Heritage Organization Site Survey Report

Prepared by

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Introduction

Most of the Upper Peninsula's heritage organizations (historical societies, museums, and archives) formed and began operations in the late 1960s or early 1970s. This period experienced a major decline in commercial mining operations throughout the region. The last copper mine closed in 1969; by 1980, only two open-pit iron mines remained in operation. In the face of economic and population collapse, many communities formed historical societies, museums, and archives in an attempt to preserve their history and cultural heritage.

During the summer of 2019 (June – September), NMU archivist, Marcus C. Robyns, visited 17 Upper Peninsula heritage organizations and received 9 responses to an online survey from institutions he was unable to visit. The 26 institutions represent 79 percent of the 33 heritage institutions in the Upper Peninsula. Robyns gathered data on historical manuscript collections and interviewed staff. Interview questions focused on governance, operations, funding, and the management of digital material. Robyns inventoried historical manuscript materials, focusing on significant collections contributing to our understanding of Upper Peninsula history. He also identified and inventoried digital collections as either stand-alone items or components of larger analog collections.

Governance Structure

All of the surveyed heritage institutions are 501(c)3 tax exempt organizations with a governing board, executive officers, and an approved set of operating bylaws. In most cases, executive board officers are the most active volunteers, serving multiple roles to sustain museum or archives operations. Many of these individuals have served a number of years, sometimes decades, becoming irreplaceable institutional resources. Unfortunately, such reliance has led to the loss of significant institutional memory. In the case of one heritage organization, a long-time volunteer and board member died recently, leaving no documentation of her work, including collection inventories and finding aids.

Funding, Revenue, and Operating Budgets

As the tables below indicate, funding types, expenditures, and revenues vary widely among the UP's heritage organizations. Although a few organizations struggle financially, most operate with a positive income - expenditure ratio, resulting in relatively healthy fund balances.

Event funding raising and membership dues are the two most significant methods of revenue generation. For example, an eastern Upper Peninsula heritage organization's annual antique boat show is their single annual funding raising event, drawing visitors from around the state and region. Revenue raised from this event accounts for 80 percent of the organization's annual revenue. Some organizations also benefit from gift shop or publication sales. Only six

organizations charge an entrance or user fee, and only four receive any local government assistance, mainly in the form of utility credits or landscape service.

Significantly, nine organizations report annual revenue of over $10,000 with seven reporting revenue of over $20,000. Most organizations appear to manage their funds well, with many reporting healthy fund balances. Seven institutions provided detailed treasurer's reports indicating fund balances ranging from $25,000 to nearly $80,000.

Principal Funding

Total Revenue

Operating Budget (Expenses)
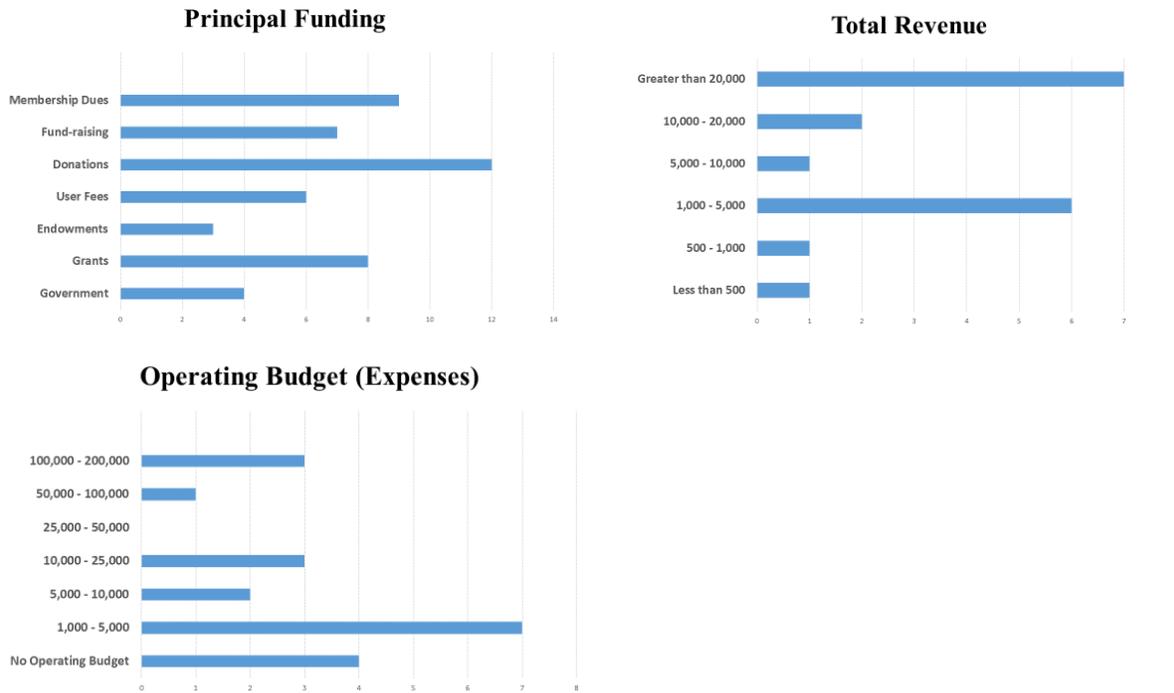
**Collection Development** (Collection Development Policy)

Most organizations do not actively solicit donations of archival or historical manuscript collections. Most do not have a formal collection development policy and take a passive approach to collecting. As the volunteer archivist of one heritage organization commented, "the policy is pretty much whatever comes in." However, this organization, along with seven others, also has a "collections committee" made-up of three board members that reviews all acquisitions and makes the final determination whether to accession a donation. Regardless of whether they have a formal collection development policy, all organizations limit their acquisitions to collections and items that specifically document a subject or geographic location, such as a city, township, or county.

Staff

As indicated by the table below, heritage organization staffs are overwhelmingly volunteer and the majority have completed no formal archival training. Only two organizations include full-time professionally trained and paid staff members. Seven include a mix of paid and volunteer staff. However, the paid staff represent only 1-2 non-professionals working part time at an hourly

minimum wage. Often, paid staff members had formerly served as members of the organization's board of directors. One eastern UP organization enjoys the largest professional staff among the surveyed heritage organizations with a staff comprised of three-paid FTE and six-paid part time. The director, collections manager, and project manager are college graduates with professional training in museum or archival management. On the opposite extreme, a western UP heritage organization has only one untrained volunteer working with historical materials without the use of computers or Internet access.

Despite their unpaid status, most volunteers are retired professionals that offer substantial skills, years of experience, and education. For example, one heritage organization archivist is a retired public librarian with experience working with historical material; another archivist in the central UP is a retired chemical engineer; another is a retired newspaper editor; and the president of a southern UP heritage organization is a retired public school teacher and amateur historian.

Staff
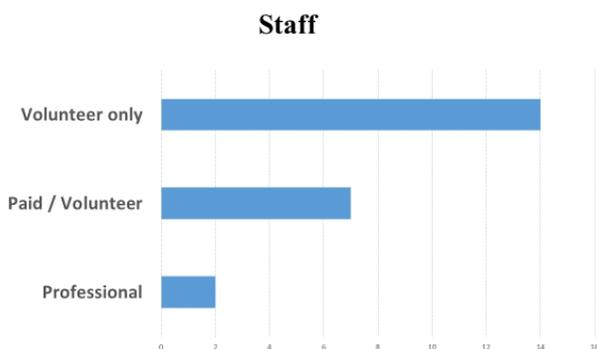
Patron Access and Use

Public access and use of historical manuscript material maintained by heritage organizations varies widely. However, there is a near even split between those institutions experiencing 25 or more research visits per year (9), and those experiencing less than 25 (11). Five institutions had 50 or more research visits per year, and three 100 or more. Genealogical and property research or queries dominated visits. Six organizations provided research access by appointment only and five did not process external (email, US Post, or phone) reference queries. Only five heritage organizations provide a separate, staff monitored reading room. Most utilized a table or desk located near or in their administrative office. One organization sets up a folding table in the hallway near the archives storage room. None segregated personal belongings or used a standard registration / conditions of use form.

Patron Research / Reference
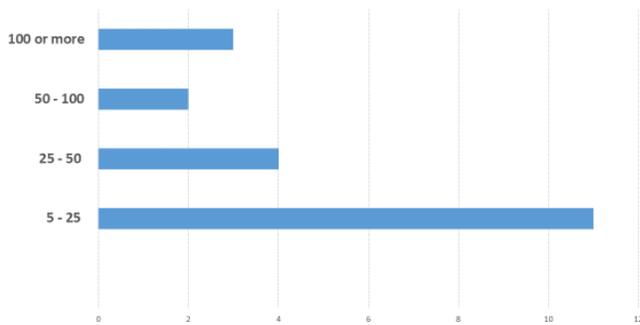
Processing (Arrangement)

As the table below indicates, Upper Peninsula heritage organizations do very little, if any, processing of historical manuscript collections. Their work with collections is largely limited to simple refoldering or reboxing of selected materials. Collections generally remain in their condition or state at the time of accession. For example, the volunteer archivist of one of the largest historical societies in the Upper Peninsula indicated that she does little to no arrangement and description of historical manuscript collections. She spends the bulk of her time answering reference and research queries and working with the digital collections on PastPerfect.

Far more worrisome was the discovery that the majority of organizations routinely ignore provenance, separating items from complete collections and distributing them among general subject files. Compounding the error, these organizations do not maintain intellectual control over these separations. They maintain no separation sheet or cross-reference information in the donor agreement, accession record, or finding aids.


Description

As the two tables below indicate, the majority of UP heritage organizations do not engage in any substantive descriptive work with their historical manuscript collections. Only two create basic item or folder level inventories. No institution creates a collection level finding aid, catalog, or

guide to their collections. Not surprisingly, they also do not provide basic online abstracts or descriptions of their collections. However, eight organizations do use PastPerfect to create and maintain a basic accession record. All organizations create a basic hardcopy accession record usually maintained in a notebook or folder. Many also use the donor agreement as the accession record. In a few instances, an organization may include a very rudimentary inventory or broad description of the accession.
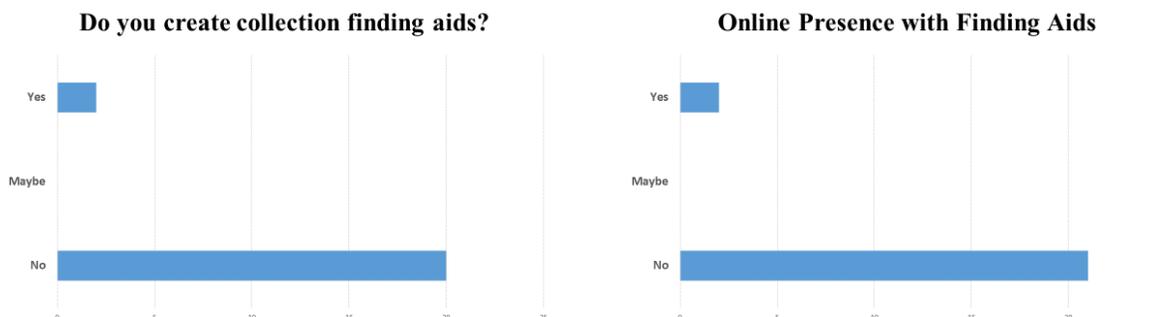
Significant Analog Historical Manuscript Collections

The on-survey of the Upper Peninsula's heritage organizations revealed the existance of a large number of unknown, or "hidden," analog historical and digital historical manuscript collections documenting a wide-range of subjects, events, organizations, and indivduals. For a complete list of selected collections, please see Appendix ?? Collections of particular note, include the following.

- <u>Alger County Oral History Collection</u> (Alger County Historical Society)
  Volunteer and former Alger County Historical Society president, Faye Swanberg, spent several years conducting interviews documenting the history of Alger County. Swanberg completed 200 interviews recorded on audio reel-to-reel and cassette. Approximately 10 percent are transcribed.

- <u>Captain James Bendry papers</u>, 12 ledger boxes, 1850s – 1880s (Baraga County Historical Society)
  Bendry was an entrepreneur from England. He arrived in the United States sometime in the 1840s and worked on a transport ship that would eventually purchase. Bendry transported supplies and trade goods to Sault Ste. Marie. Collection includes Bendry's shipping and general business records.

- <u>Cleveland Cliffs Iron Mining Company Employment records</u>, 60 volumes, 1900 – 1960 (Cliffs Shaft Iron Minining Museum)
  This collection contains detailed information that records vital information, family members, mines worked, length of employment; date and reason for leaving employment, accidents and injuries, workers compensation payments, benefit funds, etc. Records also indicate employee literacy.

- <u>Wisconsin Land and Lumber Company / IXL Company records</u>, 200 cubic feet, 1878 -1980.
  A fantastic collection documenting the two major UP lumber and land companies. The collection contains, but is not limited to, general administrative correspondence; Marketing records; accounting department records; reference material; forest product purchases; correspondence with other lumber companies in the area; Additional wooden cabinets of approximately 20 cubic feet in the "president's office" contain "log contracts" from the early 20th century; land purchase records; "letters to politicians"; personal correspondence and family financial records of G. Harold Earle (company president); records related to Blaney Park; correspondence with professional trade organizations; workers compensation and injury report records (1920s-1960s)

Digital Collections

As indicated by the tables below, the majority of U.P. heritage organizations do not actively collect or manage digital records. However, those organizations that do digitization work overwhelming digitize photographic material from their collections and maintain the digital content on hard drives, flash drives, or CDRs, DVDs. No organization has digitized a complete manuscript collection comprised of different analog formats. Organizations digitize material in-house, mainly at a volunteer's home using their personal equipment. The number of organizations with any type of backup procedure is evenly split between those that do backups and those that do not. The majority of backup procedures are very rudimentary, involving external hard-drives or flash drives. Only one organization provides online public access to their digital material.

The Delta County Historical Society (Escanaba) has created a substantial digital collection of photographs and textual material available online via the organization's PastPerfect Cloud subscription service. Digital images and metadata are available online at https://deltahistorical.pastperfectonline.com/. The site makes approximately 5,327 digital images publicly available online. Not all of the items include complete metadata.

The Menominee Range Historical Society (Iron Mountain) does not actively collect or accession digital content, but its current president, a retired teacher and amateur historian, has digitized approximately 4,000 photographs in the Society's collection. This volunteer creates jpegs and pdfs and maintains the digital content on his personal computer's hard drive.

The Alger County Historical Society's (Munising) volunteer archivist has digitized approximately 3,000 historic photographs at his home using personal equipment. He digitizes the images as jpegs at 400 dpi. When appropriate, he links the digital images to the collection accession record on PastPerfect. The archivist maintains the digital images on the Society's office windows desktop computer drive. He also maintains back-up files on his personal home computer. The Society does not provide online public access to its digital content.

The Menominee County Historical Society's (Menominee) volunteer executive director has digitized approximately 5,000 historic photographs as jpegs. He maintains the digital images on

his personal computer. He arranges digital images in folders organized by broad subjects but does not follow any standard file naming procedure. The digital material is not accessible by the public; however, the director routinely posts the images on the Society's Facebook page as part of its social media outreach. The director does not back-up the digital files but is hoping to purchase an external hard-drive for back-ups in the near future.

Collect and Manage Digital Data

How Do You Digitize Your Collections?

Types of Digital Content

Digital Storage

Digital Storage Back-up
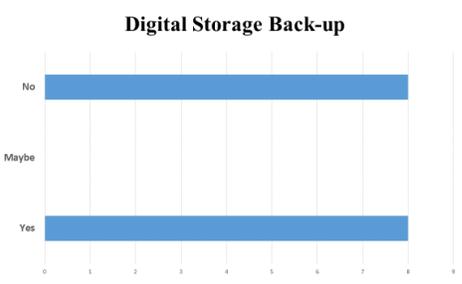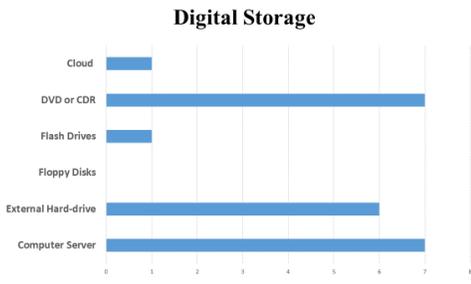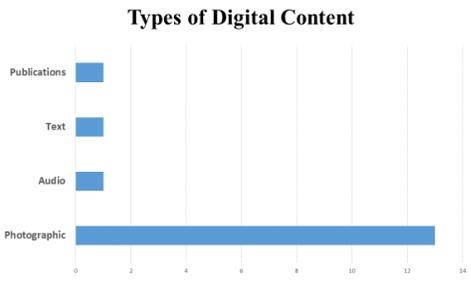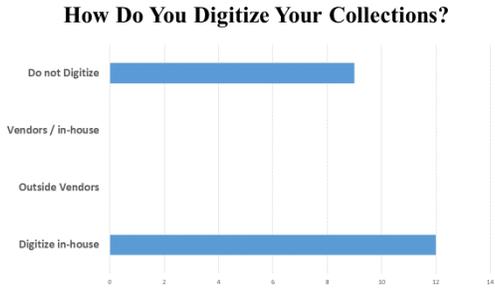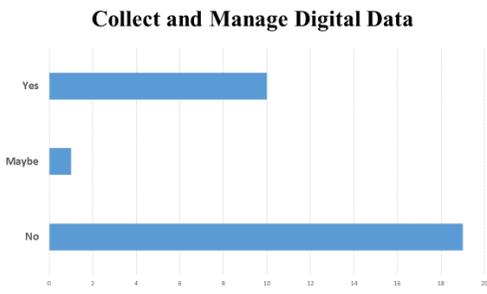
Conclusions

Many of the findings from the onsite visits and online survey are not surprising. The majority of U.P. heritage organizations are well-organized and established cultural institutions in their local communities. A volunteer staff of largely retired professionals maintain and operate these museums and archives. Despite the near total lack of online collection information and limited service hours, U.P. heritage organizations experience moderate demands for public research access to their collections. This finding suggests that greater online information and access may dramatically increase and broaden research use of essentially "hidden" collections. Other findings that have the most impact on the proposed regional digital preservation and access network are the financial and human resources available to heritage organizations, collection arrangement and description, and the scope of digital content.

Although income disparities exist, most heritage organizations are in stable financial condition. The majority receive annual revenues of $5,000 or greater. For the most part, revenues exceed expenditures, allowing most heritage organizations to maintain healthy fund balances. More often than not, overhead costs are low or non-existent, as most organizations utilize the knowledge and skills of a large number of retired volunteer professionals. These results suggest that the majority of U.P. heritage organizations would be able to provide the proposed digital preservation and access network with at least a modest level of financial and human resource support. Stakeholder buy-in in the form of a membership sliding fee scale combined with in-kind labor contributions should not be an insurmountable hurdle for the U.P.'s heritage organizations.

However, a significant hurdle to overcome is the arrangement and description of significant historical manuscript collections maintained by the U.P's heritage organizations. As the report demonstrates, most heritage organizations have failed to process even their most historically valuable collections and have not created any collection finding aids beyond very rudimentary donor and accession records. The proposed digital preservation and access network cannot accept unprocessed collections for digitization and ingest into a preservation platform. The network will have to develop a process and procedure for training local staff to process manuscript collections or incorporate a processing service into the network's fee structure.

The lack of collection processing or even adequate intellectual control over collections has not prevented some U.P. heritage organizations from digitize a significant number of items from historical manuscript collections. As indicated, digitization of photographic material dominates digitization efforts. Unsurprisingly, only one heritage institution has provided online professional access to portions of its collections. However, staff from every organization made it very clear that they would very much like to digitize and provide online access to their collections but are unable to do so because of human and financial limitations. This individuals made it very clear that they would welcome the services and assistance of the proposed digital preservation and access network.