

Digitization Strategy – Preserving Our Heritage: Protecting the Past for Tomorrow

NOVEMBER 2023

Georgina Pioneer Village and Archives



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Glossary and Acronyms

The following are a set of acronyms used in this document.

Abbreviation	Full Spelling
CAP Survey	Collections Assessment for Preservation Survey
CHIN	Canadian Heritage Information Network
FTE	Full Time Equivalent
KPI	Key Performance Indicator
OCR	Optical Character Recognition
UV	Ultraviolet

Current State

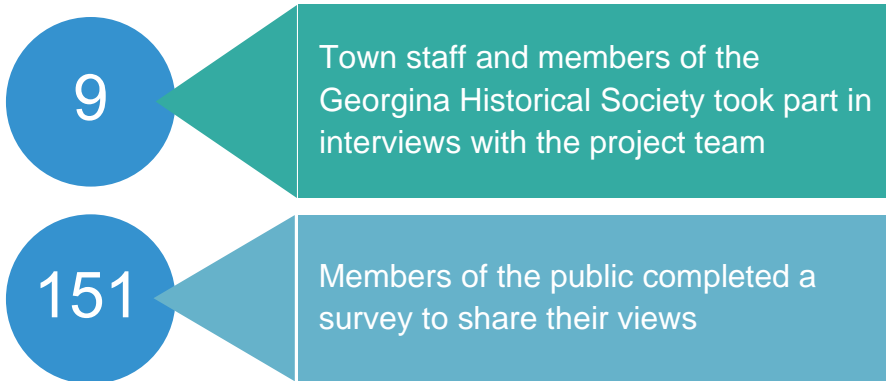
Context

The Town of Georgina (the Town or Georgina) contracted Blackline Consulting (Blackline) to develop a Digitization Strategy for the Georgina Pioneer Village and Archives (the GPVA or the Museum). The aim of the Digitization Strategy is to preserve Georgina’s heritage and improve the ability to provide public access to the GPVA’s Heritage Collections (Collections).

This first section of this document lays out the current state of the GPVA’s Collections. The subsequent sections of the document are the Digitization Strategy itself.

This section provides our findings and observations based on four inputs:

	Document review		Interviews and on-site walk through
	Public survey		Desk research and analysis



Scope of Services

The table below lists common museum services the GPVA provides. We derived the list and service descriptions based on the Canadian Heritage Information Network (CHIN)'s resource "[Capture Your Collections: A Guide for Managers Who Are Planning and Implementing Digitization Projects](#)". In addition, there are other organizations that provide similar services but focus on a different set of assets / collections.

Museum Services	Service Description	GPVA	Georgina Library	Georgina Military Museum
Collections Management	Receiving, cataloging and storing artifacts and archival materials with cultural / historical significance.	Partially	Partially	Partially
Conservation	Using preventative conservation methods to ensure their longevity and integrity.	Partially*	Partially	Partially
Research	Conduct research to enhance understanding of artifacts and archival materials. Assist customers with personal research projects.	Yes	Yes	Partially
Education	Providing informative programming to promote learning and cultural enrichment for visitors.	Yes	Yes	Yes
Digital Media	Create interactive and online experiences that engage audiences beyond physical museum spaces.	Partially	Partially	No
Marketing / Communications	Promote exhibitions, events and museum offerings. For example, through brochures, press kits, flyers and ad campaigns.	Yes	Yes	Yes

*Partially means the organization provides the service but there is likely an opportunity to expand / modernize.

Stakeholders from some of the groups above have expressed interest in working with the GPVA on its digitization effort. Given the overlap in services provided there is likely a business case for pooling resources when it comes to acquiring equipment and other resources needed to digitize the GPVA's collections.





GPVA’s Collection


The GPVA manages three collections of historical objects, defined formally as follows:

1. Permanent Collection—collection of material culture (archives, artifacts), that have been accepted by donation to the GPVA due to its association with a person, place or event within the boundaries of the Town.
2. Reference Collection—the published and unpublished (documentary or photographic) resource material used for research, programs and exhibition.
3. Education Collection—the reproduction or non-Permanent Collection objects, documents or photographs used for hands-on use for program demonstrations and interpretation.

The “Collections” refers to these three collections of the GPVA’s assets. The rest of this document categorizes these objects into mutually exclusive asset types. See the table below for the set of five asset types, rationale for grouping and the present estimated volume.

[Appendix A](#) lists the distinct attributes of each asset type, including key properties. [Appendix B](#) maps the asset types with objects listed in the GPVA’s CAP Assessment Survey.

Asset Type	Rationale for Group	Total Objects	Total Linear Feet
 Paper (articles, diaries, books, newspapers)	Method of digitizing these materials will likely involve the use of OCR software and other tools dedicated to scanning printed materials.	150 maps/oversized documents	235 linear feet of library / archival materials
 Paintings / Pictures	Unlike written materials, paintings / pictures do not require the use of OCR software, they do however require specific care to ensure preservation.		17 linear feet
 Video / Audio Physical Media	How video and audio is digitized will differ based on how the information was captured / is presently stored. But the digitization levels for these materials is consistent.	30 media objects	
 Small Physical Objects	All physical objects that can be feasibly captured via a 3D scan.	9,585 (the GPVA also has ~20,000 archeological artifacts which aren’t included in this strategy)	

	Large Physical Objects	Objects that could not be readily reproduced via 3D scan, e.g. industrial equipment.	5	
Estimated Total Volume of Assets			9.770 objects	252 linear feet

The total number of assets is derived through estimates provided in the CAP Assessment Survey. The growth of the collection is organic, averaging 50 artifacts per year.

Public Interest

The public is interested in accessing digitized materials. GPVA and Blackline launched a public survey through the summer. Nearly 75% of respondents said they have never accessed the GPVA’s heritage collections. But 66% strongly agreed that the availability of digital records would influence their decision to do so.

When asked how satisfied they are with the current availability of the GPVA’s collections over 70% selected the answer “Neutral or no opinion”.

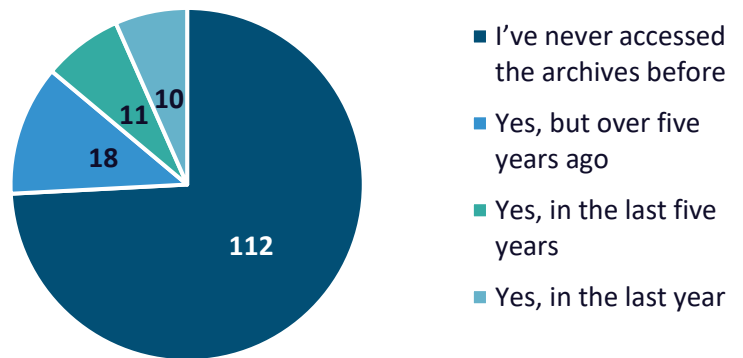
This suggests an overall lack of engagement with the GPVA.

In addition to stated public interest, digitization can help preserve Georgina’s heritage. Without digitization, the GPVA’s assets are at risk of:

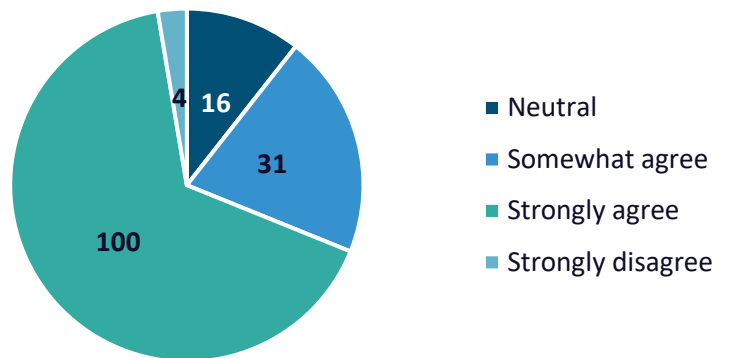
- Physical deterioration—documents and artifacts degrade over time, even under ideal preservation conditions.
- Loss and irreparability—in the case of flooding or fire, physical assets are at risk of being damaged or lost entirely.

By not digitizing, the GPVA misses out on opportunities to engage the community and ultimately improve its Collections. Digitization makes the GPVA’s assets more accessible.

Have you accessed archival materials at the Georgina Pioneer Village and Archives before?



The availability of digital records would influence my decision to access GPVA's heritage collections



Community members would be more likely to interact with the Collections, perhaps even providing additional context for certain assets. Creating digitally available records of assets requires comprehensive documentation and will involve capturing information about assets in multiple media formats. This reduces the odds that the GPVA loses context for items in the Collections over time.

Levels of Digitization

Below we have created a Digitization Framework based on stakeholder consultation and review of resources published by the CHIN. We define what digitization means by asset type. We have distinguished three levels of digitization which can be generally defined as follows:

- **Level 1—Catalogued:** the item has been catalogued in a central database with relevant metadata accurately recorded. All items should be searchable via these metadata tags.
- **Level 2—Digital Format:** the item has been captured in a digital format and is in some way accessible to the public.
- **Level 3—Reproducible:** the item is accessible digitally, in additional formats where relevant and with additional contextual information formally captured. The aim with Level 3 is to have enough data available so that the item can be reproduced if desired.

Asset Type	Level 1 - Catalogued	Level 2 - Digital Format	Level 3 - Reproducible
Paper	Item is catalogued in the central database. It can be searched for via metadata.	The item is scanned and available in a digital format. A photograph is taken of the object itself (e.g., book, map) for cataloguing and inventory purposes.	The item can be reviewed in plain text online, the plain text version is accessible via screen reader. Its original form is accessible digitally, allowing users to flip through scans of the physical item itself.
Paintings / Pictures	Item is catalogued in the central database. It can be searched for via metadata.	The item is scanned and available in a digital format. A photograph is taken of the object itself for cataloguing and inventory purposes	The item can be viewed in a digital format with written descriptions for visually impaired individuals. Additional contextual information is included where available.
Video / Audio Physical Media	Item is catalogued in the central database. It can be searched for via metadata.	The analog recording is digitized with the digital file uploaded to the centralized database.	Audio transcripts are created and included for each item. Additional contextual information is

Asset Type	Level 1 - Catalogued	Level 2 - Digital Format	Level 3 - Reproducible
		Users can playback audio and video recordings. A photograph is taken of the object itself (e.g., cassette) for cataloguing and inventory purposes.	included where available.
Small Physical Objects	Item is catalogued in the central database. It can be searched for via metadata.	The item is scanned using 3D modelling technology. These scans are accessible online. A photograph is taken of the object itself for cataloguing and inventory purposes.	3D scan is accompanied by a written description. Additional contextual information is included where available.
Large Physical Objects	Item is catalogued in the central database. It can be searched for via metadata.	The item is photographed with the high-resolution photos uploaded to the database entry for the item.	The images are accompanied by a written description which is screen reader compatible. Additional contextual information is included where available.

The GPVA's Current Level of Digitization

With the Digitization Framework in mind, we can assess the GPVA's Collections across these three levels to understand where the organization is today.

Level 1—Catalogued: the GPVA has asset information across databases in two systems, FileMaker Pro, and the newer system PastPerfect. Some assets and their metadata are captured in each system but neither system captures the entire collection. The Museum's goal is to replace FileMaker Pro with PastPerfect. The GPVA has paper collection records that must be integrated into the final database as well. A key challenge is that over the past fifty years methods of cataloguing new collection items have changed. However the GPVA has not had the dedicated resources required for a fulsome update of the Collections' metadata (e.g., updating all asset information to align with a singular method of cataloguing).

Level 2—Digital Format: there has been some work done to capture some assets in a digital format (e.g., in PastPerfect), but this content is generally not accessible to customers. Independent researchers looking to explore the GPVA's materials must reach out to the GPVA's Heritage Coordinator and arrange an appointment. They cannot view materials online.

Level 3—Reproducible: without reaching Level 2 it is not possible to meet the criteria for Level 3. There has been some work to create interactive media however, such as the GPVA’s mobile application which visitors can use to digitally supplement tours of the pioneer village. The application even includes a QR scanning feature which could be used by visitors to scan items and access digital materials.

Facility Conditions and Staffing

Facility Conditions

There are two main areas GPVA uses to store the Collections: the main office / archives room, and the Noble House. Both facilities are temperature controlled and monitored by staff on site. Both lack fire protection. The main office / archives room holds books and paper artifacts. All rooms holding artifacts either have no windows or window coverings, minimizing risk of damage caused by ultraviolet (UV) radiation. The office has flooded in the past, the Town is carrying out ditching work to mitigate this issue. Consequently, archives are stored on shelves elevated approximately 1-foot above ground level. The building has no humidity control capabilities.



Image 1: *Physical objects located in the Noble House.*

Physical objects are held on the second floor of the Noble House, negating flood risk. Humidity is controlled using household humidifiers and dehumidifiers. Security measures are lax, posing a potential risk to the Collections’ safety. Temperature is also difficult to regulate in the building given its size and age. The absence of backup power is a vulnerability. In the event of a power outage, artifacts and essential systems are at risk.

Staffing

There is currently no formal process to digitize artifacts as they are accessioned. Limited staff capacity is a key driver behind this lack of digitization. The Heritage Coordinator is the sole Full-Time Equivalent (FTE) resource dedicated to accessioning artifacts into the GPVA’s collections. However, this role is also responsible for other key work done by the GPVA including programming and assisting customers with research. A lack of digitally available content produces a negative feedback loop where the

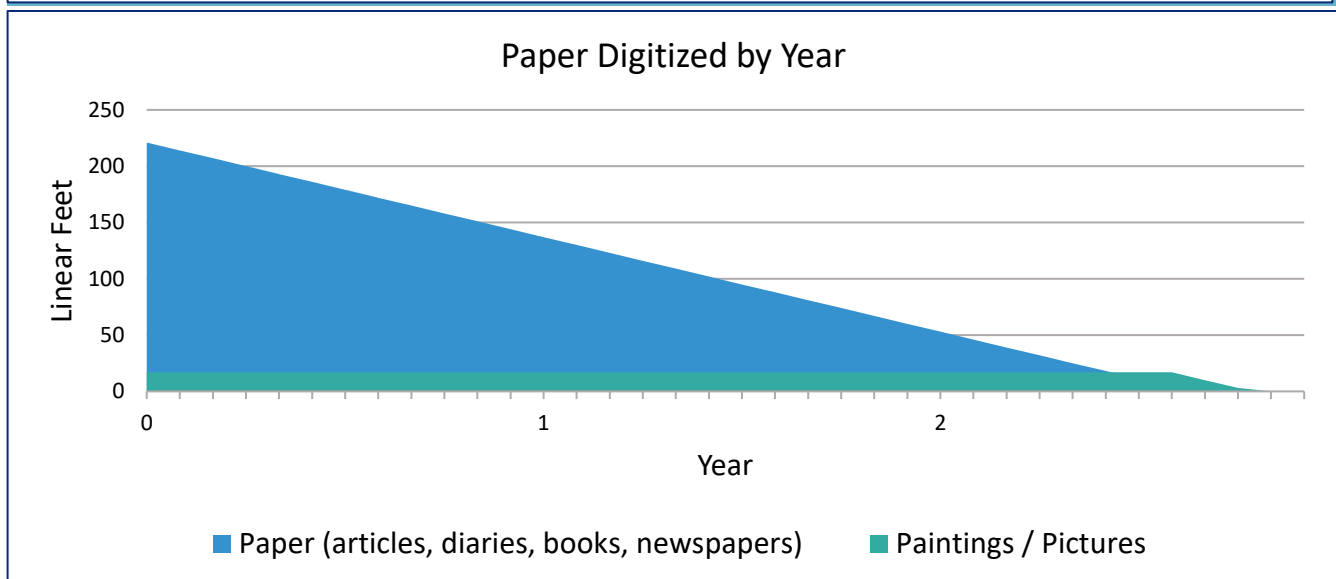
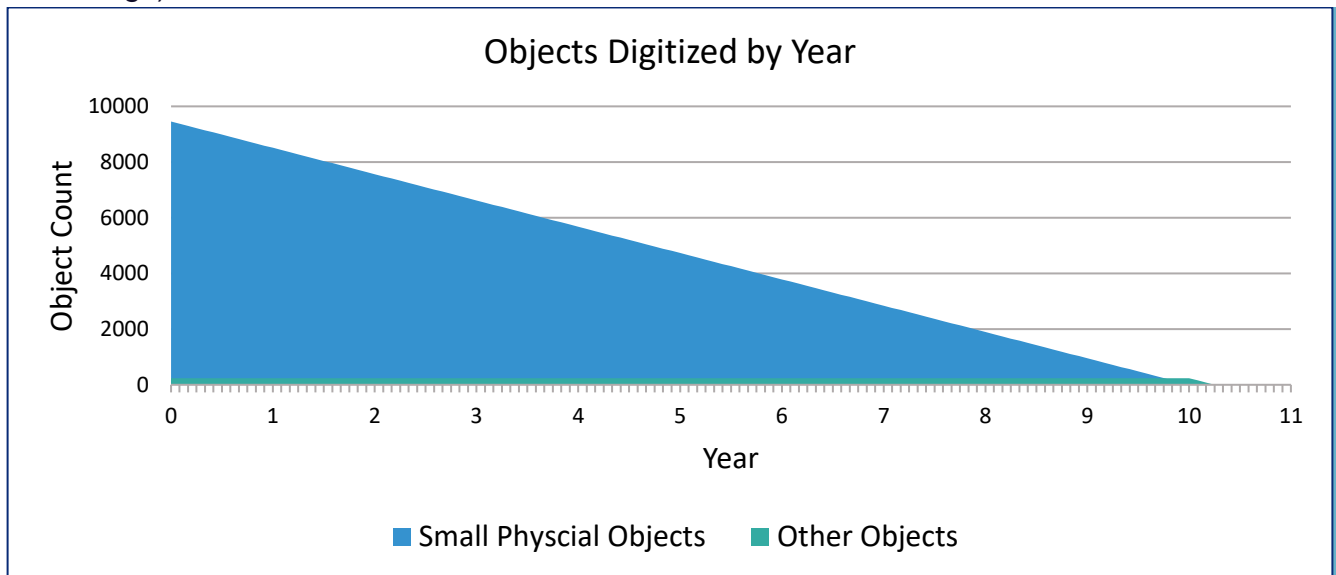


Image 2: *Paper artifacts in the Noble House, showing elevation from floor.*

Heritage Coordinator must devote time to facilitating customer research—in turn limiting this staff member’s capacity to work on producing digitally accessible content for research, programs and exhibits.

Part of the challenge, as mentioned previously, is that no single database includes all the items in the GPVA’s collection. GPVA previously used FileMaker Pro to catalogue its artifacts. More recently the Town acquired the museum collection management software PastPerfect. Neither system includes records of all the GPVA’s assets. Approximately 2,000 items are currently catalogued in PastPerfect, out of the estimated 9,770 objects and 252 linear feet of paper the GPVA currently manages.

The graphs below show the pace at which the Heritage Coordinator could digitize the GPVA’s current collections. Please note that given the low volume of assets in certain categories they are grouped together as “Other Objects” (there are 5 large objects and 30 video / audio recordings).



However, the model assumes the GPVA receives no new assets over this period and that the Heritage Coordinator can devote 25% of their time to this work. Given these assumptions are untenable, the Town will need to invest in additional resources to digitize its collections.

Additionally, the GPVA recently received a donation of approximately 20,000 archeological artifacts. Given the recency and sheer volume of the donation, the digitization of archeological artifacts is considered outside the scope of this strategy.

Summary of the Current State

Without additional investment the GPVA may never be able to digitize its Collections

The GPVA has limited resources it can dedicate to digitizing its assets. This exposes Georgina to a few notable risks:

- If the Collections were damaged, the impact would be disastrous. Without sufficient digital records, many items would be permanently irrecoverable. Given the GPVA's current collection storage methods, this risk has to be taken into account.
- Without digital access to assets, the GPVA misses an opportunity to educate the public, celebrate Georgina's history and support research. Digitization could also support the acquisition of additional assets and information from the public too. There are likely community members with valuable information but, without knowing what the GPVA has collected, they are unaware that they have something to contribute.
- Without being able to keep on top of cataloguing, the GPVA risks loss due to dissociation. Dissociation is the loss of objects, their related data, or the ability to associate objects with data. When historical objects are not documented and tracked effectively, they become disconnected from their own history. Through dissociation objects lose their ties to the past and thus their historical meaning. The Canadian Conservation Institute recognizes dissociation as one of the primary threats to historical objects, which they call the agents of deterioration.

Why the GPVA should digitize its Collections

There are several reasons why the GPVA should invest in digitizing its Collections.

1. Avoiding the risks stated above.
2. The act of digitizing gives the GPVA a chance to catalogue objects and make record of their condition—the larger the lag between acquisition and digitization the greater the odds that some key information about the object is lost.
3. There are other community groups in Georgina who offer similar services and have expressed interest in pooling resources on this effort (see groups included in [Scope of Services](#)).
4. Strong public survey results demonstrate the community's interest in accessing the GPVA's assets digitally.

The subsequent sections of this report comprise the GPVA's Digitization Strategy.

Digitization Options

There are three options for the GPVA to choose for digitizing its assets. Each have pros / cons, an estimated timeline and cost implications are summarized in the table below.

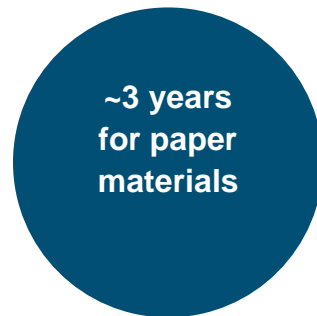
	1. Status Quo	2. Full Digitization of Collection using a third party	3. Hybrid Approach using a third party to digitize a portion of the Collection
Description	The GPVA continues its best efforts to digitize.	Hire a third-party to digitize all of the GPVA's materials.	Hire a third-party to digitize the GPVA's paper/painting materials only. GPVA digitizes physical objects with internal resources.
Pros	<ul style="list-style-type: none"> Requires no additional investment. 	<ul style="list-style-type: none"> Mitigates the risk of Collection loss. Public is able to access a significant amount of historical objects / information. Consistent approach to digitization. 	In addition to Option 2: <ul style="list-style-type: none"> Paper archival materials are valuable, yet fragile so digitizing them quickly is critical. It will be easier to find a vendor who specializes in digitizing paper.
Cons	<ul style="list-style-type: none"> A prolonged timeline increases the likelihood of damage to the Collection. Missed opportunity to share the value of the Collection with the public. 	<ul style="list-style-type: none"> More expensive than the other options. 	<ul style="list-style-type: none"> Same as Option 1 but to a lesser extent.
Digitization Cost Estimate	\$0	\$157,248	\$30,427
Estimate of GPVA Effort	6,933 hours or 533 hours / year	1,560 hours or 520 hours / year	5,356 hours or 487 hours / year
Estimated Duration	13 years	3 years	11 years

This strategy is predicated on Options 2 or 3 (recommended).

The following pages provide more details for each option. [Appendix D](#) includes details of our assumptions.



Option One: Status Quo

Description:



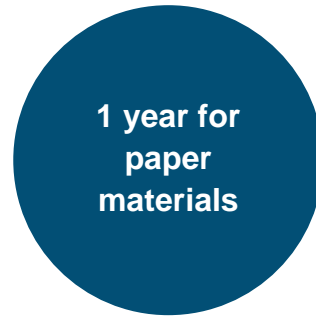
The first option is to continue with the status quo. In this option the GPVA will digitize its assets with in-house capabilities only and continue with its current pace. There may be some minor investments in equipment, however completing the digitization work will be left to the Heritage Coordinator with the help of summer students.

This option would take the GPVA ten years to digitize its physical objects and nearly three years to digitize its paper materials, for a total of thirteen years. Given capacity constraints, the two asset categories cannot be digitized concurrently. The graph in this part of the [current state section of the report](#) summarizes this option. See [Appendix C, Option One](#) for a graphical representation of the pace to digitize.

<p style="text-align: center;">Pros</p> 	<p style="text-align: center;">Cons</p> 
<ul style="list-style-type: none"> • Requires no additional investment. 	<ul style="list-style-type: none"> • A prolonged digitization period increases the risk of damage or loss of the collection. • Missed opportunities to provide historical value to the public as it will take a significant amount of time to digitize. • The Heritage Coordinator has other duties that may extend the timeline. • A thirteen year timeline is risky—key staff carrying out the work may leave the organization over such a long period. • Data about the Collections is currently stored across multiple systems. Given this, it will be challenging to reach a mature level of digitization with internal resources only.



Option Two: Full Vendor Support

Description:



The second option is to hire a third-party to digitize the entirety of the GPVA's collection.

We assume this option would take roughly three years in total to digitize GPVA's entire Collection. See [Appendix C, Option Two](#) for a graphical representation of the pace to digitize.

Pros 	Cons 
<ul style="list-style-type: none">• The GPVA will be able to digitize its assets against a specified timeline. This will be the quickest way to digitize the bulk of the GPVA's collection.• Having all materials digitized by one service provider will help the GPVA maintain quality standards.• A quick digitization timeline reduces the risk of loss or damage to the collection.	<ul style="list-style-type: none">• More expensive than the status quo or hybrid options.



Option Three: Hybrid Method

Description:



The third option is to hire a third-party to digitize a portion of the GPVA’s collection. Based on our research of digitization, it is much easier to find a vendor who specializes in digitizing paper materials than one who focuses on physical objects. This is in part because the digitization process of physical objects is more complex and involves 3D scanning of objects. In this option, the vendor would digitize the GPVA’s paper materials, paintings and pictures. As a second phase to digitization GPVA would take on the work to digitize its physical objects itself.

In this option, there would be initial work with the vendor (see Initiatives [3](#), [4](#) and [5](#)), but once that work was completed it would take the vendor up to 12 months to digitize the GPVA’s paper materials. See [Appendix C, Option Three](#) for a graphical representation of the pace to digitize.

Pros 	Cons 
<ul style="list-style-type: none">• Paper archival materials are a valuable digital resource for researchers. Making these assets digitally accessible quickly can boost engagement.• Paper archival materials are fragile, capturing them digitally helps preserve their contents.• There are vendors who specialize in digitizing paper records. Getting one vendor to digitize all asset types will likely prove challenging. The hybrid approach avoids this.	<ul style="list-style-type: none">• The hybrid approach will require a substantial level of involvement from the GPVA in both managing a vendor and in carrying out digitization work directly.

Summary of Initiatives

The following pages provide a summary of the eight initiatives and their benefits.

Initiative	Brief Description	Benefits	Owner
1. Accessing Funding	Search for funding to assist with digitizing GPVA assets.	Funds the strategy – reducing risk to the collection and improving accessibility to the public.	GPVA and potential stakeholder partners
2. Go to Market – Digital Services	Create an RFP to select a partner to help digitize your assets.	A third-party vendor will provide the GPVA with additional resources to digitize within a more feasible and efficient timeline.	GPVA and Georgina Procurement
3. Define Level of Digitization by Asset Type	Work with the vendor to define an achievable level of digitization by asset type.	Standardizes GPVA’s approach to digitization.	GPVA supported by Vendor
4. Deaccession Materials	Determine which materials GPVA should deaccession.	Streamlines the GPVA's digitization efforts.	GPVA supported by Vendor
5. Centralize Asset Information	Centralize asset information into PastPerfect.	Enhances accessibility and efficiency in managing GPVA's collections.	GPVA and Vendor
6. Enhance Physical Storage of Assets	Look for alternative space or enhancements to existing space to reduce the risk of harm to assets.	Improved storage maximizes the preservation and accessibility of GPVA's assets.	GPVA and Georgina’s facility management staff
7. Develop and Implement a Marketing Campaign	Create a campaign to “show off” assets and new level of digitization. Consider loaning assets to other institutions.	Elevates GPVA's visibility, attracting wider audiences to explore and engage with its digitized assets.	GPVA and Georgina’s Marketing Coordinator
8. Optimize Digitization Practices	Optimize digitization practices, including regular review of policies / procedures, and the accuracy of asset data.	Preserves GPVA's collection.	GPVA

In addition to the above, GPVA should consider the following project:

Initiative	Brief Description	Benefits	Owner
9. Assess Archaeological Artifacts	Determine use and level of digitization of the recently acquired archaeological artifacts.	These artifacts may hold extensive historical significance.	GPVA

Implementation Roadmap

This roadmap is a high-level indicative timeline of the initiatives outlined in this strategic plan. It is based on an initial analysis of priority, dependencies, and resource requirements. Following the acceptance of this strategy and roadmap the Town should further validate the timeframes and develop detailed capital budget plans.

Initiatives	Y1	Y2	Y3	Y4	Y5	Y6+
1. Access Funding						
2. Go to Market – Digital Services*						
3. Define Level of Digitization by Asset Type						
4. Centralize Asset Information						
5. Deaccession Materials						
6. Enhance Physical Storage of Assets						
7. Develop and Implement a Marketing Campaign						
8. Optimize Digitation Practices						
9. (optional) Assess Archaeological Artifacts						

*For initiative #2, the green represents the years of active involvement with a professional digitization service provider. After the vendor is done with their scope of work, the GPVA will continue to digitize its physical objects with in-house resources—this work is represented by the yellow boxes.

Note: The \$30,427 investment specified in Scenario Three is for Initiatives #2 - #5. Initiative #6 will likely have additional expenses that are highly dependent on changes to facilities. Initiatives #7 through #9 assume no costs and use the Town / GPVA’s resources.

Initiatives




1. Access Funding


Current Situation

The GPVA will likely require more funding to digitize its assets. This requirement is likely also shared by other similar organizations (e.g. Town clerk, Georgina Military Museum and the Georgina Library).

Description of Initiative

The objective of this initiative is to secure additional funding for the GPVA's effort to digitize its Collections.

<p>Consult Partner Organizations</p> 	<ul style="list-style-type: none"> • First, the GPVA should reach out to local groups that would be interested in partnering on this initiative. With a broader set of stakeholders, the project may qualify for more grant opportunities than it would otherwise. • It is important at this stage to share adequate information with the local partner groups to ensure they understand the scope of the project and the associated timeline. • It is possible that in order to partner with some of these groups, the GPVA will have to make adjustments to the scope of this project. This depends on the needs and interests of the other group(s). • Whether the GPVA partners with any other stakeholder group should be based on what path will best suit the GPVA's needs.
<p>Research Available Grants</p> 	<ul style="list-style-type: none"> • After deciding if the GPVA is partnering with other groups, the Museum should research available grants that support heritage, cultural and digitization projects in Ontario. Some notable sources of grants include: <ul style="list-style-type: none"> ○ Ontario Arts Council (OAC) ○ Ontario Trillium Foundation (OTF) ○ Canadian Heritage ○ Museums Assistance Program (MAP) ○ Municipal / regional funding opportunities • For example, the Digital Access to Heritage initiative is a component of the federal government's Museums Assistance Program. It provides funding to heritage organizations looking to digitize their collections. • The GPVA should also contact the Town's Grant Specialist to assist in targeting any grants they may be aware of.
<p>Understand Eligibility Criteria</p> 	<ul style="list-style-type: none"> • After having selected several grant programs to pursue, the GPVA should do further research to understand the criteria of these programs and ensure its eligibility. • One issue worth exploring is whether different grant programs permit joint bids from multiple organizations. The Museum should coordinate with its partner organizations.

	<ul style="list-style-type: none"> • Consider contacting the organizations the GPVA is applying to for grant funding. They can help clarify any doubts or provide guidance on the process. These types of pre-application consultations can increase the Museum's odds of securing funding.
<p>Prepare and Submit Applications</p> 	<ul style="list-style-type: none"> • Finally, the GPVA should prepare its grant submission in accordance with all relevant submission guidelines.

Benefits

- Reaching out to local stakeholder groups can help the GPVA form beneficial partnerships. For instance, representatives from the Georgina Library expressed interest in working with the GPVA and believed there was merit to collaborating on this effort.
- Grant funding would allow the GPVA to go to market for a third-party vendor to come in and help digitize the Collections. Without this help, the GPVA faces a significant resource gap (e.g., labour available to complete the necessary processing work).

Key Assumptions

- Any stakeholder partnerships the GPVA establishes will not significantly impact the scope of the GPVA's digitization work.
- Georgina's Grant Specialist has capacity to take on this grant writing work.

Dependencies

- No dependencies, however, other initiatives are dependent on securing grant funding.



2. Go to Market – Digital Services



Current Situation

Realistically, the GPVA will need additional resources to help in its digitization effort. In the current state section of this report, we showed that to digitize the GPVA’s Collections would take 13 years. This assumes that the Heritage Coordinator can devote 25% of their time to this work and over the digitization period, the GPVA accepts no new materials.

Description of Initiative

This initiative focuses on procuring the services of a vendor who can help digitize the GPVA’s Collections. It lays out a formal procurement process with suggestions on how to approach a joint bid with potential stakeholder partners.

<p>Document Requirements</p> 	<ul style="list-style-type: none"> • The first step will be to document the GPVA’s requirements. Vendors will want to have a strong understanding of the scope of the project including: <ul style="list-style-type: none"> ○ Regulatory requirements; ○ Technical requirements (e.g., scan resolution, file formatting, colour accuracy); ○ Project timeline; ○ Metadata and cataloguing standards; ○ Any handling requirements for delicate objects. • If the GPVA chooses to partner with any stakeholder groups, they will need to be consulted at this point on what standards their own work requires. The GPVA and any partner organizations will need to ensure they agree on project timelines and requirements—otherwise partnering to procure this service will be challenging. • The GPVA and partner groups should consider creating a Scope of Work that documents what requirements are shared across all of them and what are unique (e.g., not applicable to all groups). This Scope of Work can be presented in phases with individual work streams for each group. <ul style="list-style-type: none"> ○ For example, in phase 1 of the project, an important activity may be vendor support selecting what to deaccession. This deaccessioning work would likely be required by all groups. However, a later phase might involve processing digitized material in PastPerfect—this work will likely be unique to the GPVA. • The GPVA and its partner groups should create detailed and weighted evaluation criteria derivative of the Scope of Work.
<p>Create RFP and Go to Market</p> 	<ul style="list-style-type: none"> • Next, the GPVA should create the RFP in accordance with the Town’s procurement practices. Key items the GPVA should consider include the following: <ul style="list-style-type: none"> ○ The detailed Scope of Work created in step 1. This should also include project milestones and specific deliverables;

	<ul style="list-style-type: none"> ○ Weighted evaluation criteria, also created in Step 1: Document Requirements—this may include for example experience, cost, references, demonstrated technical ability; ○ Details on the vendor evaluation process (e.g., specify the deadline for vendor questions).
<p>Evaluate Vendors</p> 	<ul style="list-style-type: none"> ● Next, the GPVA and its partner stakeholders should establish an Evaluation Committee comprised of representatives with deep knowledge of the materials to be digitized. ● Evaluators should evaluate vendor proposals based on the evaluation criteria. If there are substantial differences in scoring across partner groups, then the GPVA will need to work to harmonize across the Evaluation Committee.
<p>Begin Digitization</p> 	<ul style="list-style-type: none"> ● Complete reference checks with the highest scoring vendor and then begin the digitization work.

Benefits

- The Current State section of the report established that the GPVA has identified a need to digitize its Collection but does not have the in-house resources to do so against a realistic timeline. By contracting with a third-party vendor, the GPVA will be able to effectively move forward with digitization.

Key Assumptions

- The GPVA has the resources required to manage the procurement process and then coordinate with the winning vendor.
- In-house staff will be actively involved in the digitization work itself. This will include both the Heritage Coordinator and any seasonal staff the GPVA employs for the duration of the project.
- The grant funding the GPVA and its partners secure will be sufficient to carry out this work.

Dependencies

- Initiative #1 is a key dependency. Without grant funding the GPVA may not be able to digitize its Collections with the help of a third-party.



3. Define Level of Digitization by Asset Type

Current Situation

The GPVA will need to work with the chosen vendor to set a defined level of digitization for its collection. This strategy provides initial definitions of [three distinct levels of digitization](#).

Description of Initiative

The objective of this initiative is to establish clear digitization targets for the types of assets in the GPVA's collection.

<p>Current Assessment</p> 	<ul style="list-style-type: none"> • First, the GPVA should work with the vendor to categorize the different asset types within its collections, considering factors such as format, material and size. There are several asset types presented in this report. The GPVA may adapt these with flexibility. • The GPVA and the vendor should set criteria defining various levels of digitization. The report introduces Level 1, Level 2 and Level 3 for digitization, which the GPVA may utilize and customize as necessary.
<p>Define Targets</p> 	<ul style="list-style-type: none"> • Based on the assessment, the GPVA and the vendor should work together to establish digitization targets for each asset type. The goal is to define which level is both achievable and desired for each type. • The GPVA and the vendor should document the defined targets for each asset type together, outlining the specific criteria, metadata and quality standards for achieving each level. • Conclude by seeking formal approval from key stakeholders within the Town. This step is to ensure alignment and commitment to the set targets. • The GPVA should periodically evaluate the progress of digitization against the defined targets. See Initiative #8 for further details.

Benefits

- Defining digitization targets by asset type provides clarity and ensures a consistent approach throughout the digitization project. It enables all involved parties to understand what they need to achieve for each asset type.

Key Assumptions

- The selected vendor possesses the required expertise and capabilities to work collaboratively with the GPVA in defining and achieving the digitization targets.
- The digitization process will adhere to copyright laws and privacy regulations, especially concerning items like books and content with individuals' personal information.

Dependencies

- Initiative #2 is a key dependency. This initiative is dependent on securing a vendor to assist with digitization.

4. Deaccession Materials



Current Situation

The GPVA possesses a significant amount of material that requires attention regarding its status within the GPVA's collection. Material that the GPVA should deaccession fall into two categories:

- **Disposable Materials:** This category includes materials that are no longer of any value or use to the GPVA. These are incomplete, irrelevant, duplicates, or damaged beyond repair.
- **Lack of Information:** The GPVA also holds a subset of materials for which there is a lack of sufficient information. This lack of data makes it challenging to determine their relevance, usage or potential value as historical items.

Description of Initiative

This initiative focuses on the removal of items that no longer serve a purpose within the GPVA's collection. The primary objective is to deaccession materials that are no longer needed, either due to their poor condition or a lack of relevant information.

<p>Assessment and Categorization</p> 	<ul style="list-style-type: none"> • Working with the vendor, develop criteria for deaccessioning and the process by which to conduct deaccession that is in-line with common practices. • Conduct an inventory of all materials under the GPVA's ownership. During this process, categorize materials into three primary categories: <ul style="list-style-type: none"> ○ Keep in collection ○ Deaccession—lacking sufficient information ○ Deaccession—poor condition • For the assets for which the Museum lacks sufficient information, the GPVA should consider seeking out additional information about them prior to committing to deaccessioning. • Note that the deaccession process requires approval from the Board of the Georgina Historical Society. Once this categorization work is complete, consult with the board for formal approval.
<p>Disposal of Materials</p> 	<ul style="list-style-type: none"> • Dispose of all items labelled for deaccession. • Ensure environmentally responsible disposal methods for removed materials. Ideally, assets are donated to other institutions or sold through auction, based on collection standards,

Benefits

- This initiative will streamline the GPVA's collection by removing unneeded or obsolete materials. This optimization will result in a more focused, relevant and manageable collection, aligning with the GPVA's mission and objectives.

Key Assumptions

- The initiative assumes that materials categorized for removal are genuinely no longer needed or serve a meaningful purpose within the GPVA.

Dependencies

- This initiative has no critical dependency. However, it is recommended it be performed after initiative #2, having secured a vendor for the digitization work.



5. Centralize Asset Information

Current Situation

The GPVA manages its asset information across two distinct database systems, namely FileMaker Pro and the more recent PastPerfect. While some assets and their associated metadata have found a place within these databases, neither system provides a complete overview of the GPVA's extensive collection. For example, the GPVA's current artifact collection has been migrated into PastPerfect, but there are archival records captured in FileMaker Pro that will need to be moved over.

Description of Initiative

This initiative aims to streamline the GPVA's asset information management by centralizing its databases into a single system. The goal is to improve efficiency and accessibility in managing the GPVA's collections.

<p>Evaluate and Plan</p> 	<ul style="list-style-type: none">• With the assistance of the vendor, the GPVA should ensure that PastPerfect is well-suited to capture the desired level of digitization required to achieve its goals.• Develop the data migration plan with the vendor. The GPVA will ensure the plan covers technical aspects and resource requirements effectively for a successful migration.• The GPVA should consider how data migration to PastPerfect will differ based on the source of the data being transferred. For instance, there may be a way to export data from FileMaker Pro for transfer into PastPerfect. However, for paper records, manual effort will likely be required to enter data directly.
<p>Implementation and Quality Assurance</p> 	<ul style="list-style-type: none">• With the vendor's support, begin data migration. Given the disparate nature of the GPVA's asset data, there will likely be a meaningful amount of labour required to complete the migration into PastPerfect.• Collaborate with the vendor during data validation to promptly identify discrepancies and errors. Standard quality assurance activities include:<ul style="list-style-type: none">○ Verify the integrity of the migrated data to ensure there are no data corruption issues;○ Check the data for consistency to ensure that it aligns with the original source data;○ Ensure that all metadata associated with the digitized assets is accurate.

Benefits

- The initiative will enhance data quality and consistency, reducing errors and discrepancies. A centralized system simplifies asset management and facilitates easier tracking and retrieval.
- The centralized system will make asset information more accessible, benefiting both the GPVA staff and external users.

Key Assumptions

- Past Perfect is a suitable system for GPVA as it meets the criteria for accommodating the GPVA's collection size while delivering efficient performance.
- The vendor possesses the required expertise to guide GPVA throughout the initiative.

Dependencies

- [Initiative #4](#) is a key dependency. This initiative is dependent on deaccessioning of unnecessary materials to prevent their inclusion in the centralized system.


6. Enhance Physical Storage of Assets




Current Situation

The GPVA currently faces challenges with the storing of its collections. The main office / archives room and the Noble House serve as primary storage locations, each with unique strengths and vulnerabilities – [See current state](#).

Description of Initiative

Assess the GPVA's current facilities and identify appropriate next steps based on present funding and space constraints. The GPVA should consider both upgrades to its current facilities and the potential to move into a new centralized facility depending on availability.

<p>Facility Assessment</p> 	<ul style="list-style-type: none">• The GPVA should work with the Town's facility management staff to assess the main office / archives room and the Noble House. The purpose is to evaluate the structural integrity, environmental controls and security measures of these facilities.• Prioritize the identified risks (see Current State section - roof leaks, flooding, fire and general climate instability are potential risks) and their potential impact on the collection.• Explore storage layouts to maximize space utilization. This step aims to enhance the efficiency of storage space while considering the results of the facility assessment.• Conclude this phase by assessing the availability of essential resources, including budget, personnel and materials required for facility improvements. Depending on the outcome of the assessment, the GPVA may need to house its assets in a new space entirely.
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<p>Explore New Facilities</p> 	<ul style="list-style-type: none"> • The GPVA should work with the Town’s facility management to determine options for moving the collection to a more fit-for-purpose space (mitigating the aforementioned risks). • Next, establish clear prioritization criteria for these potential spaces. Considering factors like proximity to the GPVA, adequacy of size to accommodate the growing collection and adaptability to meet storage requirements. • If repurposing or adapting existing structures does not meet the GPVA’s storage needs, consider alternative solutions. These include renting nearby storage locations or commissioning the construction of additional facilities. • Conclude by developing a detailed budget that aligns with the chosen storage option. Additionally, identify potential funding sources to support the selected approach.
<p>Upgrade Existing Facilities</p> 	<ul style="list-style-type: none"> • Working with the Town’s facility management to identify the necessary modifications required for enhancing storage conditions and security. Ensure that these upgrades prioritize addressing the most critical risks and vulnerabilities, as identified in the assessment findings.
<p>Relocation and Accessibility</p> 	<ul style="list-style-type: none"> • Determine which items in the collection, if any, require relocation. Consider the storage layouts identified during the facility assessment phase to optimize the storage configuration. • There are two key considerations to be made before relocating any objects. The first is that the GPVA’s assets should be centralized to the greatest extent possible. The second consideration is for accessibility, the GPVA can consult with the Georgina Accessibility Advisory Committee to ensure any new locations used for public access are sufficiently accessible.

Benefits

- The initiative will lead to improved collection safety, reducing risks such as flooding and fire, which will safeguard the GPVA’s valuable collections.
- By considering public accessibility and display aspects, the GPVA can make its collections more accessible and engaging to the public, furthering its educational and cultural mission.

Key Assumptions

- The success of this initiative depends on the availability of adequate budgetary resources to support facility upgrades or the construction/acquisition of new storage spaces.

Dependencies

- This initiative does not have any critical dependencies. Nevertheless, it is advisable to execute it following [Initiative #5](#). Centralizing asset data reduces the risk of losing items during transfer, enhancing the efficiency of this endeavor.



7. Develop and Implement Marketing Campaign



Current Situation

The community survey conducted in the Summer of 2023 found that the majority of respondents would be more likely to access the GPVA's collections if they were available digitally. Respondents ranked remote access as the most important way in which digital records would enhance their ability to engage with local history. After digitizing the bulk of its collection, the GPVA will have an opportunity to market its efforts and drive community engagement. The GPVA should consider how to market to a broader audience given the broadened access digitization facilitates.

Description of Initiative

This initiative is aimed at creating a marketing strategy to promote the digitized collection. First, the GPVA should define the goals of the campaign and consider how to measure their success. The rest of the initiative is focused on executing the campaign. Generally, the marketing campaign should be focused on increasing the GPVA's online presence, supporting research and collaboration, and educating future generations about Georgina's history.

<p>Define Objectives and Audience</p> 	<ul style="list-style-type: none"> • Begin by defining the primary campaign objectives, such as increasing website traffic, promoting digitized materials or enhancing visitor engagement. The GPVA should collaborate with the Town's Marketing Coordinator to ensure that these objectives align with the Town's broader community outreach goals. • The GPVA should work with the Marketing Coordinator to conduct audience research. The GPVA should create detailed audience personas to tailor campaign content to specific groups. Utilize existing data on the GPVA's audience, such as website visitors, social media followers and newsletter subscribers, to inform this research. • Collaboratively, develop KPIs that will be used to measure the success of each objective.
<p>Create Marketing Plan</p> 	<ul style="list-style-type: none"> • The GPVA in collaboration with the Town's Marketing Coordinator, should develop a detailed marketing plan. This plan should outline the campaign's strategies, tactics and a timeline with defined milestones and deadlines. • A crucial component of this planning phase is budget allocation. Ensure that there is a clear understanding of how funds will be distributed for each aspect of the campaign.

<p>Develop and Share Content</p> 	<ul style="list-style-type: none"> • The GPVA should create visually appealing content by incorporating digitized content, high-quality images, videos and infographics. The content should be educational, entertaining and relevant to the target audience. • Create a content calendar to schedule content releases during the campaign. • Showcase the content across the GPVA's website, social media channels and other relevant platforms.
<p>Execute and Monitor</p> 	<ul style="list-style-type: none"> • The GPVA should implement analytics tools to track campaign performance, focusing on website traffic, social media engagement and other relevant metrics. • The GPVA should follow the campaign's timeline while adhering to the content calendar. • Continue content promotion through various mediums, such as blog posts, video channels and social media profiles. • The GPVA should respond to comments, questions and feedback promptly to create a sense of community around the digitized materials.

Benefits

- Increased interest in the GPVA’s materials fosters a sense of community and draws visitors to Georgina’s history.
- Increased visibility strengthens the GPVA’s position as a valuable resource in the community.

Key Assumptions

- The website and digital platforms will remain accessible and functional for the duration of the campaign, ensuring that users can explore the digitized materials without technical issues.
- Increased marketing efforts will result in increased audience engagement and interaction with the digitized materials.
- The Heritage Coordinator and Marketing Coordinator will have capacity to deliver this marketing campaign.

Dependencies

- This initiative depends on the successful completion of [Initiative #5](#), which is the centralization of asset information. The dependency is based on the premise that materials must be digitized before they can be effectively marketed. Therefore, the GPVA should prioritize digitization as a precursor to implementing the marketing campaign.




8. Optimize Digitization Practices

Current Situation

After the GPVA has implemented its digitization practices, it's essential to conduct a review to assess progress and identify areas where further optimization is needed. This initiative acknowledges that procedures, policies, and the overall digitization process require regular review to ensure efficiency and maintain data accuracy.

Description of Initiative

The purpose of this initiative is to enhance and optimize the GPVA's existing digitization practices.

<p>Update Policies and Procedures</p> 	<ul style="list-style-type: none"> • The GPVA should identify areas of the digitization process it can make more efficient (e.g., equipment is faulty and needs repair or process should be revised based on learnings). From there, draft revised policies and procedures that align with the GPVA's specific requirements and industry practices. • Ensure transparent documentation and effective communication of updated policies and procedures to all pertinent stakeholders.
<p>Assess Data Accuracy</p> 	<ul style="list-style-type: none"> • Establish a systematic approach to validate data regularly. When inaccuracies are detected, create a process for prompt correction and the prevention of future errors. • Carry out routine spot-checks on digitized items, ensuring ongoing data accuracy.
<p>Enable Loan Services (Optional)</p> 	<ul style="list-style-type: none"> • Explore the viability of loaning digitized collection items to other museums and historical groups. • Define loan terms, encompassing fees, insurance requirements and legal agreements. The GPVA will need to ensure any loan agreements are highly formalized and that partner organizations adhere to the appropriate preservation standards. • Track the availability and condition of loan items.

Benefits

- Enhanced data accuracy and quality.
- Improved efficiency in digitization procedures.
- Alignment with industry best practices.

Key Assumptions

- Adequate resources and budget are available for system upgrades and reviews.

Dependencies

There is a critical dependency on [Initiative #5](#). An optimization of the digitization process can only be completed post centralization of the collection's asset information.

Appendices

Appendix A – Asset Attributes

A1. Attribute Descriptions

Attribute	Description
1. Material / Medium / Format	Description of the primary material used in the artifact.
2. Dimensions	Size measurements of the artifact (e.g., height, width, depth).
3. Purpose / Function	Intended use or function of the artifact.
4. Access / Display Requirements	Special considerations or requirements for accessing, displaying, or handling the artifact.
5. Digitization Requirements	Specific technological details or requirements associated with digitizing the artifact (e.g., playback equipment for media, scanner for print materials).

A2. Attributes

Asset Type	Attributes
Paper (articles, diaries, books, newspapers)	<ol style="list-style-type: none">1. Paper, e.g., cardstock, parchment, newsprint. Bound books, loose paper, binders.2. Dimensions vary but less than 5lbs.3. Written communication, personal / community records, documentation, reading materials, education.4. Protective sleeves, stable humidity, temperature and light levels.5. High-resolution scanner for text documents, document management system.
Video / Audio Physical Media	<ol style="list-style-type: none">1. Analog tape, optical disc, digital file.2. Varies based on format (e.g., VHS tape, DVD, digital file).3. Entertainment, education, archival record.4. Compatible playback equipment, proper storage to prevent degradation.5. Video digitization equipment, audio interface for capturing analog sound.
Small Physical Objects	<ol style="list-style-type: none">1. Lots of variety: wood, metal, plastic, ceramic, textile.2. Variation but generally under 40lbs.3. Decorative, symbolic, functional (tools such as kitchen appliances, industrial equipment).4. Secure display case(s) for physical objects, 3D scans for digital access.5. 3D scanning equipment, digital photography.

Asset Type	Attributes
Large Physical Objects	<ol style="list-style-type: none"> 1. Lots of variety: wood, metal, plastic, ceramic. 2. Large objects that cannot be handled by a single individual (e.g., vehicles, large farming equipment). 3. Similar to small objects, decorative, symbolic, functional. Objects are more likely to be utilitarian in nature. 4. Photos for digital access, for physical access considerations should be made for installation / spatial requirements and the fragility of the object. 5. High-resolution digital photography.
Paintings / Pictures	<ol style="list-style-type: none"> 1. Canvas, paper, wood, prints, various types of paint (oil, acrylic etc.). 2. Varies based on size of artwork, generally portable. 3. Visual representation, artistic expression, record-keeping. 4. Proper lighting conditions, stable temperature and humidity levels. 5. High-resolution scanner, colour calibration tools/software.

Appendix B – Asset Categorization

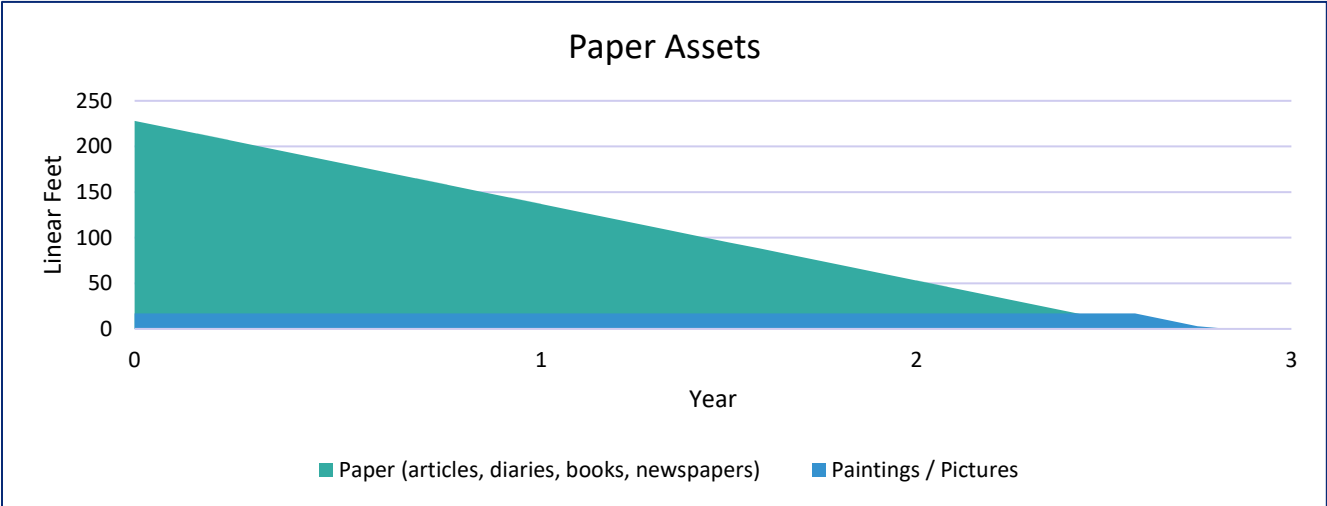
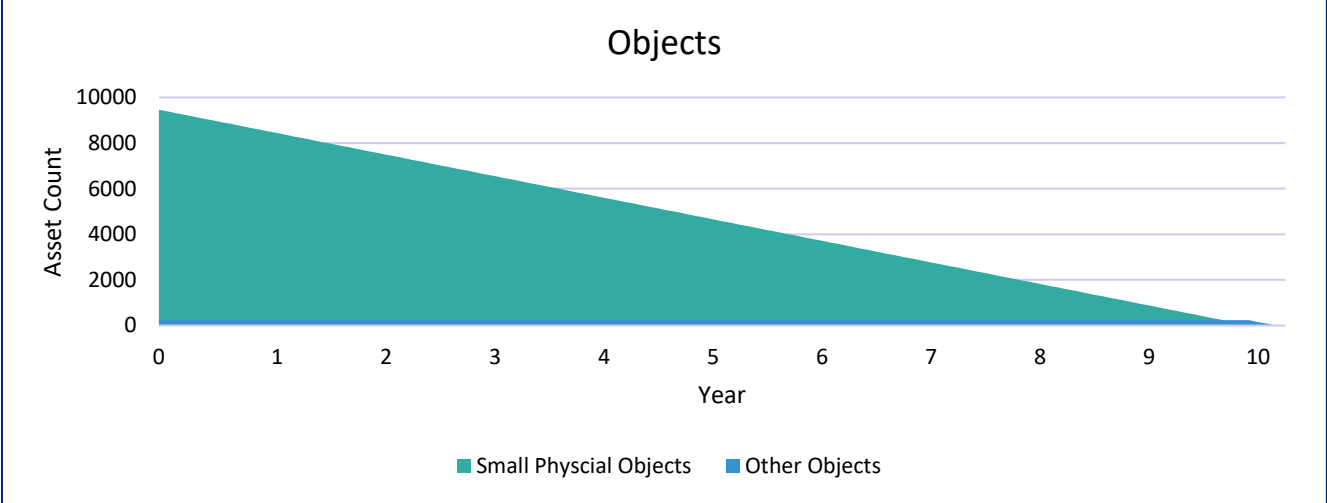
Asset Type	Collection type	Estimated Count	Total Objects	Total Linear Feet
Paper	Maps/Plans/Oversize documents	150	150	
	Library/archival materials	235 linear feet [estimates for pages/foot range from 52-1800]		235 linear feet
Paintings / Pictures	Paintings (panel/canvas)	17 linear feet		17 linear feet
	Photographic materials			
	Watercolours/ drawings /prints			
Video / Audio Physical Media	Film/sound recordings	30	30	
Small Objects	Arms and armor/weapons	5	9,585	
	Ceramics and glass	1000		
	Ethnography	50		
	Furniture/wood artifacts/wood sculpture	1500		
	Historic Objects	2000		
	Metalwork	2000		
	Musical Instruments	10		
	Science/technology/medicine	2000		
	Stone artifacts and sculpture	20		
	Textiles and costume	1000		
Large Physical Objects	Industrial machinery	0	5	
	Transportation vehicles	5		
Total Collection			9,770 objects	252 linear feet

Appendix C – Option Details

This appendix provides further details on the pace of digitization for each option.

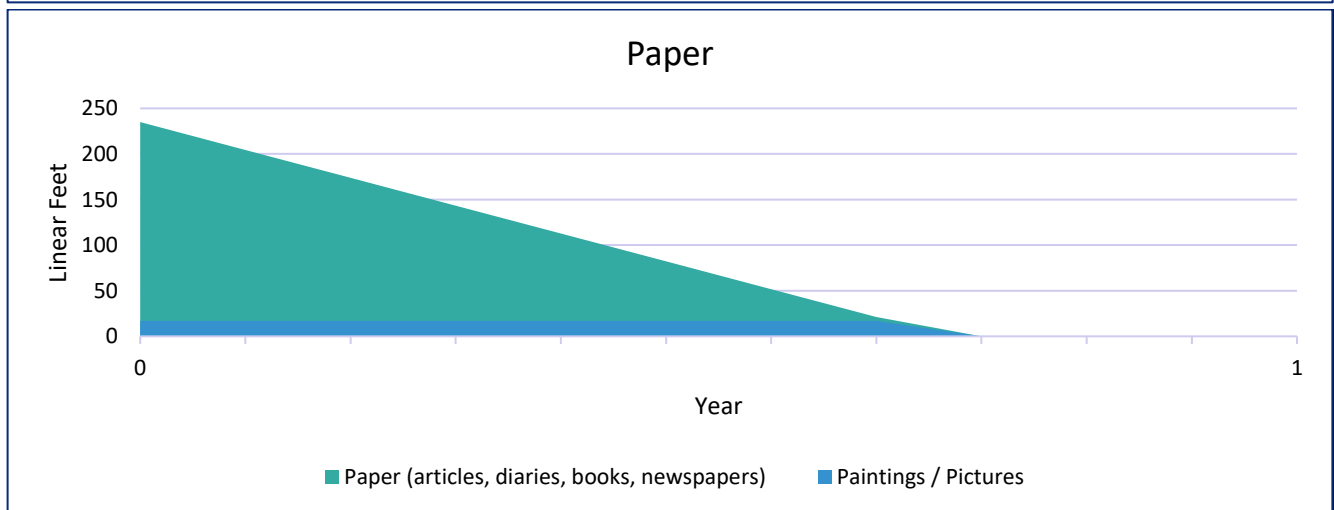
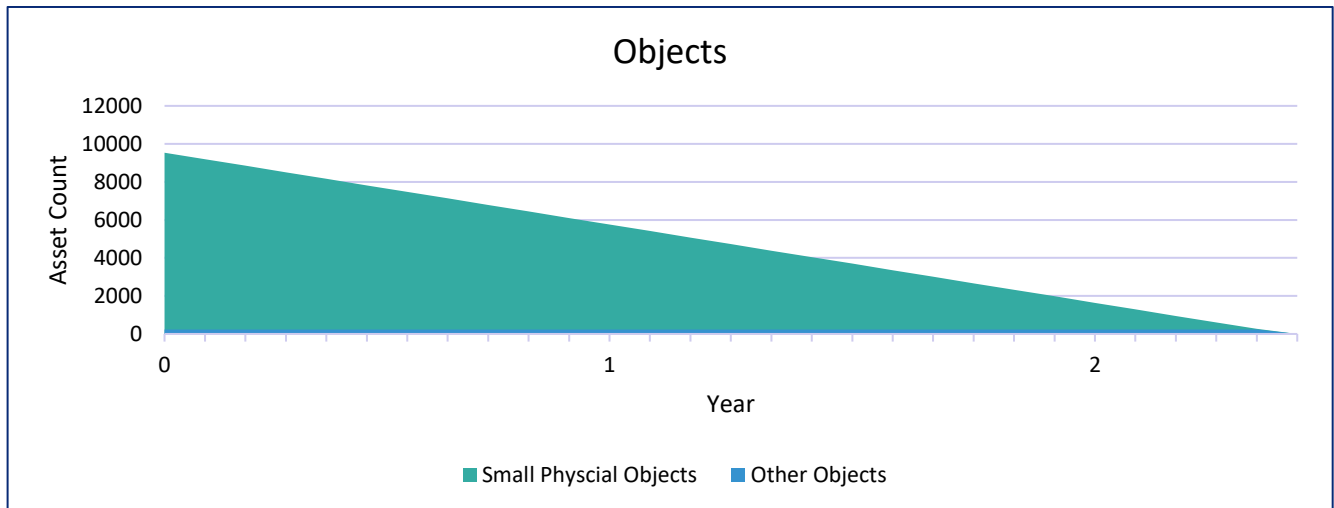
Option One: Status Quo

No investment in third-party services leads to the prolonged timeline shown here.



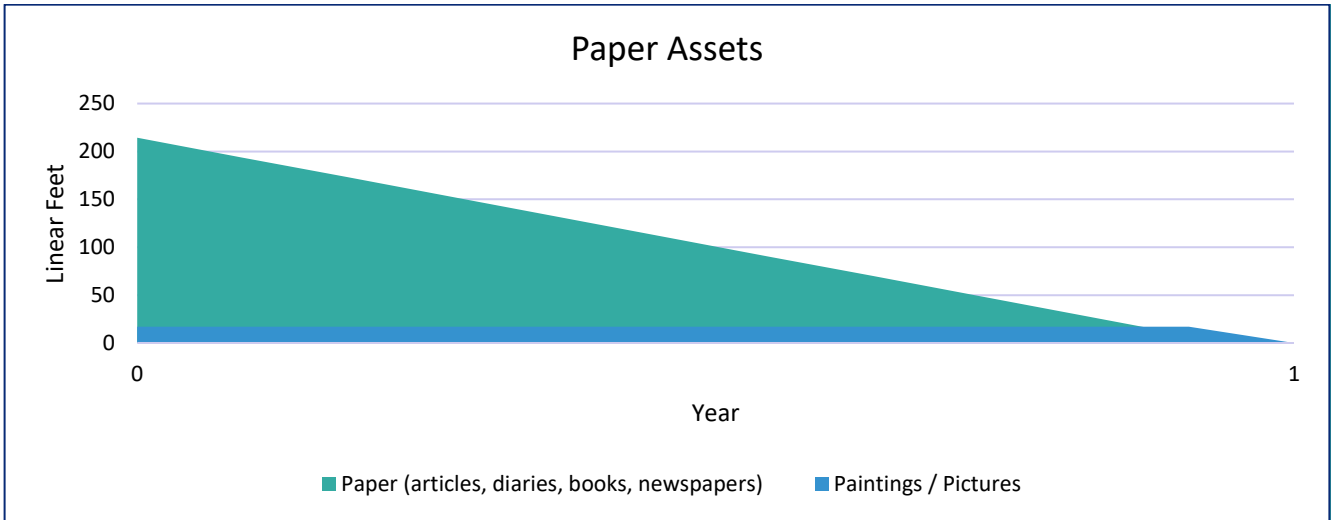
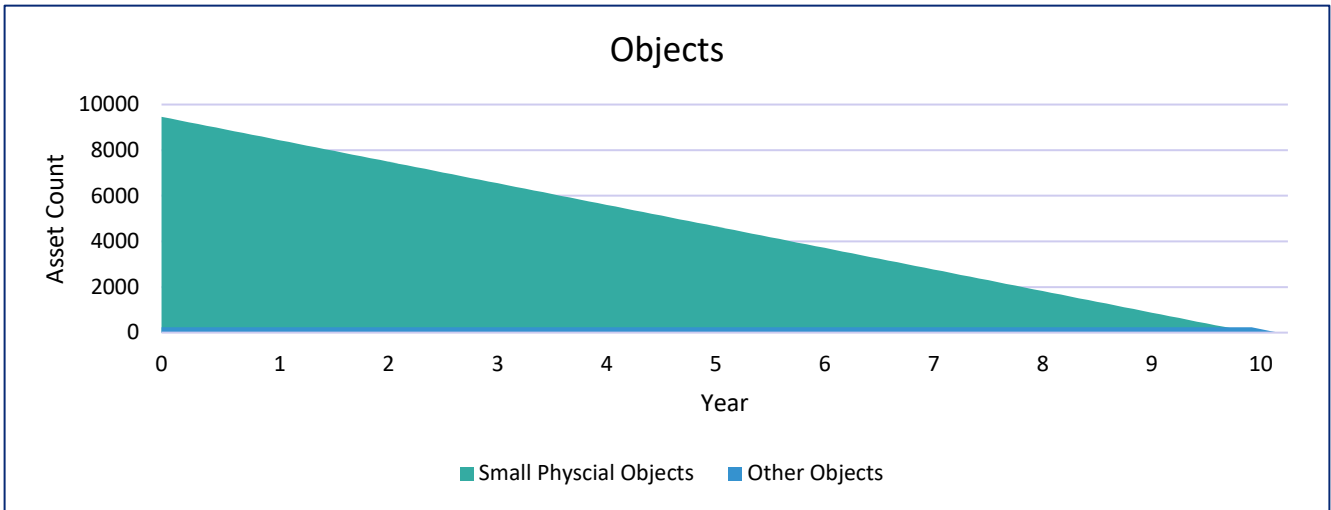
Option Two: Full Vendor Support

Option Two targets a three-year timeline for all of the GPVA's collection. We estimate a total cost of \$157,000 for this timeline.



Option Three: Hybrid Method

This method involves procuring a third-party service, but only for the digitization of the GPVA's paper assets.



Appendix D – Assumptions

Below we provide the assumptions for calculating the digitization options.

#	Description
#1	21 workdays per month with an 8-hour workday.
#2	One person can digitize 15 objects per day. This is the pace used in the model for all physical objects.
#3	One person can digitize 1.33 linear feet of paper materials in one day. This is the paced used in the model for all paper materials.
#4	The pace of digitization is based on the estimate of time it will take to digitize assets to Level Two. See Levels of Digitization for a full description.
#5	The number of objects in GPVA's possession does not change. No new materials will be digitized, and no materials will be deaccessioned.*
#6	A third-party digitization service will charge \$30 per hour per person. This is not based on any digitization quote. Initiative #2 would provide GPVA with a more specific quote.
#7	The model does not account for time spent organizing data or deaccessioning materials.
#8	GPVA will consider whether or not it wants to digitize its archeological materials independently.
#9	The GPVA's Heritage Coordinator can devote 25% of their time to digitization.
#10	Any partnerships the GPVA establishes with other local stakeholders will not impact the GPVA's timelines and goals.
#11	The strategy does not include any additional costs e.g. new equipment, moving to new facility or updating existing.
#12	Any existing funding from current grants have not been factored into the costs.

*Initiative #4 recommends deaccessioning materials. However, without knowledge of how much material will be deaccessioned, the model cannot account for this work.



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