cameron, WI)
- Forest County Historical and Genealogical Society (Crandon, WI)
- Kenosha County Historical Society (Kenosha, WI)

Each host organization will receive a stipend to support one daylong drop-in event. These funds may be used to cover speaker costs and consumable supplies as well as provide some compensation for the hosts’ contributed time. Each host may design the event as they see fit in order to best spotlight their own successful digital work and that of area partners and meet the community-building and learning needs of potential attendees in their region. The Program Assistant, along with operations staff at the Wisconsin Historical Society, will provide structure and support for these events including connecting hosts with guest speakers and experts, coordinating event logistics, and promoting the fairs to the local history affiliate network and other public history organizations throughout the state. See Supplementary Materials for letters of commitment from Appleton Public Library and Kenosha County Historical Society.

We will collect contact information from Digital History Fair attendees who desire to participate more fully in the CoP and include them in future communications. We will solicit feedback from
attendees after each event and use this data to inform future events and further hone the CoP and how it supports local history practitioners and organizations.

**Virtual Community-Building and Information Sharing**

Throughout the grant period, we will use several virtual community-building activities and tools to raise awareness of the CoP, provide a safe space for participants to ask questions and receive expert advice, and encourage community-building through peer-to-peer mentoring and learning. Offering virtual opportunities for engagement in the CoP will also ensure equity of participation for individuals in all parts of the state, particularly those in remote areas who may be unable to travel to in-person events.

- **Email list.** We will leverage the existing Wisconsin Digital Stewardship Google group, which was initially created in 2016 to support communication among participants in the IMLS-funded Curating Community Digital Collections program. CoP participants will be invited to use this listserv as a space to share documentation, announce local projects, and pose questions to peer institutions and experts in the network.

- **Resource directory.** An action step identified in Goal Two of the strategic plan is to make training materials and other resources gathered and created by the CoP easily accessible in a central online location. We will update and expand the Digital Projects Toolkit on the Recollection Wisconsin website into a free and openly available online directory of peer mentors, tools, vendors and other resources to support CoP participants’ digital work.

- **Case studies.** A recurring theme in our information-gathering phase was a desire among small repositories to understand how their organization’s digital work measures up to similar work by peer organizations. This type of community validation often carries more
weight for these organizations than advice from outside experts. We will coordinate with organizations that have undertaken exemplary digital community history projects to create at least eight one-page case studies, modeled on the “Tiny Case Study” format used by WiLS to spotlight projects for the Wisconsin Schools Digital Library Consortium. The Launch Committee will help identify case study subjects and topics. The case studies will be made available publicly on the Recollection Wisconsin website. Case study subjects will also be invited to become informal peer mentors for CoP participants working in similar institutions or with similar types of records.

PROJECT PRODUCTS

- Five in-person Digital History Fairs to increase awareness of and build support for the CoP and promote the value of digital work within public history organizations.

- Version One of the Digital Readiness Levels benchmarks.

- A listserv to facilitate peer-to-peer networking among CoP participants, maintained and moderated by the Recollection Wisconsin consortium.

- An online directory of resources, tools, and other support available to Wisconsin repositories undertaking digital projects, made publicly available on the Recollection Wisconsin website and maintained and updated by the consortium.

- At least eight case studies showcasing exemplary digital work at small institutions, representing a breadth of institution types and locations and a range of content types.

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**PROJECT PUBLICITY**

We will regularly share information about the Digital Readiness Community of Practice, its mission, activities, and most importantly, how to participate. Our primary target audience for project publicity is the staff and volunteers of public history organizations around the state, particularly small and under-resourced repositories. Our secondary audiences are other Wisconsin cultural heritage institutions engaged in digital stewardship work, including Recollection Wisconsin Content Partners and WiLS members, as well as the broader archives community, both regionally and nationally.

During the planning grant, we created a webpage about the project within the Recollection Wisconsin website. In the implementation phase, we will expand and update this web presence, using this space to share project updates and outcomes, event announcements, and relevant links. We will push out this information to our target audience through a number of established communication channels including the Wisconsin Digital Stewardship listserv, the Wisconsin Historical Society Local History listserv, and the Facebook pages and monthly e-newsletters of Recollection Wisconsin and the Wisconsin Historical Society Field Services program.

We will encourage the Launch Committee and CoP participants to share announcements of events, activities, and resources within their own local networks by providing templates for press releases, social media posts, and other communications. Many of the Launch Committee members are also active participants in other relevant networks and will help publicize the project to those audiences, including the Wisconsin Council for Local History, the Wisconsin Federation of Museums, and various regional genealogy and historic preservation interest groups. We will also look to the Launch Committee to suggest ideas for other outreach and publicity strategies.
Finally, in order to share this work with the broader archives community, we will propose a session about the project for a regional or national professional conference, most likely the Midwest Archives Conference (MAC), which is slated to take place in Madison, Wisconsin in summer 2021.

**PERSONNEL QUALIFICATIONS**

The partner institutions 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. In 2019, WiLS initiated a two-year cooperative agreement with IMLS to mentor a national cohort of small and rural libraries working on community memory projects, as part of IMLS’s new *Accelerating Promising Practices* funding model. 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.

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 providing expert professional advice to local historians through the affiliate program. 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.
Key Personnel

Program Assistant, WiLS

WiLS will hire a Program Assistant (1.0 FTE for one year) to support project logistics. This position will provide administrative support to the Launch Committee (setting meeting agendas, notetaking, etc.), maintain the project website, manage contact lists, assist with event planning, create and distribute promotional materials, and create and share communications. NHPRC funds are requested to support the salary and benefits for this position. See Supplementary Materials for Program Assistant Position Description.

Vicki Tobias, Project Director, WiLS

Vicki Tobias coordinated the NHPRC planning grant from July-December 2019 and is the Program Coordinator for Recollection Wisconsin’s IMLS-funded Curating Community Digital Collections initiative. Ms. Tobias will act as the Project Director for this grant. She will supervise the Program Assistant, facilitate meetings of the Launch Committee, manage communications among partners and participants, coordinate evaluation and strategic planning processes, and create or review all grant products outlined above. NHPRC funds are requested to cover 10% of her salary and fringe benefits. See Supplementary Materials for resume.

Emily Pfotenhauer, Community Liaison and Service Specialist, WiLS

As Program Manager for the Recollection Wisconsin consortium since 2011, Emily Pfotenhauer has extensive experience in guiding cultural heritage organizations through all aspects of digital collection creation and management. She is the Project Director for Recollection Wisconsin’s NEH-funded effort to digitize at-risk oral history recordings from small repositories and leads WiLS’ cooperative agreement with IMLS to mentor the Accelerating Promising Practices Community Memory cohort. She will manage the project budget, hiring, timeline, and grant
reporting, and assist Ms. Tobias in the final review of grant products. Ms. Pfotenhauer will contribute 5% of her time to this project as cost share from WiLS. See Supplementary Materials for resume.

Kristen Leffelman, 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. She is also one of the Society’s staff liaisons to the Wisconsin Council for Local History. Ms. Leffelman will participate in the Launch Committee as an advisor and will assist with planning and promoting the Digital History Fairs. She will contribute 10% of her time to this project as cost share from the Society. See Supplementary Materials for resume.

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 communities throughout the state as the Society plans for a new history museum. Ms. Seymour will advise on evaluation approaches and strategic planning processes and will review all grant products outlined above. She will contribute 5% of her time to this project as cost share from the Society. See Supplementary Materials for resume.

Operations Program Associate, Wisconsin Historical Society

Support staff in the Office of Programs and Outreach at the Society will provide general support for event planning and promotion and will coordinate with Society staff as they plan
complementary Society programs including the Annual Conference and regional workshops. The Society will contribute 5% of operations staff time as cost share.

**PERFORMANCE OBJECTIVES**

- Representatives from 11 public history organizations across Wisconsin will actively participate in the Launch Committee and lead the formation of the ongoing CoP.

- At least 250 community memory stakeholders will learn about digital stewardship work and the CoP by attending one of five in-person events.

- Representatives from at least 30 local historical societies and historic preservation organizations will participate in virtual community building activities by engaging in conversation on the listserv, utilizing the resource directory, or contributing a case study.

- The Digital Readiness Levels will be made publicly available as a tool for small repositories to plan digital stewardship activities and benchmark their progress.