

**"The Quilt Index Phase III:
National Expansion and Data Integration"**

Final Evaluation Report

Grant # PA-52057-06

Executive Summary

The Quilt Index (QI) Phase III: National Expansion and Data Integration project built on a successful effort to establish a national collaborative network for storing images of quilts and metadata. The current grant sought to extend the investment by growing the QI, both the collections and data. The evaluation addressed core project goals: expanding the QI and establishing an authoritative, critical mass of quilts, collections, data and collaborators; identifying what new uses and applications are now possible; key challenges; and future directions.

Over the course of the project the 31,412 records were added to the QI and thirteen new contributors joined, including five new collections hand-entered into the system, seven new databases imported, a detailed plan for incorporating a flagship quilt journal (*Uncoverings*), and collections that covered broad new range of demographics. These additions are consistent with the central goal of Phase III. With respect to use and applications, an encouraging increase in access was observed when the expanded collection recently went live, both nationally and internationally. Results of a final user survey conducted this past December show the QI used as part of a broad range of applications in teaching, research and artistic practice that had not been reported previously. In addition, the expanded QI was included as one of three collections in a \$300,000 award to use computer-aided visual analysis to examine dimensions in authorships across objects in a database. The additional materials incorporated via Phase III seem to have brought new opportunities for funding and sustainability.

There were challenges as well. Adding private collections required rethinking the value a collection gains when it is added to a national repository like the QI, as well as the work and cost required to meet the expectations of the collector. This was an important lesson learned. In addition, there were unexpected changes in foundational technology and staffing that were addressed and overcome with hard work and perseverance.

Finally, work on Phase III resulted in well defined opportunities to expand the QI. These directions became apparent over the course of the project, via meetings, discussions, and assessments. Of all the possible next steps, four future directions emerged as exceptionally meaningful, and merit serious thought and planning:

1. Internationalization: Data on the use of the QI suggest that there is an extensive international quilt community that would add a rich dimension to the project.
2. Exhaustive coverage of local collections: Illustrating the true richness of local cultural heritage by including complete collections for target demographics.
3. Engaging alternative audiences. Materials and collections that match the QI to audiences which have shown an unexpected interest (e.g., the military).
4. Education: Using the QI for teaching and research across a range of subjects.

"The Quilt Index Phase III: National Expansion and Data Integration"

A. Building a Critical Mass

This project was well thought out and implemented. Despite unavoidable changes in staff and technology that required shifts in plans and schedules, the QI now includes approximately 31,412 additional quilts stored, descriptive metadata for each, and new organizing tools suitable for investigating large collections. This achievement is consistent with the goal set out in the original proposal. More importantly, the additions seem to have transformed the QI from a modest collection to a national archive. In a summative assessment of use December 2009, one user suggested

“The Index is building a comprehensive view of what thousands of women were making creatively over the past two hundred years while men were making other things, like steel, cars, and war.”

It is only recently that the additional collections to the QI went live and were available to users. Early signs of QI web use are encouraging. The only comparison possible at the moment is between use in December 2008 and December 2009. Based on web usage tracked by AWStats, which monitors traffic to the QI, the unique number of visits to the QI during December 2008 was 6764. That number rose to 9833 in December 2009.

The critical mass extended to new partnership and user and demographics as well. Thirteen following thirteen new partners made the bulk of the contributions added during Phase III (five entered collections manually and seven new partners contributed data bases).

- North Carolina Quilt Documentation Project at the North Carolina Museum of History;
- Heritage Quilt Project of New Jersey at the Rutgers University Libraries: Special Collections and University Archives (SCUA);
- Wyoming Quilt Project, Inc.;
- Iowa Quilt Research Project at State Historical Society of Iowa;
- Mary A. Barton Collection -- A collection of quilts amassed by one collector and now housed at the State Historical Society of Iowa;
- Rhode Island Quilt Documentation Project Archives at the University of Rhode Island;
- Mountain Heritage Center at Western North Carolina University (a small but well-researched collection which dovetails with both the North Carolina Documentation records and with the museum collections added under separate IMLS funding).
- West Virginia Quilt Search at the West Virginia Archives;
- Connecticut Quilt Search Project;
- Hawaii Quilt Research Project;
- Louisiana Quilt Documentation Project at Louisiana Regional Folklife Program;
- Minnesota Quilt Project at Minnesota Quilters Inc.;
- New England Quilt Museum quilts as documented by MassQuilts (access database which sets ground work for all the Massachusetts quilts).

The number of additional quilts proposed in the original plan is remarkably close to the actual number added, slightly exceeding the target. The table in Appendix I charts the planned versus the actual progress.

B. Defining What's Possible with the QI

Beyond the expansion in size, activities included in Phase III helped define a new broad range of possible uses and applications.

- The QI, and The Alliance for American Quilts, were an integral part of a successful proposal to new joint government program Digging into Data¹. The project will pursue research using advanced computational techniques to explore humanities themes related to the authorship of large collections of cultural heritage materials, namely 15th century manuscripts, 17th and 18th century maps, and 19th and 20th century quilts. It is unlikely the QI would have been a good candidate for this competition if it had not been grown to its current scale. Searches for particular signature quilts now identify populations of 2000-3000 additional quilts to which the signature quilts might belong.
- Collections also allowed the QI to cover a broad new range of demographics. In April 2009, in part due to this coverage, as well as outreach, new tools and good fortune, the QI had nearly 160,000 pages accessed from .edu domains. The explosion of use can be traced to the QI's role in quilt/cultural heritage forum at Emory University. Phase III provided the support for the QI to serve as the center piece of expositions, owing to its size (reaching a critical mass of demographics suitable to national and even international events), as well as reputation as an authoritative repository supported by partners with solid reputations in quilting, history and cultural heritage and technology.
- There were a remarkable number of new uses reported, stemming from the applications of the original and expanded QI. Forty four percent of respondents had used it in their research, forty two percent in their artistic practice. Below is a sample of applications that users reported for how the QI made a difference in their projects and ventures:

1. *The QI formed the backbone of my new lessons on composition and literature. I used patterns founded across quilts and illustrated the ideas of voice and genre.*

¹ The Digging into Data Challenge is an international grant competition sponsored by four leading research agencies, the Joint Information Systems Committee (JISC) from the United Kingdom, the National Endowment for the Humanities (NEH) from the United States, the National Science Foundation (NSF) from the United States, and the Social Sciences and Humanities Research Council (SSHRC) from Canada. What is the "challenge" we speak of? The idea behind the Digging into Data Challenge is to answer the question "what do you do with a million books?" Or a million pages of newspaper? Or a million photographs of artwork? That is, how does the notion of scale affect humanities and social science research? Now that scholars have access to huge repositories of digitized data -- far more than they could read in a lifetime -- what does that mean for research?

2. *It's not yet public knowledge, but Oregon is launching a state survey in 2010. We will be using the Quilt Index method of documentation with the goal of adding our research to the index.*
3. *Currently I am working with a tour company looking at different focuses and interests which depend on the location of certain quilts and while this is an unusual application of the index it assists me greatly in locating where quilts of interest are geographically within the USA.*
4. *The compare tool is great for me when looking at similar quilts from distant locations particularly when following the migration of a particular pattern.*
5. *I have used the index in teaching middle school children aspects of the civil war and America's connection to Africa through art.*

B. Challenges: Every large scale technology project with multiple partners will have unanticipated challenges. Some challenges offer meaningful lessons for other projects and the field of digital humanities in general, even if no clear solutions have been identified. Two challenges from QI Phase III are worth noting because they are likely to serve as useful heralds of quandaries for future projects.

1. Adding Private Collections

One of the avenues for expanding the Quilt Index is adding private collections. At face value this seems like a straight forward activity. However, experience suggests otherwise.

- Adding a collection to QI might add value to the collection itself, and it is not clear how to factor this gain in when negotiating with owners about adding their collection to the QI
- Most owners have very little experience with the challenges of creating digital representations of their collections. Only after the process is well underway and their collection begins to be accessible do they understand what it is they hope to see on a screen.

Extensive discussions among partners led the senior QI team to forge a set of guidelines on work plans for adding private collections. The adopted draft, still open for discussion and revision, is found in Appendix II.

2. Changes in Staffing and Technology

Early in the project MATRIX chief technology officer Michel Fegan died unexpectedly. This event, beyond being a personal, family, and community tragedy, required changes in job assignments, staffing, and technology. It required staff training and new strategies for storing records in alternative repositories. This challenge held up progress on the QI, but did not prevent the project from reaching and exceeding goals. The take home message is that people and

technology go together. Changes in personnel may be at least partially accommodated by making changes in technology.

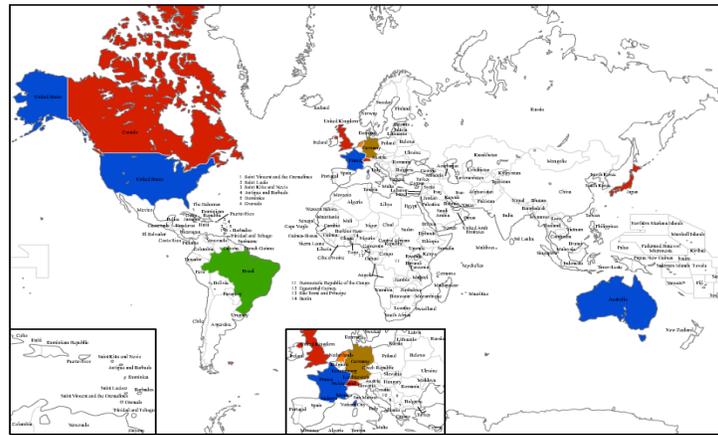
C. Future Directions

Each of the four directions outlined below merits serious considerations by senior personal building the QI and officers at NEH. Discussions about how best to move forward merits support of a planning grant with input from the populations addressed by each option.

1. Internationalization

It is difficult to track the origin of many visits to the QI. However, to the extent that AWStats can track the Internet origin of visits, data suggests there is an extensive international community for the QI. As of 12/16/09, based on AWStats, visits originated most often from the following ten countries. Future development of the QI might best be served by accommodating the interests of the international quilt community.

1. United States	6. Germany
2. Australia	7. Brazil
3. Canada	8. Switzerland
4. Japan	9. France
5. Netherlands	10. United Kingdom



2. Exhaustive coverage of local collections

One gap in the QI can be filled by including complete collections for target demographics. These collections illustrate the true richness and expanse of local cultural heritage. Many respondents to the Phase III end of project survey expressed the following interest in broad geographical coverage and including all state-based collections:

I love the idea of having the state documentation quilts indexed, especially if there are concise descriptions of the state/regional characteristics.

The QI has many complete collections, but none that are complete for a given demographic. It may be worth developing at least two demographically complete collections to support population level cultural heritage research.

3. Engaging alternative audiences

The data suggests that unexpected audiences have interest in the QI, especially the US military. This US military-based user audience might be a valuable group to engage.

4. Education and research

Respondents have suggested a number of educational and research applications, both within and outside of the quilt world. Applications are blossoming across educational settings, from elementary schools to universities. Most applications address topics in the humanities and social sciences, but some may also be relevant to the natural sciences and mathematics.

Like most teachers that avail themselves of exemplary new technologies, these teachers are leaders, and there is an opportunity to support and disseminate their work and ideas. An educational and research program to support creative applications of the QI in education and research would further leverage an already effective investment.

APPENDIX I

Synopsis of Total Work Plan for Quilt Index Phase III: Expansion and Data Integration Activity:

Contributor	Estimated # of data records	Data storage and ingestion activity	New Records	Complete records live, December 31, 2009
West Virginia Department of Archives and History (4,000 records, 6000 slides)	4000	Access db to convert at MSU, slides digitized in WV	4259	4259
North Carolina Museum of History (10,106 proposed, 5000 funded)	5000	Cut budget and workplan in half for reduced grant amount, once project activity underway, database of approximately 1200 records was discovered, switched from hand entering to MSU data transfer project, scanning in NC.	4056	4056
Connecticut Quilt Documentation Project	3200	Microsoft Access database to convert converted at MSU, slides digitized through contributor funds (CT opted to contribute all their work through costshare, which greatly assisted the budget revisions necessitated by reduced funding award.)	4128	4128
Hawaiian Quilt Research Project	1200	Filemaker Pro db converted, all records ingested, slightly less than half the records are not yet live, awaiting publishing of Hawaiian book to be released online.	1213	600
Louisiana Regional Folklife Program	2500	Access Database converted, images uploaded.	2311	2311
Minnesota Quilters Inc.	4000	Data on 4000 quilts in Excel spreadsheet converted and ingested	4306	4299
American Quilt Study Group Uncoverings	0	Planning ONLY -- abstracts digitized and detailed workplan and budget created for eventually incorporating "Uncoverings" into Quilt Index.	0	0
New England Quilt Museum / MassQuilts	200	Access database converted and ingested; with NEQM quilts and MassQuilts also ingested because crosswalk was identical. Only NEQM quilts available, (MassQuilts awaiting scanning, permissions, and additional funding to proceed.)	402	402
Rutgers University Library/Archives	2619	Site hand entered data and conducted all scanning onsite. Most records contain full and detail images.	4706	4690
State Historical Society of Iowa	2558	Site hand entered data and conducted all scanning	2282	2274
University of Rhode Island	889	Site hand entered data, faculty continuing to verify records.	889	543
Mountain Heritage Center (40 records and 60 digital images)	40	Site to hand enter data	54	54
Wyoming Quilt Project, Inc.	2300	All images digitized and basic records entered. Site volunteers continuing to enter records by hand.	2806	356
Totals:	28,506		31,412 stored	27,972 live

Building a Process for Adding Private Collections to the QI
A Summary of Perspectives from Participants in Phase III
February, 2009

Private collections differ from traditional collections in two key ways. First, there is greater variability in private collections, from the state of the data and depth of the research, to the interest and capacity of the owner(s) to participate, to the funds available and/or required for the work to be undertaken. Secondly, and perhaps more importantly, they have a special connection to the owner/donor. The collection can represent a person, family, or era in the same way an autobiography or biography might. These personal qualities, and the emotional commitment they motivate, make archiving and presenting private collections a unique endeavor.

These unique dimensions of private collections need to be carefully considered when adding a private collection to the QI. They are likely to increase project time, as well as quality. The overwhelming sentiment of those who commented on this issue suggested the key was to move in well defined steps; proceed in phases, and consider the work, costs and schedule for each phase. In addition a point person from the QI should be designated as the primary contact for the owner. Below are a set of phases that emerged when considering how to add private collections to the QI.

Phase 1. Feasibility: Estimating the resources required to complete each phase of adding a private collection. Feasibility should be part of the brainstorming phase since that is when the project will take shape. It is important to note, however, that considering feasibility does not mean deciding that a project is or is not feasible, but is about considering what can be done with available resources, what in-kind resources might be available, and what additional resources are required. The QI management team QI should offer donors a sense of the cost for completing the feasibility and brainstorming phases of a project before beginning.

Phase 1a. Brainstorming: There needs to be brainstorming phase, when members of the QI work with the collector and examine ways the collection might be preserved and presented in the QI. If the project budget is modest, it may be best for the collector to take on the goal of drawing up the design based on discussions. It is important however to realize that it can be frustrating to present a design to the group only to find out that it violates established procedures. To reduce that possibility, members of the QI should begin the process by making clear what is possible, and what practices have already been established. This phase should end with a formal design for the project and cost/time estimates for each phase.

Phase 2. Development: Development requires a clear schedule with mini-milestones and target dates. Changes need to be communicated. When development begins changes to the design should be minimal. Few changes are minor, and costs can grow exponentially if the design is modified when engineered. The lesson here is to be thorough in the design phase. This can be

difficult as great ideas may emerge when the development is in progress. Save them, discuss them, but remember they may be difficult to accommodate when development is underway.

Phase 3. Review: After development is a time to review the first online version of the project, by both the owner and a small group of potential users. The QI point person should serve as the facilitator. Typically revisions take between 20-40% of the original development time. If it is less you did a great job on the brainstorming and design. The milestone here should be a new development schedule.

Phase 4. Release: The second phase of development hopefully ends with the first version of the collection online. A meeting should be scheduled between the owner and point person to review implementation and make sure all identified details have been attended to. The owner needs to sign off on the project.

Phase 5. Updates: Updates are tricky. Any change can cause a bug, and in the best of all possible worlds all changes would be followed by testing. Updates are best assessed as fixes vs improvements (while the difference may sometimes be debatable, the owner and point person should be able to reach consensus). If something is broken it needs to be fixed and tested. Improvements may be best implement collectively during an update phase (every three or six months) when one testing session can accommodate many improvements.

Finally, schedules should be respected, and advance notices issued when targets might be missed. Each phase should have a milestone, and when it is reached, a little celebration may ensue (don't ignore the value of these celebrations). When milestones are reached, project costs and timelines should be re-evaluated. The following processes are essential at each step.