

**¡Presente!**

**Documenting Latinx History in  
Wisconsin**

**A Digital Edition**

Editorial Policies

**NOTE:** The following is a working document with the following sections to be created during the **NHPRC-Mellon Start-up Grant** ending in December of 2023: (1) Introduction (2) Document Selection and Collection Process (3) Digitization and Metadata Creation Process. If awarded, the following sections will be created during year 1 of the **NHPRC Publishing Historical Records in Collaborative Digital Editions Grant** ending in December 2024: (4) Transcription and Annotation Guidelines and (5) Translation Standards.

Updated May 9, 2023

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## Introduction

### **What is a digital edition?**

A Digital Edition (DE) is a collection of source materials edited, curated, and interpreted in a digital publication to expand and/or frame our understanding of history. In other words, it is an online edition of historical records that have been selected and contextualized by scholarly interpretation. The scholarly interpretation of resources allows DEs to make a contribution to existing research and discourse. While primary source items are central to a DE, DEs also contextualize them within a broader range of resources weaving relevant information together to tell a story. These sources include monographs, peer-reviewed articles, websites, virtual exhibitions, translations with annotations. Creating an edition beyond print makes archival documents accessible to a wider audience.

### **The Wisconsin Latinx Historical Collective (WLHC)**

Founded by Dr. Andrea-Teresa Arenas in 2020, the WLHC is a network of faculty, staff, students, teachers and community members from across the state of Wisconsin dedicated to highlighting the history and everyday life of Latinxs in rural and urban regions of the state.

### **Description of DE project**

The ¡Presente! Digital Edition (DE) project will feature the stories and contributions of Latinx populations in Wisconsin through the publishing and curating of primary source materials. The selective DE will include both digitized and born-digital items, such as original oral histories, documents from the interviews, photographs, organizational records, and personal papers from the Wisconsin Historical Society's (WHS) existing holdings or from collections recently acquired through a joint WLHC/WHS collecting initiative. These primary sources will be organized around the themes of Migration and Family Histories, Labor, Politics and Activism, Education, Arts and Media, and Community.

More than a digital repository, the ¡Presente! DE will offer intellectual access and educational resources for site users to view the materials and gain a better understanding of their historical significance. Through a searchable and open-access website managed by the WHS, English and Spanish-speaking users will have access to primary sources with metadata description, transcription, translation, scholarly interpretation, contextualization (e.g., essays), Story Maps, bilingual K-12 lesson plans, and suggested bibliographies. The collection will be of interest to a wide range of site users, including researchers, university faculty and students, Wisconsin residents, public libraries, K-12 public schools, Latinx serving nonprofit organizations, and community activists.

**Anticipated size:** 3,000 items

## Selection and Collection Process

### Key Themes

1. Migration and Family Histories
2. Labor
3. Politics and Activism
4. Education
5. Arts and Media
6. Community

### Selection Criteria *(to be reviewed and expanded by advisory council in Year 1):*

1. Items that provide important historical or contemporary information on one or multiple **DE themed categories** will be selected based on WLHC member theme and research area expertise.
2. Items deemed to hold the most **historical, informational, and/or research value**, particularly those that facilitate readers' understanding of some of the most representative, unique, and/or consequential aspects of Latinx experiences in Wisconsin.
3. Items that represent the **diversity of Latinx communities** and/or prioritize the perspectives of underrepresented groups in the state.
  - a. Major Latinx groups in Wisconsin, historically and present-day, such as Mexicans/Mexican-Americans, Tejanos, Puerto Ricans, Cubans/Cuban-Americans, Central Americans (e.g. Guatemalans, Salvadorans, Nicaraguans), South Americans (e.g. Ecuadorians, Colombians, Venezuelans, Argentinians)
  - b. Ethnic and racial diversity (e.g., AfroLatinxs, Indigenous Latinxs, Intra-Latinxs, and others)
  - c. Women (will be equally represented in our selected items and included in all of the themed categories)
  - d. LGBTQIA+ persons and communities
  - e. Diverse life experiences (e.g., occupation, generation, language(s), education, neurodiversity, etc.)
4. To demonstrate **Latinx's diverse geographical experiences**, items from rural, urban and suburban areas of the state will be included as well as items that demonstrate transnational and translocal connections and practices.
5. Items that are identified by community members as important and/or representative of their collection/experiences will be included and informed by their descriptions as part of our **DE approach of shared authority**.
6. If there are multiple items that are similar in nature, one or two **representative items** will be selected from the larger group to avoid repetition.

### **Selection Process** *(to be reviewed and expanded by advisory council in Year 1):*

The WLHC team will identify specific items to include in the DE with the purpose of providing an easily digestible narrative of Latinxs in Wisconsin to a broad audience including scholars, educators, community members, and others interested in learning more about the topic. As such, careful consideration of the DE theme categories and intended audiences will guide the item selection process. Taking expertise and interests into account, a WLHC faculty member will lead a DE selection team (including students and community members) to review each collection.

While WLHC researchers will use their knowledge of Latinxs in Wisconsin to identify and select materials to digitize for inclusion in the DE, WHS archivists will review materials and make final decisions about what will be housed in their archives.

Once the WLHC selection team has selected items from a collection to include in the DE, the PI will present the selections to the DE advisory council made up of at least 3 WLHC members (faculty, students, and community members) for feedback. Final decisions will be approved by the advisory council. Once approved, WHS can begin the digitization process.

### **Types of materials**

Primary and secondary source documents, items, and oral histories will be included in the DE. Materials can include things such as photographs, letters, memos, legal documents, journals, artwork, oral histories (audio and video), artifacts (digital equivalents), rare newspapers, and other relevant items. While WLHC prefers collecting original documents whenever possible, some materials may be scanned only and included in the DE (*See specifications in “Metadata and Digitization Standards”*).

### **Training Materials for Oral Histories and Archival Collections**

1. Wisconsin Latinx History Collective Overview, [WLHC Toolkit for Oral Histories](#) (Arenas et al. 04\_2022)
2. WLHC/WHS Oral History Submission Guidelines and Release Forms, [LibGuide](#)
3. Archival Collection Training, [WHS Community Archives Training](#) (J. Nelson, 04\_08\_2022)
4. WLHC Powerpoint for Community Field Visits (**when completed add: title/link, author(s), and date**)

### **Collection Sources**

(1) **New collections:** These collections can come from community members, community organizations, nonprofit organizations, etc. They may be donated (preferred) or borrowed for digitization by WHS, and/or digitized during site visits. WLHC will help curate (select and

organize) these collections with community donor input before collecting and submitting them to WHS for permanent holding. WLHC will then select representative items from the new collections to be digitized for the DE site (See “Metadata and Digitization Standards”).

(2) **Existing collections:** These will include selected documents from larger existing collections housed at WHS or other repositories. WLHC will make selection and digitization decisions based on the selection criteria included above.

List of Prospective Collections for the DE ([Update link](#))

### 1. New Collections (On-Site Visits)

- a. Once a private collection has been identified, WLHC members will conduct a site visit to determine if items should be included in the DE based on their contribution to project themes.
- b. If a collection is to be donated, WLHC members will arrive on site with materials for collection intake (i.e., boxes, folders, gloves, etc.) and transport the entire collection directly to WHS for processing.
  - i. Instructions for site visits
    1. Equipment Needed: 1 laptop, 1 scanner, 1 digital voice recorder (MP3/WAV), 32GB SD card and batteries for recorder, 1 camera (if available), 128 GB SD card for camera, 1 tripod, 1 box of manila folders, 1-2 file boxes, 2 packs of post-its, a pair of gloves (if available). Contact the Project Manager to pick up supplies and borrow electronic equipment.
    2. Community Donor Folder: Prepare a folder with important information and copies of release forms to give to community partners (archival donors) for their records. Folder should include: WLHC’s contact information sheet, WHS’s “Submitting Materials to the Wisconsin Historical Society’s Archives,” “Collection Receipt Form Instructions,” “Collection Receipt Form,” and an “Oral History Authorization Agreement and Release” Form (if applicable). You may also print out the WLHC Powerpoint for Community Field Visits (optional).
    3. If archives are collected during visit, ask donor to sign the Collection Receipt Form, and later email/mail a copy of it for their records.
  - ii. WLHC members will work with WHS staff to set up a time/room to process donated collections. Contact Collection Development Archivist, Jennifer Skarbek, at [jennifer.skarbek@wisconsinhistory.org](mailto:jennifer.skarbek@wisconsinhistory.org).
  - iii. WHS will provide supplies and oversee processing and metadata creation for the entire collection. (This process is described in “Submitting Materials to the Wisconsin Historical Society’s Archives,” p.8)
  - iv. WLHC will select items to include in the DE collection based on their contribution to DE themes. Each item selected for the DE should be included in the [Metadata Spreadsheet](#) (See “Metadata and Digitization Standards”).

- v. WHS will also oversee transcription and digitization of collection materials to be included in the DE. (See “Metadata and Digitization Standards” and “Transcription and Annotation Guidelines”)
- c. If a collection is loaned to WLHC for digitization, the same process will be followed, except WLHC will complete a temporary receipt form for WHS indicating that materials must be returned to original owners after digitization.
- d. If a collection must remain on-site, WLHC members will arrive with a digitization toolkit (scanners and other tools necessary materials such as boxes, gloves, folders, etc.) in order to digitize items on-site.

## 2. Existing Collections

- a. WLHC will identify existing collections for relevance and select specific materials for digitization and inclusion in the DE.
- b. If housed at WHS, WHS staff will digitize materials selected by WLHC.
- c. If held outside of WHS, WLHC will work with WHS to determine permissions.
  - i. Within the [Wisconsin Area Research Center Network](#), collections may be transferred to WHS for digitization.
  - ii. Outside of the Wisconsin Area Research Center Network, special arrangements will be made on a case-by-case basis.

**\*\*All collections should be digitized following WHS standards (see below)**

## Submitting Materials to the Wisconsin Historical Society's Archives

**1. Proposed Materials and Collection Receipt Form:** WHS is committed to documenting diverse communities in support of its mission to preserve and provide access to materials with long-term historical research value covering the full story of Wisconsin's history. However, not everything offered is appropriate for the Archives. If archival materials are offered or solicited by a WLHC representative, we ask that you work with the potential donor to complete a WHS Collection Receipt document and submit both the offered materials and the completed document to the Collection Development Archivist at WHS. If the WLHC representative thinks that the offered materials seem well-suited for use in the DE or other digital component of the grant project please indicate this when the materials are delivered.

**2. Society's Collections Committee and Statement of Gift (if accepted):** Upon receipt, the Collection Development Archivist will evaluate the offered materials. If the Collection Development Archivist agrees that offered materials are appropriate for preservation in the archives, they will prepare a proposal for the Society's Collections Committee, which typically meets every two weeks. Upon acceptance by the Collections Committee, the Collection Development Archivist will send a WHS Statement of Gift document to the donor and upon receipt of the signed and completed gift document the materials will become part of the permanent collection of the Society's Archives. No offered materials may be accepted for the Archives without this approval by the Collections Committee.

**3. Donated Collection and Public Access Catalog:** After approval by the Collections Committee, the donated collection will be added to the list of collections to be accessioned and cataloged in the online public access catalog, which the Society's Archives shares with UW-Madison Libraries. Depending on the needs of the grant, selective digitization of materials in the accepted collection may also occur at this time. Once the collection is in the catalog it will be available for research use in the Society's Archives and around Wisconsin through the Area Research Center Network of archives located at the four-year UW campuses. If a collection is of special relevance to a particular area of the state it may be stored in the archives of the UW campus in that part of the state.

Original photos and documents are strongly preferred and should be the default expectation, but, depending on the nature of the offered materials, the archives may accept scanned materials if the person does not want to donate the original documents. See the Scanning Images and Texts (below) for specific instructions on how to maximize the quality and future usability of scanned materials. It may be useful to discuss issues or concerns about scanning a potential collection with the Collection Development Archivist ahead of time, especially before engaging in a time-consuming scanning project.



## **Collection Receipt Form Instructions**

Keep original for WHS files and give a photocopy to the owner. In most cases, the collection development archivist will notify the donor of its decision about whether to accept the collection within **forty-five days**.

### **Collection Description:**

Provide enough information to identify the materials being received (quantity, types of containers). If possible record background information on the collection (subject, approximate dates, relationship of donor to collection).

### **Signatures**

The staff person receiving the collection should sign and date the form. It also should be signed by the individual delivering the collection as owner or agent.

### **Donor/Agent Information**

Print the requested information. If the person delivering the collection is the agent and not the owner, please be certain to record the name, address and phone number of both the donor and the agent.



**LIBRARY – ARCHIVES DIVISION**

**COLLECTION RECEIPT FORM**

The collection described below has been received for evaluation by the Library-Archives Division of the State Historical Society of Wisconsin.

**Private Records Acquisition: Public Records Acquisition: Collection**

**Description:**

\_\_\_\_\_  
SHSW/ARC staff signature Date

\_\_\_\_\_  
Signature of owner or agent Date

**Print the following information:**

Owner Name:

Agent Name:

Owner Address:

Agent Address:

Owner Phone:

Agent Phone:



WISCONSIN  
HISTORICAL  
SOCIETY

**DIVISION OF LIBRARY, ARCHIVES, AND MUSEUM COLLECTIONS**

**STATEMENT OF GIFT**

I own the materials described below and voluntarily donate them to the State Historical Society of Wisconsin. It is understood that the purpose and intent of this gift is to transfer and assign all rights, title, and interest that I possess to these materials to the Historical Society, except as specified below. The Historical Society may make discretionary use of the donated materials to include, but not limited to, exhibition, display, digitization for preservation and access purposes, and making materials available for research and scholarship. I acknowledge that the Historical Society may dispose of any donated materials inappropriate for its collections unless instructions to return unwanted materials to the donor are specified.

**Description of materials:**

\_\_\_\_\_  
**Signature of Donor or Agent**

\_\_\_\_\_  
**SHSW Representative**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Date**

**Donor Name:**

**Address:**

**Phone/Email:**

**Accession number(s):**

### LIST OF STANDARD RESTRICTIONS

**Copyright: (Fill in a specific time period, only if applicable. Otherwise leave blank.)**

1.  
The donor retains copyright until \_\_\_\_\_ (month/day/year), at which time copyright and renewal rights to the donated materials are granted to the State Historical Society of Wisconsin. The Society reserves the right, at any time, to microfilm, digitize, or otherwise duplicate these materials as required for preservation or exhibition.

**Access: (Fill in either 2 or 3, only if applicable. Otherwise leave blank.)**

2.  
Access to the donated material is limited to use by State Historical Society of Wisconsin staff for the purposes of cataloging or organizing the collection until \_\_\_\_\_ (month/day/year), at which time the collection will be available for public access.

3.  
Access to the donated material is limited to use by State Historical Society of Wisconsin staff for the purposes of cataloging or organizing the collection *and* to researchers possessing the written approval of the donor, or the donor's designee, until \_\_\_\_\_ (month/day/year), at which time the collection will be available for public access.

## Metadata and Digitization Standards

Whenever possible, WHS staff should digitize collection materials using their equipment to ensure the highest standards of quality. If materials may only be digitized by WLHC staff onsite, the same standards should be followed to the extent possible.

### Metadata

Metadata generated for this project will conform to digital library standards and archival best practices. All materials in the DE will have item-level administrative, structural, and descriptive metadata. *iPresente!* will utilize Dublin Core for descriptive metadata, using controlled vocabularies from [Library of Congress](#), [Art & Architecture Thesaurus](#), and [PBCore](#), as well as work by the [ALA Association for Library Collections & Technical Services Subject Analysis Committee Working Group](#), [Archives for Black Lives in Philadelphia](#), [Bilindex](#), and DE consultants USLDH to create culturally sensitive subject headings.

WLHC members will work with creators to fill out the WLHC [Collection Metadata Template](#) to gather preliminary descriptive metadata for items selected from each collection.

WHS metadata staff will then enhance this metadata utilizing its own standardized descriptive workflows to create administrative and structural metadata and assign authorized headings. WHS cataloging staff will create catalog records (MARC) and finding aids (EAD) for each collection, as well as individual digital object records (Dublin Core) for digitized/born-digital items.

For audiovisual recordings, <BEXT> headers will be embedded in all files to provide administrative metadata according to technical guidelines from the [Federal Agencies Digital Guidelines Initiative \(FADGI\) Audio-Visual Working Group](#).

WHS maintains documentation for its cataloging and descriptive practices [online](#). Relevant sections include:

- Catalog records (MARC)
  - [Cataloging Manual](#)
- Finding Aids (EAD)
  - [Manual](#)
  - [Collection-Level Description](#)
- [Electronic Records](#)

### Digitization (WHS)

WHS develops technical specifications for digitization projects using a process that considers many factors, including the physical characteristics and safe handling requirements of the source material, project scale, budget, timeline, and the user community's functional requirements for the materials and associated metadata. WHS has developed digitization workflows for a wide variety of materials, and continually refines their practices based on our growing experience, the availability of new hardware and software, and evolving user expectations.

WHS maintains documentation for each of its digitization labs and for specific equipment. This project will implement workflows developed by the [Audio Lab](#) and [Digital Lab](#).

### *Images*

WHS selects, configures, and calibrates our equipment, workflows, and spaces with care. With a new, industry-leading Digital Transitions Phase One iXH 150MP overhead camera, Versa stand, Photon LED lights, film scanning kit, and the use of targets and [Golden Thread software](#), we aim to achieve the [FADGI 4-star standard](#) for all images created in our digitization lab. Pre-capture quality control steps include: setting appropriate color profiles, setting appropriate curves for maximum tonal range, creating luminance uniformity, and setting the correct white balance using device level targets. Post-capture, we apply additional processing steps to optimally match images to source material, including use of color calibrated monitors and a D50 [ISO-3664:2009](#) conforming viewing booth, as well as perform image analysis using Golden Thread software. Final images are saved in standard color spaces & embedded with the Adobe RGB (1998) ICC color profile. Master images files are saved in uncompressed 16-bit TIFF format; access copies are saved in JPEG format.

### *Audiovisual media*

Digitization of audio, film, and video conforms to guidelines established by the [International Association of Sound & Audiovisual Archives](#) (IASA). Audio is digitized using the 24-bit 94kHz [Broadcast WAVE Audio File Format](#) (BWF) specification, with preservation files saved in the WAV format and access copies in the MP3 format. Video is digitized using the ProRes [QuickTime File Format](#) (.MOV) [QT210 spec](#) for uncompressed 10-bit master files, with [ProRes 4444](#) mezzanine copies, and H.264 MP4 access copies. Film is digitized using the [National Archives 2K \[MPD-P3\] standard](#). Master files are output in 2K DPX uncompressed 10-bit format, with ProRes 4444 mezzanine copies, and H.264 MP4 access copies.

### **Digitization (Onsite)**

While it is recommended that WHS staff scan materials at WHS whenever possible, the following instructions have been developed for scanning onsite when necessary.

### **Scanning Instructions (Onsite)**

The goal of scanning is to provide a **faithful representation of the historical item**. To do this, digital imaging should be done at the highest level of quality you can achieve with available resources. In other words, follow a “scan once” policy – do not anticipate returning to re-digitize an item.

*Note: These instructions are intended as a general guide for most formats. Software settings terminology can vary from scanner to scanner. Additional considerations will be necessary if working with negatives, slides, or other non-standard materials.*

#### **1. Before Scanning:**

- Wash your hands.
- Always keep a clean workspace, with enough space to safely accommodate the original materials.

- Keep the workspace clear of food and drinks.
- Clean the scanner bed (glass) to ensure it is free of dust, dirt, or other particles.
- Use gloves if working with images.

## 2. Preview & Presets:

- Place the original item on the scanner, leaving a small amount of space between the item and the edge of the scanner glass so that none of your image gets cut off.
- Position the item as square and straight as possible.
- In your scanning software, check the following settings:
  - Set configuration to “no color correction”
  - Color: 48-bit color.
  - B/W: 16-bit grayscale
  - Turn off Unsharp Mask and any other default settings.
- Click Preview to do an initial scan of the item.

## 3. Scanning Settings:

- Click and drag to adjust the marquee box around the preview image, leaving a narrow border around all four sides of the item.
- Adjust the resolution depending on the size of the original item:
  - If the longest side of the item is **shorter than 7 inches**, then scan at a resolution of **600 dpi**.
  - If the longest side of the item is **longer than 7 inches**, then scan at a resolution of **300 dpi**.
- Scan the item.

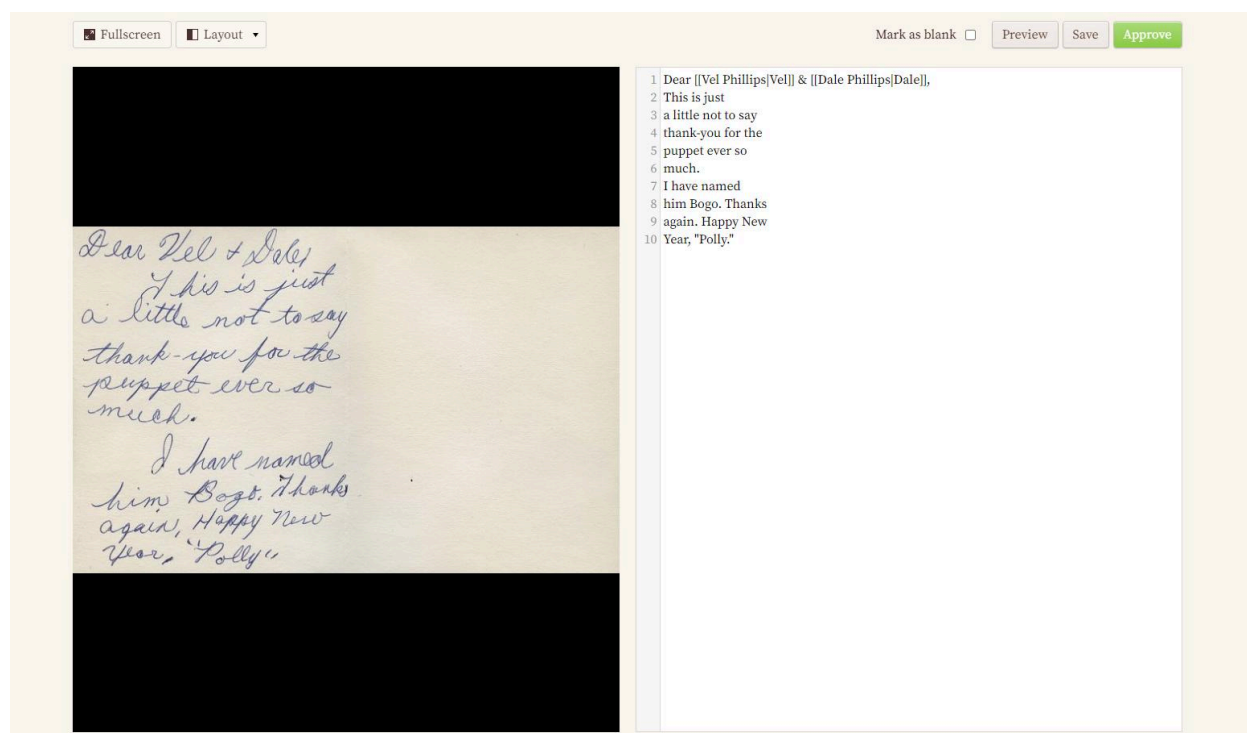
## 4. Saving & File Naming

- When scanning is complete, save the scanned image as an uncompressed TIFF (.tif) file.
- To name your master scan, only use lower case letters, numbers, underscores, and dashes; **do not** use spaces or punctuation (e.g., mss0001\_b01\_f01\_001.tif)
  - Use leading zeros for consecutive numbering; for example: 001, 002, 003; not 1, 2, 3.

*Note: most scanning software includes functionality for automated file-naming so make sure to set this up before you start scanning each collection, box, or folder to facilitate efficiency.*

## Transcription and Annotation Guidelines

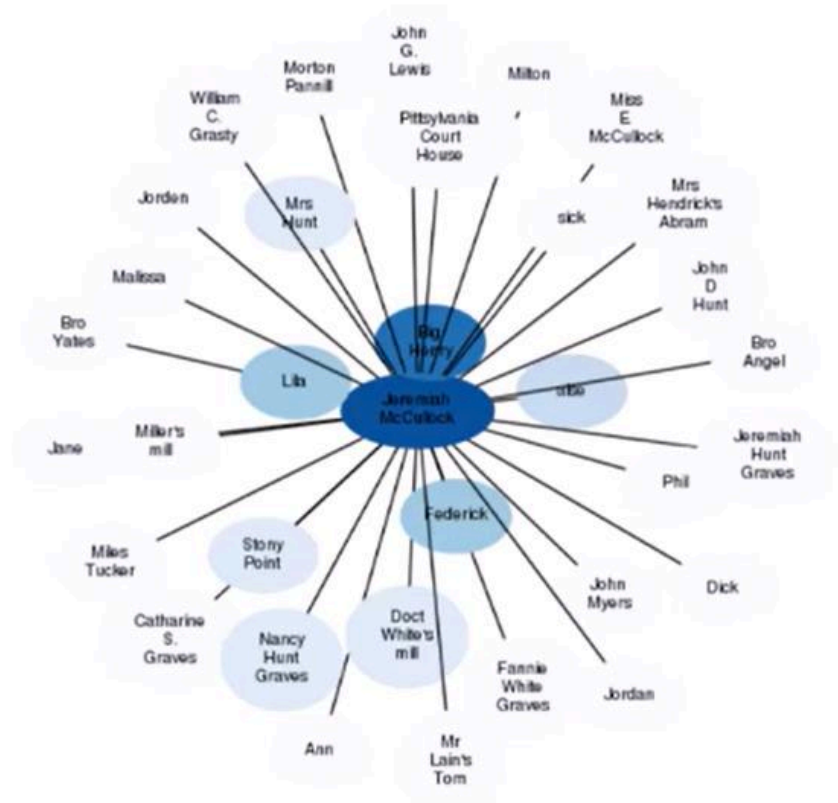
For materials with text, WHS uses ABBYY Fine Reader to perform Optical Character Recognition (OCR) on scanned images to create searchable text. Review and proofreading of this generated text will be completed by student workers using [From the Page](#), an online crowdsourcing platform, which provides a user-friendly interface for transcription, translation, and tagging.



*From the Page transcription interface*

Editing of transcriptions will conform to established [WHS protocols](#) for consistency and conformance with professional standards, including use of line breaks, capitalization, punctuation, spelling, illegible text, indicating imagery and illustrations, and handling of columns and forms. Advanced tagging, including assignment of [subjects](#) (names, places, topics) will be used on a collection by collection basis to generate network graphs for enhanced contextual exploration.





*From the Page Subject Graph*

## Translation Standards

During Years 1 and 2 of implementation, Elena Casey (UW-EC), and Diego Roman (UW-M) will help lead the training of a qualified team of translation supervisors, under the consultation of the [US Latino Digital Humanities Center \(USLDH\)](#). Supervisors will attend training at the [Digital Humanities Summer Institute](#) (DHSI) and applicable courses with [Humanities Intensive Learning and Teaching](#) (HILT), and will complete online, open-access courses relevant to transcription and translation through [eLaboratories](#). Translation training and output during Year 1 and 2 will include the development of a public, culturally-responsive translation statement for the DE, and bilingual (Spanish/English) controlled vocabulary including subject headings, keywords, and metadata that are culturally and linguistically responsible. Informed by consultation with USLDH, training from DHSI and HILT, and conforming to standards set by the [Library of Congress](#) and [Bilindex](#) (a database of Spanish Subject Headings), a cataloger will set up an established controlled vocabulary and workflow for the DE translation. The translation work for DE materials digitized and transcribed (during Year 1&2) may begin during Year 3.

**\*\*\*To be completed before Year 3 \*\*\***