

GLAM-DCM PR: Digital Collection Management in Puerto Rican GLAM institutions

Project justification

The University of Puerto Rico, Río Piedras Campus, requests \$142,419 to support the *GLAM-DCM PR Forum Project* to develop capacity-building meetings under the forum category on topics related to digital collections management in galleries, libraries, archives, and museums (GLAM-DCM). The proposed project aligns with Laura Bush 21st Century Librarian Program's 2024 Goal 3 (Enhance the training and professional development of the library and archival workforce to meet the needs of their communities) and Objective 3.5: "Support training of the library and archival workforce in digital collection management. This may include, but not be limited to, preservation and access to information and resources through retrospective and born-digital content; digital preservation strategies; community archives; web archiving; and improving cataloging and inventory practices".

Memory workers **across** galleries, libraries, archives, and museums (GLAM) – individuals who work with recorded information, focused on supporting justice, equity, and access (Society of American Archivists, 2005-2024), while "improving the research landscape for future generations and fighting to preserve endangered knowledge and spaces in partnership with diverse communities" (Powell et al., 2018) – work within institutional boundaries. Communities of practice and professional associations are often constituted as disciplinary silos, with limited exchange of knowledge and best practices. The problem of institutional silos in GLAM has been addressed extensively in the United States (Waibel, 2007; Zorich et al., 2008; IMLS, 2009; Novia, 2012; Willey, 2017). In 2016, a working summit was held in the University of Miami with participation from museum and library administrators from fourteen academic institutions (Deupi & Eckman, 2016). Also in 2016, the OCLC Coalition to Advance Learning in Archives, Libraries and Museums organized the Collective Wisdom Cohort with the participation of 18 librarians, archivists and museum professionals from the US and the American Samoa with the goal of increasing interdisciplinary collaborations and continuing education (Allen et al., 2017). However, these initiatives have been limited to participants from academic institutions, are English based, and have not included participation from other United States territories, namely Spanish-speaking Puerto Rico.

In Puerto Rico, communities of practice emerged in 2006-2007 and were constituted by librarians working in the University of Puerto Rico System (Sánchez-Lugo, 2020). In 2020, the Association of Alumni of the Graduate School of Information Sciences and Technology (ASEGRABCI) invited representatives from four communities of practice to participate in a webinar series and all groups were library-based: collection development; information literacy; virtual reference, and technology integration. In addition, school librarians working in the Department of Education have their own community of practice. Professional associations are also institution- and discipline-specific: [Sociedad de Bibliotecarios de Puerto Rico](#) (librarians); [Association of Caribbean University Research and Institutional Libraries](#) (librarians); Red de

Archivos de Puerto Rico - [ArchiRED](#) (archivists), and [Alianza de Museos de Puerto Rico](#) (museologists). Moreover, these associations do not fully represent the diversity of Puerto Rico's cultural heritage sector and are not inclusive of memory workers that work in community organizations or creative industries. Memory workers that may not have formal education in library or archival sciences are active participants in cultural and creative industries and community organizations that are responsible for the stewardship of cultural patrimony in material and digital formats. Since 2015, the Commission for Cultural Development (CODECU) has gathered data on cultural and creative activity in Puerto Rico. The report *Estudio sobre el ecosistema cultural de Puerto Rico* (2015) states that the cultural ecosystem in Puerto Rico is constituted by approximately 4,871 entities: 65 government agencies; 1,716 for-profit organizations; 2,465 non-profit organizations; 506 individuals, and 119 non-categorized entities (p. 37). In 2023, the Center for Creative Economy published updated statistics, stating that there are 2,124 entities related to cultural and creative industries (p. 64). In addition, the Non-Profit Evaluation and Resource Center published the 2023 edition of the *Directory of Non-Profit Organizations of Puerto Rico* with contact information for 597 organizations. Workers from diverse cultural organizations and with varying degrees of expertise could benefit greatly by participating in interdisciplinary discussions centered on the curation and stewardship of cultural heritage, particularly in digital formats.

Digital collection management requires memory workers to transcend traditional institutional and disciplinary boundaries. Given that the management of digital collections is widely normalized by disciplinary structures based on academic programs of Library Studies and Communication and Information Technologies the participation of memory workers from diverse professional backgrounds and lived experiences is limited. Recent initiatives in the University of Puerto Rico, such as UPR Caribe Digital, which promotes the study of digital humanities at the University of Puerto Rico, Río Piedras Campus, aim to provide training and support for professors, researchers, and librarians in the development of digital projects. Our proposed project builds upon these initiatives to create and sustain collaborative spaces centered on developing knowledge and skills applicable to the digital domain.

The *GLAM-DCM PR Forum Project* is based on a broad definition of memory workers to include the participation of non-trained memory workers responsible for cultural heritage management in community-based organizations. Memory workers from community organizations that manage digital cultural heritage are excluded from current institutionalized communities of practice. This project will support the creation of an independent and sustainable community of practice focused exclusively on digital collection management, open to trained and non-trained memory workers from a variety of institutional settings and community organizations. With the goal of reaching a wider audience in the Hispanic Caribbean and in Hispanic communities in the United States, the project will also produce an open access, bilingual toolkit in Spanish and English. Finally, the project will lay the foundation for an interdisciplinary, inclusive community of practice for digital collections management.

To achieve this, The *GLAM-DCM PR Forum Project* will develop a series of activities guided by three main objectives: 1) to foster collaborative relationships that transcend disciplinary silos; 2) to support critical discussions of existing guidelines, best practices, and strategic workflows; and 3) to advance and sustain the professional development of a DCM community of practice in Puerto Rico constituted by memory workers with diverse backgrounds. To achieve these goals, we will first develop a series of workshops, following the forum format, for memory workers across GLAM institutions in Puerto Rico that serve local communities, including collections from community-based organizations. The forum will identify and discuss common needs related to digital collection management, including collection development, metadata, preservation, user needs, and access. Workshops will be followed by the configuration of working groups, composed of participants from diverse GLAM backgrounds, who will engage in follow-up discussions on tools, best practices, and workflows. Based on the insights from the discussion groups, the project team will develop a series of open-access bilingual resources (in Spanish and English) for widespread dissemination. These activities will be supported by the convening of qualified experts and GLAM stakeholders to help explore the digital management of collections as opportunities for professional development, community outreach and emergency preparedness, considering extreme weather events that pose a continuous threat to cultural heritage management in Puerto Rico and the Caribbean. Thus, the project will create a forum to facilitate communication, collaboration and professional development among memory workers aimed towards efficient and sustainable management of digital collections. Also, the project will publish a bilingual, open access toolkit to support interdisciplinary DCM in Puerto Rico and in neighboring GLAM communities in the Caribbean and other coastal settings.

The activities in this forum cycle will be geared towards trained and non-trained memory workers in higher education institutions and community-based organization that manage galleries, libraries, archives, and museums (GLAM), given that these professionals traditionally work within disciplinary silos, with few opportunities to share common skills and knowledge. Having a mixed cohort of participants will generate a balanced digital toolkit with best practices in metadata management, storage, digital curatorship, and cultural dissemination strategies that will consider local needs and issues related to the management of digital cultural patrimony from an interdisciplinary perspective. In recent years memory workers must respond not only to government budget cuts but also to the challenges resulting from extreme weather conditions due to climate change. Consequently, trained and non-trained memory workers are first responders when it comes to natural disasters such as massive hurricanes, droughts, tornados, and heavy floods. The project will choose ten participants: 5 individuals from libraries, archives, and museums, including those that form part of higher education institutions and 5 individuals from community-based organizations. Criteria for recruitment includes geographic and institutional diversity. We want to include participants from the Puerto Rican archipelago, including island municipalities of Vieques and Culebra; in this way, we contribute to the accessibility of education and training opportunities, which are usually limited to the San Juan metropolitan area.

Institutional diversity is also important: we will choose participants from independent libraries, archives, and museums; from LAMs that are part of higher education institutions, and from community organizations. We are reaching out to potential participants through a formal letter of invitation; if they agree to participate, we are requesting a letter of commitment. So far, we have received letters of commitment from two community-based organizations: the Vieques Historical Archive and Taller Comunidad La Goyco. We are actively working on the recruitment process to secure 10 participants by August 2024.

The ultimate beneficiaries of the project include memory workers that choose to join and contribute to the community of practice; memory workers from the Caribbean and mainland United States that seek models for the establishment of interdisciplinary DCM communities of practice that include participation from community-based organizations; students in library and information sciences, records management, archival science, museology, digital humanities, and cultural management, and the public that wishes to consult materials from the open-access toolkit.

Project Work Plan

The *GLAM-DCM PR Forum Project* will organize a series of online workshops centered on fundamental topics in digital collections management (DCM) and guide discussion groups with trained and non-trained memory workers focused on developing guidelines, best practices, and strategic workflows for DCM across galleries, libraries, archives, and museums (GLAM). The materials from the workshops and discussion groups will be available through a bilingual digital toolkit, that will serve as an Open Educational Resource freely available to the GLAM community and the public. The toolkit—a curated and organized collection of useful digital resources, tools, and learning objects—will include guidelines and best practices for DCM that consider local needs, particularly collection management in the face of extreme weather events. The *GLAM-DCM Forum Project* will serve as the basis for the creation of a diverse and inclusive community of practice that will support professional development for memory workers across GLAM institutions and community-based organizations that manage cultural heritage. Our project will also support ongoing initiatives like UPR Caribe Digital that actively work towards fostering the study of digital humanities and digital project management.

Project team

Prof. Dinah Wilson (Co-PI) works as cataloging librarian at the Library System of the University of Puerto Rico, Río Piedras Campus. Dinah will select and invite the participants for the discussion groups; select subject experts; develop the workshop framework; design and implement tools to assess and evaluate workshops; guide discussion groups and asynchronous interactions between participants; gather and organize educational materials produced in workshops and discussion groups; gather and analyze surveys, polls, and other evaluation tools

administered to participants; design and produce the bilingual digital toolkit; design and maintain an internal administrative repository with project documentation, and supervise graduate students.

Prof. Jeanmary Lugo, MIS (Co-PI) is a special collections librarian at the Puerto Rican Collection, University of Puerto Rico, Río Piedras Campus. She brings expertise in academic libraries, Digital Humanities community projects, collaboration, and mentoring aspects. Jeanmary will select and invite the participants for the discussion groups; select subject experts; develop the workshop framework; design and implement tools to assess and evaluate workshops; guide discussion groups and asynchronous interactions between participants; gather and organize educational materials produced in workshops and discussion groups; gather and analyze surveys, polls, and other evaluation tools administered to participants; design and produce the bilingual digital toolkit; create, implement and lead dissemination activities; and supervise graduate students.

Prof. Mila Aponte-González (GLAM DCM Programmatic Advisor) is an adjunct professor at the Humanities Faculty, University of Puerto Rico, Río Piedras Campus. Mila will provide counsel to PIs on the development of a workshop framework; provide support on the assessment, design, delivery and evaluation of the workshop series; develop digital tools (such as surveys, polls, etc.) for workshop assessment and evaluation; design and develop a shared online repository of workshop materials for project participants; and provide counsel to PIs on the design and development of the bilingual open-access toolkit.

Dr. Miriam Lugo (Digital Collection Specialist) is editor and professor at the Center for Historical Research of the Humanities Faculty, University of Puerto Rico, Río Piedras Campus. Miriam will conduct an initial assessment of participants' digital collections to identify priorities and needs; provide individual support to participants during forum cycle; and provide guidance on the development and sustainability of digital collections after forum cycle.

The graduate students will work collaboratively with the project team to support project tasks. They will help in the communication process with participants (i.e. emailing participants with information regarding workshops dates, deadlines, and other administrative information); offer technological support during hybrid workshops and discussion group sessions; support the Programmatic Advisor in the management of the shared online repository; support PIs with the development of the bilingual toolkit and create and share content through social media channels.

Project partners

Project partners will support dissemination efforts to help the project reach a wider audience; offer logistical and technological advice for the workshops sessions and help identify subject experts. Partnership with UPR Caribe Digital will provide support in contacting and selecting potential participants from community organizations. We have letters of support from the following individuals and organizations:

Nadjah Ríos Villarini, Director, UPR Caribe Digital
 Andreína Soto, Senior Grant Associate Director, Caribbean Digital Scholarship Collective
 Juana Suárez, Director, Moving Image Archiving & Preservation M.A., New York University
 M.Stephanie Chancy, Director of Operations, Digital Library of the Caribbean

Work Plan and Timeline

The period of performance for the GLAM-DCM PR Forum project is two years. Activities are organized in three main components: planning and recruitment; implementation, and dissemination.

First Semester (August 2024-December 2024): Recruitment and Planning

The first phase is focused on two main objectives: recruitment and planning. Recruitment tasks include recruitment of graduate students; selection of participants; and recruitment of subject experts for workshops. Co-PIs are responsible for recruitment tasks and will receive support from project partner UPR Caribe Digital for the selection of participants from community organizations. When selecting participants, we will explain the project's objectives, participants' responsibilities and stipend amounts, and sign letters of commitment. Selection and recruitment of participants and subject experts is already underway; this is why the recruitment phase will extend only from August to September 2024. Planning phase for the internal administrative repository and communications extends from August to September 2024 and includes the following tasks: creating an internal repository for administrative documents; launching email list for communication with participants; and designing a template to report ongoing progress to partner institutions. Co-PIs will be responsible for this segment of the planning phase. The planning phase for the workshop framework extends from September to December 2024 and includes the following tasks for Co-PIs and the Programmatic Advisor: designing components for effective online sessions, learning outcomes, learning materials, activities, and assessment for the workshop series; developing surveys for workshop assessment and evaluation, and developing shared online repository for participants. The shared repository will include PPT presentations of each workshop, guides, best practices, bibliography and related resources for each topic, and guidelines for the discussion sessions. The Digital Collections Specialist will be responsible for scheduling an initial assessment of participants' digital collections to identify priorities and needs. Finally, Co-PIs will host an initial plenary session with participants (in online format) and develop a dissemination plan via social media and online mailing lists to share ongoing progress with the GLAM community.

The dissemination plan is based on two main objectives: communication with project participants and communication with the public. We will develop an online mailing list for participants only to share information on workshops, discussion groups, surveys, and resources. We will also develop social media channels to share and promote workshops (which will be open to the

public) and project highlights and results. Project partners will also share information through their own social media channels and mailing lists. Graduate students will assist with dissemination tasks.

Second and Third Semester (January 2025-December 2025): Implementation of Workshops and Discussion Groups

The implementation phase extends from January to December 2025. Tasks include managing workshop logistics (managing technological equipment and settings for online sessions); administering surveys for workshop assessment; capturing topics that emerge during discussions and implementing the dissemination plan. The Programmatic Advisor oversees the creation of surveys. We will administer various surveys during the forum cycle:

- An initial survey for participants before the start of the forum cycle to gauge understanding of basic DCM concepts and learn about participants' needs and expectations.
- Post workshop surveys. After each workshop, we will administer one survey to assistants to learn about their satisfaction with the workshop (format, delivery, interaction with subject experts, recommendations for future workshops) and a different survey to the 10 participants to gain more insight into their understanding of the topics and needs related to specific topics.
- Post forum survey. We will administer a final survey to participants to evaluate the forum cycle on four main aspects: accessibility; understanding of topics; applicability to everyday scenarios, and collaborative relationships.

Workshop Design and Topics

Workshops and discussions groups will be offered in online format and will be in Spanish. We will devote two sessions to each topic: a two-hour workshop, followed by a discussion group. Workshops sessions will be open to all, offered in online format, in Spanish. Workshops will be led by subject experts and will include Q&As and discussions to identify pressing needs and key challenges currently faced by GLAM memory workers. After the workshops, participants will complete surveys, polls and engage in email discussions to propose tools, guidelines, best practices, or workflows for evaluation, discussion, and selection. Discussion groups are only for participants and will be delivered in online format. Discussions will focus on three selected tools, guidelines, best practices and workflows, and critical evaluation of their suitability to GLAM context. Co-PIs and the Digital Collections Specialist will guide discussion sessions to focus on shared needs and experiences in DCM.

We will use the following broad themes to guide the creation of the workshops:

1. ***Introduction to Digital Collection Management*** – This session will introduce participants to fundamental concepts of the digital curation cycle. Suggested deliverables: bibliography on DCM.
2. ***Project Planning and Evaluation*** – This session will offer participants the tools needed to plan and evaluate digital projects; Knowledge Management, project continuity, and interpretative planning will be addressed to blend management concerns with user needs. Suggested deliverables: project plan.
3. ***Organization and Description*** – This session will focus on the organization of information and metadata assignment according to international standards and how to adapt standards to local needs through application profiles. We will also discuss the use of Wikidata as a low-barrier alternative for GLAMs to contribute data from their collections. Suggested deliverables: metadata application profile.
4. ***Digital Preservation*** – This session will address key aspects and best practices for digital preservation, adapted to the specific need of participants’ digital collections. Suggested deliverables: preservation plan.
5. ***Content Curation and Dissemination*** – This session will cover aspects of meaningful selection and responsible circulation of digital content, including aspects such as digital rights management, terms of use, correct citation, open access, web accessibility, among others. Suggested deliverables: intellectual property policies.

We are currently evaluating and selecting potential subject experts for each topic. Five experts will be selected on or before September 2024.

Fourth Semester (January 2026-June 2026): Toolkit Development and Dissemination

Dissemination phase extends from January to June 2026. The main tasks include developing the bilingual toolkit and sharing the results with GLAM workers. Co-PIs will develop the toolkit, with support from the Programmatic Advisor and the Digital Collections Specialist. Participants can hold individual meetings with the Digital Collections Specialist as needed.

Evaluation

Online surveys will be administered after each workshop to collect feedback. The individual interaction with the Digital Collection Specialist will provide insight into participants’ needs.

Tracking Progress

Progress will be monitored by creating a shared digital repository for research team members. Notes and minutes will be transcribed and stored to document decision-making and collaborative practices among participants. As an initial plan, we propose monthly meetings for Co-PIs, bi-monthly meetings for the primary staff, periodic team gatherings to discuss evaluation results and weekly meetings with graduate students.

Dissemination

Educational materials will be developed and shared following accessibility standards. Materials will be made available and shared with a Creative Commons license. After the workshops, we will encourage the participants to share their experience. We will continue the dissemination plan developed in the first semester of the project. Dissemination activities will be led by the Co-PIs. Our dissemination plan will include the following aspects:

- Target communication strategies: we will disseminate our project and related resources to our target audience.
- Social media: we will create and utilize social media platforms to share infographics, snippets of the activities, and other information.
- Closing webinar and other publications: we will disseminate the project results and offer a final conference (in hybrid format: in-person with live online transmission) at the University of Puerto Rico.
- Organizational support: We will have the support of UPR Caribe Digital, part of Caribbean Digital Scholarship Collective; Digital Library of the Caribbean (dLOC); Digital Preservation Outreach and Education Network (DPOE-N), and the Library System of the University of Puerto Rico, Río Piedras Campus.

Diversity Plan (Optional)

The project will create, enrich, and sustain networks among trained and non-trained memory workers in GLAM institutions and community-based organizations across Puerto Rico. Memory workers are used to working in silos according to institutional traditions and established best practices. Moreover, these silos do not represent the diversity of workers in the cultural heritage sector. Memory workers in community-based organizations are stewards of cultural patrimony but may not have formal training in library and archival sciences or museology and do not participate in discipline-specific communities of practice. The term “memory workers” encompasses the diverse skills, knowledge and expertise that must be shared to work with new challenges inherent to the digital landscape. The GLAM-DCM PR Forum Project will provide and foster a dialogical environment for GLAM memory workers to consider how their multiple experiences, opinions, and values can sustain inclusive communities of practice. Memory workers will be better equipped to support local communities in the creation and management of their own digital community archives, thus contributing to the creation, visibility, sustainability, and access of materials related to traditionally underrepresented groups.

The specific activities that will contribute to ensuring diversity, equity, and inclusion include selecting a diverse cohort of participants from various institutions and community-based organizations across the Puerto Rican archipelago; designing hybrid workshops and discussion sessions to facilitate in-person and virtual participation; gathering participants' feedback on their experiences throughout the project via surveys and meetings to ensure a responsive environment

and maximize the learning experience; creating a bilingual (Spanish and English), open-access educational resource to serve as a resource for memory workers across the Caribbean, Latin America, and the United States.

Project Results

The forum sessions will foster a community-wide critical discussion on existing guidelines, best practices and strategic workflows for DCM in galleries, libraries, archives, and museums (GLAM) settings, aiming to identify those best suited for (or adaptive to) Puerto Rico's current environmental, fiscal, legal, and info-technological landscape. The discussion will also address the current "haves and needs" of memory workers to execute said practices and workflows; the resulting conclusions will support strategic planning activities and capacity-building efforts within and beyond the University of Puerto Rico, particularly with community organizations.

The project will subsequently develop a bilingual digital toolkit, based on the *LibGuide* digital reference format, showcasing the findings on digital asset management guidelines, best practices and strategic workflows suited to our Caribbean GLAM context. The publication of the digital toolkit via the UPR Libraries website, as an Open Education Resource, aims to strengthen a community of practice for memory workers in Puerto Rico. In addition, the toolkit will help to impact other communities interested in DCM, through the sharing of resources, strategies, tools, and best practices.

In the long term, this project aims to serve as a blueprint for the development of collaborative relationships between memory workers in libraries, archives and museums and those in community organizations. The project also will also add to existing resources on DCM in Spanish to support memory workers in the Hispanic Caribbean, Latin America and Hispanic communities in the United States.

Digital Products Plan

Type

This project will create a bilingual (Spanish and English) digital toolkit using LibGuides as an Open Education Resource. The toolkit will contain downloadable instructional materials in various formats (.docx, .pdf, .pptx, and .jpg). The PI and Co-PI will be responsible for collecting documentation from workshops including slides, videos, infographics, and bibliographies. Materials resulting from the discussion groups will also be available, such as workflows, best practices, metadata application profiles, project planning guidelines, and digital preservation plans, among others.

The rationale for selecting the **LibGuide** as a publication platform is two-fold. Firstly, LibGuides appeal to a diverse array of audiences, within and beyond academic/institutional settings. It allows us to create attractive multimedia content, share knowledge and information, and promote information resources to the community. The platform is versatile and robust, with templates that can achieve a completely different look with CSS and HTML, while allowing the creation of multimedia resources that incorporate texts, links, images, video, RSS feeds, and interactive features (both natively and through embedding) to appeal to different types of learners. Furthermore, the platform employs many accessibility practices behind the scenes, such as ARIA tags, alt attributes, proper heading nesting order, among others. Secondly, it is a platform **readily available** and **widely used** in our institution, with a robust infrastructure in place for training, development, maintenance, and support, in both the short and long term.

The toolkit will be offered as open educational resources, aligned with dLOC's *Open Educational Resources in Caribbean Studies Project*: teaching, learning, and research resources, free of cost and access barriers, carrying legal permission (via a Creative Commons license) for users to openly retain, reuse, revise, remix and redistribute them (<https://dloc.domains.uflib.ufl.edu/teaching-resources/>).

Availability

The toolkit will be open and available online to the public, anyone can access the toolkit and freely download content. We will also disseminate these materials via social media, relevant listservs, and GLAM associations in Puerto Rico, the Caribbean, and the United States.

The digital products included in the toolkit will go through a design process involving the PIs and graduate students as well as the GLAM DCM Programmatic Advisor and the Digital Humanities Consultant to ensure the quality of the outcomes.

Access

The toolkit will be licensed under Creative Commons. We will include the logo on all materials to explain the license terms. We will also ensure content accessibility through recommended

practices, such as the use of ARIA tags, alternative text and alt attributes, proper heading nesting order, optimal color contrast, and properly structured URLs.

Sustainability

The selected content management platform is LibGuides, which is hosted and maintained by the Library System of the University of Puerto Rico, Río Piedras campus. The PIs will review the toolkit twice per year to ensure links and files are active and accessible. The toolkit will have an archived copy at the Internet Archive using their “Save Page Now” feature.