ARCHIVAL **OUTLOOK**

July/August 2015

Published by the Society of American Archivists

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COVER PHOTO

History Makers. In fall 1956, JoAnne Smart and Bettye Ann Davis Tillman became the first African American students to enroll at the Woman's College of the University of North Carolina (now the University of North Carolina at Greensboro [UNCG]). Their experiences, along with many of the earliest African American students to attend the school, have been captured since 2010 in an oral history project. In "Found Sound" (page 3), Erin Lawrimore writes about UNCG's experience using the Oral History Metadata Synchronizer to provide enhanced access to many of these interviews. *Courtesy of the Martha Blakeney Hodges Special Collections and University Archives, University Libraries, The University of North Carolina at Greensboro.*

Lessons Learned while Living Dangerously

In my incoming presidential remarks last August, I urged all of you, my colleagues, to spend "A Year of Living Dangerously for Archives." In this final column I would like to reflect on the past year. I ran for a leadership position with a specific vision in mind: After more than thirty years in this profession, I hoped that together we might find a way to move our profession forward—a few steps, or even a mile or two—in the area of awareness and advocacy for archives.

My presidential address at ARCHIVES 2015 in Cleveland will focus on archival advocacy and awareness developments during the past year and the implications and lessons learned. I won't address that here (our plenary session will be taped and available for those of you who are not able to be with us in Cleveland). What I do want to share are some of the "collateral" understandings I've gained or had reinforced in the past year as we've lived dangerously together as a professional community. Following are some that are most striking to me:

- The passion we have as archivists is evident when we speak about our profession. Although qualities like "quiet" or "introverted" are often associated with archivists, we are not shy nor do we lack capacity when we talk about "why I am an archivist." Archivists want to inspire and be inspired, which was demonstrated in your comments and ideas shared via personal conversations, Twitter, Facebook, and blog posts; in comments quoted by journalists; and in public presentations.

- Archivists want to be involved in our profession and our professional association. We are all enriched when more voices are an active part of the profession, but this isn't easy to accomplish. We must think and talk more about how to make this happen effectively, inclusively, and respectfully.

- Archivists have opinions—and want SAA to speak out on many issues of emerging concern. As a professional association relying on a small staff and volunteer time from members, it isn't always easy, clear, or neat to come to a position or develop a statement. I don't shy away from stating opinions personally or professionally, but I have been impressed by how much more difficult it is to do this on behalf of SAA as an organization, given our diverse community of perspectives to represent and shifting data (or no data at all!).

- Our members contribute a tremendous amount of volunteer time to support SAA and our profession. From standards development and intellectual property issues to public awareness, public policy, measuring holdings, and governance, there are so many aspects of our professional association to which our colleagues give extensive time and energy. I would love to see a "cost contribution" estimate of the time given by our members—it must be in multiples of millions. We should be thanking each other regularly for all the giving that supports our association.

In my own way I have been living dangerously, interacting with people I might not have met or talked with otherwise and trying to navigate challenges and situations that were planned and unplanned, sometimes confusing and sometimes downright frustrating. Throughout the year, so many of you have shared with me your dedication to and passion for archives in ways that have inspired me, and you have offered a welcome range of perspectives and thoughts that enriched my understanding of all of us as the individuals who constitute SAA. I can honestly say that it is good to be among you. For your contributions to SAA and to the archives profession, and for engaging with me during the past year, you have my heartfelt thanks! ◼

FOUND SOUND

Using OHMS to Enhance Access to Oral History

Erin Lawrimore, University of North Carolina at Greensboro

JoAnne Smart and Bettye Ann Tillman made history in fall 1956 as the first African American students to enroll in the Woman's College, now the University of North Carolina at Greensboro (UNCG). Their experiences, along with many of the earliest African American students to attend the school, have been captured since 2010 in an oral history project through UNCG's Martha Blakeney Hodges Special Collections and University Archives (SCUA). These interviews are indexed and audio is accessible online, thanks to an internal University Libraries grant to support adoption of the Oral History Metadata Synchronizer (OHMS).

African American Institutional Memory Project

The African American Institutional Memory Project, an ongoing SCUA effort, ensures that the stories of the earliest African Americans to attend the institution are preserved and made available to current and future researchers. As of May 2015, thirty-five African Americans who attended UNCG between 1956 and 1970 have been interviewed.

As more undergraduate courses began using these interviews in their research, we found our method of online delivery was not meeting user needs. PDF transcripts were the only online record of the interviews. Audio was available via CD, if requested, but not provided online. While the PDF transcripts ranked among the highest downloads in our digital collections, many researchers reported it burdensome to search a lengthy transcript to identify passages that might be useful in their work.

Internal Grant Funding Acquired

An internal grant from the UNCG University Libraries' Innovation and Enrichment Program gave us the opportunity to use OHMS to provide enhanced access to many of these valuable oral history interviews. SCUA received a

Lisa Withers interviews Alice Barnes Freeman (UNCG Class of 1968) as part of the African American Institutional Memory Project. *Courtesy of Erin Lawrimore.*

one-time grant of $2,500 to focus on time syncing and indexing, at minimum, twenty-five of the African American Institutional Memory Project interviews. Additionally, two staff members—David Gwynn (the digital projects librarian) and I (the university archivist)—were allotted time to devote to the project.

OHMS was identified as the best way to provide enhanced access to the oral histories. OHMS is a web-based tool developed by the Louie B. Nunn Center for Oral History at the University of Kentucky Libraries. OHMS supports time syncing and indexing of audio recordings to existing transcripts, allowing researchers to more readily search each oral history for relevant information and quickly skip to key topics discussed in the interview.

Using OHMS to Enhance Access to Oral Histories

Work on the project began in July 2014. The OHMS viewer was installed on a library server, and two folders were created to house files being produced—one for MP3 files and another for XML files exported from OHMS. Additionally, local documentation for the OHMS workflow was created from the existing OHMS user guides. The twenty-five initial African American Institutional Memory Project interviews to be included in the project were selected based upon content and past download rankings for the PDF transcript. With these dominoes in place, a graduate student from the Department of History's Museum Studies Program was hired to begin work on the project in August 2014.

The Case of the Puzzling

Personal Digital Archiving as an Opportunity for Collaborative Advocacy and Murder Mystery Intrigue

Wendy Hagenmaier, Georgia Tech Archives, and Michelle Kirk, Iron Mountain Incorporated

Act I: The Dramatic Opening

Imagine you've been given a USB drive that was found at the scene of a murder. It's believed to contain a personal digital archive filled with clues about the crime and the identity of the victim. What's in the archive? And who created it?

And so begins "Find the Person in the Personal Digital Archive: Murder Mystery Edition!", the centerpiece of a new open access personal digital archiving work-shop curriculum designed by the Society of Georgia Archivists (SGA), the Atlanta Chapter of ARMA International, and the Georgia Library Association (GLA), which information professionals can reuse and remix to teach workshops in their workplaces and communities.

Act II: The Backstory

Intended for participants from any background and experience level, the workshop empowers attendees to see themselves as archivists of their own digital records. It covers topics ranging from best practices for creating digital records and rights issues in the digital landscape to strategies for active preservation and the digital afterlife.

The workshop is about personal digital archiving, but, at its core, it's an outreach and advocacy tool: The overarching goal is to advocate for information professionals as essential sources of expertise in assisting individuals (the public, family, students, colleagues, etc.) with their personal archiving needs.

How did this idea come about? How does the hands-on mystery activity work? How might you adapt the workshop for use in your own workplace or community? Read on to uncover the clues . . .

Act III: The Sleuth's Journey

Dun dun dun! It's a dark and stormy night in January 2014. As outreach and advocacy manager for SGA, Wendy Hagenmaier ponders ideas for a themed campaign that would bring SGA members together, offer opportunities for uniting with like-minded organizations, and provide a natural way to connect with users of archives. Time to sleuth! She looks for clues: archivists, allied info professionals, *and* the public are all grappling with digital records questions. The solution? SGA's outreach and advocacy campaign theme will be "Everyday Digital Archives." Archivists and nonarchivists alike create, use, and preserve digital records in their daily lives, so why can't digital stewardship feel more "everyday"—more friendly, more doable?

Hagenmaier and Assistant Outreach Manager Cathy Miller plan activities focused on demystifying digital stewardship and using personal digital archives as a way to connect with the public about the impor-tance of archives. Programming includes Q&A blog posts with digital archivists, social media outreach, and SGA Annual Meeting discussion sessions used to gather data about digital stewardship challenges Georgia archivists face and the support they need from SGA and the profession.

The heart of the campaign is a reusable workshop to be created, facilitated, and promoted collaboratively with other organizations of information professionals. Hagenmaier reaches out and finds partners in crime: Michelle Kirk, eRecords and information governance program manager at Iron Mountain Incorporated, representing ARMA Atlanta, and Oscar Gittemeier, youth services librarian at the Atlanta-Fulton Public Library, East Atlanta Branch, representing the Georgia Library Association. With our complementary perspectives combined, we are unstoppable.

Together, we create our weapons: the Creative Commons–licensed workshop materials. They include:

- A forty-five-minute presentation that combines the insights of records managers, librarians, and archivists on topics such as:
  - o What is a record?
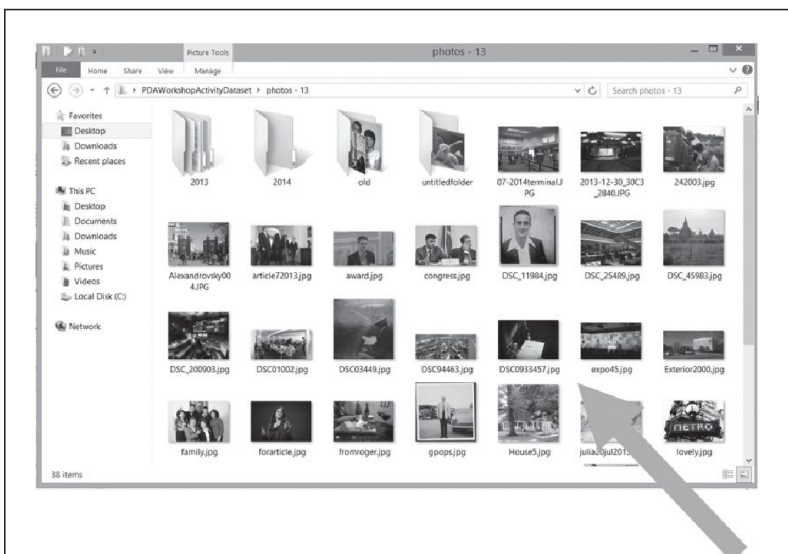
Images from the fake personal digital archive, which workshop participants analyze to uncover murder mystery secrets and best practices for personal digital archiving.

Personal Digital Archive

- o Best practices for creating personal digital records
- o Hardware and software ecosystems in which personal digital records are created and stored
- o Ownership and copyright
- o Privacy and security
- o Active, ongoing preservation
- o And best practices for the digital afterlife
- An extensive additional resources handout
- Instructions with discussion questions, for both instructors and participants
- Materials for the interactive activity

So, where does all the mystery come in?

Act IV: The Plot Twist

Dun dun dun! Meanwhile, back on that dark and stormy night of planning in 2014, Hagenmaier needs a way to make personal digital archiving interactive and fun. She looks for clues: themes of digital forensics, privacy, spy culture, data ownership, surveillance, citizen archiving, and data security swirl around and color her view, both in her work and in current events. *Somehow* these themes overlap with personal digital archiving in an exciting way. Outside, the clouds grow darker and lightning flashes as the storm rages on, creating a feeling of ominous mystery. *Ah hah!* That's just it! The solution: a "Find the Person in the Personal Digital Archive" activity that uses embedded murder mystery intrigue to entice participants to contemplate preservation pitfalls!

Here's the scheme: Hagenmaier manufactures a fake personal digital archive of a murder victim (think *Sherlock* or *Murder, She Wrote*), embedding clues in the archive that will inspire participants to piece together not only a mystery narrative but also an inventory of preservation best (and worst) practices. In a playful meta twist, the identity of the victim and the narrative itself will reflect themes of data security, surveillance, hacking, and sleuthing. The plot takes shape: ransomware + the personal digital cloud = a mysterious international plot called Ransomcloud!

She gathers photos, videos, documents, databases, and obsolete file formats, all licensed for reuse, from Open Preserve's Format Corpus, Wikipedia, and Flickr, and creates a fake Google account for the victim, including emails, documents, and maps and downloads copies of this data. She encrypts and password protects pieces of the archive and messes with creation dates and file properties. She invents file names ugly and inconsistent enough to make archivists shudder. Then she saves copies of the archive on USB drives. There are answers in the archive, but some of the story remains open ended, a reflection of the mysteries still surrounding the topic of personal digital archiving and how we will steward our digital legacies into the future.

An Archivist and Historian Brew

Tiah Edmunson-Morton, Oregon State University

Creating the Oregon Hops & Brewing Archives (OHBA) in the Special Collections & Archives Research Center at the Oregon State University (OSU) Libraries followed a unique recipe.

I spent most of my career as a traditional reference and instruction archivist, matching researchers with collections and convincing students they were researchers. My work was gratifying but also felt a bit like the movie *Groundhog Day*— for first-time researchers the experience was fresh and new, but the days seemed to be on repeat for me. I'd been at my job for seven years and feeling the edges of burnout; my focus on access for others meant *I'd* moved away from research and descriptive practice.

In summer 2013 my job shifted radically when I pitched the idea of establishing the first archive in the country dedicated to collecting materials on the history of hops and craft brewing. Oregon has a rich history of growing hops and brewing beer, and it's bursting with opportunities for researchers, consumers, artists, and tourists. Creating OHBA turned out to be an easy sell to the OSU Libraries administration and the state's beer-related industries. However, this work has called into question my own definition of an archivist's role, required me to grapple with the mechanics of community-based archival practice, and allowed me to explore the professional ethics of working closely with a historian.

OHBA is a repository of records and stories told by the industries and communities, but it isn't just a collecting initiative housed in a university archive. I wanted it (and me) to connect researchers to collections in local archives, libraries, and historical societies. This was a personal challenge! Though I'd grown up in Oregon and had hop growers in my family (four generations back), I wasn't a collections archivist, scientist, brewer, hop grower, or even a big beer drinker. Being the first to establish a subject-specific archives like this is awesome, but if I wanted to collect *and* refer, I had research to do.

Life as a Researcher

Initially, I was a traditional researcher. I did Google and library searches, looked through bibliographies, read summaries and longer articles, contacted staff at archives and historical societies, and made a lot of visits. Sometimes I walked in with a clear idea of what I wanted, while other times I had a vague hunch that "there must be something here." Sometimes I got a lot of instruction, other times staff assumed that I knew what I was doing and I was on my own. *I* assumed I knew what I was doing and that hunches were always right.

One particularly sobering (and humorous) example was a trip to the state archives to research the "Brew Pub Bill," significant for craft brewers in Oregon, but also ripe for their misremembering. I wanted to verify information I'd read in a book, so I requested the records related to that bill and other versions. The boxes rolled out, I opened them up, and I soon realized that I had no clue what I was looking for or how to find what I wanted. After thirty minutes of faking it, I went up to the desk with the bill numbers—and left embarrassed by how little I knew about the way our government operates.

I continued my research journey visiting with other archivists and historical society staff but also learning who's who in the industries and absorbing

Above: Hop and Brewers Convention, Yakima, circa 1955. *Courtesy of MSS Godfrey Hoerner Collection, Oregon Hops & Brewing Archives.*
Right: Fuggles (a traditional aroma hops) cold room, 1932. *Courtesy of Agricultural Experiment Station Records, Oregon Hops & Brewing Archives.*
Below: Tiah Edmunson-Morton picking up ephemeral items from Portland brewery Hair of the Dog for a beer art exhibit, March 2015. *Courtesy of Tiah Edmunson-Morton.*

PS' History
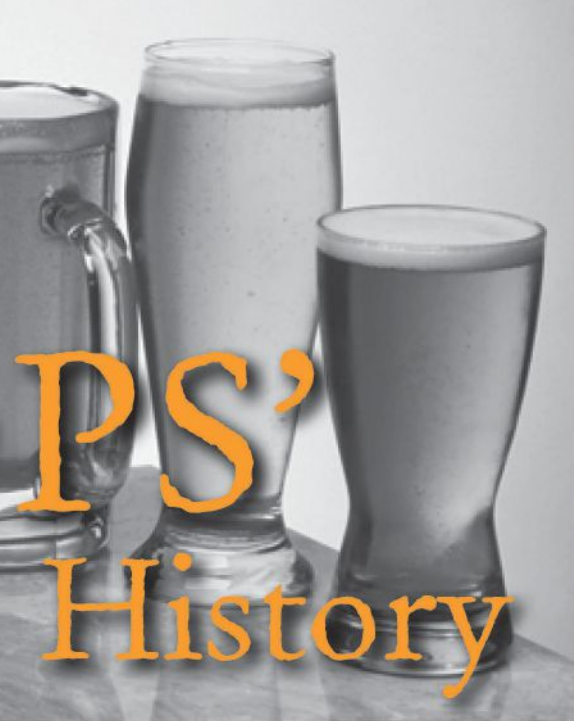
enough science to sound credible. I moved into the territory of original research, exploring OSU collections, growers' association cabinets, brewing company design files, and the world of "breweriana." However, to collect materials that reflected the history of these industries and their orbiting communities, I also had to think broadly about what "research" was in this context. Because I wasn't a big beer drinker, I had to expand my knowledge of styles and community events so I could have conversations with potential donors and the media. The top question I got was, "What's your favorite beer?" I needed to make sure my go-to answer wasn't "the yellow one."

My experience with research was complicated by assumptions about professional roles. For example, I believed the archivist collects and the historian reflects. We bring together raw materials, and they make meaning. We may have deep subject knowledge that can aid in collection development and reference, but our role is to provide the resources *for* the subject experts. We create guides for our collections, but those guides are merely road maps rather than history lessons. These were the rules set in my mind since I became an archivist over a decade ago, and these were the rules that codified in my practice as a reference archivist.

OHBA blurred those lines between the content I created as an archivist, the content I collected from others, and my subject expertise. I went to festivals. I conducted oral histories. I sought out materials to digitize, and then I returned the originals. I did the research. Soon I was called on to be the expert.

Beyond beer styles, I *wanted* to learn more about the science, and being at a university with hop yards and a research brewery on campus gave me access to experts. Though I value what I've learned on my own and from scientists, running parallel to my own research journey was my connection to a professional historian who was writing *the* book on hops history in our growing region. Our relationship is an important part of this story.

Life with a Historian

Several important things happened in summer 2013: a wedding at a hop yard, the Archives Leadership Institute, and a talk on hops history by Dr. Peter Kopp. Though he works at New Mexico State University, Kopp grew up in Oregon and did dissertation research in OSU's archival collections. He'd also travelled through the state looking through boxes and conducting oral histories, so he knew how scattered the information was. Aside from the 1992 book *Tinged with Gold: Hop Culture in the United States*, Kopp was literally writing the book about my archives. Although he was still researching, he'd already done much of the research legwork that would form the foundation for my own work.

Our relationship was collegial, yet complex from the beginning. While our objective was the same—to share and save the stories—it

Above Photo: Peirce students exiting College Hall, 1920s. *Courtesy of Peirce College Archives.*
Photo to Left: Peirce student soldiers gather on Pine Street during the First World War, 1917. *Courtesy of Peirce College Archives.*

Archives, REENERGIZED

Using a Milestone Anniversary to Reinvigorate Interest in Your Collections

Bart Everts, Peirce College

How do you generate interest in the archives on a campus of working adults at an institution known for looking forward? This question lingered among the curators of Peirce College's archival collections, and the answer was found in marking a major milestone at the institution, the sesquicentennial anniversary.

Peirce College in Philadelphia is celebrating its 150th year throughout 2015, and this has provided an opportunity to dig through the archives to better tell the history of the school to the community. Founded as the Union Business College by Dr. Thomas May Peirce and a group of educators in September 1865, the original purpose of the school was to provide business training to returning soldiers and supply the rapidly growing industrial sector of Philadelphia with clerks, office workers, and managers.[1] An educator, master penman, and prominent Philadelphian, Peirce collected and preserved several items related to the early years of the school to establish an archives.

Sharing Our Story

The anniversary was a chance for Peirce librarians to "rediscover" the archival collections and collaborate with our communications department and the anniversary task force to promote the history of the college. The staff was able to expose the archives to a wide audience, with historical photographs appearing on various promotional and event items, internal exhibits promoted through social media, and a monthly space on the campus blog that highlighted various items and their relationship to the history of the institution.

Items from the first fifty years of Peirce history were displayed in the library. This first half-century saw the college grow in size and scope, and exhibit items include catalogs; letters from presidential commencement speakers, including Howard Taft and Theodore Roosevelt; and photographs of Peirce family members who ran the school in those years. Subsequent planned exhibits will document the second and current half-century histories of the school.

The previous year, the librarians began a dialog with the Historical Society of Pennsylvania (HSP), creating an opportunity to display select items from the collections beyond the Peirce community in a physical setting viewable to scholars, genealogists, and the general public. Peirce first loaned items to HSP for their January 2015 exhibit *Pen to Paper* on nineteenth-century penmanship. Following the success of this collaboration, the college loaned additional items related to the sesquicentennial celebration for the 2015 exhibit *1865: Eyewitness to History*. Fitting to a school founded as the Union Business College, a sketch of the original campus and a copy of the 1865 catalog were included in a section of the exhibit related to programs for returning Union soldiers.[2] A discussion and photographs of the exhibit were shared with the Peirce community on the Peirce Connections blog.[3]

Preserving Our Present

Sharing preserved items wasn't the only way the archives was engaged in the anniversary. During the annual alumni reception, former students recorded their memories and experiences at the school. Representatives from classes that graduated in the 1950s through recent alumni participated in this voluntary activity, and their stories will be preserved, ensuring future anniversary celebrations will have physical representations of this

100 YEARS OF ORSON WELLES

Matt Messbarger, Northwestern University

100 Years of Orson Welles: Master of Stage, Sound, and Screen was the Lilly Library's featured exhibition from January 20 to May 20 of this year. *Courtesy of Chaz Mottinger, Indiana University.*

Orson Welles would've turned one hundred on May 6, 2015. In honor of the late legendary actor, writer, producer, and director, Indiana University (IU) recently held the academic conference *Orson Welles: A Centennial Celebration and Symposium*. Between April 29 and May 3, leading film scholars, archivists, and filmmakers from around the world gathered in Bloomington for talks, panel discussions, and screenings, all to pay tribute to the iconic film director and his unparalleled career as a multimedia pioneer. Welles was an artist who revolutionized theater, radio, and, most famously, cinema to become one of the true cultural giants of the twentieth century.

As part of the festivities, IU's Lilly Library featured an exhibition of materials culled from their extensive Welles manuscripts collection, the most prominent of its kind. The exhibition, *100 Years of Orson Welles: Master of Stage, Sound, and Screen*, was a meticulously curated survey of Welles's life and career in all of their glorious guises. Letters, annotated script pages, photos, posters, and sketches all represent Welles as a theatrical wunderkind, the mad genius of radio, a populist progressive and civil rights crusader, and an independent filmmaker who could not be reined in by the studio system. We also learned about Welles the man; his parents who died when he was very young; and the progressive school in Woodstock, Illinois, where his colossal talents started to take shape. We saw Welles and Rita Hayworth, the movie star couple, and Welles the father to three girls by three different wives.

Lilly Library Manuscripts Archivist Craig Simpson spent 9 months exploring the 40-plus cubic feet of material that included 20,000 items from the Welles manuscript collection to select 160 items for 18 display cases. The main challenges of designing the exhibition, he said, included how to effectively engage a diverse audience and how best to honor the many sides of Welles's life and career that scholars and historians are still grappling with the meaning of today.
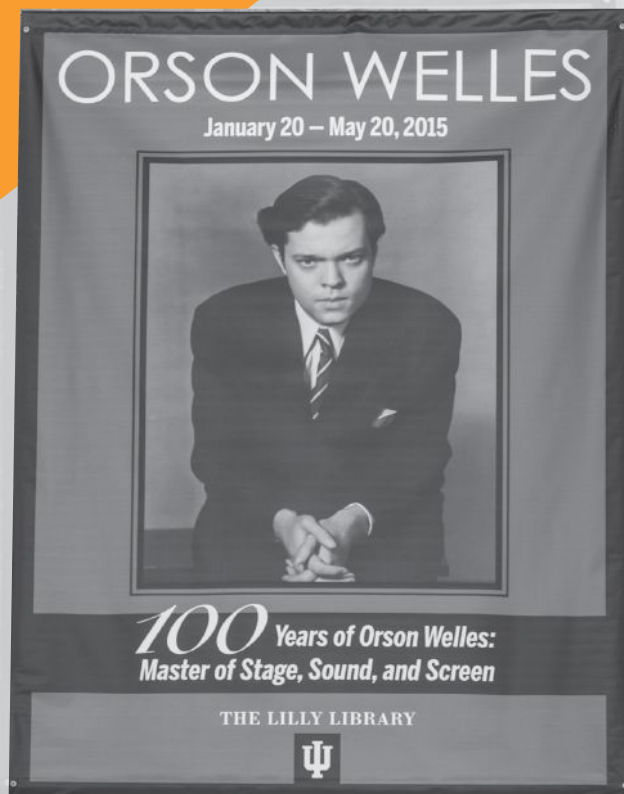
In the course of his research, Simpson made many surprising discoveries about his subject. "I wasn't aware of the extent of his political involvement," he says. "He was deeply invested in American politics in the 1940s, a proud progressive (prounion, antifascist), and a staunch supporter of FDR and the war effort. Additionally, Welles was

Exhibition highlights included a display of materials related to the Mercury Theater's legendary theatrical productions of the 1930s. *Courtesy of Kristin Leaman, Indiana University.*

an outspoken champion of civil rights, and used the airwaves and a regular newspaper column to espouse his views. I'm pleased to have included exhibit cases detailing this relatively unfamiliar side of Welles's life, which is essential to understanding much of his art and the complicated trajectory of his career from a studio director to an early pioneer of independent filmmaking."

What is essential in making these discoveries possible is the archive itself. Indeed, for a filmmaker whose work was notoriously compromised by the financial backers he was forced to depend on throughout his career, Welles's manuscripts provide the clues to what we are missing from the dominant Hollywood narrative that has branded him, unjustly, as a failure after one great film.

For Simpson, this demonstrates the critical importance of the archival collection. The archive, he says, "shows the 'invisible Welles' in the form of his compromised works. *The Magnificent Ambersons*, for example, was cut by RKO against Welles's wishes from 130-minutes down to 88; fortunately, the archive features a continuity script and photographs of Welles's complete vision, including his original ending."

"So much of Welles's career was filled with incompletion that for a long time he was branded a failure for it," Simpson noted. "Now, however, in the age of the Internet and DVD special features, I think our culture has grown more accustomed to fragments, alternate endings, and multiple versions of the same work of art. They're fascinating!"

With assistance from research institutions such as the Lilly Library, film scholars are able to map out the potentially endless interpretations of works both finished and unfinished in the Orson Welles canon, leading to discoveries that are still deepening our understanding of his filmmaking legacy. ■

In the July/August 2013 issue of *Archival Outlook*, the article "Make Access Happen: Help NARA Rethink Electronic Recordkeeping" asked members of SAA to help create a vision for a future where the electronic records problems we face now would be solved.

This article reports back on the discussions NARA hosted over the last year and the ideas you collectively contributed to this vision. NARA staff who worked on this project enjoyed the many lively conversations, thought-provoking questions, and sense of common purpose that came out of this exercise.

What We Did and Why

The Managing Government Records Directive (M-12-18) (*https://www.whitehouse .gov/sites/default/files/omb /memoranda/2012/m-12-18 .pdf*) called on NARA to assist the federal government in switching to electronic recordkeeping by developing a twenty-first-century approach to records management. That's a tall order, so we knew we'd need to call on experts in archives and records management to figure out what that might look like.

This visioning effort was specifically linked to the task in the directive to write a report and plan for Automated Electronic Records Management (A3.1). NARA took this as an opportunity to explore not just automation but also broader and more open-ended questions about what the ideal future would look like.

After publication of "Make Access Happen," NARA spent the following year talking with groups that had insights into the future of electronic records management (ERM). We held live discussion sessions at the Best Practices Exchange in Salt Lake City (November 2013) and Mid-Atlantic Regional Archives Conference in Rochester (April 2014). We invited members of SAA's Electronic Records Section, Records Management Roundtable, and Government

Records Section to webinar-based discussions during summer 2014. We also held discussions with members of ARMA International, the Records Management Listserv community, the Federal Electronic Records Management Automation Working Group, and open government/open data advocates.

You Helped NARA Rethink Electronic Recordkeeping

What We Heard

We heard from people with quite different visions of what should happen, but there were a number of sentiments that we heard again and again. The conversations were wide-ranging and the ideas didn't always line up neatly with particular questions. Nevertheless, the core discussion questions we asked provide a way of outlining some of the interesting thoughts of the participants.

What is the biggest challenge for electronic records management and what should we do about it?

It was widely acknowledged that the volume of electronic records is overwhelming and the variety of formats and types makes it hard to manage the volume. Many said that the reality of electronic records is "messy," the

record versus nonrecord distinction confuses end users so that they don't know what they need to capture, and end users don't care enough about electronic records to do a good job capturing and categorizing them. Although a number of people made these points, there was some difference of opinion on what to do about each of these points.

Accept or fight the messiness (or both)?

Some participants stressed that archivists need to expect ongoing messiness in e-records (i.e. variety, frequent changes, lack of standardization) and develop e-records systems that are forgiving of that messiness. Others stressed establishing and enforcing standard formats, metadata, and communication mechanisms for interoperable systems whenever possible. Although we heard both sides, this may be a false dichotomy. We will probably have to plan for ongoing messiness by developing systems that can cope with a wide range of formats and metadata, while at the same time trying to improve the quality and standardization of records whenever we can.

"Records" or "information"?

Many participants mentioned that determining what needed to be managed as a record was a significant challenge for good ERM. One solution is to stop stressing the distinction between record and nonrecord, and instead manage all information so that an organization knows **everything** it has and how long it needs to be kept. This allows an organization to skip the error-prone step of determining what is a record, and may support more automation of the capture process.

However, some discussion participants believed that the record/nonrecord distinction is very important. Some participants acknowledged that part of the appeal of defining something as a nonrecord means the records managers don't have to

PUTTING ARCHIVES ON THE AGENDA

How and Where to Use Strong Words in Continual Internal Advocacy
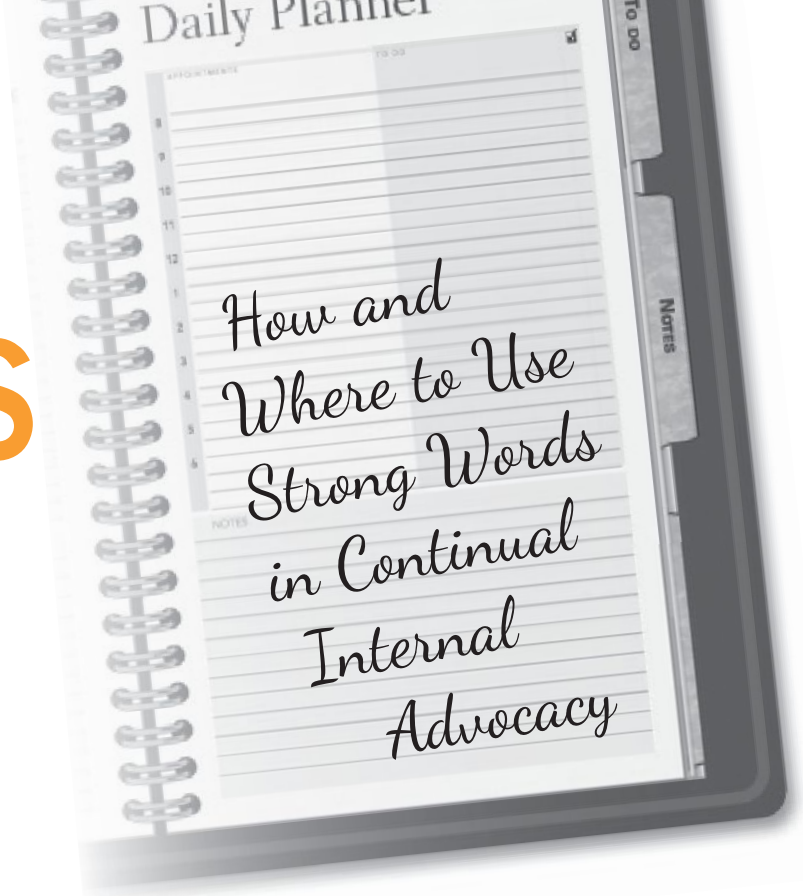
Mark A. Greene, University of Wyoming

If I've heard it once I've heard it a hundred times over the course of my career: "My [insert supervisor or resource allocator position title here] never comes down to the archives and doesn't know what we do. No wonder the archives is ignored, underfunded, stereotyped, and underappreciated." I've long itched for an appropriate venue to rebut this frustrating (not to say infuriating) analysis of a program's weaknesses. Then a recent issue of *Archival Outlook* (March/April 2015) featured two articles that seemed to give me the perfect springboard.

Kathleen Roe's president's column rightly noted that "To be honest, *sometimes archivists seem to take pleasure in being 'misunderstood'*" (emphasis added) and encouraged archivists to employ "strong words" in describing themselves and their profession. In the same issue, Bruce Dearstyne's column summarized the four key themes in his book[1] on leadership for memory institutions, one of which is advocacy:

> Dynamic programs have advocacy in their DNA. It is part of everything they do, part of everyone's job . . . . They . . . report not just numbers of users but also user testimonials and examples of the impact of research

projects. The director is a constant ambassador for the program.

But advocacy is not just externally directed, or at least it shouldn't be. Rather you should be "a constant ambassador" *to your boss and other resource allocators*. Internal advocacy (once upon a time referred to as "inreach") is just as important to the success of archival programs as external advocacy.

Reach Out to Your Boss

It does no good to hunker down with either a "let your work speak for itself" or "but management is too self-absorbed and busy to even give me the time of day" attitude,[2] ones I have encountered again and again on discussion lists, in conference sessions, and elsewhere among too many archivists. Instead of assuming your work should speak for itself, heed the advice of experienced corporate middle managers: "'Your boss is busy and has his or her own biases. . . . It's not like if you perform well, all will be fine.'" Instead, in the words of another manager, "'*You* are responsible for making your boss appreciate the good work that you do'. . . ."[3]

And in a typical environment promoting your and your repository's work requires much, much more than waiting for your boss to drop by or schedule a tour of the archives. It requires more than holding receptions for exhibit openings and inviting your resource allocators. And it demands more than publishing even the most engaging and colorful newsletters and annual reports. It requires, first and foremost, that if necessary you "accept that your boss does not see your area as a priority. In this case you'll want to set up regular meetings to keep her engaged"[4]— don't wait for your boss to ask you.

When I arrived at the American Heritage Center in 2002 there were still, among the repository's resource allocators—most importantly the provost (my immediate supervisor) and the president—important misconceptions about the Center, little direct knowledge of its services and programs, and no apparent interest in spending time at AHC being toured and educated about the unit. But the provost was willing, *upon my request*, to establish a once-monthly meeting in his office, so long as I defined an agenda ahead of time and kept the discussion under one hour.

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EXPANDING ARCHIVAL HORIZONS

Natalie Baur (University of Miami Libraries), Christian Kelleher (The University of Texas at Austin), and Francine Snyder (Robert Rauschenberg Foundation), founding members of Itinerant Archivists

i·tin·er·ant (ĭˈtinə r nt)

adjective: traveling from place to place.

It started innocently enough.

"I just got back from this great study trip in Budapest . . ." "It's interesting how much you can learn by visiting their repositories . . ." "There should be something like this for archivists . . ." "I worked with a community archives in Rwanda . . ." "The different perspectives really make you think about processes . . ." "I have a lot of contacts in Ecuador. . ."

Conversation can inspire ideas. Ideas can spur action. Last year, conversations led to the founding of the Itinerant Archivists. The initial idea started during down time at the 2014 Archives Leadership Institute. At various times during the week, three of us—Natalie Baur, Christian Kelleher, and Francine Snyder—would chat about archives, internationalism, community, and collaboration. We began to recognize a theme in our talks: How do we encourage more international archival conversation? How do we interact with communities beyond our own?

The week ended. Yet the conversation, instead of fading as we returned to our everyday lives, maintained a life of its own via email and Google Hangouts. Then, the obvious was spoken: *Would it be possible to create a pilot project independently, just to see if it would work?* If there is no international exchange program, maybe someone needs to develop it. And maybe that someone is us.

That's how we founded Itinerant Archivists, an independent, grassroots group, with the sole purpose of promoting and encouraging international archival peer-to-peer exchange.

Building On the Past

Ideas don't come from thin air. The Society of American Archivists has a rich history of foreign study programs. From 1972 to the early 1980s, the SAA International Archival Affairs Committee offered expansive programs abroad. These programs were intensive, with participants visiting several archival repositories in multiple countries over the course of several weeks. Announcements and tour summaries are detailed thoroughly in past issues of *The American Archivist*. If it has been done before, it could be done again.

The American Archivist, April 1975. Page 180.

2015 Pilot Project

After acknowledging how fantastic SAA's past trips were (More than twenty repositories! Six or more countries! Three weeks of traveling!), we turned our resources to developing a small, realistic pilot project to test our ideas. Primarily, we needed to determine when, where, and how. To maximize our chances for success, we developed building blocks for the pilot project:

- Realistic and manageable goals
- Build on our existing international contacts
- Maximize impact by collaborating with preexisting programs

Small Is Good: Realistic and Manageable Goals

Given the grassroots nature of the project, the success is based on our and others personal time and resources. Therefore, to stack fortune in our favor, small is good. Our goals, whether it be meetings in Cleveland or travel abroad, need to reflect our resources and time. National meetings could be more inclusive; international travel needs to be a smaller, self-funded group.

Ecuador: Building On Our Existing International Contacts

Ecuador was selected as the pilot project because of the opportunities and connections we had there. Over the past several years, Baur built an extensive network of librarians and archivists in Ecuador. One of her primary contacts, Jorge Yépez, archivist at the Union of South American Nations (UNASUR) and professor of archival sciences at the Pontificia Universidad Católica del Ecuador, has been instrumental in spearheading dialogue within Ecuador and expressed an interest in expanding internationally through hosting a symposium or workshop. Around the same time, Kelleher met Judy Blankenship, a recent Fulbright recipient who is working on the Archivo Cultural de Cañar, a community archive project in Ecuador. Their conversations gave light to possible collaborations among the Itinerant Archivists and the communities in Quito and Cañar to expand their projects. Ecuador became the perfect partner.

Existing Programs: Maximize Impact Through Collaboration

To make the discussion as large as possible, we looked for opportunities to

join programming nationally at SAA's Annual Meeting as well as internationally with Ecuadorian programs.

Peer-to Peer Exchange at the SAA Annual Meeting in Cleveland

At the SAA Annual Meeting in Cleveland, we are collaborating with the International Archival Affairs Roundtable (IAART) and the Latin American and Caribbean Cultural Heritage Archives (LACCHA) Roundtable to host a discussion and presentation at their joint roundtable meeting on Wednesday, August 19, from 5–7 p.m. Yépez and Blankenship will join as guests of honor, giving an opportunity for SAA attendees to learn more about archives and practices in Ecuador and for archives professionals to discuss outreach and challenges on a global scale. All are welcome to attend.

The Itinerant Archivists are collaborating with two Ecuadorian archivists: Jorge Yépez, head archivist at the Union of South American Nations, and Judy Blankenship of the Archivo Cultural de Cañar, a community archives project.

Quito Symposium/Workshop

A small group of archivists will travel to Ecuador this fall to continue the peer-to-peer exchange. Working with Ecuadorian archivists, we'll participate in a half-day international symposium or workshop (the final agenda is still being determined). Archivists in neighboring cities and countries will also be encouraged to attend. Yépez elaborates on the motivation behind the symposium and the need for an international dialogue:

Ecuadorian archives have experienced significant progress in the last decade, however, the efforts made by the public and private sector have not been sufficient, and there are still many challenges associated with access to information, control and protection of personal data, societal use of information, and the preservation of documentary heritage, due in large part to the inadequate conditions in most Ecuadorian archival institutions.

This has motivated me to provide my contribution from my academic and professional backgrounds to promote developing Ecuador's archives and, in this way, it has been necessary to research best practices in more developed countries and to promote the exchange of experiences and professional collaboration with colleagues from other regions and perspectives.

Flee *to the* Cleve

Jennie Thomas, 2015 Host Committee Co-Chair
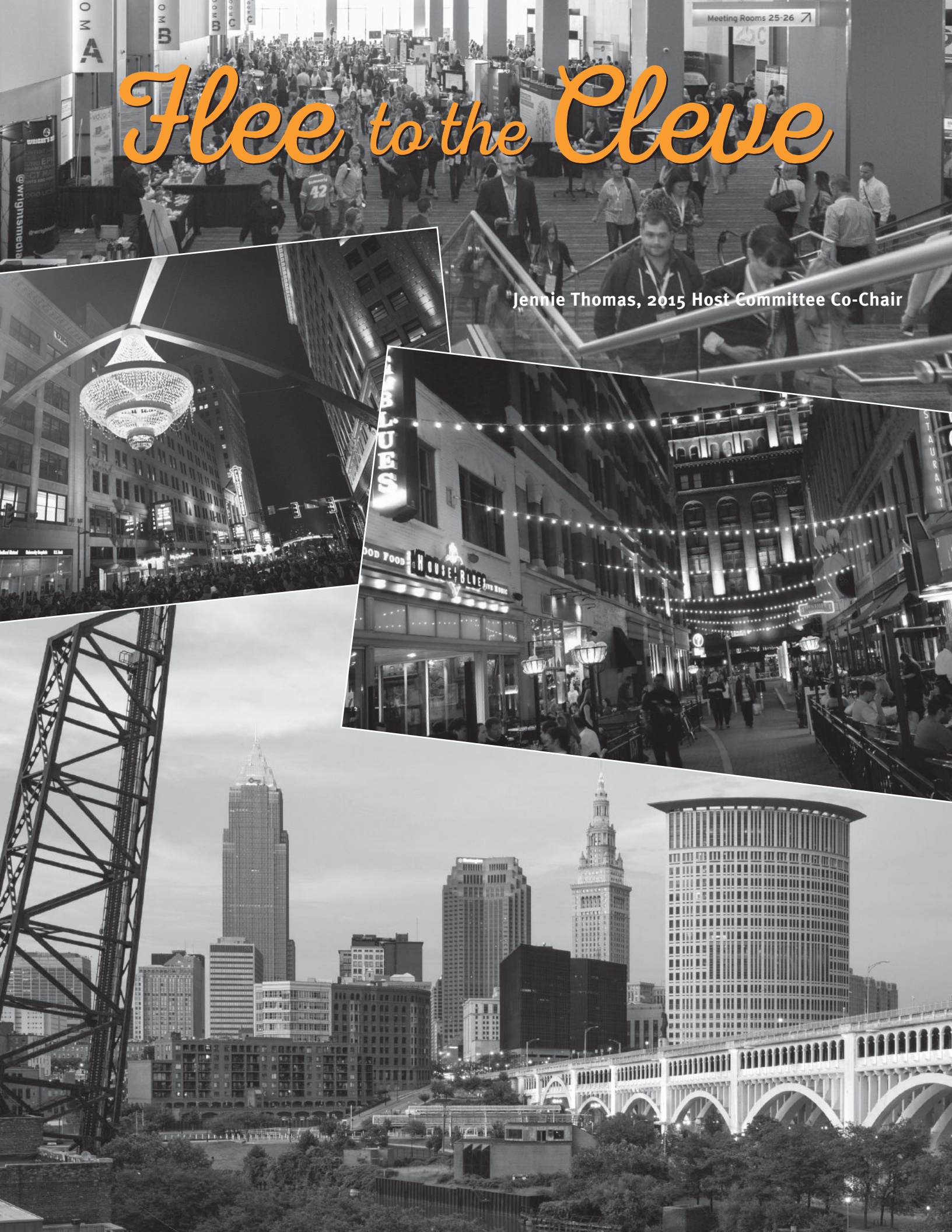
As Jack Donaghy once told Liz Lemon on *30 Rock*, "We'd all like to flee to the Cleve and club-hop down at the Flats and have lunch with Little Richard, but we fight those urges because we have responsibilities." During the 2015 SAA Annual Meeting August 16–22, you can decide how responsible (or not) you want to be as you experience Cleveland's world-class offerings with midwestern sensibilities! Here are some highlights, but be sure to check out the Host Committee blog for more information on the city and everything it has to offer: *https://saa2015cle.wordpress.com*.

Getting There and Around

There are a number of options for getting to and around Cleveland. The city sits within a 500 mile radius of nearly half of the U.S. population. It has two main airports: Cleveland Hopkins International Airport (CLE), about 14 miles (or 20 minutes) from the Convention Center and hotels, and Akron-Canton Airport (CAK), about 50 miles (or 53 minutes) away. Train and bus transportation to the city is also available via Amtrak, Greyhound, and Megabus. See the *ARCHIVES 2015* website (*https://archives2015.sched.org/*) for more information.

Upon arrival, the Greater Cleveland Regional Transit Authority (RTA) connects busy travelers through four rail lines and 69 different bus routes. For just $5, visitors can snag a one-day Cleveland Pass that allows for unlimited rides. The slick, modern HealthLine Bus Rapid Transit (BRT) links downtown hotspots to hospitals and restaurants. Once downtown, take advantage of the city's free trolley network, bring your bike, or use your feet. If you'd simply like to tour the city, there are a number of options available—from Lolly the Trolley to Cleveland Segway to the Goodtime II. Everything you need during your stay in Cleveland is only moments away!

Photos, clockwise top: Interior of the Cleveland Convention Center. *Courtesy of Cody York for ThisisCleveland.com.* **Right:** Cleveland's East 4th Street, home to many dining and entertainment options. *Courtesy of Larry E. Highbaugh, Jr., for ThisisCleveland.com.* **Bottom:** Cleveland skyline from the Flats. *Courtesy of Cody York for ThisisCleveland.com.* **Left:** Cleveland's Playhouse Square is the largest performing arts center outside of New York. *Courtesy of ThisisCleveland.com.*

Cleveland Community Service Project

Conference attendees will have the opportunity to give back to the host city by participating in a charitable service project with Shoes and Clothes for Kids (SC4K). SC4K is the only nonprofit organization in Greater Cleveland providing new shoes and clothes throughout the year to thousands of children in need—all at no charge. Volunteers can participate on Tuesday, August 18, from 9:30 a.m. to 12:30 p.m. at the Woodland Data Center, 4966 Woodland Avenue, to help with a packing day. (SC4K buys pallets of clothes that need to be counted, sorted, and repacked into smaller boxes for its distribution partners.) A minimum of ten volunteers is needed and FREE lunch will be provided to volunteers after the shift.

A second opportunity to help SC4K is available if you bring to Cleveland a few articles of children's back-to-school essentials and clothing, specifically socks and undergarments, to donate to the cause. See "Service Project" (under the "Attend" tab) on the *ARCHIVES 2015* website for more information, or contact Host Committee member Nicole Laflamme at nicole.laflamme@jmsmucker.com. For more about *SC4K*, see the group's website at *https://www.sc4k.org/*.

Repository Tours

Host Committee members Anne Salsich and Leslie Cade have pulled together an amazing array of repository tours and open houses for Tuesday, August 18, and Wednesday, August 19. Tours include everything from Kent State University for the 45th anniversary of the nationally transformative events of May 4, 1970, to nearly every cultural heritage institution in the University Circle area, as well as a walking tour and presentation related to the history of both the town of Oberlin and its world-renowned college. There are many more offerings and space is limited for many of the repository tours, so make sure you secure your spot by contacting the person responsible for each tour (see "For Reservations and Information" in each individual listing).

Please note that adding a tour to your Sched.org profile does not constitute official registration!

Food and Brew

Finally, if you haven't seen all the recent press hailing Cleveland cuisine and craft brews, prepare to be schooled! We have Iron Chefs and James Beard Award winners running our restaurants! For all the information, check out Destination Cleveland's online dining guide at *http://www.virtualonlinepubs.com/publication/?i=228059*, or browse its incomparable website for the numerous articles that have been written and compiled about area chefs, restaurants, breweries, wineries, and available food tours: *http://www.thisiscleveland.com/restaurants/*. Looking for a distinctively "Cleveland" meal? Check out Sokolowski's University Inn, Slyman's Restaurant, Melt Bar and Grilled, and the Happy Dog.

Photo, Top: Melt Bar & Grilled, which offers gourmet grilled cheese sandwiches and beers to please any palate. *Courtesy of ThisisCleveland.com.* **Bottom:** If you're looking for a distinctively "Cleveland" meal, stop by Happy Dog, a neighborhood corner bar with hot dogs, beer, and live music, ranging from rock and country to punk and polka. *Courtesy of ThisisCleveland.com.*

FROM THE ARCHIVIST OF THE UNITED STATES
David S. Ferriero
National Archives and Records Administration
david.ferriero@nara.gov

NARA Already Working on Obama Library

You've probably heard by now that President Barack Obama will locate his presidential library on Chicago's South Side.

"All the strands of my life came together and I really became a man when I moved to Chicago," Obama said, in revealing where he wanted his library to be. "That's where I met my wife. That's where my children were born, and the people there, the community, the lessons that I learned, they are all based right in these few square miles."

Chicago's South Side

Chicago's South Side is already home to the prestigious University of Chicago, the famed Museum of Science and Industry, and the Chicago White Sox, the president's favorite baseball team. It is also an area of Chicago with a wide gap in incomes, resulting in neighborhoods that are impoverished to those that are affluent.

The Obama Library will increase NARA's presence on Chicago's South Side, where we already have the National Archives at Chicago and a Federal Records Center. When the library, to be built by the Barack Obama Foundation with private funds, is complete, it will be turned over to the National Archives and be the fourteenth in our system of presidential libraries that date back to Herbert Hoover's. Like some of the other libraries, it will be part of a larger entity, in this case the Barack Obama Presidential Center.

Planning the Transition

NARA already has begun its important role in this transition. We are working with the White House staff to determine the volume of textual, electronic, and audio/visual records, as well as the number of artifacts, that must be moved out of the White House by the end of Obama's term. And we will work with the Obama Foundation as it builds the library to ensure it meets our environmental, archival, and safety standards.

> Once [the library] is open, it will provide a history not only of the administration of the nation's forty-fourth president but also of the times in which he served in the White House.

When Obama's term ends on January 20, 2017, the records of the president and Vice President Joseph Biden become property of the government under the Presidential Records Act. The act was signed into law in 1978 in the wake of Watergate-era concern over the tradition of private ownership of presidential materials. These records include textual and audio/visual records, along with artifacts, which include gifts to the president from heads of state as well as from private citizens from America and around the world.

Our staff will seek to start moving materials from the White House in October or November of the president's final year in office. The Department of Defense will provide both manpower and assistance in transporting the material, which will occur mostly by truck. However, NARA will be responsible for the security of the records and artifacts as they are shipped.

Electronic Records

The electronic records of the Obama Administration will also be moved. The transfer of electronic records is one of the most complex and challenging parts of a presidential transition since the volume and variety of records generated or received by presidential administrations has rapidly increased. These electronic records must be transferred from White House systems and verified and indexed for ingest into NARA's Electronic Records Archives, which allows processing of electronic records for eventual release through the National Archives Catalog.

While the electronic records will be housed in NARA's data center, the other records and artifacts will go to a temporary location that will serve as a de facto library for several years until the library itself is built and ready for occupancy. Both this site, and the library itself, must meet NARA's requirements.

* * *

When the library is complete, the Obama Foundation will turn it over to the archives along with a payment equal to 60 percent of the construction costs to serve as an endowment to help maintain the facility. The Obama facility will be operated by NARA with a staff of federal employees hired by this agency under civil service rules and headed by a director I will appoint in consultation with the president.

And once it's open, it will provide a history not only of the administration of the nation's forty-fourth president but also of the times in which he served in the White House. ■

Michigan Archivists Present at Michigan Historic Preservation Network Conference

As part of the 2014–2015 call to advocacy, several archivists in Michigan presented a session on Preserving the Archives of the Modernists at the 2015 Michigan Historic Preservation Network conference in Midland, Michigan, in mid-May. The conference celebrated modern architecture in Michigan. The focus of the session was sharing information on the wealth of architectural records resources in four Michigan repositories and how these records could help historic preservationists with their work.

NEH Digital Project Offers Access to the History of Free People of Color in Louisiana

"Free People of Color in Louisiana: Revealing an Unknown Past" is a collaborative digital project funded by the National Endowment of Humanities (NEH) that brings together and provides access to more than thirty thousand pages of family and personal papers, business records, and public documents from the Louisiana State University (LSU) Libraries' Special Collections, the Louisiana State Museum Historical Center, the Historical New Orleans Collection, Tulane University's Louisiana Research Collection, and the New Orleans Public Library. LSU Libraries received the grant in 2013, and the site (*http://www.lib.lsu.edu/special/fpoc/*) was launched in April 2015 as the grant concluded.

Archives Help Inspire California State Senator's Office

California State Senator Bob Hertzberg's District Director Barri Worth Girvan and staff recently contacted a variety of Southern California institutions, searching for various historical photographs, including those of author Upton

Courtesy of Gary Leonard.

Sinclair; the Los Angeles Aqueduct; William Mulholland, known for building the water system of Los Angeles; and the San Fernando Valley. Their goal is to create an inspiring, educational space for the senator's constituents, staff, and interns in their new offices. Here, Hertzberg (left) and David Keller, archivist for the Metropolitan Water District of Southern California, shake on the loan of a Mulholland photograph from Metropolitan's Historical Collection. The photo immediately behind Hertzberg and Keller depicts F.E. Weymouth, Mulholland, and W.P. Whitsett on a Metropolitan Directors' inspection party and Mission Creek Wash, California, January 24, 1931.

CALL FOR PROGRAM AND CONTINUING EDUCATION PROPOSALS
*ARCHIVES * RECORDS 2016*

Joint Annual Meeting of the Council of State Archivists and the Society of American Archivists
July 31–August 6, 2016 | Hilton Atlanta | Atlanta, Georgia
See *http://www2.archivists.org/am2016/call-for-proposals* for details.
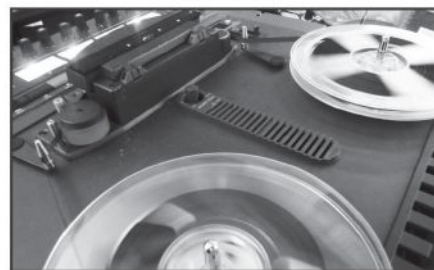
Tim Pyatt was appointed the new dean of the Z. Smith Reynolds Library at Wake Forest University. Pyatt currently serves as the Dorothy Foehr Huck Chair and head of the Eberly Family Special Collections Library at Pennsylvania State University.

Kelly Spring joined the University of California, Irvine, as archivist for special collections. Prior to UC Irvine, Spring served as manuscripts archivist at Johns Hopkins University.

Melanie Sturgeon, state archivist of Arizona, received the Conference of Inter-Mountain Archivists (CIMA) 2015 Life-Time Achievement Award. The honor is given to individuals who have demonstrated considerable service and leadership in the inter-mountain west region, and who have made significant contributions to the CIMA organization and/or the archival profession.

Erin Passehl-Stoddart has been appointed head of special collections and archives at the University of Idaho in Moscow, Idaho. Passehl-Stoddart previously held the position of university archivist and digital collections librarian at Western Oregon University.

Jane Nokes retired from Scotiabank in June. As director of arts, culture, and heritage, Nokes played a vital role in expanding Scotiabank's active contribution to the patronage, promotion, celebration, and conservation of Canadian culture and talent in the fields of archives and visual art. Nokes headed the Scotiabank Corporate Archives team since 1971 and was responsible for establishing the Fine Art Collection in 1975. Under Nokes's direction, the Scotiabank Fine Art Collection grew to become one of North America's leading corporate art collections. Nokes has been a member of SAA since 1975.

Elaine Engst, an SAA Fellow and university archivist at Cornell University, retired earlier this summer. Engst's first jobs included working on the New York Historical Records Inventory, a survey compiling descriptions of more than 24,000 collections in 1,100 archives, and data entry as a technical services archivist at Cornell's Kroch Library. Engst became university archivist in 1995. In addition to helping faculty, students, staff, and alumni with questions and research inquiries, she had a hand in establishing Cornell's Human Sexuality Collection (among many other collections) and has been a keen interpreter of institutional history, most recently in the sesquicentennial exhibition *150 Ways to Say Cornell*.

Virginia Purdy, 92, passed away on May 22. Purdy received a bachelor of arts degree from the University of South Carolina and a master's degree and PhD in history from the George Washington University. Purdy worked as a reference librarian at the Library of Congress and as an assistant historian and keeper of the Catalog of American Portraits at Smithsonian's National Portrait Gallery. In 1969, she moved to the National Archives, where she remained until she retired in 1989. Purdy was active in SAA; she was named a Fellow in 1981 and served as the editor of *The American Archivist*.

Dr. James Berton "Bert" Rhoads, Sr., passed away in April. Rhoads earned his bachelor's and master's degrees from the University of California, Berkeley, and his PhD from American University. Rhoads joined the National Archives in 1952 and held a number of positions before being appointed the fifth Archivist of the United States in May 1968. Under Rhoads's direction, the National Archives' quarterly publication *Prologue* was founded. Rhoads played a key role in establishing the Truman, Johnson, and Kennedy libraries. Rhoads also encouraged engagement in the International Council on Archives and headed the United States delegation to the ICA-sponsored International Congress of Archivists in Moscow. He later went on to serve as ICA president

from 1976 to 1979. Rhoads was named an SAA Fellow in 1966 and served as the SAA president from 1974 to 1975. After leaving the National Archives in 1979, Rhoads taught at Western Washington University before retiring.

Dr. Allen Weinstein, the ninth archivist of the United States, passed away on June 18. Weinstein was sworn in as archivist in 2005. NARA saw many accomplishments under his leadership, including an increase in the annual appropriated budget for the National Archives from $318.7 million for fiscal year 2005 to $411.1 million for fiscal year 2008; the establishment of the National Declassification Initiative to begin to address the challenges regarding the policies, procedures, structure, and resources needed to create a more responsive and reliable executive branch-wide declassification program; and the creation of the First Preservers program in the aftermath of Hurricane Katrina. Among numerous awards and fellowships, Weinstein has held two Senior Fullbright Lectureships; served as a Fellow of the Woodrow Wilson International Center for Scholars and the American Council of Learned Societies; and was a Commonwealth Fund Lecturer at the University of London.
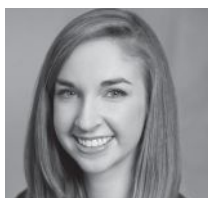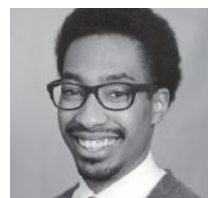
MOSAIC PROGRAM UPDATE

Micha Broadnax   Joanna Chen Cham   Adriana Flores   Harvey Long   Sara Powell

Nearly two years have passed since the ARL/SAA Mosaic Program was launched. Here's an update on the 2013–2015 cohort.

Micha Broadnax

- Simmons College
- Internship host: Schlesinger Library, Radcliffe Institute for Advanced Study, Harvard University
- Completed internship in June 2015.
- Anticipated graduation: May 2016
- Currently interning as the archives and records management intern with the Congressional Research Service, a division of the Library of Congress. In the fall, she will return to the Schlesinger Library as a research services student assistant.

Joanna Chen Cham

- University of California, Los Angeles
- Internship host: Special Collections Department, University of Southern California Libraries
- Completed internship in June 2015.
- Graduated in June 2015 with a Showcase Portfolio on "Holocaust Education and the Role of the Archivist" and the 2015 UCLA MLIS Award for the Advancement of the Profession. Awarded the James V. Mink Scholarship by the Society of California Archivists at the 2015 Western Roundup and a Rare Books and Manuscripts Section Scholarship for the 2015 RBMS Preconference.

Adriana Flores

- Simmons College
- Internship host: Howard Gotlieb Archival Research Center, Boston University
- Completed internship in May 2015.
- Anticipated graduation: May 2016
- Currently working as the assistant archivist for acquisitions at the Howard Gotlieb Archival Research Center, Boston University.
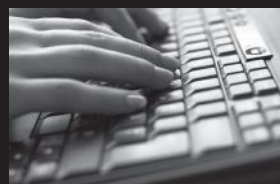
Harvey Long

- University of Wisconsin–Madison
- Internship hosts: Wisconsin Historical Society and the University of Wisconsin–Madison Libraries
- Completed internship in May 2015.
- Anticipated graduation: May 2016
- Recently recognized at the Midwest Archives Conference for

his first-place poster, based on his internship assignment at the Wisconsin Historical Society. He also interned this summer at El Colegio de México in México City, developing a digitization strategy for the Biblioteca Daniel Cosío Villegas with digital initiative librarian Alberto A. Martínez.

Sara Powell

- Simmons College
- Internship host: Institute Archives and Special Collections, Massachusetts Institute of Technology (MIT) Libraries
- Completed internship in May 2015.
- Anticipated graduation: May 2016
- Currently interning as a textual reference intern at the John F. Kennedy Presidential Library and continued work through the summer at MIT as an archives assistant.

Sustaining SAA

A Member Dues Proposal

Mark J. Duffy, SAA Treasurer (2012–2015)

In November, SAA members will be asked to vote in an online referendum to approve or deny a Council-proposed increase in member dues, effective July 2016. SAA Treasurer Mark Duffy discusses why he thinks this proposal should be approved.

I have had the benefit of monitoring some very good years for SAA from a financial perspective. As I noted in my report to the 2014 Annual Membership Meeting,[1] SAA's finances are strong. For the past decade the organization has weathered both economic downturns and business model adjustments with steady growth in numbers, expanded services, and increasing capacity to affect the wider archives and information profession.

So why does the SAA Council see the need for a dues increase?

The simple answer is that it is so much more productive to work from a place of confidence rather than fear when planning for the profession's future. Being free from threat of constant budget tightening has allowed the Council and other SAA leaders to imagine what it would take to make the profession's presence felt in the larger conversation that society is having about retention, care, and reuse of the historical record. We've laid out a very ambitious five-year strategic plan for SAA that, if implemented, will have a dramatic and positive impact on archivists nationwide. To sustain our overall growth, we must have a certain baseline measure of predictable income (i.e., dues) so that we're not overly reliant on the increasing success of such products and services as publications, workshops, and annual meetings.

To dig a bit deeper:

- Although SAA's membership remains healthy at 6,200+, growth has leveled off. The FY16 budget projects no growth in member dues income.

- Part of the resources derived from the 2011–2014 dues increase has allowed SAA to position itself to begin developing first-class information technology, e-publishing, and professional education programs for our members. Technology is expensive, but we must maintain a steady (predictable) investment in it or risk spending money on temporary, patchwork responses to members' interests. To sustain itself and continually enhance our programs long term, SAA must have a predictable revenue stream for infrastructure and technology, including the membership database, efforts to make our website more accessible and content rich, and expansion of our excellent professional development curricula.

- Nothing has given the Council more joy in the past few years than the advances we've made to create a solid public advocacy agenda. To remain the preeminent professional organization representing the interests of archives and archivists, SAA must ensure the sustainability of its investments in advocacy and public awareness efforts through outreach and coalition building. With modest funding our early efforts have been strong—if modest in view of our ambitious goals. Bolder initiatives and the possibilities that come from experimental risk will require more robust and continuous funding.

- Members are turning to SAA for continuing education in record numbers as career opportunities widen. We must continue to enhance and upgrade our education offerings and methods of delivery. Capacity is stretched thin currently; the human talent is in place and infrastructure solutions to expand capacity are within our grasp. We cannot drop the ball now because of budget limitations.

- Based on member feedback, we are experimenting with new locations and models for the Annual Meeting. Although we all agree this is a good move, the Annual Meeting is a critical source of non-dues revenue, and it's highly unlikely that our experiments will yield the generous income margins that we've experienced in recent years. Regardless of those factors, we know that costs for travel, room rental, AV, and food and beverage will continue to increase. We must plan now to fill the gap that we anticipate in our future Annual Meeting revenues.

- The early 2000s marked years of progressive growth in publication revenue that came to a halt with the 2008 recession. Since then, publication sales have declined steadily despite our move to electronic publications. This is our "loss leader" category that awaits a successful e-publishing business model. In the meantime, healthy revenues from membership dues will allow us to maintain high-quality professional publications and implement new platforms that are the foundation of this new business model.

The table lays out the proposed increases, which would be implemented over a three-year period. Each year anticipates an increase of approximately 3 percent. We believe that the proposal reflects a fair distribution of the dues burden among the various categories of membership.
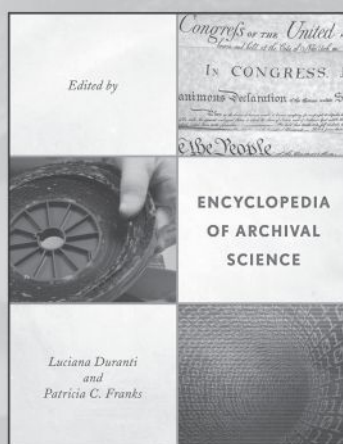
Implementation of a modest dues increase in July 2016 is critical to SAA's ongoing financial stability. It captures cost-of-business increases since the last dues change ending in FY14 and accommodates forecasted changes in non-dues revenue streams (including publications, workshops, and annual meetings). Staggering that increase over time enables members and SAA to budget accordingly and allows SAA to develop programs and balance operational costs with anticipated income. A planned increase also minimizes the risk of financial crisis and reactionary budgeting. This proposal not only provides support for the Society's routine operations, but will generate a modest yearly contribution to reserves (in the range of 3 percent to 6 percent) to support advances in technology and communication and future member services.

I urge you to vote "yes" to this proposal in November. If you have questions (none too small!) or would like to discuss the proposal, contact me at mduffy@episcopalarchives.org or incoming Treasurer Cheryl Stadel-Bevans at treasurer@archivists.org. ■

Notes

1 http://www2.archivists.org/history/leaders/mark-j
   -duffy/2014-treasurers-report

Membership Category	Current Dues (FY2016)	Proposed Dues (FY2017)	Proposed Dues (FY2018)	Proposed Dues (FY2019)
Retired	$70	$73	$75	$77
Bridge	$50	$52	$53	$55
Student	$50	$52	$53	$55
ID1 (<$20k/yr)	$80	$83	$85	$88
ID2 ($20-$29k/yr)	$105	$109	$112	$115
ID3 ($30-$39k/yr)	$130	$135	$139	$143
ID4 ($40-$49k/yr)	$160	$166	$171	$176
ID5 ($50-$59k/yr)	$200	$208	$214	$220
ID6 ($60-$74k/yr)	$225	$234	$241	$248
ID7 (≥$75k/yr)	$250	$260	$267	$275
Regular	$300	$312	$321	$330
Sustaining	$550	$572	$589	$605
Associate Domestic	$100	$104	$107	$110
Associate International	$125	$130	$134	$138

Found Sound
continued from page 3

The first step in the student's work was to prepare copies of audio recordings and interview transcripts for OHMS. This required converting WAV files to MP3, stitching together recordings that had been broken into two files, and deleting extended silences at the beginning of recordings. The transcripts were reformatted to plain text, with special characters replaced, and preface information, including names of interviewer and interviewee, deleted.

Once the audio and transcript files were prepared, the student created an OHMS record for each interview. Metadata, including title, interviewer, interviewee, and abstract, was duplicated from the existing CONTENTdm record for each PDF transcript. Syncing interviews required the student to listen for cues and mark in the text transcript the words spoken at the minute marks (1:00, 2:00, etc.). The student indexed interviews by marking in OHMS the starting points of important conversation topics. He was instructed to note segments that were particularly relevant to the aims of the African American Institutional Memory Project—campus life in the 1960s and issues faced by UNCG's African American students during this time. The OHMS Interview Manager dashboard was used to monitor and quality check the student's work and export XSL files for CONTENTdm.

The student tracked the amount of time spent on each task with each interview. We found that creating enhanced access to an interview with an existing transcript took approximately ninety minutes per hour of interview time. We believe that the time would be reduced if the indexer was the person who actually conducted the interview and/or created the transcript. Approximately fifteen of the ninety minutes were spent reading the interview to get a general sense of subject matter and determine key issues that required noting in OHMS.

CONTENTdm and OHMS

CONTENTdm, our digital collection management program, posed a couple of challenges in implementing the project.

We wanted to provide access to the audio recording through the OHMS viewer in CONTENTdm while also making the PDF transcript available as a printable file. While we initially explored the possibility of a single instance for each interview with both the PDF and embedded OHMS files as parts of a compound object, this option was ultimately rejected when issues arose with having a compound object consisting of a PDF and another file type. As an alternative, two instances now exist for each interview included in the project: one for the audio file, accessible through the embedded OHMS player, and another for the previously existing PDF. The OHMS file and PDF transcript instances are differentiated both by their title and by the icon displayed in the CONTENTdm search results.

> With our local OHMS documentation and workflow in place and a sense of the time needed to create this level of enhanced access, we can better plan these sorts of future projects.

Additionally, the two instances are linked using the "Related" field in each instance's full item description.

Embedding the OHMS viewer into CONTENTdm was another challenge. While we could provide links out from CONTENTdm to the OHMS viewer, we wanted to embed directly to produce a more seamless experience for researchers. After exploring a number of options for embedded viewer access, our digital projects librarian edited a portion of code in the CONTENTdm DMZ area to embed the OHMS viewer directly in the CONTENTdm window using an IFRAME.

Future Challenges

University Archives has hundreds of other valuable oral history interviews in our collection currently accessible online only as PDF transcripts. We have,

however, identified a few issues with earlier interviews that may limit the scope of OHMS implementation with legacy files.

In some instances, the transcripts do not match the audio files. Editing was done both by the interviewer and, sometimes, the interviewee—often without notation of correction in the transcript itself. This makes the transcript an account of what the interviewee *meant* to say, not necessarily an account of what was actually said. Because OHMS is time synced, single-word differences had negligible impact. But when full sentences or paragraphs were redacted or added into the transcript, we encounter a major issue syncing the audio file to the existing transcript. Prior to creating enhanced access (or even providing access to audio files) to many of these legacy interviews, we must formalize a policy that balances risk against reward, particularly in instances where the editing was done by the interviewee.

With some legacy interviews, we face issues related to rights and expectations of interviewees. Many of the interviews were conducted well before the rise of the internet. As a result, interviewees may not be comfortable with the audio recordings themselves being available online. Release forms used on the various oral history projects through the years must be examined to determine what rights we have to provide direct access to the audio files (particularly in cases where they do not match the transcript). Additionally, when dealing with interviews with living interviewees, we may want to contact the interviewee to ensure that he or she is comfortable with us providing online access.

Moving Forward

While many legacy interviews present challenges, we do plan to explore broader implementation of OHMS in our oral history projects. We have modified our current oral history workflow to incorporate OHMS syncing and indexing by the person who creates or quality checks the transcript. We plan to employ students in the future to continue syncing and indexing existing interviews. With our local OHMS documentation and workflow in place and a sense of the time needed to create this level

## The Case of the Puzzling Personal Digital Archive

This is how the plot will unfold: After the presentation portion of the workshop, attendees will divide into small groups, and facilitators will distribute the USB drives and instructions. Participants will attempt to analyze the archive and, in so doing, uncover clues about the murder mystery. The instructions will ask them to inventory the files, identify organization methods (or lack thereof), think about files that might be important to preserve, look for sensitive information and preservation problems, and consider how they would manage the files for better long-term stewardship. The instructions will also invite participants to guess the identity of the creator-victim and the murder mystery intrigue embedded in the archive. After sleuthing, participants will discuss the activity and their own personal archiving experiences.

So, what happens in the end?

Act V: The Happy Ending . . . and the Sequel

After much planning and sleuthing, our team organized a series of workshop events for our communities. We facilitated an in-person train-the-trainer version of the workshop at the Georgia State Archives, attended by seventy archivists, librarians, records managers, digital asset managers, genealogists, and students from across the state, and GLA provided continuing education credit for participants. We offered a webinar version of the workshop via GLA (with 390 registrations from around the world), taught a condensed version of the workshop at Atlanta Public Library System Staff Development Day (with about fifty attendees), and hosted a version of the presentation for Genealogy Day at the Georgia Archives (with another fifty attendees). And we designed an incentive for reuse and further outreach: SGA offered a prize grant for the first individuals to facilitate the workshop. The winners were Derek Mosley and Christine Wiseman of the Atlanta University Center Woodruff Library.

Here's a snapshot of survey feedback from the seventy in-person workshop
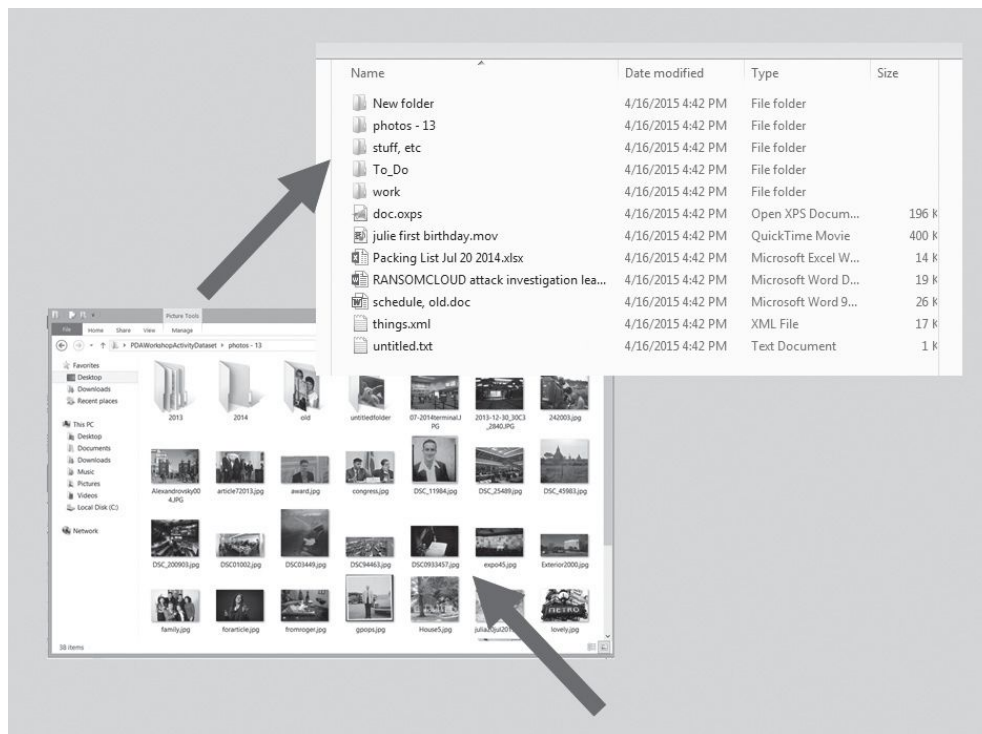
A closer look at files from the fake personal digital archive. Note the ambiguous file names and directory structures, revealing a list of what not to do when archiving personal digital records.

participants:
- A majority of participants indicated that they planned to offer the workshop in their workplaces and communities.
- Suggested venues for the workshop were: public libraries, retirement centers, genealogy groups, academic libraries, community centers, online graduate courses, family reunions, offices, places of worship, and historical societies.

A majority of participants mentioned the murder mystery activity as a highlight of the workshop. They reported that the activity "makes it seem authentic and helps me think through the issues" and was "very hands on and real." Participants offered these suggestions for improving the workshop and tailoring it to specific communities:
- Break into smaller groups for the activity
- Include more recommendations about specific tools and metadata practices
- Include information about digitization

The workshop materials could be adapted to incorporate all of that feedback, and they could also be extended and expanded. A few ideas:
- Facilitators could partner with additional organizations or groups to teach the workshop (law librarians, scholarly communication departments, artist collectives, high school teachers, student organizations, etc.).
- Instead of using fake archives, participants could examine samples of their own digital materials and develop game plans for preserving them.
- Facilitators could create additional fake archives, with different characters or record types, designed to appeal to diverse audiences. For example, a workshop for young students might include more social media records (how about disappearing Snapchats?); one for artists might incorporate mysterious glitch art; a mystery narrative for corporate employees might weave in something about e-discovery; a genealogist spin might ask participants to uncover the identity of a mysterious relative, etc.
- Facilitators could create a whole narrative mystery game, in which each small group would investigate a character and collaborate to share clues and discover how the characters interconnected in a web of archival mystery.

To download the workshop materials and adapt them for use in your own community, visit the SGA website: *http://bit.ly/pdaworkshop*. Happy sleuthing! ■

Finding Hops' History

was likely our motivations and comfort with sharing research findings would differ. Did we implicitly trust each other because of our roles as "archivist" and "historian"? Would that be complicated by the fact that I provided reference services *and* acquired collections used by him and others? How might his commitment to donate his research papers influence how I worked with other researchers? Would my ethical obligation to this researcher interfere with my work to promote the archives?

Kopp gave me time, contacts, advice, a dissertation, and a promise of his papers, but he couldn't give me full access to his research because his final product was still in progress. At times he was also concerned about the promotion of the archives itself; hops and brewing are popular topics, and since he'd spent many years gathering materials and cultivating relationships with people in the industries, he didn't want someone else to write the book first. I was creating an archives that would make future research easier, but I was still an archivist and had ethical obligations to

this researcher. When he asked me for subtlety and patience, I asked him to finish the book.

As time passed, our relationship evolved. Kopp became an even more valuable advisor for the archives, answering questions about his research, but also reminding me to be patient when working with the communities. As I grew the archive and answered reference queries, I made new connections in the materials and offered him new perspectives based on what I'd learned. He's understandably curious about what others are researching, but as I settled into my role as both researcher and collector, I found it easier to separate Kopp as the advisor from Kopp as the researcher.

One of the most exciting changes is that we've adopted new roles as content creators, conducting oral histories and participating

Hop Field Day, 1941. *Courtesy of Agricultural Experiment Station Records, Oregon Hops & Brewing Archives.*

in events or conferences together. At the National Council on Public History last spring, he referred to two stages of his work as "B.T." and "A.T."—before and after Tiah.

I relish the challenges that this archives offers and appreciate the colleagues who make growing it so interesting. Kopp offered a bit of advice early on that I've tucked in my pocket and take out regularly: "Be patient. Building these relationships takes a lot of time." ■

Archives, Reenergized

celebration. Just as archived items from the 125th anniversary helped inform the 150th anniversary committee, the minutes, programs, and promotional items from the sesquicentennial will be preserved to guide future anniversaries. We largely used items drawn from our physical collections for this anniversary. Having tangible items to display, loan, and discuss added to the understanding of the past and how the college evolved into its present-day manifestation.

Showing the Value of Archives

An anniversary provides an excellent opportunity to engage an institutional community in a discussion about the importance of archives, particularly at institutions with little budgetary allotment to archival preservation. Archivists know

the importance of preserving physical items to engage in a historical dialog about the institution, and telling the story of Peirce's 150 years would be difficult without an archival record to discuss, debate, and display. ■

Notes

[1] Bjelopera, Jerome P. *City of Clerks: Office and Sales Workers in Philadelphia, 1870–1920*. University of Illinois Press: Urbana, IL, 2005.

[2] "1865: Eyewitness to History," Historical Society of Pennsylvania, accessed June 3, 2015. *hsp.org /history-online/exhibits/1865-eyewitness -to-history*.

[3] Everts, Bart. "Peirce College as an Eyewitness to History," Peirce Connections, accessed June 3, 2015. *http://blog.peirce.edu/2015/04/peirce -college-as-eyewitness-to-history.htm*.

1865 Union Business College catalog on display at the Historical Society of Pennsylvania's *1865: Eyewitness to History* exhibit, March 2015. *Courtesy of Peirce College Archives.*
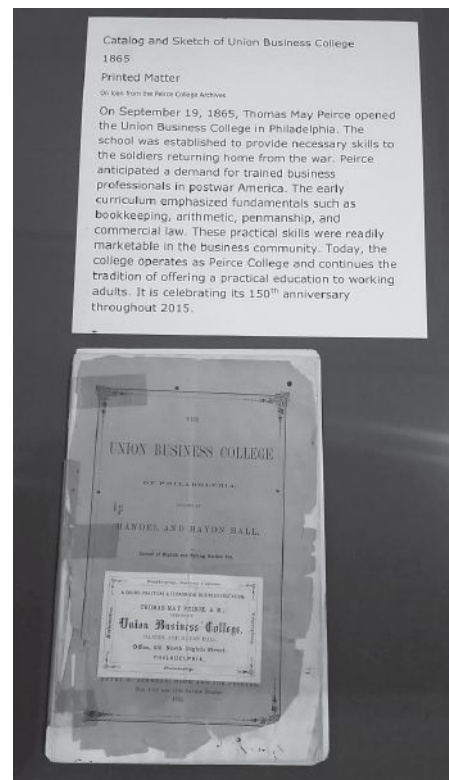
Putting Archives on the Agenda

For the most part, the agenda items for our meetings were upbeat reports meant to educate him about our mission, our successes, and the specific accomplishments that supported the university's strategic plan. I used "strong words." I attempted, over the course of a year, to touch on all the major activities, services, and programs AHC was involved with, from acquisition of new collections to administering Wyoming History Day and much else. I also made a point to inform him if I learned that our repository stood far above the national norm in some important way, e.g., number or percentage of undergraduate researchers.

When it was unavoidable or essential to put problems on the agenda, they were the mammoth problems that I could not solve on my own (for example, the continual leaks in our building's roof, which threatened our collections' safety[5]). Every so often, one of the agenda items struck his fancy and he invited me to make a presentation to the twice-monthly meeting of all the university's deans and directors—a tremendous opportunity to brag about AHC to the entire academic leadership of the institution, as well as to educate those leaders about AHC.

There is nothing new or innovative about any of this. Not only does it mirror Dearstyne's call for archivists to be "constant ambassadors" for their programs, it is part and parcel of general management literature:

> You can't assume your manager knows what you're doing, the great progress you've made, or the obstacles you've overcome *unless you make it your mission to provide that information*. . . . Get on your manager's calendar bi-weekly. . . . Instead of giving your manager a list of tasks you've accomplished, explain what those tasks mean in the bigger picture. . . . [6]

Conduct this type of advocacy as if your program depended on it, which it might well do. Do it in your resource allocators' offices and in their language (leave the jargon in the repository): "'If we want someone to understand what we have to say, we must learn to speak their language, rather than expect them to learn ours.'"[7]

Advocate for Your Staff

But wait. There's more. It's not all about you. It is imperative that your resource allocators understand the good work your employees are doing. Advocacy on behalf of your staff presents an additional opportunity to connect, in person or through a message, to your boss and to continue educating him or her about what your program does and why it matters. Also, your team's excellent work reflects well on you. The highest level of leadership is said to be one in which the leader looks "out the window, not in the mirror, to apportion credit for success. . . ." This is because superior leaders hire "the right people [for] the right seats," letting them play to their strengths. And if your employees know that you tout their achievements and initiatives to your boss, it helps to build or sustain morale.[8]

At AHC, I asked our department heads to be sure to forward to me every written kudo they or their staffs received from outside researchers, university faculty and students, and K–12 instructors (an area of intense interest to our school's leadership). I kept a folder where I filed these messages of praise and appreciation. And once every month or two, I would send a message to my boss, sometimes copying the president, with the content of the kudos pasted in (attachments might be more easily ignored). I introduced the expressions of acclaim by succinctly explaining the importance of the services or programs in question *to the university as a whole* and adding my own acclaim for the staff members' excellent work. Less regularly, but consistently, I also made a point of informing higher-ups when our archivists achieved a particularly notable result in their profession: e.g., election to chair an SAA section, publication of a refereed article, or invitation to present a paper internationally.

* * *

We *must* cease taking pleasure in being misunderstood, and must begin consistently using "strong words" to conduct continuous advocacy for our programs with our supervisors and other resource allocators—advocacy that, if as is often necessary, takes place outside the archives. Supervisors who relish trips to our repositories are apparently rather rare, so instead of feeling frustrated or sorry for ourselves we must unfailingly and frequently put ourselves in our boss's face, or at least on his or her doorstep.

For some of us this might seem like "living dangerously," as President Roe has urged us to do, but if dangerous it is no more so than hunkering down in our archives waiting for the boss to drop in. ■

Notes

[1] Bruce Dearstyne, *Leading the Historical Enterprise: Strategic Creativity, Planning, and Advocacy for the Digital Age* (Lanham, MD: Rowman and Littlefield, 2014).

[2] J.T. O'Donnell, "3 Rules To Managing Up," *Careerealism*, August 20, 2014, *http://www.careerealism.com/3-rules-to-managing-up/*.

[3] Amy Gallo, "Setting the Record Straight on Managing Your Boss," Harvard Business Review Online, December 18, 2014, *https://hbr.org/2014/12/setting-the-record-straight-on-managing-your-boss*. Emphasis added.

[4] Jean-François Manzoni , "Dealing with a Hands-Off Boss," *Harvard Business Review Online*, December 17, 2014, *https://hbr.org/2014/12/dealing-with-a-hands-off-boss*.

[5] It took many years, but consistent lobbying for remediation of the leaks finally paid off in 2013, when the University invested more than $2 million in reroofing our building.

[6] Lea McLeod, "5 Ways to Make Sure Your Boss Knows Just How Awesome You Are," *The Muse*, n.d., *https://www.themuse.com/advice/5-ways-to-make-sure-your-boss-knows-just-how-awesome-you-are*. Emphasis added.

[7] Wayne Turk, "The Art of Managing Up," *Defense AT&L* (March-April 2007), p. 23, *http://uthscsa.edu/gme/documents/TheArtofManagingUp.pdf*. Research conducted by Erin Passehl Stoddart and Richard Stoddart from the University of Idaho presents troubling if not surprising evidence of the dominance of professional jargon in archival communications meant to influence resource allocators and other stakeholders; it is part of broader investigations into the extent to which archival units in higher education do or do not clearly emphasize their strategic importance to the larger institution's mission. See their slide presentation, "Assessing the Strategic Credibility of Special Collections," American Association for the Advancement of Science—Pacific Division (2012), *http://works.bepress.com/erin_passehl/19*.

[8] Jim Collins, "Level 5 Leadership: The Triumph of Humility and Fierce Resolve," *Harvard Business Review* 83 (July/August, 2005), 141, 142.

Expanding Archival Horizons
continued from page 15

Building Community Archives, the Cañar Project

After the symposium, archivists will travel to Cañar to meet Blankenship and assist in her work with community archives. We'll discuss models for community outreach, information sharing, and the needs of a small nonarchival community documenting itself. Blankenship writes about her project and our collaboration:

> The Archivo Cultural de Cañar is a community archives project in a highland province in south Ecuador. With a large indigenous population, the Cañari, and a market town that serves the region, the archives will include photo collections from the glass plate negatives of a traditional town photographer, Danish anthropologists, and Peace Corps volunteers who worked in the region forty years ago, as well as sound recordings, oral histories, documents, and some video. I am a photographer and writer who has known the area for more than twenty years and lived here the past ten years.

> While we have a wealth of materials for the digital archive, the actual work of implementing software and creating metadata has yet to be done. For this I am looking for advice, assistance, and inspiration, which I anticipate will come from two important events in 2015: attending the SAA Annual Meeting in August and a visit from a group of "itinerant archivists" to Cañar in September.

Anticipating Outcomes

We're at an exciting part of this project; we're hopeful of the results that will come from months of planning and our anticipated projects. We'll ask participants to share what they have learned through tweets, blogs, and articles and to look for opportunities to continue their engagement with Ecuador as well as how such work can be done with other communities.

Join Us at SAA and Beyond!

As archivists, we know that vast amounts of information are only available in person. They cannot be accessed or researched virtually or online. Such is also true for cultural exchange. Our worlds are as vast and varied as we allow them to be. In the words of artist Robert Rauschenberg: "One of the questions that I remember the answer

An example from the archives of Foto Navas studio, Cañar, Ecuador, which will be included in the Archivo Cultural de Cañar digital collection. Members of the Itinerant Archivists group will assist with the development of this community archives project.

to was, '*What is your greatest fear?*' and I said, '*That I might run out of world.*'"

Join us! ◼

Important Dates

SAA's LACCHA and IAART Joint Meeting: August 19, 2015, 5–7 p.m. Ecuador trip: September 27–October 4, 2015

Learn more about the projects: *https://drive.google.com/file/d/0B-4I-K _EIVh5TXllYjBwckt6QVU/*

Flee to the Cleve

There are around twenty local breweries for you to experience a cold one on a hot August day: IPAs, lagers, and stouts (oh my!) as well as ales, porters, shandies, light, dark, red, black, fruity, bitter, nutty, smoky, sweet—whatever you prefer you can be sure to find here! If transportation is a problem, there's always the Cleveland Brew Bus,

which offers a variety of tours and tastings. And if you like your beer mixed with pastry, Brewnuts is the place for beer-based doughnuts. Words simply can't do justice to these confections!

In addition to this information, look for even more on the Host Committee blog as we count down to the SAA Annual Meeting. We've planned a busy blog calendar, full of more food, beer, tourism, sports, and Cleveland history.

Tweeting about the Meeting?

You can share what's going on with the #saa15 hashtag and, if you want to let everyone know how much you love your Cleveland experience, please add #ThisIsCLE to your posts! ◼

Making Access Happen

manage them—the distinction allows a preemptive strike against the volume and complexity of electronic records.

Automatic records management or better user training?

When we asked how ERM might be automated, some participants said they felt strongly that there are risks in making ERM too automated. For example, if it becomes so invisible to end users that they never have to think about it, they might not value their records and information appropriately. Those participants believe that better records management training for end users is still critical.

However, many participants did find the vision of an automated future appealing. They said that ERM is vulnerable as long as it's an add-on system for users and for IT acquisition and support. It has to be completely integrated to the way people do business or it will never happen consistently.

What is the ideal future state?

We asked discussion participants to describe a future world where electronic records are managed well. Although we got a range of answers to this question, a fairly consistent picture emerged from the compiled comments. In the ideal future:

Good ERM happens automatically because it is built into the way people naturally do their work. The systems know what kind of work you do and records are automatically organized in the right categories. Predictive coding software correctly categorizes newly created content by its subject matter

or function. All information created is appropriately managed.

All information captured and categorized is immediately accessible for reuse by the records creator and the organization. It is easy to search, discover, retrieve, and reuse information. Capturing records to manage them does not mean taking them away to some safe but inaccessible space; records are managed, safe, **and** accessible.

Once the permanent electronic records come to the archives, powerful search systems allow archivists and users to retrieve needed information. Archivists don't need to categorize it before it can be found. Archivists focus on using analytical systems to sort through vast quantities of electronic records.

In this ideal world good ERM happens with no burden on the record creator, creators have access to their own material, information is kept as long as it needs to be kept, and the archives receive and provide easy access to all the permanently valuable electronic records.

Wouldn't that be great?

What steps could we take to move toward that ideal future?

Participants mentioned the need for ongoing work on current archival priorities, even in the ideal future: standards for formats, metadata, and interoperable systems.

Many participants shared the sense that tools and approaches already exist, but the technology is beyond the reach of most archivists. It's time consuming to research options and select the best one, expensive to buy the tools, complex to deploy them,

and the market is changing all the time. However, that description of the hurdles also points to steps we could take that would help.

We should explain our challenges to technologists outside our usual circles. We should establish labs where we could test tools on real records. We should establish shared services where one organization could address these hurdles for many others.

To summarize: We should do it together, share solutions, spread the cost, reduce duplicate investments, and focus on simple, flexible solutions that many institutions could use.

What is NARA doing with all this input? The ideas from these discussions informed the Electronic Records Management Automation Report/Plan (*http://goo .gl/8LTSRt*). NARA released the final report and plan in September 2014 and created a website (*http://goo.gl/3CDBdj*) to provide progress updates on the plan. (You can also follow breaking news about electronic records activities on the Records Express blog: *http://blogs.archives.gov /records-express/*)

However, the discussions you had with us were broader than just automation.

This article is part of our ongoing work to digest what we heard from the community and start thinking about what else we— NARA and the whole profession—can do to build the future we want. There is a lot more work to be done.

NARA thanks everyone who talked with us last year. We look forward to continuing the conversation as we get closer to the ideal future of electronic recordkeeping. ◼

FROM THE EXECUTIVE DIRECTOR
Nancy P. Beaumont
nbeaumont@archivists.org

The Cleve

Cleveland. It's not just in my every thought these days. It's everywhere!

Over the course of what seemed like an eternity in May and June, the Cleveland Cavaliers advanced through the NBA playoffs and finals, thrashing my beloved Bulls along the way and giving Golden State a run for its money. How many times did we see Cleveland's lovely skyline during that run? But also . . .

- Tucked between Sri Lanka at #19 and Vietnam at #21 on Fodor's "Go List 2015" ("...the 25 can't-miss spots that we think should be on every traveler's radar in 2015")? #20: Cleveland.

- Number 7 on Travel + Leisure's "Best Food City in America" list? Cleveland.

- James Beard award-nominated "Best Chef/Great Lakes"? Jonathon Sawyer, The Greenhouse Tavern, Cleveland.

- Named to the "150 Best Bars in America" list? The Velvet Tango Room in Cleveland.

- Site of the 2016 Republican National Convention? Cleveland. And, in fact, the Cleveland Convention Center.

ARCHIVES 2015 will be our first annual meeting in a convention center. We've learned a few lessons about how convention centers differ from conference hotels. For example, in this convention center we can't change room sets in the middle of the day or move the chairs around. (They're hooked together!) There's no restaurant. But there is an Au Bon Pain off the West Patio upstairs and we'll have a concession kiosk open on Thursday during the noontime forums and brown bag lunches. There are many restaurants just blocks away. And we'll have great meeting and networking space with some actual natural light at the end of the long hallway.

Be prepared! The morning events will start just a bit later to accommodate "commuting" from the hotels. (See the full schedule at *https://archives2015.sched .org/*.) Something we didn't know when we booked this meeting—apparently no one outside the planning commission knew it—was that the Public Square on which the Renaissance Hotel sits would be under serious construction. Getting pretty for the RNC, we're told. So do allow yourself some extra time.

You won't want to be late for the plenary sessions on Thursday and Friday mornings. For Plenary I on Thursday, SAA President Kathleen Roe has found some excellent speakers to open our eyes to the importance of telling compelling stories about archives and archivists—stories that express how Archives Change Lives. At our "Leadership Plenary" on Friday, you'll hear Kathleen's reflections on the "Year of Living Dangerously for Archives" in her presidential address; President-Elect Dennis Meissner will share the directions and initiatives within SAA's Strategic Plan that will be the focus of his presidency; and Council member Helen Wong Smith will introduce the Council's initiative on cultural competence for archivists.

Throughout the conference, you'll be able to select from the array of seventy education sessions selected by the Program Committee. And this year you'll be able to propose a Pop-Up session spontaneously—or participate in voting for which Pop-Up ideas are of greatest interest to you. Stay tuned to the conference website for more information.

If you're wondering what to do in your spare time, take a look at the Host Committee's awesome collection of ideas on its blog (*https://saa2015cle.wordpress.com/*) and Co-Chair Jennie Thomas's article in this issue ("Flee to the Cleve," page 16). Really, Jennie, beer-based doughnuts?

So much to do in just four perfect days in the Cleve.... ∎

Council Proposes Stepped Dues Increase, Effective July 2016

An important item of business will be brought before the Annual Membership (Business) Meeting in Cleveland on Saturday, August 22, 11:15 am–12:30 pm: A proposal to initiate a three-year stepped dues increase, effective July 1, 2016. The proposal will be discussed—but not voted on—at the Membership Meeting. Instead, according to a Council-proposed procedure that was adopted by the membership in 2011, the discussion will inform an all-member online referendum that will be conducted in November. For more information about this process, see the SAA Constitution (IV. Dues)[1] and Bylaws (11. Member Referenda).[2] And be sure to read Treasurer Mark Duffy's article about the dues proposal on page 24.

Notes

1. *http://www2.archivists.org/governance/handbook /section1/constitution*

2. *http://www2.archivists.org/governance/handbook /section1/bylaws*

Stay ON TREND

Digital records pose many challenges for archives, libraries, and museums, and behind them all lurks the shadow of trust. How can donors know that your repository will take good care of their digital files? How can people verify that the records they wish to use are authentic? How can they have confidence in being able to access obsolete file formats far into the future?

These are difficult questions, but whatever the size or mission of your archives, you can move it closer to answering them and to being a trustworthy digital repository. Meeting the gold standard—ISO 16363, Audit and Certification of Trustworthy Digital Repositories—may seem like a far-off goal, but this complex standard is demystified by Steve Marks in *Module 8: Becoming a Trusted Digital Repository*, which is the latest addition to the series Trends in Archives Practice.

TRENDS IN ARCHIVES PRACTICE

MODULE 8
BECOMING A TRUSTED DIGITAL REPOSITORY

STEVE MARKS

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Edited by Michael Shallcross

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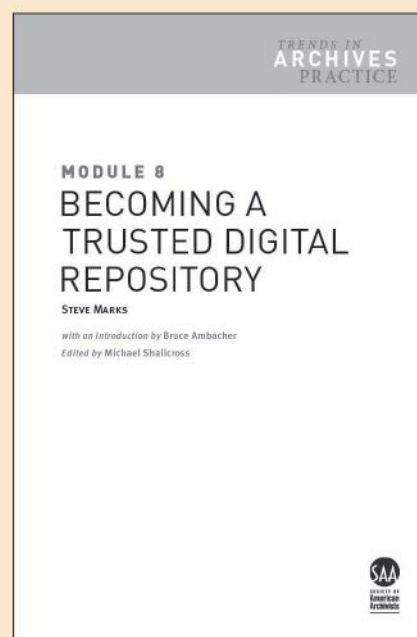
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