

## **Curating Community Digital Collections: Abstract**

Wisconsin Library Services (WiLS) requests a two-year grant of \$238,029 from IMLS to provide library school students with practical experience in digital stewardship while increasing the capacity of small libraries and cultural heritage organizations to curate their digital collections. WiLS will partner with the University of Wisconsin-Madison's School of Library and Information Studies (SLIS) and the University of Wisconsin-Milwaukee's School of Information Studies (SOIS) to place graduate students in summer fieldwork positions in small and under-resourced memory institutions across Wisconsin that are actively creating and collecting digital content documenting their communities. Students and host institutions alike will receive training and mentoring in digital stewardship and will work together to manage, preserve and provide access to materials digitized from analog formats and born-digital items.

The program will be administered in two cohorts over two years, with six summer fieldwork placements in Year 1 and ten placements in Year 2. Each fieldwork placement will be structured as a three-part collaboration, consisting of a graduate student, a supervisor from the host institution and a professional mentor. Students will complete 120-150 hours of work for host organizations, earning course credit from SLIS or SOIS as well as a stipend. Supervisors will plan the fieldwork projects, facilitate student work during the placement period and commit to continuing work on the project after the placement concludes. Each mentor will offer expertise in digital curation issues to both student and supervisor and provide the student with career guidance.

Over the course of the grant period, 16 masters-level students will gain advanced knowledge and practical experience in digital curation; develop essential career skills including professional speaking, writing, project management and virtual collaboration; and connect with a professional network of mentors and colleagues. Staff from 10-16 libraries and cultural heritage institutions will receive training and guidance in issues of digital curation and stewardship; collaborate with students and professionals to plan and carry out projects to improve the care of digital objects; and establish a framework and knowledge base to inform future digital work.

Before the summer placements begin, participants will take part in a three-day immersion workshop incorporating a high-level overview of digital stewardship issues and applied skills training in digital preservation tools and methods, as well as activities focused on building connections and fostering an environment of support among the cohort. WiLS will contract with AVPreserve, a leading preservation and information management consulting firm, to assist in developing and delivering the immersion workshop curriculum. The Digital Public Library of America will disseminate educational materials and other grant products to the DPLA Hubs network as a model to adopt and adapt.

The proposed program builds on and borrows from the highly successful framework of the National Digital Stewardship Residency (NDSR) program developed by the Library of Congress in partnership with IMLS. By scaling the NDSR model to meet the needs of smaller institutions, this program aligns with the goals of WiLS, SLIS and SOIS to: a) build local and enduring communities of practice related to digital curation, preservation and access; b) provide modern, relevant work experiences for aspiring information professionals that reflect contemporary position descriptions; and c) advocate for continuing education, cooperative training and collaboration with local institutions.

## Curating Community Digital Collections: Narrative

Wisconsin Library Services (WiLS) requests a two-year grant of \$238,029 from IMLS, in the Curating Collections category of the Laura Bush 21<sup>st</sup> Century Librarian Program, to provide library school students with practical experience in digital stewardship while increasing the capacity of small libraries and cultural heritage organizations to curate their digital collections. WiLS will partner with the University of Wisconsin-Madison's School of Library and Information Studies (SLIS) and the University of Wisconsin-Milwaukee's School of Information Studies (SOIS) to place graduate students in summer fieldwork positions in small and under-resourced memory institutions across Wisconsin. Students and host institutions alike will receive training and mentoring in digital stewardship and will work together to manage, preserve and provide access to materials digitized from analog formats and born-digital items.

## Statement of Need

The 2015 *National Agenda for Digital Stewardship* asserts that “As the stewardship of digital materials becomes a responsibility for an increasing number and variety of institutions, education, training, and workforce development are key elements in supporting the expertise necessary for building a competent base of current and future digital stewards.” Furthermore, “knowledge about standards and practices in an evolving field is best gained through direct, practical experience.”<sup>1</sup> In other words, any new graduate entering the library and archives profession should expect to work with digital assets in some capacity, whether they are part of a technology team at a leading research institution or the sole professional staff member at a small community library. Moreover, the best way to prepare current graduate students for the responsibilities of digital stewardship is through applied work in real-world information environments.

While library school students need opportunities to build critical skills in digital curation and stewardship through experiential learning, staff at small organizations are in desperate need of practical assistance to establish basic control of their digital assets. These organizations are actively creating digital content documenting their communities – recording oral history interviews, scanning archival collections, hosting community digitization events or building web-based exhibits. Yet few are equipped to manage, preserve or provide access to this digital content effectively. For the “lone arranger” in a public library’s local history archives or the part-time archivist for a technical college, little expertise, time or institutional support is available for the largely invisible work of digital preservation. An IMLS-funded survey recently completed by OCLC found that 66% of “very small” public library respondents (defined as service population less than 10,000) are currently engaged in digitizing collections, have done digitization in the past three years, or intend to start digitization projects in the next 12 months. At the same time, 51% of those libraries indicated they have no digital preservation strategies in place.<sup>2</sup>

In Wisconsin, this gap between digitization and ongoing digital stewardship is very real. Since 2005, WiLS has served as the project manager for Recollection Wisconsin, the state’s collaborative digital program. In 2016, Recollection Wisconsin became a Service Hub for the Digital Public Library of

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<sup>1</sup> National Agenda for Digital Stewardship. (2015) National Digital Stewardship Alliance. Retrieved from <http://www.digitalpreservation.gov/documents/2015NationalAgenda.pdf>

<sup>2</sup> Morgan, K., Proffitt, M. (2017) Advancing the National Digital Platform: The State of Digitization in US Public and State Libraries. OCLC Research. Retrieved from <http://www.oclc.org/content/dam/research/publications/2017/oclcsearch-advancing-the-national-digital-platform-2017.pdf>

America. The Recollection Wisconsin DPLA Service Hub offers metadata aggregation, basic guidelines and training for the creation of digital collections, and an access solution for small-scale digitization projects. However, like many DPLA Service Hubs, Recollection Wisconsin does not have the resources to offer centralized storage or preservation solutions. The result is that resources digitized from analog formats and born-digital items are managed in wildly inconsistent environments – if managed at all – by institutions of all sizes, in all parts of the state.

Taking on the issue of digital preservation is an immense task, even for large, well-funded institutions. For small organizations, confronted with an array of tools, standards and acronyms, it can be downright paralyzing. The proposed “Curating Community Digital Collections” program is inspired by two highly successful IMLS-funded initiatives to address this challenge on a national level: the National Digital Stewardship Residency (NDSR) and the Preserving Digital Objects with Restricted Resources (Digital POWRR) project.

In 2013, the Library of Congress, in partnership with IMLS, established the National Digital Stewardship Residency program (NDSR) in order to “build a dedicated community of professionals who will advance our nation’s capabilities in managing, preserving and making accessible the digital record of human achievement.”<sup>3</sup> Over five years and six iterations, NDSR has trained more than 50 new professionals, creating a strong cadre of digital stewards and field-testing a replicable model.

The “Curating Community Digital Collections” program will borrow many features from the NDSR model: a competitive application process for host institutions, a cohort model to encourage relationship-building among participants, a multi-day hands-on training workshop at the start of the project, a concluding capstone event and significant opportunities for mentoring and career skills development. However, the proposed program diverges from NDSR in several significant aspects and thus is not presented as a direct implementation of the NDSR program.

One major difference is that participants will not be recent graduates in their first professional positions, but rather, students currently enrolled in LIS graduate programs. This approach offers graduate students the chance to apply their classroom knowledge and explore digital stewardship in real-world settings prior to entering the workforce. This also means that students are able to take on this work while meeting the requirements of a fieldwork placement under the auspices of their university, obtaining course credit while working within the structure of an existing LIS curriculum.

Additionally, the duration of the fieldwork placement is only 120 hours over the course of a summer rather than the nine, ten or twelve months typical of NDSR residencies. This shorter period enables small institutions to benefit from support and partnerships without the more extensive commitment of resources required to host a yearlong, full-time resident. This variation on the NDSR model is intentionally scaled to meet the needs of institutions that are responsible for only a small amount of digital materials, do not anticipate establishing a full-fledged digital preservation program and do not have an institutional mandate to become a Trusted Digital Repository.

In order to meet the digital stewardship needs and limitations of small libraries and cultural heritage institutions, the proposed program follows the “good enough” philosophy of the Digital POWRR

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<sup>3</sup> National Digital Stewardship Residency Program. Retrieved from <https://ndsr-program.org/>

project. In their white paper for IMLS, the POWRR team emphasizes the value of an incremental, iterative approach to preservation (emphasis added):

Early in our team’s investigative efforts, we discovered a fundamental misconception preventing many cultural heritage professionals (including some of us) from making meaningful progress towards the development of an effective program. We assumed that digital preservation is an either/or proposition; either an institution has implemented successful digital curation and preservation measures or it has not. We came to realize that the opposite is true. *Digital preservation is best thought of as an incremental, ongoing, and ever-shifting set of actions, reactions, workflows, and policies.* An iterative approach means that practitioners don’t have to start by creating or selecting a comprehensive solution and making hard and fast technology choices to be used for the next 20 years. They can start by taking small steps to prioritize and triage digital collections, while working to build awareness and advocate for resources. *It is appropriate to focus efforts on the activities we can perform in the next six to twenty-four months to steward our digital content, rather than wait a decade for a potential perfect solution.*<sup>4</sup>

The proposed program focuses on small, rural and tribal cultural heritage organizations, not only because they are typically the most in need, but also because many new librarians and archivists entering the field will work in these institutions. Nearly 80% of Wisconsin’s 380 public libraries and almost 20% of the state’s 68 academic libraries, including University of Wisconsin System schools as well as private colleges and technical colleges, are located in communities of fewer than 10,000 people.<sup>5</sup> Many graduates of the LIS programs at UW-Madison and UW-Milwaukee who choose to remain in the state are likely to land their first professional position in one of these small communities. By embedding future librarians and archivists into small Wisconsin libraries and cultural heritage institutions, this program will deepen students’ understanding of the types of communities many of them will serve in their careers. Furthermore, establishing students’ professional networks within the state prior to graduation is a powerful way to inoculate against “brain drain.”

## Project Design

The primary goal of this program is to build core competencies in digital stewardship for library school students as well as library and archives professionals in small, tribal and rural institutions. Although the profession has not formally adopted a competency profile for digital stewards, an analysis conducted by former NDSR residents identifies a set of relevant skills, responsibilities and knowledge areas.<sup>6</sup> The six competency categories outlined in this study – technical skills, professional output responsibilities, communication skills, research responsibilities, project management abilities and knowledge of standards and best practices – will be addressed in this program through hands-on work, intensive training and numerous opportunities to build skills in professional communication and virtual collaboration.

The program will be administered in two cohorts over two years, with six summer fieldwork placements in Year 1 and ten placements in Year 2. Each fieldwork placement will be structured as a three-part

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<sup>4</sup> Schumacher, J., Thomas, L., VandeCreek, D. et. al. From Theory to Action: Good Enough Digital Preservation for Under-Resourced Cultural Heritage Institutions (2014). Retrieved from <http://commons.lib.niu.edu/handle/10843/13610>

<sup>5</sup> Wisconsin Department of Public Instruction, Division for Libraries and Technology (2015) Wisconsin Public Library Service Data. Retrieved from <https://dpi.wi.gov/pld/data-reports/service-data>; WiLS member database (2016)

<sup>6</sup> Blumenthal, K.-R., Griesinger, P., Julia, Peltzman, S., & Steeves, V. (2017, March 29). What makes a digital steward: A competency profile based on the National Digital Stewardship Residencies. Retrieved from [osf.io/zndwq](https://osf.io/zndwq)

collaboration, consisting of a graduate student, a supervisor from the host institution and a professional mentor. The **student** will complete 120-150 hours of work for the host organization as part of a practicum or fieldwork placement coordinated by their graduate program. The **supervisor** will plan the fieldwork project and facilitate the student's work during the placement period. The **mentor** will offer expertise and guidance in digital curation issues to both the student and the supervisor as the project proceeds and will provide the student with career mentorship. A part-time Program Coordinator will oversee all fieldwork placements and facilitate communication among the cohort.

The pre-proposal submitted to IMLS outlined a single-year initiative, but peer reviewers recommended expanding to two years in order to iterate and refine the program. In response to that feedback, this proposal adds a second year and an additional cohort. Year 1 will comprise six fieldwork placements: six students, six supervisors and six mentors, for a total of 18 cohort members. The Year 2 cohort will grow to ten placements: 10 students, 10 supervisors and 10 mentors, totaling 30 participants. Expanding to two years will allow for incorporation of participant feedback from Year 1 in order to improve the cohort experience and refine the model in Year 2. A second year also allows for the possibility of a host site participating a second time, building on groundwork laid in Year 1 to dig more deeply into a project.

The inclusion of professional mentors, a role distinct from that of the supervisors from host organizations, is a key feature of the project design and another divergence from the NDSR model. Mentors will be librarians, archivists, technologists or curators from larger institutions with significant expertise in digital stewardship and connections to regional and national professional networks. Because mentors will assist with selection of host sites and development of local projects, they will be identified at the outset of the grant period and will commit to their role for a full year. To date, four professional mentors are confirmed:

- **Kristin Briney, Data Services Librarian, UW-Milwaukee;** member of the Council of University of Wisconsin Libraries Digital Preservation Task Force
- **Amy Cooper Cary, Head of Special Collections and University Archives, Marquette University;** Council Member, Society of American Archivists
- **Stacey Erdman, Digital Archivist, Beloit College;** member of the Digital POWRR team
- **Jesse Henderson, Digital Services Librarian/Production Manager, UW Digital Collections Center, UW-Madison;** co-chair, Summer Educational Institute (SEI), sponsored by ARLIS/NA and VRA

In a preliminary call for potential host sites, six contributors to the Recollection Wisconsin DPLA Service Hub expressed strong interest in the program. These potential hosts represent small, tribal and rural libraries as well as museums and historical societies in all corners of the state and include the College of Menominee Nation Library, La Crosse Public Library Archives, McMillan Memorial Library, the Neville Public Museum of Brown County, Ripon Historical Society and Three Lakes Historical Society. In addition, four regional public library systems have volunteered to either host a student themselves or work with their member libraries to develop placement opportunities. Combined, these systems (Monarch Library System, Outagamie Waupaca Library System, South Central Library System, and Wisconsin Valley Library Service) reach 127 public libraries in 20 Wisconsin counties.

The Project Director and Program Coordinator, in consultation with mentors and LIS faculty partners, will review applications from potential hosts and select the host sites. Hosts will be expected to demonstrate institutional and community support to carry on the work after the student placement is

completed. Host sites will be selected in order to form a geographically diverse, multi-type cohort.

In the NDSR model, potential hosts are required to provide a detailed project proposal as part of the application process. In contrast, this program builds in time and support to help each host site identify an appropriate project and develop a plan for the placement period and beyond. After the hosts are selected, the Program Coordinator will visit each site in-person to discuss institutional needs, goals and challenges. Each supervisor, in consultation with the Program Coordinator and the assigned mentor, will design a project that will result in tangible benefits to their institution while providing a substantive learning experience for the student. A detailed project plan, including expected outcomes, activities and tasks, will be created using WiLS' [Project Planning Template](#).

Each local project will aim to move host organizations towards Level 1 recommendations (“Protect Your Data”) described in the National Digital Stewardship Alliance’s Levels of Digital Preservation or, when appropriate, NDSA Level 2 (“Know Your Data”).<sup>7</sup> To help ensure that hosts are positioned to carry their projects forward after the placement is completed, students will produce detailed documentation of all procedures and tools used, based on provided templates. For institutions in need of a stable storage solution for their digital assets, the University of Wisconsin-Madison Libraries will donate up to five terabytes of digital archival storage for a period of three years. While not a permanent solution, this contribution will provide a secondary space in which assets can be stored while longer-term preservation storage and digital curation options are considered.

The following table aligns potential project activities with NDSA Level 1 and the NDSR digital stewardship competency profile:<sup>8</sup>

Project activity	NDSA Level 1	NDSR competencies
Move digital content off CDs, DVDs or hard drives into the storage solution contributed by UW-Madison Libraries or another storage option.	For data on heterogeneous media (optical discs, hard drives, etc.) get the content off the medium and into your storage system.	Technical skills: digital asset management
Use a checksum utility (e.g. Fixity, an open source tool developed by AVPreserve) to generate and validate checksums for existing digital content.	Create fixity info.	Technical skills: implementation of hardware/software
Identify security restrictions currently in place at host organization and draft a recommendation for enhanced information security.	Identify who has read, write, move and delete authorization to individual files, and restrict who has those authorizations.	Research responsibilities: Environmental scan Communication skills: Interact/liaise with internal staff/stakeholders
Conduct an inventory of digitized and born-digital content held by the host organization.	Inventory of content and its storage location.	Professional output responsibilities: Survey/inventory

<sup>7</sup> Phillips, M., Bailey, J., Goethals, A., Owens, T. (2013). The NDSA Levels of Digital Preservation: An explanation and uses. Retrieved from [http://www.digitalpreservation.gov/documents/NDSA\\_Levels\\_Archiving\\_2013.pdf](http://www.digitalpreservation.gov/documents/NDSA_Levels_Archiving_2013.pdf)

<sup>8</sup> Blumenthal, K.-R., Griesinger, P., Julia, Peltzman, S., & Steeves, V. (2017, March 29). What makes a digital steward: A competency profile based on the National Digital Stewardship Residencies. Retrieved from [osf.io/zndwq](https://osf.io/zndwq)

Other potential project activities will hone students' technical skills and prepare institutions to move towards NDSA Level 1, such as establishing a file naming convention and renaming files, determining a directory structure template and reorganizing folders, reviewing and remediating descriptive metadata or rescuing data from floppy disks or Zip disks using the IMLS-funded PROUD kit (Portable Recovery of Unique Data) developed by UW-Madison SLIS ([SP-02-16-0015-16](#)).

WiLS will work with faculty and advisors to recruit a diverse cohort of qualified graduate students from both the in-person and distance learning degree programs at SLIS and SOIS. As a prerequisite, participating students will have completed at least one course in technology or digital libraries. The Program Coordinator and Project Director, in consultation with faculty and supervisors, will select students and match them with appropriate host sites based on students' areas of interest and geographic location.

All students will enroll in either LIS 620, "Field Project in Library and Information Agencies" (UW-Madison) or INFOST 990, "Fieldwork in Library and Information Science Services" (UW-Milwaukee). Students will receive credit towards their degree as well as a stipend. As part of the course requirements, students will complete a number of assignments to provide context for their fieldwork and build their skills in professional communication: a community study, three written reflections, an informational interview with the director or other "higher authority" at their host institution, a final research paper and a final poster presentation. Students will also participate in various professional development activities coordinated by SLIS, including a "New Professionals" panel discussion with recent LIS graduates, a cover letter review and a mock job interview.

After all supervisors, students and mentors are identified, the Program Coordinator will lead an orientation webinar to discuss program logistics, timelines and expectations. Before the summer placements begin, participants will take part in a three-day immersion workshop in Madison, facilitated by AVPreserve consultants and other experts. Day 1 of the session will include all students, supervisors and mentors and will focus on building connections and fostering an environment of support among the cohort. Day 2, for students and supervisors, will offer a high-level overview of digital preservation issues, utilizing the Digital Preservation Outreach and Education (DPOE) curriculum developed by the Library of Congress. On Day 3, students and supervisors will participate in applied skills training.

Over the course of the summer, all students and supervisors will participate in at least two group check-in conversations, facilitated by the Program Coordinator using GoToMeeting. Each mentor will coordinate at least three one-on-one interactions with the student, in person, by phone or videoconference – one before the placement starts, another during the first few weeks of the placement and a final conversation after the placement is completed. Midway through the summer, the Project Coordinator and mentor will conduct a site visit to check in with both student and supervisor. Before, during and after the placement, the cohort will have access to interactive communication channels (managed by WiLS in BaseCamp and Slack) to post questions and share project updates.

The full cohort will reconvene virtually at the end of the summer. In this "virtual capstone" event, students will present posters summarizing their project work and related research. Supervisors and mentors will have the opportunity to comment on challenges, successes and future directions. In order to foster continued communication among the cohort after the grant period, WiLS will maintain the

BaseCamp site and Slack channel created for the program on an ongoing basis.

To disseminate the program model and support communities of practice at the national level, WiLS will report on the program during Year 2 of the grant period at conferences targeted at library consortia and smaller institutions, such as the International Coalition of Library Consortia (ICOLC), the Association for Rural and Small Libraries (ARSL) and the American Association for State and Local History (AASLH). Mentors will coordinate with current or former NDSR mentors to propose a panel session for the DLF Forum. The Recollection Wisconsin Service Hub will share program results with the DPLA Hubs network at the DPLAfest annual conference and other DPLA-sponsored events. All grant products will be shared publicly on a dedicated program site maintained as part of the [Recollection Wisconsin website](#) and, as appropriate, posted to [Library Workflow Exchange](#) and the DPLA Hubs network site (currently in development).

## EVALUATION METHODS

Both formal and informal evaluation methods will be crucial to shaping and improving the program during the grant period and beyond. Following the example established by NDSR, each student will complete a self-assessment survey before and after the placement to identify their digital stewardship competencies and perceived professional development status. Supervisors will complete a similar self-assessment before and after the placement to document increases in professional knowledge and institutional capacity. Students and supervisors alike will complete a survey after the immersion workshop to provide feedback on curriculum content, training structure and quality of instruction. Another survey will be administered to supervisors and students six months after the placements are concluded, and again two years out. These long-range surveys will assess the ongoing status of local projects and evaluate how well the program prepared participants for current work, including any resulting job placements. All surveys will incorporate the pre-determined performance measure statements related to the IMLS agency-level learning goal.

Qualitative assessments of the program will be gathered informally as part of phone check-ins and site visits scheduled throughout the grant period. In addition, all members of the cohort will be able to share informal, anonymous feedback at any time using a web-based form. The form will utilize questions designed to prompt reflection, such as describing a challenge encountered, a moment of success, or a new learning experience.

## BUDGET SUMMARY

As indicated in CLIR's recent assessment of NDSR, "the key to the successful administration of an NDSR program is dedicated staff who can devote enough time to coordinate and communicate effectively." According to Margo Padilla, an NDSR resident from the 2013–2014 Washington cohort who later became program manager for the NDSR-NY initiative, "Running NDSR is one full-time job. That can be broken up in different ways (hiring one full-time person, or part-time staff mixed with a percentage of time from full-time staff), but I think getting 50 percent of a full-time position commitment should be standard for stability."<sup>9</sup>

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<sup>9</sup> Beck Mink, M. Keepers of our digital future: An assessment of the National Digital Stewardship Residencies, 2013-2016 (December 2016) Council on Library and Information Resources. Retrieved from <https://www.clir.org/pubs/reports/pub173>

To that end, the largest portion of the budget request is to support program staff: a Program Coordinator (0.50 FTE) and Project Director (0.15 FTE), for a total of \$108,336 in salaries and fringe benefits over two years. Other major budget requests are \$52,340 for student support, including stipends and travel costs; \$13,860 in stipends and travel costs for professional mentors; and \$19,602 to support instruction and facilities for the immersion workshops. The total amount requested from IMLS is \$238,029. (This total represents a significant increase over the amount requested in the pre-proposal stage, due to the addition of a second program year.)

## PROJECT PERSONNEL

### **Vicki Tobias, Program Coordinator (0.50 FTE for 2 years)**

The Program Coordinator will publicize the placement opportunities, coordinate communications with participants, work with host institutions to develop project plans, work with instructors to develop immersion workshop curriculum, review and share workflows and other grant products, conduct and analyze evaluations and maintain the program website and other communication channels. Vicki Tobias is an Associate Lecturer in the School of Library and Information Studies at UW-Madison, where she teaches online and in-person courses in archives and digital libraries and advises graduate students following the archives track at SLIS. Ms. Tobias has more than 15 years of experience managing complex technology projects, including administration of IMLS, NHPRC and LSTA grant-funded digitization projects for the UW Digital Collections Center and the UW-Madison University Archives.

### **Emily Pfothauer, Project Director (0.15 FTE for 2 years)**

The Project Director will determine project deadlines, manage program budget and grant reporting, coordinate communications with program partners, help develop immersion workshop curriculum and project plans, help conduct and analyze evaluations and supervise the Program Coordinator. As Program Manager for Recollection Wisconsin since 2011, Emily Pfothauer brings extensive experience in project management and collaboration with libraries and cultural heritage institutions across Wisconsin. She has supervised numerous undergraduate and graduate students in practicum placements and internships, served as Project Director for WiLS' recent NEH-funded statewide assessment of at-risk audiovisual collections, and is a member of the Digital Preservation Outreach and Education (DPOE) train-the-trainer network.

### **Debra Shapiro, Instructor and Coordinator of Online MA Program, UW-Madison SLIS**

As coordinator for summer practicum placements at SLIS, Ms. Shapiro will recruit students from the in-person and distance programs, help match them with hosts and teach the companion LIS 620 course.

### **Julie Walker, Career Services Advisor, UW-Milwaukee SOIS**

As coordinator for SOIS fieldwork placements, Ms. Walker will recruit students from the in-person and distance programs, help match them with hosts, and coordinate course credit and faculty supervision.

### **Bertram Lyons and Amy Rudersdorf, Senior Consultants, AVPreserve**

AVPreserve, a leading preservation and information management consulting firm, will assist in developing the immersion workshop curriculum. Mr. Lyons and Ms. Rudersdorf will act as instructors for the digital preservation theory and hands-on training portions of the workshop.

## OUTCOMES, ASSUMPTIONS, RISKS

Intended program outcomes include:

*16 masters-level students will:*

- Gain advanced knowledge and practical experience in digital curation
- Develop essential career skills including professional speaking, writing, project management and virtual collaboration

- Connect with a professional network of mentors and colleagues

*10-16 Wisconsin libraries and cultural heritage institutions will:*

- Receive training and guidance in issues of digital curation stewardship
- Collaborate with students and professionals to plan and carry out projects to improve the care of digital objects
- Establish a framework and knowledge base to inform future digital work

*WiLS and Recollection Wisconsin will:*

- Gain a deeper understanding of institutional needs and barriers related to digital stewardship in Wisconsin, leading to improved support for member organizations
- Create a freely-available curriculum and related documentation for other library consortia, LIS programs and DPLA Service Hubs to replicate and adapt
- Build and grow a network of organizations offering mutual support and information sharing

The project design assumes that IMLS's investments in training, expertise and labor to jump-start local digital stewardship initiatives will result in sustained activity on the part of host organizations after the student placements are completed. The risk, then, is that without ongoing, active support, those local projects will wither rather than continue to grow. Including supervisors in all training opportunities alongside the students is key to mitigating this risk. Additionally, the Program Coordinator and the assigned mentor will provide advice and assistance to the host institution before, during and after the placement. Students will be tasked with documenting any procedures or tools used during the placement. Finally, the development of a cohort community will provide opportunities for ongoing knowledge sharing and mutual support.

This proposal also assumes that the limited duration of the placements will provide students with meaningful work experiences and produce tangible results for the host institutions. The 120-hour placement is a standard for both LIS partners: 120 hours of work are required for SLIS practicum opportunities, and that total is squarely within the 50-150 hours expected for SOIS fieldwork placements. By carefully mapping out project goals, outcomes and activities in advance and providing relevant skills training, students will be able to step into clearly defined roles right away in order to make the best use of their time and their host's time.

## **Diversity Plan**

Because this program will recruit students from the populations already admitted to the LIS programs at UW-Madison and UW-Milwaukee, diversity is circumscribed by the diversity of the existing student bodies. UW-Milwaukee is the most diverse campus of the University of Wisconsin System and SOIS has a distinguished history of actively promoting diversity in the field, most recently in the 2013 IMLS-funded Fostering East Asian Librarianship (FEAL) initiative ([RE-01-13-0014-13](#)). UW-Madison SLIS has an outstanding record of outreach to tribal libraries and cultural heritage institutions in Wisconsin through the IMLS-funded Convening Great Lakes Culture Keepers program ([RE-06-13-0069-13](#); [RE-06-15-0079-15](#)).

WiLS is committed to an environment in which all individuals are treated with respect and dignity. It is the policy of WiLS to ensure equal opportunity without discrimination or harassment on the basis of

age, race, creed, color, disability, marital status, sex, sexual orientation, national origin, ancestry, arrest record, conviction record, military status, or use or nonuse of lawful products during nonworking hours. Host organizations will be recruited according to this statement, although each host is responsible for ensuring that it adheres to the standards set by their institution.

## **National Impact**

The “Curating Community Digital Collections” program forges a path for small and under-resourced memory institutions to engage with the National Digital Platform. The program will introduce current and future cultural heritage professionals to the digital curation standards, strategies and tools that make up the NDP, including the DPOE curriculum and the NDSA Levels of Digital Preservation. In scaling the NDSR model to meet the needs of smaller institutions, this program will build on the successful framework developed by NDSR as it aligns with the goals of WiLS and its partners:

- to build local and enduring communities of information professionals with common goals and shared knowledge related to digital curation and preservation;
- to raise awareness of challenges inherent to acquiring, providing access to and preserving digital content and provide solution-focused training and experiences to meet these challenges;
- to provide modern, relevant work experience for aspiring information professionals – experiences that more accurately reflect contemporary position descriptions and desired skills and qualifications; and
- to advocate for continuing education, cooperative training and collaboration with local institutions focused on digital preservation work

This program will field-test a replicable model designed to be adopted and adapted by the Digital Public Library of America’s growing Hubs network. The program will demonstrate how a DPLA Service Hub’s infrastructure, in partnership with LIS graduate programs, can be leveraged to build local expertise and capacity.

For the students who participate, this program offers an invaluable opportunity to hone digital curation and preservation skills in a real-world environment. This program will prepare future information professionals for myriad employment opportunities in the library realm and beyond. Students will be challenged to problem-solve, think creatively and critically, understand complex technology issues, confidently communicate with a variety of people on a variety of topics, manage multiple tasks and deadlines, and use communication and project tools effectively and appropriately.

As society continues to create preservation-worthy digital content in a variety of formats, at an ever-increasing rate, state- and regional-level consortia have a professional mandate to develop systems, processes and professional standards to acquire and expertly manage this content and contribute to training the next generation of leaders in this area. Success depends on our ability to keep pace with this evolution by creating long-term, mutually-beneficial relationships between those who create and manage this information and the information professionals who aspire to embrace this challenge throughout their careers. By doing so, we create a structure that will continue to grow and evolve, and provide support for future projects and collaborative work.





## DIGITAL PRODUCT FORM

### Introduction

The Institute of Museum and Library Services (IMLS) is committed to expanding public access to federally funded digital products (i.e., digital content, resources, assets, software, and datasets). The products you create with IMLS funding require careful stewardship to protect and enhance their value, and they should be freely and readily available for use and re-use by libraries, archives, museums, and the public. However, applying these principles to the development and management of digital products can be challenging. Because technology is dynamic and because we do not want to inhibit innovation, we do not want to prescribe set standards and practices that could become quickly outdated. Instead, we ask that you answer questions that address specific aspects of creating and managing digital products. Like all components of your IMLS application, your answers will be used by IMLS staff and by expert peer reviewers to evaluate your application, and they will be important in determining whether your project will be funded.

### Instructions

You must provide answers to the questions in Part I. In addition, you must also complete at least one of the subsequent sections. If you intend to create or collect digital content, resources, or assets, complete Part II. If you intend to develop software, complete Part III. If you intend to create a dataset, complete Part IV.

## PART I: Intellectual Property Rights and Permissions

**A.1** What will be the intellectual property status of the digital products (content, resources, assets, software, or datasets) you intend to create? Who will hold the copyright(s)? How will you explain property rights and permissions to potential users (for example, by assigning a non-restrictive license such as BSD, GNU, MIT, or Creative Commons to the product)? Explain and justify your licensing selections.

The curriculum materials and documentation produced by WiLS, SLIS and SOIS in the course of this project will be released under a Creative Commons By Attribution license (CC BY 4.0). Host institutions creating documentation as part of this project (e.g. project plans, policies) will be strongly encouraged to release that content under the same license.

**A.2** What ownership rights will your organization assert over the new digital products and what conditions will you impose on access and use? Explain and justify any terms of access and conditions of use and detail how you will notify potential users about relevant terms or conditions.

Materials produced by WiLS, SLIS and SOIS over the course of this project will be freely available to the public for use, reuse and adaptation. Host institutions creating documentation as part of this project will be strongly encouraged to make that content freely available to the public as well.

**A.3** If you will create any products that may involve privacy concerns, require obtaining permissions or rights, or raise any cultural sensitivities, describe the issues and how you plan to address them.

Respondents to all assessment surveys will have the option to remain anonymous. Identifying personal and institutional information will be removed before any evaluation data is shared publicly.

## Part II: Projects Creating or Collecting Digital Content, Resources, or Assets

### A. Creating or Collecting New Digital Content, Resources, or Assets

**A.1** Describe the digital content, resources, or assets you will create or collect, the quantities of each type, and format you will use.

Project staff, faculty advisors and consultants will create syllabi and presentation slides for immersion workshops, application forms, requirements and expectations for host sites and students, and pre- and post-placement assessment survey questions. Students and supervisors will create or collect local project plans, workflows, procedures, policies and/or guidelines, inventories of digital content, file fixity information and other preservation and technical metadata.

**A.2** List the equipment, software, and supplies that you will use to create the content, resources, or assets, or the name of the service provider that will perform the work.

The majority of the resources listed in A.1 will be created using standard word processing or presentation software, e.g. Microsoft Word, PowerPoint, Google Docs and Google Slides. Content inventories will be created in Excel, Google Sheets, or a simple database program such as Microsoft Access. File fixity information and other technical metadata will be generated using the Fixity application or other open source tools.

**A.3** List all the digital file formats (e.g., XML, TIFF, MPEG) you plan to use, along with the relevant information about the appropriate quality standards (e.g., resolution, sampling rate, or pixel dimensions).

Project documentation: pdf/a

Inventories: csv and/or xls

Technical metadata: csv and/or xml

## **B. Workflow and Asset Maintenance/Preservation**

**B.1** Describe your quality control plan (i.e., how you will monitor and evaluate your workflow and products).

Digital products from this project will be reviewed on a regular basis by the Program Coordinator, Project Director, professional mentors, expert consultants and faculty advisors.

**B.2** Describe your plan for preserving and maintaining digital assets during and after the award period of performance. Your plan may address storage systems, shared repositories, technical documentation, migration planning, and commitment of organizational funding for these purposes. Please note: You may charge the federal award before closeout for the costs of publication or sharing of research results if the costs are not incurred during the period of performance of the federal award (see 2 C.F.R. § 200.461).

Project documentation will be maintained in WILS' cloud storage provider (Dropbox). Copies will also be stored in the University of Wisconsin System's institutional repository, Minds@UW (<https://minds.wisconsin.edu/>) and on the Open Science Framework platform (<http://osf.io>).

## **C. Metadata**

**C.1** Describe how you will produce any and all technical, descriptive, administrative, or preservation metadata. Specify which standards you will use for the metadata structure (e.g., MARC, Dublin Core, Encoded Archival Description, PBCore, PREMIS) and metadata content (e.g., thesauri).

File fixity information and other technical metadata will be generated using the Fixity application or other open source tools. Standards for technical and preservation metadata will be based on the PREMIS Data Dictionary.

**C.2** Explain your strategy for preserving and maintaining metadata created or collected during and after the award period of performance.

Host institutions will be responsible for preserving and maintaining any inventory information or other technical or preservation metadata. WILS will provide guidance for storing and maintaining this metadata in the digital archival storage contributed by UW-Madison Libraries and/or other storage solution(s).

**C.3** Explain what metadata sharing and/or other strategies you will use to facilitate widespread discovery and use of the digital content, resources, or assets created during your project (e.g., an API [Application Programming Interface], contributions to a digital platform, or other ways you might enable batch queries and retrieval of metadata).

Metadata created during the award period will be used for technical, preservation and administrative purposes and will not be distributed for discovery purposes.

## **D. Access and Use**

**D.1** Describe how you will make the digital content, resources, or assets available to the public. Include details such as the delivery strategy (e.g., openly available online, available to specified audiences) and underlying hardware/software platforms and infrastructure (e.g., specific digital repository software or leased services, accessibility via standard web browsers, requirements for special software tools in order to use the content).

Grant products will be shared publicly on a dedicated program site maintained as part of the Recollection Wisconsin website (<http://recollectionwisconsin.org>) and, as appropriate, posted to Library Workflow Exchange (<http://libraryworkflowexchange.org>) and the DPLA Hubs network site (currently in development). The digital products will also be made available to the public on the Open Science Framework platform (<http://osf.io>).

**D.2** Provide the name(s) and URL(s) (Uniform Resource Locator) for any examples of previous digital content, resources, or assets your organization has created.

Recollection Wisconsin Contributor Guidelines:

<http://recollectionwisconsin.org/guidelines>

Digital Projects Toolkit (self-guided online course for Service Hub Contributors):

<http://recollection-wisconsin.thinkific.com/>

## **Part III. Projects Developing Software**

### **A. General Information**

**A.1** Describe the software you intend to create, including a summary of the major functions it will perform and the intended primary audience(s) it will serve.

**A.2** List other existing software that wholly or partially performs the same functions, and explain how the software you intend to create is different, and justify why those differences are significant and necessary.

### **B. Technical Information**

**B.1** List the programming languages, platforms, software, or other applications you will use to create your software and explain why you chose them.

**B.2** Describe how the software you intend to create will extend or interoperate with relevant existing software.

**B.3** Describe any underlying additional software or system dependencies necessary to run the software you intend to create.

**B.4** Describe the processes you will use for development, documentation, and for maintaining and updating documentation for users of the software.

**B.5** Provide the name(s) and URL(s) for examples of any previous software your organization has created.

### **C. Access and Use**

**C.1** We expect applicants seeking federal funds for software to develop and release these products under open-source licenses to maximize access and promote reuse. What ownership rights will your organization assert over the software you intend to create, and what conditions will you impose on its access and use? Identify and explain the license under which you will release source code for the software you develop (e.g., BSD, GNU, or MIT software licenses). Explain and justify any prohibitive terms or conditions of use or access and detail how you will notify potential users about relevant terms and conditions.

**C.2** Describe how you will make the software and source code available to the public and/or its intended users.

**C.3** Identify where you will deposit the source code for the software you intend to develop:

Name of publicly accessible source code repository:

URL:

### **Part IV: Projects Creating Datasets**

**A.1** Identify the type of data you plan to collect or generate, and the purpose or intended use to which you expect it to be put. Describe the method(s) you will use and the approximate dates or intervals at which you will collect or generate it.

**A.2** Does the proposed data collection or research activity require approval by any internal review panel or institutional review board (IRB)? If so, has the proposed research activity been approved? If not, what is your plan for securing approval?

**A.3** Will you collect any personally identifiable information (PII), confidential information (e.g., trade secrets), or proprietary information? If so, detail the specific steps you will take to protect such information while you prepare the data files for public release (e.g., data anonymization, data suppression PII, or synthetic data).

**A.4** If you will collect additional documentation, such as consent agreements, along with the data, describe plans for preserving the documentation and ensuring that its relationship to the collected data is maintained.

**A.5** What methods will you use to collect or generate the data? Provide details about any technical requirements or dependencies that would be necessary for understanding, retrieving, displaying, or processing the dataset(s).

**A.6** What documentation (e.g., data documentation, codebooks) will you capture or create along with the dataset(s)? Where will the documentation be stored and in what format(s)? How will you permanently associate and manage the documentation with the dataset(s) it describes?

**A.7** What is your plan for archiving, managing, and disseminating data after the completion of the award-funded project?

**A.8** Identify where you will deposit the dataset(s):

Name of repository:

URL:

**A.9** When and how frequently will you review this data management plan? How will the implementation be monitored?