



## Inspire! Grants for Small Museums

Sample Application IGSM-249160- OMS-21  
Project Category: Collections Stewardship

### Milwaukee County Historical Society

Amount awarded by IMLS: \$17,223.00  
Amount of cost share: \$0

The project description can be viewed in the IMLS Awarded Grants Search:  
<https://www.ims.gov/grants/awarded/igsm-249160-oms-21>

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 and project category (if applicable) to which you are applying.

**Narrative**

**Project Justification**

**Need**

The Milwaukee County Society requests \$16,773 to fund the creation of a holistic digitization plan. The plan would be created with the help of a consultant between September 2021 and August 2022. A detailed and complete digitization plan is necessary for the Society to move forward and seek funding for large-scale digitization.

The Society's archival collections hold more than one million photos and millions of documents that detail a broad range of Milwaukee County's history. These collections are available to the public through the Research Library, which is open six days a week.

Digitizing fragile and/or heavily used collections is a priority for the Society. It will make the collections more accessible and aid in the preservation of the documents and photos by reducing the amount of time they are handled.

The Society has applied for funding in the past to digitize our collections. Unfortunately, the Society's archivists lack the expertise and background necessary to plan and implement such a project, and that lack of expertise was reflected in the applications. Before seeking funding for digitization, the Society wishes to develop a holistic plan.

The creation of a plan with a consultant along with continued education for the Society's archivists will allow the Society to better understand how to carry out a digitization project and provide the added staff, technological, and financial capacity we will need to implement the plan.

As the repository for Milwaukee County's records, the Society receives new documents each year. Digitization is especially crucial as the Society will begin to receive digitally born documents soon. To store and make these records accessible, we will need to have a system that can handle this.

**Scope of Collection**

We were founded in 1935 to serve as the repository for records from Milwaukee County. Since then, the collection has grown to include a wide variety of documents and photos that represent many facets of the County's history.

The archival collection has more than 14,000 cubic feet of manuscript material containing millions of documents and more than one million photos. This material documents a wide range of Milwaukee County government activities beginning in the 1830s, and several collections are especially helpful for genealogical purposes. These include naturalization records, civil court records, coroner's inquests, marriage applications, jail registers, and probate records. The library also contains more than 3,000 separate manuscript collections from various businesses, organizations, families, and individuals – some of whom are among Milwaukee's earliest settlers. Additionally, the Society holds various maps and photos that are particularly useful for our youth education programs.

While our collections are an important representation of Milwaukee County's history, several collections in the archives are of national importance. The beer and brewing collection is accessed by researchers from around the country who are researching beer and brewing in the U.S. The Society also holds materials relating to Milwaukee's unique Socialist history, and these documents and photos attract researchers from around the country.

The archival collection is generally in good condition, though some documents and photos are very fragile. Naturalization records are among the most fragile documents and these records are some of the most requested by genealogists. Due to the continued use and wear and tear, the already fragile documents will deteriorate further.

Digitization would ensure that the Society's archival collections can be shared widely. It would also ensure the continued preservation of our collection's most fragile documents.

## **Beneficiaries**

Beneficiaries include the researchers that utilize the documents and photos in the collections. Researchers include academics completing scholarly research, genealogists researching their family history, and individuals seeking their own records including divorce decrees for name changes and records to prove citizenship. The Research Library continues to grow with increasing public interest and now assists 5,000 researchers each year. Digitization will increase access to the collection and make it easier to use the services.

Other beneficiaries include students, who will benefit from the greater accessibility of the documents and photos.

## **Alignment with Strategic Plan**

The Society's mission is to collect, preserve and share Milwaukee County's history. The archival collection is a large component of this work. The Society's strategic plan includes developing a strategy for digitization so we can digitize portions of our collection and also have the ability to accept digitally born documents. The staff and Board of Directors recognize the importance of developing a detailed plan as this will be our most powerful digitization tool. Funding from this project would allow us to fulfill this portion of our strategic plan.

## **Addressing Inspire! Small Grants for Museums Priorities**

The Society seeks funding under the Collections Stewardship and Access category of the Inspire! Grants for Small Museums. The proposed program aligns with this category on multiple points. The IMLS supports projects "that support the exemplary management, documentation, conservation, long-term preservation, and access to and use of the materials entrusted to a museum's care." The digitization project will contribute to better stewardship of the documents as they will be handled less once they are digitized. The digitized documents will also be significantly more accessible to researchers. To digitize documents, the Society needs to create a plan.

## **Project Workplan**

### **Activities and Evaluation**

Digitization of the Society's vulnerable and heavily used collections is an urgent priority; however, our staff lacks the training or technological knowledge necessary to carry out such an undertaking. To address this challenge, the Society seeks the help of a digital archives consultant to create a digitization plan through this project. Society archivists will also receive training to prepare them to manage a digitization project and maintain a digital database.

The Society's archivists will attend digitization training sessions where they can learn about different types of equipment, software, and best practices. The knowledge these trainings provide will enable the archivists to make informed decisions about the Society's digitization plan when working with the consultant.

To begin the digitization plan, the consultant will work with Society archivists to determine which records should be digitized and in what order. The condition of the documents will be the primary criterion used, with the most fragile material given the highest priority. Patron demand for the documents is another consideration to determine digitization. Some items – especially photos from our collections – are very popular and used frequently. Digitization would not only reduce the wear on these records and photographs but also increase access to them.

A broad range of digitization equipment is available on the market, and the plan will identify which best fits the Society's needs. The consultant will help the Society's archivists select equipment that provides quality scans and allows documents to be digitized efficiently.

The consultant will also work with the Society's archivists to select the digitization database software that allows for optimum access and storage. The Society seeks to create a user-friendly database of digitized content. We also wish to create a searchable database which researchers can use. The plan the consultant helps to create will identify the software that enables this level of use and access.

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The Society understands that, beyond the equipment and software, digitizing requires significant staff time. The consultant will work with our archivists to estimate the number of staff hours necessary to scan, create metadata, and add documents and photos to the database. The consultant will also help the staff better understand the long-term staffing needs to maintain the digitized collection.

In addition to a comprehensive digitization plan, the consultant will also help the Society create a digital collections policy. The policy will guide the archivists with regard to the file formats they will employ, where the backup copies of the digitized documents will be stored, how the metadata will be organized, and the staff members responsible for maintaining the collection.

The digitization project plan and digital collection policy will help the Society to understand the financial, staff, and other resources needed to digitize our collection. This plan will enable the Society to take the next step and seek funding to implement the project.

### **Risks**

The Society has sought funding for digitization before, but our lack of expertise proved to be our greatest barrier. It prevented us from creating a comprehensive plan and a competitive application. While we believe that the plan created in partnership with the consultant will enable us to submit a competitive application, this is not guaranteed. The greatest risk to the project is that we may fail to obtain the funding needed to carry it out. Digitization technology advances quickly, and failure to implement the plan quickly may result in it becoming obsolete.

To mitigate these risks, the Society has plans in place to seek both federal and non-federal funding to implement the digitization plan in a timely manner. This funding plan includes local foundations, federal grant opportunities, and funding from Milwaukee County. As digitization is a part of our strategic plan, our Board of Directors understands its importance, and they are committed to including digitization in the Society's operating budget.

### **Planning, Implementation, and Management**

Kevin Abing, the Society's lead archivist, will manage the project. He has 15 years of experience as an archivist and has spent seven years managing the Society's archival collection. Abing will be responsible for hiring and working with the consultant to create each piece of the plan. Assistant Archivist Steve Schaffer will also be involved in the project. With seven years at the Society, Schaffer will work with Abing to identify collections for digitization and attend training sessions. Ann Hanlon, the consultant, will also play a vital role in the project as the expert who will evaluate our needs and create a plan for digitization.

### **Partners**

It is impossible to talk about our archives without mentioning Milwaukee County. As the repository for Milwaukee County's records, the Society and the County partner together to preserve and share these documents. As the Society will begin to receive digitally born records from the County soon, the Society has already initiated discussions for digitization strategy and potential funding.

The Wisconsin Historical Society (WHS) is another valuable partner. The Society and WHS have collaborated on other projects, including youth education. WHS has the largest digital archives in the state, and we have used them as a resource for our questions about digitization. When the Society implements the digitization plan, we will continue conversations with WHS about a partnership that will increase the accessibility of the digitized documents.

### **Sequence of Activities**

The Society seeks to create a holistic digitization plan and digital collection policy with the assistance of a consultant. We will complete the following activities between September 1, 2021 and August 31, 2022.

- September 2021 – Hire consultant: Ann Hanlon will work with the Society for the duration of the project.

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- September 2021-October 2021 – Assess collection: The consultant, with Abing and Schaffer, will assess the Society’s archival collection to identify documents that should be digitized first.
- September 2021-October 2021 – Discover needs: The consultant will work closely with Abing and Schaffer to identify the primary goals the Society’s digitization project will meet. These goals will guide the consultant as they identify software and equipment needed, write the plan and timeline, make staffing recommendations, and create the digital collection policy.
- Fall 2021 – Metadata Class – Archivists attend online class on digitization through LYRASIS
- November-December 2021 – Assess metadata readiness: The consultant will review existing metadata information and create a plan and timing estimate for metadata creation.
- December 2021-January 2022 – Assess file management and storage: The consultant will assess current storage infrastructure and determine the estimated amount of storage needed.
- January 2022-March 2022 –Software recommendation and collection strategies: The consultant will determine which database software will meet the Society’s needs.
- January 2022 – Staffing needs assessed: The consultant will assess current staff capacity to carry out a digitization project. This information will be used in conjunction with the desired timeline to determine when the Society needs to add staffing.
- March 2022-May 2022 – Developing the plan: The consultant will use the information gathered about the collection, current staff capacity, and digitization goals to create a comprehensive timeline and plan for implementing a digitization project. The plan will include software and equipment recommendations. The digital collection policy will also be drafted at this time.
- Summer 2022 – Review: The digitization plan will be reviewed by Abing and MCHS leadership and adjusted where necessary. The consultant will be available for counseling sessions as needed in this process.
- August 2022 – Society of American Archivists Annual Meeting: Abing and Schaffer will attend the conference and focus on sessions about digitization and digital archives. The conference will provide them with learning opportunities and valuable networking opportunities.
- August 2022 – Completion: The project will be considered complete when the holistic digitization plan and digital collection policy are done.

While outside the scope and timeline of this project, it is important to add that the Society will immediately begin to seek funding to implement the plan as soon as it is completed.

### **Time, Financial, and Personnel Resources**

This project should take 12 months to complete. We anticipate this project will use approximately 7% of Abing’s time and 6% of Schaffer’s time. Mame McCully, Executive Director, will also dedicate a small portion of her time to ensure the plan and its goals align with the Society’s strategic plan and long-term goals.

In terms of financial needs, the greatest cost will be the consultant’s fee. Other costs include staff time and costs related to the archivists attending conferences and professional development seminars.

### **Evaluation of Progress**

A successful project will result in a complete and detailed digitization plan customized to the Society’s collection, strategic plan, and public use of the collection. The progress of the plan will be tracked regularly through meetings between the consultant and Abing. McCully will join meetings periodically to ensure that the developing plan meets the Society’s priorities.

## **Distribution of Results**

The Society will share the plan with our Board of Directors, who will work with staff to seek funding for the plan. It will also be shared with potential donors as the Society seeks to fund the plan's implementation. Lastly, the Society will share the plan with Milwaukee County. As the official repository for Milwaukee County records, the Society receives records from various County departments each year. Moving forward, an increasing amount of that material will be digitally born records. By sharing our digital collections policy with the County, the Society hopes to better serve the interests of the County, the Society, and the general public by ensuring future records will be properly maintained and made accessible for research purposes.

## **Project Results**

### **Intended Results**

By the conclusion of the project in August 2022, the Society will have a detailed and complete digitization plan. The plan will identify the collections of documents and photos within the archival collection to be digitized. The plan will also include a detailed and realistic timeline to digitize the documents, create the metadata and add to a database, and share them with the public in a meaningful way.

Through the creation of the plan, the Society's archivists, staff leadership, and Board of Directors will understand the added financial, technological, and staff capacity needed to implement the plan. The Society's archivists will also attend trainings and conferences during this time to bolster their background knowledge on the topic. This continued education will pair well with the work they complete with the consultant.

The project will also enable the Society to create a digital collection policy. With the consultant, the Society's archivists will design a policy that fits the Society's needs.

The Board of Directors and Society leadership identified digitization as a priority in our most recent strategic plan. While digitization is imperative to the Society's ability to share the collection in the future, we do not have the staff expertise to create a plan for implementation. The plan will be a powerful tool that will enable us to ultimately carry out a digitization project.

### **Impact on Collection**

During the initial phase of the project, the consultant will work with the archivists to assess the collection and identify the most fragile materials. This, combined with the archivists' knowledge of which documents are requested most frequently by researchers, will determine which documents should be targeted for digitization. This initial assessment will allow the Society to have a clear understanding of the condition of the archival collection.

Once the digitization plan can be implemented, the collection will benefit from reduced handling. The documents will also be more accessible to the public once digitized.

### **Measuring Success**

The ultimate indicator of success would be having a realistic plan that the archivists are prepared to implement. To be sure that our project goal remains on track, the Society will set benchmarks for progress at various points as outlined in the workplan.

### **Sustaining Benefits**

The Society's leadership at all levels is committed to digitizing portions of the archival collection. As such, we will explore all funding opportunities to implement the plan. These include federal, private, and County sources. Securing funding to implement the plan will ensure that the benefit of creating the plan will be sustained to help our collection stewardship and access for years to come.

