



Inspire! Grants for Small Museums

Sample Application IGSM-251843-OMS-22
Project Category: Collections Stewardship and Access

La Jolla Historical Society

Amount awarded by IMLS:	\$49,995
Amount of cost share:	\$13,028

The La Jolla Historical Society will complete the second phase of a collections management project to increase public accessibility, improve internal efficiency, and strengthen the management and stewardship of its community archive. The project will preserve original materials and create container lists and collection guides for 77 individual collections in 193 boxes measuring approximately 288 linear feet. The project will support a paid internship program for students from surrounding universities, intended to foster interest in history careers. Container lists and collection guides produced through the project will broaden public access to the materials in the collection. The museum will publish the resulting finding aids in the freely accessible Online Archive of California.

The project will increase the museum's understanding of how the collection is being used and identify ways to use its collections to better serve the community.

Attached are the following components excerpted from the original application.

- Narrative
- Schedule of Completion

When preparing an application for the next deadline, be sure to follow the instructions in the most recent Notice of Funding Opportunity for the grant program to which you are applying.



I) Project Justification

La Jolla Historical Society (LJHS) proposes to increase public accessibility while strengthening the stewardship of its community archive through its **Project for Collections Preservation and Accessibility (Project)**. Deputy Director/Collections Manager, Dana Hicks, will retain, train, and work closely with qualified interns to systematically organize and preserve LJHS's collections. This Project supports LJHS's internal plan to professionalize its collections and increases its ongoing capability. This meets IMLS's goal to *"increase public access to information, ideas, and networks."* It aligns with the Inspire program goal of Collections Stewardship and Access, specifically Objective 3.1 to *support cataloging, inventorying, and registration; collections information management; and collections planning*. It also corresponds to Objective 3.3 to support database management.

LJHS's collections encompass over 80 years of collected books, newspapers, magazines, manuscripts, maps, scrapbooks, printed ephemera, artworks, architectural drawings, and more. Volunteers in the Historical Committee of the Library Association of La Jolla started gathering photographs and documentation in the late 1930s, including items that dated back to the previous century. These became the nucleus of LJHS's archives today. Of particular importance are LJHS's visual collections, which include over 20,000 photographs. LJHS staff/volunteers listed, cataloged, and cross-referenced its archives using a traditional card-catalog filing system, and detailed spreadsheet lists. The different collections came together physically in 2010 after the renovation of LJHS's campus in central La Jolla. (See *Organizational Profile* and *Supporting Document 2*.) In 2016, LJHS started using a software program called PastPerfect 5.0 (PP5) to manage and catalog its collections.

The Project will preserve original materials and improve access to LJHS's collections by creating container lists and collection guides for the Donor Based Collection made up of materials donated by specific local community organizations, individuals, and early families. Its contents of 77 individual collections in 193 boxes measure approximately 288 linear feet. It includes three large architectural collections along with research documents recording La Jolla's beginnings from the author of the first book on local history. Also represented are Japanese American and women's histories, plus a large collection of photographs from the local newspaper.

La Jolla's past has had broad implications. For instance, issues while constructing a local high-rise building led to the formation of the California Coastal Commission. Many renowned institutions started in La Jolla, including Scripps Institution of Oceanography, the University of California at San Diego, La Jolla Playhouse, the Salk Institute of Biological Sciences, Scripps Memorial Hospital, J. Craig Venter Institute, and more. LJHS's Town Council collection (part of the Donor Based Collection) and Community Planning collections show what has been important to La Jollans, plus trends and concerns for San Diego and the region.

The Project's key activities include:

- The interns will create detailed lists for each container of items in the Donor Based Collection, using appropriate protocols and documenting each item including related subjects, people, dates, donor, and more. During this process, each item will be preserved using archival--grade sleeves, envelopes, boxes, and appropriate storage methods.

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- The container lists will be reviewed/edited and then input into LJHS's PP5 database using industry standards/best practices that include digital searchability. This database enables LJHS staff to quickly and thoroughly identify materials related to a research request.
- The newly organized and reviewed container lists of LJHS's collections will be migrated to a publicly available program, PastPerfect Online (PPO). Anyone with access to PPO can search LJHS's container lists and determine whether LJHS can further their research efforts.
- The next step is to fill the collection guide forms (abstracts, additional context) of the Online Archive of California (OAC), a statewide digital library project that provides free public access to detailed descriptions of primary resource collections maintained by more than 200 contributing institutions including libraries, special collections, archives, historical societies and museums throughout California and collections maintained by the 10 University of California (UC) campuses. The OAC is a core component of UC's California Digital Library (CDL).

This Project represents a vital continuation of work that was initiated and supported by the IMLS's 2019-2021 *Inspire! Grant for Small Museums* (IMLS/19-21). Led by Hicks, IMLS/19-21 enabled LJHS to organize its permanent collection and streamline the processes and forms for creating container lists to upload into PP5 and collection guides to present on OAC. Per the IMLS/19-21 grant terms, LJHS completed these activities for 50% of its collections. (See *Supporting Document 3*.) This Project will complete the other 50%, building upon lessons learned in IMLS/19-21:

- Preservation – This Project includes supplies for archival sleeves/other preservation materials.
- Online Access – LJHS has added a PPO subscription for two years. PPO enables crucial levels of detail and specificity compared to OAC's more general, albeit more widely available, guides.
- Tracking – LJHS added a new process during IMLS/19-21 to collect visitor/research statistics that identify how the collection is being used and ways to better serve the community. For instance, queer residents/visitors were known to frequent Black's Beach in La Jolla, yet the archives have no record of this cultural presence. Tracking helps LJHS identify, understand, and address the implications of such "archival silences."
- Inquiries – The tracking protocol also confirmed previous estimates that LJHS responds to nearly 150 visitor inquiries and email/phone calls requesting research assistance each year. This was during COVID, and it remains to be seen how this number will change.

LJHS welcomes public requests as part of its mission "to preserve and share La Jolla's distinctive sense of place and to inspire and empower the community to make La Jolla's diverse past a relevant part of contemporary life." Self-directed access is very emboldening, and this "retail/over-the-counter" approach underscores LJHS's vision to serve as a "thriving community resource and gathering place."

LJHS also supports researchers or interested individuals who are uncomfortable with online tools or unable to physically access the archive. Hicks performs onsite research on their behalf and shares relevant materials virtually or in person. This Project supports Hicks' time, and enhances equitable access to LJHS's collection regardless of individual physical ability or geographic location. La Jollans, San Diegans, and the larger historical/archival community will be able to more easily find and appreciate the rich resources of LJHS's collections.

LJHS's reputation as a trusted resource for the stewardship and care of individual and architectural archival materials has grown substantially since the completion of IMLS/19-21. This is evidenced by

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the recent donation of two architecture firm's complete drawing sets, consistent inquiries from local institutions/architects asking to have their records accessed into the LJHS collection, as well as requests about best practices in cataloguing and preserving archival materials.

The internship programs will strengthen collaborations with local universities and foster enthusiasm for careers related to history. The LJHS has experienced positive results from interns working on IMLS/19-21 from the University of California, San Diego (UCSD). One intern was invited to serve as a volunteer on the LJHS's Collections Committee and a second intern was invited to continue working in the collection on another paid grant. The second student is a potential returnee for this Project. His previous training and expertise with lists and PP5 will advance the Project. Ongoing university collaborations help LJHS fulfill its goal to connect and inspire students of history.

LJHS aligns the American Alliance of Museums (AAM) and its Code of Ethics for Museums (See <https://www.aam-us.org/programs/ethics-standards-and-professional-practices/code-of-ethics-for-museums> accessed 11/12/2021) which emphasizes public accessibility and public service:

- *It is incumbent on museums to be resources for humankind and in all their activities to foster an informed appreciation of the rich and diverse world we have inherited...*
- *For museums, public service is paramount... They are organized as public trusts, holding their collections and information as a benefit for those they were established to serve...*

II) Project Work Plan

The goal of this Project is to make LJHS's collection more accessible, specifically by adding the Donor Based Collections to PP5, PPO, and the OAC. The Project will take two years, from September 1, 2022 to August 31, 2024. It consists of two one-year cycles of recurring activities in the process of managing an intern team to produce accurate container lists, enter them into PP5, upload these to PPO, and then create more contextual entries into the AOC. (See *Schedule of Completion*) Simplified, sequential Project activities years include:

1. Each Month: (from September 2022 through July 2024)
 - Define monthly goals and targets;
 - Report on monthly completed entries/results to Collections Manager;
 - Summarize evaluation results;
2. Each August/September 2022/2023:
 - Interns: Recruit, hire, train two interns for the academic quarter/semester, through relationships with history departments of San Diego State University (SDSU), University of California at San Diego (UCSD), and University of San Diego (USD); (See Supporting Document #1)
 - Confirm work hours/dates, work agreement, and intern evaluation needs;
 - Define goals, provide template, and assign teaching aids to complete;
 - PP5: Implement PP5 data entry for designated collection by interns adding new container lists and updating existing entries;
 - Review/refine PP5 process, including: issues creating data-entry bottlenecks; streamlining/error-proofing opportunities; and changes to update template;
 - Cross check/edit/correct by Collections Manager;
 - Report to Collections Manager on completed PP5 entries, logging completed entries and preparing them for data entry to OAC and PPO;



- OAC: Collections Manager implements OAC upload of collection guides;
 - Create OAC-directed abstracts/finding aids/context/other for the completed and approved PP5 entries;
 - Add new information via *Records Express* interface in the OAC dashboard;
 - Cross check/edit/correct, then push new entries live to LJHS's OAC webpage;
 - End previous/Begin new academic cycle and interns:
 - Record and report any process changes in PP5, PPO, or OAC procedures;
 - Ensure smooth hand-off from previous interns to new ones;
 - Review and report quarterly goals and targets;
3. Evaluate Project annually; Internally identify/address progress on performance measures;
 4. Annual reporting to IMLS to include financial and descriptive reports on time as required.

LJHS is well-equipped and prepared to continue this work efficiently, having refined the processes during IMLS/19-20 and becoming skilled at accurately predicting timing. It will start with the parts of the Donor Based Collection that have been organized/described at a basic level, for instance situations where lists of a particular container's contents exist and have been added to PP5 to some degree. By working on adding detail to these container lists, items can be efficiently managed in PP5 and easily added to PPO and OAC. In the second year, LJHS will use the knowledge gained in organizing the initial phase of the Project to guide its efforts in describing and organizing more difficult collection material.

LJHS completed cataloging 50% of its archival collection under IMLS/19-20 using a very similar work plan. LJHS estimates that 5% of the Donor Based Collection targeted by this Project have finding aids that are "OAC ready" and could be uploaded without issue. LJHS expects to quickly ramp up this grant and complete cataloging of the Donor Based collections. This will increase from 50% to 100% the amount of archival materials cataloged from its permanent collection.

Project risks include that the Collection is large and cumbersome. Its linear measurements are close to what IMLS/19-21 accomplished, however, and LJHS staff is committed to do what is needed. Another risk is intern quality, though this has been successfully mitigated in the past though LJHS's screening and hiring track record. There is also the risk of inconsistent entry into PP5. This oversight falls to Hicks. She will regularly review the template, guide interns in the process, and ensure ongoing quality and efficient entry. LJHS follows onsite and cloud backup protocols, mitigating data loss risks.

Executive Director Lauren Lockhart will support Hicks in the Project. Both have substantial experience. (See *Key Project Staff* and *Resumes*.) Staff and intern time are the major resources needed to carry out this Project. (See *Budget*.) Hicks will devote 18% of her time, including maintaining systems, ensuring accuracy, and providing context. Lockhart will track and assist in documenting the project's results.

LJHS will broadly advertise the results of its project, urging its more than 500 member households and all visitors/callers to try the new, free, archive access tools. LJHS will note this project's progress on its website, through its partnering schools' websites, and in press releases. It will share findings about increased effectiveness and the use of the new tools with other historical organizations.

III) Project Results

Output goals will be set and tracked for this Project regarding: the number of containers



sorted/protected with archival material; the number of containers lists completed and entered into PP5 and PPO; and the number of files described with collection guides uploaded to OAC. It will also continue to track statistics around public access to quantify and report how many and how easily LJHS helps people making inquiries. As noted, this helps LJHS to clearly understand its audiences, its archival gaps, and needed staff time.

The Project will double the materials categorized at LJHS, including some that were previously unidentifiable. PP5/PPO/AOC search-term capabilities will broaden public access to those materials. This aligns with LJHS's goals to increase public accessibility and strengthen stewardship through user-centered processes: improved efficiency, increased effectiveness, and clear reporting about the archive's use:

- Improved efficiency – More detailed and searchable records will reduce the time it takes for LJHS staff to respond to inquiries. LJHS currently averages three requests a week for research information. Given the other duties of the staff, on average, the turnaround ranges up to 48 hours to find the files and material requested. Drop-in visitors, those without appointments, are handled more quickly, but only at the expense of interrupting other jobs. LJHS expects to decrease the average response time to 24 hours.
- Increased effectiveness – Importantly, categorizing of the archives will increase LJHS's accuracy and thoroughness when pulling materials related to an inquiry. NCM believes this improved effectiveness correlates to higher customer satisfaction/confidence. Since IMLS/19-21, LJHS staff has been able to look up archival materials in PP5, know the locations of all materials, and pull them for the researcher. Before IMLS/19-21, locations were not always known.
- Increased users – The ability of researchers to easily access information will lead to increased use of the collections, indicating higher visibility for LJHS. This Project will enable LJHS to understand who uses the archive, what they need, and why they come to us. Focusing on the external users (not internal users such as staff and curators) will help define which collection guides need to be prioritized for OAC and help LJHS better meet the access needs of all users. This will increase the number of external users from all points of contact, including OAC users, with a goal to increase the number of user requests to an average of five per week in year one and seven per week in year two.
- Clear reporting - Activities and trends will be tracked through Google Analytics reports on LJHS's OAC website including the number of website visitors, time spent searching, and the number of files accessed. Aggregated monthly reports facilitate the tracking of changes in customer access habits. Combined Google Analytics and in-house data will clarify what collections are most used and help direct LJHS's next steps.

Ultimately, the work supported by this grant will be foundational in LJHS moving forward with digitizing its collection, beginning with the expansive photograph collection, and making this resource available to the public. LJHS plans to extend its college internship program into future budgets, continuing the partnerships with SDSU, UCSD, and USD and maintaining momentum to perform this critical next phase of work. The LJHS Board of Directors and Collections Committee understands the importance of maintaining and expanding access to the collection and supports this and ongoing archive accessibility projects.

