

## Memorandum of Understanding

From: \_\_\_\_\_  
To: Mount Desert Island Historical Society, acting as fiscal agent for Friends of Island History  
Subject: Commitment to participate in the History Trust Planning Study  
Date: \_\_\_\_\_

The purpose of this memorandum is to document the commitment of \_\_\_\_\_ (Participating Organization) to participate in the History Trust Planning Study.

### The History Trust Planning Study

Friends of Island History (FOIH), a collaborative of Mount Desert Island-based collecting organizations, proposes to begin a community-wide effort to preserve the historical archives of the region. FOIH proposes to undertake a planning study to learn what steps will be required to protect collections from destruction, to catalog and digitize them, and engage the community in a greater understanding of their value.

### The Planning Grant and the Consultant

The Charles Butt Foundation (CBF) has committed to fund most of the cost of a planning study that would involve up to fifteen FOIH organizations. The consultant for the study is HistoryIT, a digital technology company headquartered in Portland, Maine, with additional bases of operations in New York, Chicago, and the Netherlands. Headed by a Ph.D. historian, Kristen Gwinn-Becker, HistoryIT has undertaken major projects, not only for FOIH, but also for organizations of national stature ranging from the Salt Institute for Documentary Studies to the National Baseball Hall of Fame.

FOIH and HistoryIT have a longstanding and productive relationship. In addition to being the industry leader in creating usable digital collections, HistoryIT is familiar with most of the participating organizations and the history of MDI. One HistoryIT contractor, a College of the

Atlantic graduate and MDI resident, has worked extensively with MDI-based collecting organizations. The project will provide FOIH with the information it needs to develop a strong, island-wide support system (both physical and digital) and deliver a step-by-step strategic plan for the processing, cataloging and digitization of participating collections.

### Funding and Expenses

These are the estimated revenues and expenses of the project, considering two scenarios. The first scenario is that five to ten organizations participate. The second scenario is that eleven to fifteen organizations participate.

### Charles Butt Foundation Planning Grant Income and expense projection

	<b>Income</b>	<b>Scenario 1: 5 to 10 participants (1)</b>	<b>Increment for Scenario 2 (2)</b>	<b>Scenario 2: Total for 11 to 15 participants</b>
1	CBF Grant	344,520	35,100	379,620
2	FOIH Fund raising	38,280	42,900	81,180
3	Total	382,800	78,000	460,800
	<b>Expense</b>			
4	<i>History IT Contract (80% of cost)</i>	319,000	65,000	384,000
5	MDIHS Support (3)			
6	Collections Curator	21,000	13,000	34,000
7	Fellow	5,000	0	5,000
8	Grant Writer	5,000	0	5,000
9	Web Consultant	5,000	0	5,000
10	Support for Operations	27,800	0	27,800
11	<i>Total MDIHS (20% of cost)</i>	63,800	13,000	76,800
12	<b>Total Expense</b>	<b>382,800</b>	<b>78,000</b>	<b>460,800</b>

- (1) If 5 to 10 organizations participate, CBF will fund 90% of cost and FOIH will raise funds to cover 10% of cost.
- (2) If 11 to 15 organizations participate, CBF will add an additional \$35,100 and FOIH will raise funds for the balance of the incremental cost.
- (3) Overhead support will defray costs of a collections specialist, grant writer, administration, and fundraising. The collections specialist and grant writer will work on behalf of both FOIH and Mount Desert Island Historical Society.

## Deliverables

Deliverables include an FOIH strategic plan that will address fundraising requirements for immediate priorities and long-term sustainability, collective assessment for FOIH organizations, individual assessments for each participating organization, and a robust digital sample that will demonstrate the value of collective digital collections and their ability to engage youth.

1. The project is anticipated to start in May 2017. During the first three months of the project, HistoryIT will:
  - a. Conduct on-site assessments for all participating institutions
  - b. Meet with FOIH participants and facilitate discussion about a shared collections prototype – a digital project that will demonstrate the depth of archival resources and their potential for engaging the community, particularly young people
  - c. Select, with the approval of the participating organization, a total of 1,800 items from the participating collections for digitization and inclusion in the shared collections prototypewith input/recommendation from HistoryIT. No materials will be taken from the institution and travel to Portland, or any other HistoryIT location, without the permission of the institution that owns the item.
2. During months 4-6 of the project, HistoryIT will:
  - a. Deliver individual reports to each participating organization
  - b. Deliver a Collective Collections Report and Strategic Plan to FOIH
  - c. Deliver a summary about the size and types of space that would be needed to safeguard physical collections
  - d. Meet with FOIH participants to review reports
  - e. Design the shared collections prototype focused on engaging youth in MDI history through the use of digital primary sources
  - f. Digitize and create enhanced metadata for the digital interactive
3. During months 7-12 of the project, HistoryIT will:
  - a. Deliver a fundraising plan to FOIH
  - b. Launch the digital interactive (prototype)

- c. Meet with FOIH participants and stakeholders to review the digital interactive and discuss ways of promoting it among area schools
- d. Initiate fundraising campaign in collaboration with FOIH

### Benefits to the Participating Organization

Each participating organization will receive a comprehensive report including:

- Review of inventories and all holdings, processed and unprocessed, and environmental conditions; identification of most urgent preservation issues
- Quantification of current physical space allocations, safety, security, available capacity and future needs
- Evaluation of existing cataloging and metadata structures, including any existing catalog records; identification of most urgent cataloging issues
- Appraisal of all digitization efforts to date; identification of professional standards and sustainability issues
- Assessment of processing, cataloging, and digitization backlog; and comprehensive summary of all measures necessary to address each, including levels of standardization necessary to contribute to the DPLA, Maine Memory Network, and other internet collectives
- Identification of potential overlapping materials with other area organizations and suggestions for collective handling of such items
- Identification of the multiple audiences that could be reached through online digital collections and the necessary metadata needed to reach those audiences
- Assessment of the current level of digitization and the advantages of sharing a common portal

### **Participating Organization will participate in the collections prototype site, consisting of:**

- Approximately 1,800 items (total) from all participating organizations, along with the creation of fully searchable, integrated metadata
- An educational interactive that enables participants to tell stories from the digital collections, highlighting how an effective shared digital collections site can provide the

basis for substantial engagement with young people and forming the basis of a digital platform through which students, teachers, residents, and visitors would engage with the history of Mount Desert Island and the surrounding region

### Obligations of the Participating Organization for this History Trust Planning Study

Full participation in the project will require, at a minimum, each participating organization to:

1. Designate a project point person who will work with HistoryIT representatives during the assessment process and who will participate in the discussions about the shared collections prototype.
2. Answer preliminary survey questions about their physical collections, catalogs, and digital content.
3. Have organizational stakeholders answer a survey about their greatest concerns and most urgent needs.
4. Provide a copy of all catalog records for the entirety of holdings so that HistoryIT may examine the detail of cataloging and digital collection development needed.
5. Provide HistoryIT project teams access to the physical collections for up to four days in order to conduct a detailed survey of the holdings.
6. Assist with fund-raising efforts by writing letters of support for grant and gift applications.
7. Participate in three meetings facilitated by HistoryIT to gather input and share updates about the progress of the initiative.
8. Receive, review, and recommend action based upon a strategic plan proposal that will consist of the following elements:
  - a. Summary of specific goals and phases required for each organization to eliminate its backlog
  - b. Considerations and cost analysis for the development of a shared collection space or spaces. A thorough assessment of current space availability will be considered prior to proposals for new construction.

- c. Summary of the relationships among the items and objects throughout and across the collections of each participating organization, noting also the gaps in the total collection.
- d. Estimate, cost analysis, and timeline for reducing and eliminating backlog, including the ways in which the collective backlog might be reduced through cooperative efforts.
- e. Suggestions for collective fundraising efforts and digital outreach presentations that would appeal to donors interested in the collective historical resources. This will result in a detailed fundraising plan that aligns collections needs with funding opportunities.
- f. Summary and recommendations to each participating entity about how best to maintain and enhance their physical and digital collections.

#### Declaration of Intent

The Charles Butt Foundation desires that participating organizations be required to demonstrate the organizational commitment and ability to fully participate in this project and consider in good faith the recommendations resulting from this project. Specifically, Donor is making this grant with the desire that this project will initiate a concerted effort by all participating organizations to protect collections from destruction, to catalog and digitize them, and engage the community in a greater understanding of their value.

Participating Organization hereby declares its intent to participate in the History Trust Planning Study as described in this Memorandum of Understanding.

For the Participating Organization

For Mount Desert Island Historical Society

Signature \_\_\_\_\_

Signature \_\_\_\_\_

Name \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Title \_\_\_\_\_