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.”

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
Our inspiration

- 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://recollectonwisconsin.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

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Bronze</th>
<th>Silver</th>
<th>Gold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan and Prioritize</td>
<td>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.</td>
<td>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.</td>
<td>Make a plan for your digital project with timelines, roles, activities, goals and required resources. Share with partners participating in your project.</td>
</tr>
<tr>
<td>Obtain Permissions</td>
<td>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.</td>
<td>Assess collection for copyright status. Identify collections items with other access restrictions or concerns, including items with privacy, ethical or cultural considerations.</td>
<td>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.</td>
</tr>
<tr>
<td>Digitize</td>
<td>Identify standards and procedures to be used to digitize physical materials or process born-digital content.</td>
<td>Undertake digitization or born-digital processing work either in-house or with an appropriate vendor or partner using identified standards.</td>
<td>Use or advocate for a quality control checklist to review digitized or born-digital content to confirm it meets identified standards.</td>
</tr>
<tr>
<td>Describe</td>
<td>Create and maintain a collection-level inventory of digital content. Identify metadata standards to be used for digital collections.</td>
<td>Using identified standards, create descriptive metadata for collection items to be shared online. Adopt a consistent file-naming convention.</td>
<td>Create expanded item-level metadata, using controlled vocabularies and a data dictionary.</td>
</tr>
<tr>
<td>Share</td>
<td>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.</td>
<td>Review access goals and options for providing access to content. Choose a system or platform that meets your goals.</td>
<td>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.</td>
</tr>
<tr>
<td>Store and Maintain</td>
<td>Store two copies of each unmodified archival file and related metadata. Check storage media annually and refresh as needed.</td>
<td>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.</td>
<td>Plan for future storage needs as your collection grows. Use software tools to check file integrity.</td>
</tr>
<tr>
<td>Evaluate</td>
<td>Identify primary users and ways to engage them in your digital collections.</td>
<td>Collect usage data. Consider using analytics tools, social media, or research inquiries to gather use stories.</td>
<td>Share your story with other practitioners to build community around digital work. Use data to inform future collection development work, outreach and programming.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
<th>Source of definition (if relevant)</th>
<th>Related to</th>
</tr>
</thead>
<tbody>
<tr>
<td>3-2-1 Rule</td>
<td>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. See: Storage Diversification, Digital Storage</td>
<td>Recollection Wisconsin Digital Projects Toolkit</td>
<td>Storage Diversification</td>
</tr>
<tr>
<td>AASLH</td>
<td>AASLH stands for the American Association for State and Local History.</td>
<td>AASLH (American Association for State and Local History)</td>
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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.

https://recollectionwisconsin.org/digital-projects-case-studies
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://recolletionwisconsin.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://recolletionwisconsin.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

- 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://recolletionwisconsin.org/cop
- Recollection Wisconsin: https://recolletionwisconsin.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/