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## Strategic Plan for Montpelier Digital Collections Project February 2020

### Introduction

This strategic plan is designed to outline the actions needed to be taken for the Montpelier Digital Collection Project (MDCP). The MDCP is a multi-year undertaking to create and populate an online, publicly accessible collections database that will incorporate all four of Montpelier's collections (Archaeology, Architecture, Archival, and Decorative Arts).

### Project Background

Early stages of the MDCP began in 2019 after Montpelier received a NEH Digital Humanities Grant. This grant supplied funds for two planning workshops. The first, held July 29-July 31, 2019, welcomed 44 participants, including Montpelier staff, members of the Montpelier Descendant Community, volunteers in the Montpelier Research and Archaeology departments, and professionals and scholars from 22 institutions including museums, universities, and non-profit organizations. The workshop had two goals: to gather information about the specific needs of each collection and to address the needs of three identified audiences (Adult Public, K-12 Students & Teachers, and Museum & Research Professionals). (See the Montpelier Digital Collections Workshop Whitepaper for more information <https://docs.google.com/document/d/1EqEF3sQYBtYZr9kwDdcUejtZHydp94b0QAsFfRuZXsY/e/dit>)

The second planning workshop was held November 21-22, 2019. For this meeting, Montpelier staff was joined by a few selected past workshop participants. The purpose of this meeting was to figure out the next steps of the Digital Collections Project using the information learned during the July workshop, following staff meetings, and winning several grants relating to digital projects. From this meeting the architecture and much of the content of this document was created.

### Values

Through these workshops and subsequent meetings Montpelier staff created a list of values that will guide this project. To create this strategic plan we arranged our proposed actions around each of these values. **We are committed to:**

- working with descendants at every step of the project
- doing better than the norm in the area of digital public engagement
- excellence in scholarship
- excellence in preservation
- public engagement and access to our collections and knowledge
- telling whole-truth history and stories
- challenging national mythology
- connecting the past to the present
- digital sustainability

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- following and supporting the principles of social justice (equity, action, participation, & rights)
- working across disciplines and collaboratively
- transparency
- supporting professional development & training

## **How to Obtain & Execute our Values**

Our values guide our current and proposed actions relating to this project. Some actions may relate to multiple values.

### Working with Descendants at Every Step of the Project

To do this well will:

- Adopt the best practices of engaged digital projects, such as Mukurtu's three prong system of Community, Cultural Protocols, & Categories.
- Make decisions for the design, presentation, staging, and use of the MDCP with Descendant Community members. Build this co-ownership and co-stewardship into both the project planning, but also the digital architecture and work processes.
- Consult with the Chair of the Descendant Committee and Chair of the Descendant Committee's Education Sub-Committee about appointing a descendant representative(s) to the Digital Collections Advisory Group.
- Work with Descendant representative on the Advisory Group to share information about the MDCP and gather feedback from the community
- Engage with the broader Descendant Community through online and in person workshops, feedback sessions, and planning meetings, both by holding sessions exclusively for the Descendant Community and inviting Descendant representatives to stakeholder and public events.

### Doing Better in Digital Public Engagement

To do this we will:

- Engage with the public at every step of the process through online and in person workshops, feedback sessions, and planning meetings.
- Work with the "sub-audiences" identified in the workshop whitepaper, for targeted engagement meeting each of these groups needs.
- Identify ways to make the MDCP accessible to as many audiences as possible by considering issues of disability and inequality in the planning, execution, and promotion of the project.
- Follow the model created by the IMLS "Bringing..." Project, the Research Department's volunteer transcribers, and Archaeology's Volunteer and Expedition Programs to utilize volunteers to assist with digitizing collections so they can be incorporated into MDCP.

### Excellence in Scholarship

To do this we will:

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- Share the progress and results of the MDCP with our colleagues and peers through presentations at academic and professional conferences.
- Use open-source software so our system can be used by other institutions and organizations dealing with similar collections.
- Publish our meta-data schemes, best practices for working with the public on MDCP, and other pertinent information for other scholars and professionals to use.
- Make appropriate collections content and metadata accessible for scholars to use for their own research.

## Excellence in Preservation

To do this we will:

- Invest in financially and through secure partnerships in long term storage and continued access to all of our digital materials.

## Public Engagement and Access to our Collections and Knowledge

To do this we will:

- Work with representatives of the public and different stakeholder groups at every step in the process, including the design and population of the database, as well as the creation of supplementary materials
- Engage digitally and in person to get the broadest amount of feedback possible

## Telling Whole-Truth History and Stories

To do this we will:

- Share collections publicly to support the research and exploration of whole-truth, complex, and difficult histories.
- Create digital interpretive products that utilize the collections to tell whole-truth history and stories.

## Challenging National Mythology

To do this we will:

- Reshape the idea of a “Presidential Library,” by expanding from the traditional collections relating to a presidents administration, to include ones that show how Madison’s entire life, including his presidency was supported through the system of race-based slavery, which he in turn embedded into the country’s founding documents.
- Use and share our collections (through interpretive products and present as raw data for self-exploration) as evidence to explore the myths and misconceptions of how we understand people in the past.

## Connecting the Past to the Present

To do this we will:

- Use and share our collections (through interpretive products and raw data for self-exploration) to demonstrate the connections between events of the past and issues our country faces today, particularly in regards to race and racism.

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## Digital Sustainability

To do this we will:

- Invest financially and in partnerships to store our digital collections.
- Invest financially and in partnerships to maintain accessibility to our digital collections through updated software and training.

## Principles of Social Justice (Equity, Action, Participation, & Rights)

To do this we will:

- Work to create digital products that promote equitable access to collections and information.
- Honor the work and time of the Descendant community by paying them for their time working on this project.
- Create ways to maximize participation in the creation of the MDCP.

## Working Across Disciplines and Collaboratively

To do this we will:

- Hold monthly meetings for Montpelier staff to establish a metadata scheme, shared language, and refine core metadata.
- Collaborate with experts in many disciplines to create a system that will meet their needs.
- Collaborate with representatives of the public and various stakeholder groups to create a system that will meet their needs.
- Collaborate with Descendants

## Transparency

To do this we will:

- Share updates about MDCP's progress with stakeholders and the general public on our website, social media, and with on-property visitors.

## Supporting Professional Development & Training

To do this we will:

- Invest in training for Montpelier staff, partners, colleagues, Descendants, and members of the public in the use and replication of the MDCP system.
- Invest in training for Montpelier staff, partners, Descendants, and other stakeholders in the structure or "backend" of the system.
- Hire a knowledgeable and experienced person to lead the MDCP, oversee its development, and be able to "trouble-shoot" onsite.
- Partner with universities to train students in the use and replication of the MDCP system.

## **Project Timeline**

- Winter 2020

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- Create the MDCP Advisory Group which will include leaders in digital humanities, members of the Descendant Community, and a public representative.
- Begin work on related IMLS “Bringing the Restoration of President Madison’s House of Storage and into a 3D Environment” (“Bringing...”) Project, which will digitize paper records from the Archaeology and Architecture collections that will later be managed in the MDCP database and will establish a model for utilizing volunteers for digitizing collections that will be followed in the MDCP.
- Draft Strategic Plan
- Continue internal staff meetings to establish metadata scheme.
- January 2020: Present academic paper discussing the MDCP at the Society for Historical Archaeology annual meeting
- Montpelier staff and MDCP Advisory Group will work to establish partnerships to support the storage, care, and maintenance of the MDCP in order to make sure it is sustainable.
- Spring 2020
  - March 2020: Convene first meeting of MDCP Advisory Group.
  - March 2020: Publish MDCP whitepaper and strategic plan online and share with colleagues to reference and use
  - March 2020: Present academic paper discussing the MDCP at the Mid-Atlantic Archaeology Society annual meeting
  - Continue digitizing work of IMLS “Bringing...” Project.
  - Distribute MDCP Workshop Whitepaper & Strategic Plan among public, colleagues, stakeholders, and Descendants.
  - Continue internal staff meetings to establish metadata scheme.
  - Continue MDCP Advisory Group meetings as necessary.
- Summer 2020
  - Continue digitizing work of IMLS “Bringing...” Project.
  - Continue internal staff meetings to establish metadata scheme.
- Fall 2020
  - Continue digitizing work of IMLS “Bringing...” Project.
  - Continue internal staff meetings to establish metadata scheme.
- Winter 2021
  - Continue digitizing work of IMLS “Bringing...” Project.
  - Continue internal staff meetings to establish metadata scheme.
- Spring 2021
  - Montpelier staff will publish MDCP metadata scheme.
  - Continue digitizing work of IMLS “Bringing...” Project.
- Summer 2021
  - Continue digitizing work of IMLS “Bringing...” Project.
  - June 2021: Apply for NEH Digital Projects for the Public Grant to create an interpretive product aimed at the public that compliments and promotes use of the database.
- Fall 2021

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- Continue digitizing work of IMLS “Bringing...” Project.
- Winter 2022
  - Continue digitizing work of IMLS “Bringing...” Project.
- Spring 2022
  - April 2022: Apply for NEH-Mellon Fellowship for digital Publication to create an interpretive product aimed at scholars & museum professionals using the database

## Funding Opportunities

- Mellon Foundation
  - Scholarly Communications Program
    - Possibly an initial planning grant then big ask
- American Council of Learned Societies
  - Digital Extension Grants (Due January)
    - \$150,000 up to two years
  - Mellon/ACLS Public Fellow (Due October)
    - 2 year placement with \$70,000 per year stipend
- National Endowment for the Humanities
  - Humanities Collections and Reference Resources (Due July)
    - Implementation \$350,000 up to three years
    - Foundations \$50,000 up to two years with possible additional \$10,000 to support planning
  - Digital Humanities Advancement (Due June)
    - Level 1 \$50,000
    - Level 2 \$100,000
    - Level 3 \$325,000 with \$50,000 match
  - Digital Projects for the Public (Due June)
    - Discovery \$30,000 one year
    - Prototyping \$100,000
    - Production \$300,000 up to three years
- Institute of Museum and Library Services
  - Museums for America (Due November)
    - \$5,000-\$250,000 (up to three years)
    - Requires 1 to 1 match
  - National Leadership Grants for Museums (Due November)
    - \$5,000-\$1,000,000 (up to three years)
    - Requires 1 to 1 match
- Council of Library and Information Resources
  - Postdoctoral Fellowships in Data Curation for African American and African Studies (possibly October)
  - Digitizing Hidden Special Collections & Archives (Due March)
    - \$50,000-\$250,000 (up to two years)
- Memorialization Funding from State of Virginia

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- Virginia Humanities (Due April or October)
  - Open Grant \$20,000
  - Discretionary \$5,000
- Local or State Foundations