Multitype Collaboration to Advance Discovery and Community

JEANNE M. LONG
SARAH M. PRITCHARD
WEDNESDAY, MARCH 27, 2019
LYRASIS LEADERS FORUM
What is it?

How can we expand access to city history?

How do we bridge institutional boundaries?
A Shared Commitment

Mission

Chicago Collections is a consortium of libraries, museums, and other institutions with archives that collaborate to preserve and share the history and culture of the Chicago region.

Vision

Chicago Collections is the collaborative force in sharing, promoting and preserving the history and culture of the Chicago region.
Governing Members
Participating Members

Northwestern Memorial HealthCare Archives
We are also supported by many individual donors.
One step leads to another:

2006 – Chicago Festival of Maps
2007 – Chicago Library Collaborative
2011 – Planning Grant from Mellon Foundation
2012 – Organization Incorporated + First Website
2013 – Staffing + Strategic Planning
2014 – 501(c)(3) + 2nd Mellon Grant + Portal Manager
2015 – Branding + Exhibition + Portal + Reference Network
2016 – Scholar Engagement + Workshops + Edit-a-Thon + K-12 + NPR Partnership + Member Survey
2018 – Partner with Black Metropolis Research Consortium and Chicago Cultural Alliance + Strategic Plan Version 2
Building a New Organization
Jane Addams Hull House to close

January 19, 2012 | By Kate Thayer | Tribune reporter

The need for its services is as strong as ever, but after years of rising costs and dwindling income from fundraising the Jane Addams Hull House Association will close and file for bankruptcy, the agency said today.

"For the last several years the agency has had trouble in the fundraising side of things," said Stephen Saunders, chair of the association's board of trustees. "After many years of struggling, we have to close our doors. It was a very difficult decision."

The Jane Addams Hull House complex once covered a city block on Chicago's... (Chicago Historical Society, Barnes Crosby photo)
Shared commitment: Facilitating Scholarship
Shared commitment: Collaboration and Community
Chicago Collections
Foundational Steps

- Organization and governance
- Technology options that meet the vision
- Funding sources – dues, grants, revenues
- Boards, officers and committees, staff
- Bylaws, legal status, and business operations
Pros and cons of various governance models:

- Independently incorporated, or under the aegis of another institution?

Ensuring member participation:

- Accommodate local practices related to cataloging, ILL, or public access
## Flexible Membership:

<table>
<thead>
<tr>
<th>Membership Levels and Benefits</th>
<th>Governing $6,000</th>
<th>Participating $2,500</th>
<th>Associate $500</th>
<th>Partners Program $5,000</th>
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<tr>
<td><strong>EXPLORE</strong> Chicago Collections participation (explore.chicagocollections.org) and staff training for adding content</td>
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<td><strong>ASK</strong> Chicago Collections reference services</td>
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<tr>
<td><strong>Representation on committees, task forces, and working groups</strong></td>
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<tr>
<td><strong>Promotional opportunities for your institutions</strong></td>
<td>✔+</td>
<td>✔</td>
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<td><strong>Exhibitions</strong></td>
<td>✔+</td>
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<td><strong>Workshops for staff</strong></td>
<td>Unlimited spots</td>
<td>6 spots/ year</td>
<td>2 spots/ year</td>
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<td><strong>Grant Participation</strong></td>
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<td>By invitation</td>
<td>By invitation</td>
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<td><strong>Voting eligibility for consortium decisions</strong></td>
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# FY14 CCC Program Profit and Loss

## Staff Resources Needed

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<tr>
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<th>Programs</th>
<th>Portal</th>
<th>Website</th>
<th>Membership</th>
<th>Exhibition</th>
<th>Public/Professional Programming</th>
<th>New Program Development</th>
<th>TOTALS</th>
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<tr>
<td>FT Staff: Portal Manager (6 mos.)</td>
<td>80%</td>
<td>15%</td>
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<td>FT Staff: Portal Developer (3 mos.)</td>
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<td>0%</td>
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<tr>
<td>PT Staff: ED (70% time for 12 mos.)</td>
<td>25%</td>
<td>10%</td>
<td>30%</td>
<td>10%</td>
<td>5%</td>
<td>5%</td>
<td>0%</td>
<td>85%</td>
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<tr>
<td>PT Staff: Admin/Programs</td>
<td>0%</td>
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## Earned Income

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<td>9,900</td>
<td>43,883</td>
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## Contributed Income (Program Specific)

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<td>41,946</td>
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## Other Income

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<td>Merchandising</td>
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<tr>
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## INCOME TOTAL

|        | 67,856 | 16,606 | 43,883 | 0 | 0 | 0 | 0 | 122,346 |

## Expenses (Program Specific)

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<tr>
<td>Staff Salaries &amp; Benefits</td>
<td>61,706</td>
<td>10,606</td>
<td>16,602</td>
<td>4,900</td>
<td>2,450</td>
<td>2,450</td>
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<td>Contracted Services</td>
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<td>Program Hard Costs</td>
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<td>10,150</td>
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<td>Marketing/Promotion</td>
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<tr>
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</table>

## EXPENSE TOTAL

|        | 67,856 | 16,606 | 24,602 | 24,900 | 2,450 | 2,450 | 137,865 |

## PROGRAM NET

|        | 0 | 0 | 19,281 | (24,900) | (2,450) | (2,450) | (10,519) |

## General Operating

### Staff Resources Needed

<table>
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<tr>
<th></th>
<th>15%</th>
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<tr>
<td>PT Staff: ED (70% time for 12 mos.)</td>
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### INCOME

<table>
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<th>(10,519)</th>
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<td>Program Net</td>
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<td>Institutional Giving</td>
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<tr>
<td>Individual Contributions</td>
<td>53,000</td>
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<tr>
<td>Events - Net</td>
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<tr>
<td>Interest Income</td>
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<tr>
<td>Other</td>
<td>0</td>
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<tr>
<td>Total Additional Income</td>
<td>53,000</td>
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<tr>
<td>TOTAL PROG NET + ADD INC</td>
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### EXPENSES

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<td>Staff Salaries &amp; Benefits</td>
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<tr>
<td>Occupancy (MOU for FY14)</td>
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<tr>
<td>Capital Reserves</td>
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<tr>
<td>All Other Expenses</td>
<td>15,143</td>
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<tr>
<td>Total Additional Exp</td>
<td>22,493</td>
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<tr>
<td>FY14 NET</td>
<td>19,988</td>
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One time only organizational exp 12,000

## FY14 Net Gain (Deficit)

| FY14 Net Gain (Deficit) | 7,988 |

### POLICY RECOMMENDATIONS

- Establish policy for building and managing reserves. (NOTE: FY14 reserves approx $100K)

### NOTES

1. Membership promotional costs include a Webinar
2. New Program Development includes costs incurred for Virtual Exhibit (with some physical aspect) to be produced in Fall FY15
3. Total mtg/PR and branding costs are higher than original projection
4. New program development costs not initially budgeted in FY14 but are covered through original Net Gain projection
5. ED salary increase in December 2013 accounts for $11,000 change in overall expenses
6. One-time FY14 org cost is for strategic planning consultants
7. Assumes Membership Increase of $13,400 and 100% retention
8. Assumes Mellon grant approval
9. Assumes additional fundraising
Strategic Framework

Institutional Goals
What CCC wants to accomplish in the world

Program Goals
What individual programs will be designed to achieve (to advance the institutional goals)

Strategic Goals
CCC’s multiple year goals that advance the program and/or institutional goals

Annual Goals
What CCC hopes to achieve in the current year (tied to strategic goals)
Strategic Plan, 2014:
Committees and Task Forces

Content
Cooperative Reference Network
Communications
Digital Exhibits
Discovery Systems

Audit & Finance
Membership
Nominating & Governance
Programming
User Assessment
### CCC FY15 Strategic Plan Implementation Timeline - DRAFT

<table>
<thead>
<tr>
<th>Decision Unit</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
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<tbody>
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<td><strong>Board</strong></td>
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<td><strong>Annual Meeting</strong></td>
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<td><strong>Board Assigned Membership Portfolios</strong></td>
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<td><strong>Quarterly Meeting and Strategic Update</strong></td>
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<td><strong>Communicate Annual Plan - Ongoing communications about strategic priorities and progress</strong></td>
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<td><strong>Update/Set Staff Annual Goals</strong></td>
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2018-2020 Goals:

- Enhance Public Access to Rich, Chicago-focused Collections
- Foster An Engaged Community through Programming
- Build A Strong Involved Membership
- Sustain An Effective, Efficient Organization
Organizational Goal #2

Foster An Engaged Community Through Programming
# Activities and Metrics

<table>
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<tr>
<th>Strategies</th>
<th>Activities/Programs</th>
<th>Measures of Impact</th>
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<tbody>
<tr>
<td>A. Develop and expand educational and cultural partnerships</td>
<td>A. - Partnerships: (Chicago Cultural Alliance, assisting CCA smaller organizations with preservation needs) -Chicago Area Archivists (work on cross promotion of activities) -ALA conference activities (promotion of CCC members participating and booth opportunities) -BMRC (joint programming of one lecture) -Dominican University and other library science schools – establishing an internship program. (ED, Board, Content Committee, Communications, Programming Committees) - North Park Conference (Chicago Research Summit) - Create a marketing plan that maps previous and upcoming types of events into a document that identifies targeted audiences and provides a more comprehensive structure to schedule activities. (ED, Programming and Communications Committees)</td>
<td>A. - Resource of similarity titled individuals at member institutions to contact/promote collaboration and co-working. Familiarize each other with collection strengths -collect number of visitors at the promotional table and their interest in CCC -Collaborate presentations given at conferences -Liaison to organizations -Number of institutions who participate in social media campaigns -Number of interns/schools participating in internship program</td>
</tr>
<tr>
<td>B. Advance a robust programming plan which includes speaker series, physical/virtual exhibitions and professional workshops</td>
<td>B. Create summary of job responsibilities for Program Manager to include delivering two public programs a year. (ED, Programming Committee) - Interns at institutions or with Chicago Collections could be trained on Scalar, use it to public results of a research project</td>
<td>B. – Program attendance and survey responses</td>
</tr>
<tr>
<td>C. Develop an active outreach program to promote the resources of CCC</td>
<td>C. Explore feasibility in maintaining and expanding local &amp; regional activities (list of calendar driven opportunities in Chicago); co-sponsoring events with institutions. (Programming, Content and Communications Committees) - Promote Scalar as a way to highlight material, or insert into a workshop as a presentation tool</td>
<td>C. - Survey at a cosponsored event how people found out about the event; where they go to find events</td>
</tr>
</tbody>
</table>
Track responsibilities, deadlines and costs:

**JANUARY 2019**
3A. Create a membership strategy plan with goals of increasing members; onboarding of new members and promoting engagement within CCC; provide an annual survey to members; creating a cultural membership category (determine member fee for this category)  
ED, Board, Membership  
To be reviewed at the end of each fiscal year - No cost

3C. Maintain and enhance communications methods (Continue social media posts which may include graphics or photographs, explore feasibility for calendar of events per "semester" in mail and PDF on website, personal outreach by committee members by phone, by email, or in person); review effectiveness.  
ED, Communications Committee  
No Cost

**MARCH 2019**
4A. Create board orientation packet, board engagement on development activities.  
ED, Nominating and Governance Committee  
No Cost

**JUNE 2019**
1A. Explore options of hiring a full-time or part-time project archivist Content Committee, Development Committee  
$55,000 or $25,000

4C. Hiring of program manager (full time), project archivist (full or part time), administrative assistant (part time).  
ED, Board, Development, Programming Committees  
Salaries $55,000, $55,000/$25,000, and $18,000 respectively

**OCTOBER 2019**
2A. North Park Conference (Chicago Research Summit)  
No costs
The Digital Identity:

explore.chicagocollections.org
Launched October 22, 2015
The Key Idea

Bring together content about the city of Chicago from multiple institutions into a single discovery system

- Initial focus: Descriptive metadata and finding aids about archival collections
- Expanded scope: Digital images and other digital files when available
The Challenge

We’ve been cataloging these collections for a long time -- different types of physical and digital objects, partial records and different metadata --

How to bring this together without years of labor to “do over?”

http://explore.chicagocollections.org/image/chicagohistory/71/b27q03r/
Who is the Target Audience for EXPLORE Chicago Collections?

• Researchers
• Faculty
• K-12 Teachers
• Students
  – K-12
  – Undergraduate
  – Graduate
• Lifelong Learners
• General Public
Technology Options that Meet the Vision

What solutions are possible and affordable?
- Commercial or open source
- Sustainability
- Hosted or member-provided

Categories of content to be managed
- Catalogs, full digital texts, images, audio?
- What is already digitized or not?

What can members legally participate in?
- Copyright
- Other cooperative obligations
The Pieces

EXPLORE Chicago Collections
(front end user interface)

Metadata Hopper
(back end administrative tool)
Archivist creates a map for each local metadata standard

“Auto-tagging” occurs upon deposit

Can deposit metadata *with or without* the digital object

Connect related records, e.g., finding aids and images

Custom-designed software that is open source
An online portal to discover the history and culture of Chicago
EXPLORE TOPICS – EVENTS, MOVEMENTS, BUILDINGS, DISASTERS
Learn about the individuals, organizations and families of Chicago's rich heritage.

SHOWN: Men standing in a line during a stockyards strike, Chicago History Museum.

ALL NAMES

A (1071) | View All>
American League of Professional Baseball Clubs (1739)
Adler & Sullivan (1640)
Adler, David, 1862-1949 (915)
Adler & Work (575)
Annunzio, Frank (265)
Atwood, Charles B., 1849-1895 (164)

B (2696) | View All>
Burnham & Root (810)
Berman, Solon Spencer, 1853-1914 (509)
Burnham, D.H., & Co (479)
Bowen, Louise de Koven, 1859- (459)
Bowen Country Club (448)
Barnett, H. (341)

C (2792) | View All>
Chicago Daily News (53751)
Chicago Daily News, Inc (49304)
Chicago Architectural Photographing Co. (2574)
Century of Progress International Exposition (1428)
Chicago Cubs (1049)
Chicago White Sox (929)

D (1474) | View All>
Davis, Robert A (1033)
DeGrane, Lloyd (568)
Dostatni, Yvette (444)
Dangler, Henry C (359)
Daley, Richard J., 1902-1976 (186)
Detroit Tigers (115)
Results

1 to 12 of 2002 Digital Images shown

1 to 24 of 419 Archival Collections shown

**Chicago Citizens Commission to study the Disorders of Convention Week. Records, 1968-1969**

A citizens' commission, chaired by Edward J. Sparling, was formed to investigate the 1968 Chicago peace march that ended in police confrontation. The group reconvened to examine the violence associated with the 1968 Democratic National Convention. The second committee, named the Chicago Commission...

**DATE:** 1968-1969

**TOPICS:** Demonstrations | Social Justice | Politics | Civil Rights | Riots

**LIBRARY/ARCHIVE:** University of Chicago

**Democratic National Convention Records, 1965, 1968**

The majority of this collection details the events of the 1968 Democratic National Convention in Chicago, with some information about the protests and police response that occurred alongside the campaign to choose a democratic candidate for president.

**LIBRARY/ARCHIVE:** Chicago Public Library
Help Guide

What You’ll Find in this Guide

The purpose of this guide is to assist users of Explore Chicago Collections throughout the research process. As you click through the navigation menu on the left, the guide will provide tips for navigating the search portal, creating citations, visiting member institutions and expanding your research beyond the Explore Chicago Collections portal. It will also address rights and access issues and offer resources for educators.

Women working in a room at the Chicago Public Library where they are collecting books for U.S. Soldiers. Photograph. Chicago History Museum, Chicago.

<http://explore.chicagocollections.org/image/chicagohistory/71/Ft8E2tCz>.
Who is using EXPLORE Chicago Collections?

- 280,157+ sessions
- 182+ countries
- All 50 United States
- 1,524,445+ page views
Programming And Outreach
Inaugural Public Exhibition:

RAWMATERIAL
Uncovering Chicago’s Historical Collections

Harold Washington Library Center
August 7 - November 15, 2015

THE GLADYS KRIEBLE DELMAS FOUNDATION
Inaugural Speaker Series

“Engaging Chicago: Telling the City’s History”
with
Dominic A. Pacygca, PhD

Harold Washington Library Center
October 6, 2015
Building on the Foundation: Cooperative Reference Network

- A Virtual Reference Desk
- Integrate with the Portal
- Development of Instructional Materials
Building on the Foundation:
Community Engagement and Member Support

- Researcher Round Tables
- Member Survey
- Professional Development Member Workshops
  - Portal training and assessment
  - Digital preservation planning
  - Encountering Primary Sources
- Wikipedia Edit-a-Thons
- Public Speaker Series
- NPR collaboration, WBEZ 91.5
Building on the Foundation: Joint Digital and Physical Exhibitions

“Place of Protest: Chicago’s Legacy of Dissent, Declaration, and Disruption”

Civil War to Civil Rights: African-American Chicago in the Newberry Collection
Building on the Foundation:
K-12 Programs and Partnerships

- Mini-Curators Program with Chicago Public Library
- Chicago Metro History Fair
- Professional Development Programs for Teachers
Public Awareness

Media coverage:

• Chicago Tribune
• Illinois Library Association Reporter
• American Libraries magazine
• Inside Higher Education
• Presentations at professional meetings

“All Together Now: Libraries Collaborate to Create History”
American Libraries (March 2016)
Strategic Member Growth

Pullman National Monument (National Park Service)
Friends of the Pullman State Historic Site
Riverside Historical Museum
Riverside Public Library
Northwestern Memorial HealthCare Archives
Henry Crown and Company
Chicago Cultural Alliance
Envisioning the future

Regional Storage Facilities?

Joint Digital Imaging Labs?

Publishing?

Shared Web Access

#1
Outcomes for Public Cultural Heritage

Connections, access, and preservation
- Public awareness and education
- Revalorizing archival resources
- Potential to work as a group to save smaller collections

Leveraging print and digital
- Simultaneously improve access and protection
- Multiple ways to participate and engage

Collaboration is the only way
- Ensure broad support and accountability
- More effective advocacy
- Future sustainability
Chicago Collections
Factors for Success

- Shared vision that attracts diverse partners
- Trust, and building on existing relationships
- Leadership commitment
- Attention to sustainability (structure, budget)
- Respect individual member policies and workflows
Twitter @ChiCollections
#TogetherChicago

Facebook facebook.com/ChiCollections

Join our eNews from our Homepage at chicagocollections.org

Explore collections at explore.chicagocollections.org
Questions?

Chicago Zoological Society, “The ‘Question House’” (c. 1940)
http://explore.chicagocollections.org/image/bz/104/4b2z926/