

Report of the Digital Archives Continuing Education Task Force

16 May 2011

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I. Background

A. Charge

On May 26, 2010, the Council of the Society of American Archivists (SAA) formed the Digital Archives Continuing Education Task Force (or DACE), which would be “responsible for developing a detailed professional development curriculum on the subject of digital archives.” The task force was further charged with developing a final report that included the following items:

1. A list of workshop topics to be developed, including brief descriptions of the areas covered in each workshop.
2. A “workshop tree” indicating how workshops (including existing offerings) build on and enhance each other.
3. A list of possible developers and reviewers for each topic.

SAA released a call for volunteers in the summer of 2010, and SAA President Helen Tibbo appointed the members of the task force as of August of that year. (The full charge to the task force appears in “Appendix A: Charge to the Digital Archives Continuing Education Task Force.”)

B. Deliberations

The members of the task force conducted their work via conference calls and a single multi-day meeting at SAA’s headquarters in Chicago. During the first conference calls, the task force discussed SAA’s current schedule of course offerings in digital archives and clarified details of its charge. During these discussions, the task force evaluated each electronic records course in SAA’s course schedule, identified a need to extend the range of course offerings, developed a structured curriculum, and developed means to target specific audiences, ensure the quality of instruction, and integrate digital archives continuing education into the rest of SAA’s course offerings.

At the task force’s meeting in Chicago in October of 2010, its members created the outline of a sophisticated structured curriculum for Digital Archives continuing education and sketched out the details of making this curriculum a reality. During these discussions, the task force finalized the design of the curriculum, developing tiers and tracks of study as well as a detailed system for maintaining metadata on each of the courses in the curriculum, helping prospective students choose courses, and ensuring the quality of these courses. The task force also identified new courses to add to SAA’s course listings, potential instructors for those courses, and the need to promote this new curriculum immediately.

The task force carried out the final leg of its deliberations via conference calls and email, completing its work in early 2011.

C. Approach

The task force agreed that two basic concepts would guide its work. The first was that its focus would be on born-digital records, thus on digital archives rather than digitized

archives. The members believed that this distinction was important because it accepts that digital records are a central concern of archivists and because these move the focus of the curriculum away from paper records, which is truly where digitization projects are focused. The task force's other guiding concept was that electronic records training needs to be integrated into the work of archives rather than treated as something separate from or in addition to that work. This is an important consideration in the curriculum itself, suggesting that most courses given by SAA include information on electronic records.

II. Discussion

SAA's digital archives course listings begin with introductory training on electronic records and continue to moderately advanced levels of difficulty, but the courses are not integrated with one another, there is no clear path of training for a prospective student to take, and the workshops provide a mishmash of styles and information rather than one clear educational vision. These are problems the task force believes must be solved, and the task force's solutions should lead to greater attendance at workshops, more revenue for SAA, and, most importantly, a national community of archivists better educated to manage the demands of digital records.

One method the task force used to consider these issues was a simple one: What is the niche that SAA's digital archives continuing education serves? The first answer was that SAA serves the archivist, whether that archivist is a member of SAA or not, but the true answer became more complicated. The full answer was that SAA, as part of its mission, provides educational opportunities to archivists and a number of people in allied professions. Because of this, SAA's digital archives education must also consider the librarian who might need training in managing digital records, the managers and administrators who will need to oversee programs for managing these records, the information technology professionals who need to understand archivists' concerns regarding digital records, and even lawyers who must be cognizant of the legal complications that some electronic records carry with them. This focus on user types led directly to the task force's idea of developing tracks of study that would address the needs of different groups of students.

The task force concerned itself with the details of the proposed training program because the members saw the need for an integrated solution where the details mattered. Given this, they discussed the modes of training that SAA has used to determine content and delivery of that content, how to coordinate this with other ongoing similar efforts being undertaken by allied groups and organizations, and how to measure its ultimate success. While principles remain stable, technology is ever changing, therefore the task force believes that the development of the curriculum and its subsequent review and refinements are iterative in nature and require a vigilant systematic and scheduled approach.

III. Recommendations

A. *Structured Curriculum*

The task force's first recommendation is a direct response to its charge to develop "a 'workshop tree' indicating how workshops (including existing offerings) build on and

enhance each other.” The structured curriculum that the task force has developed begins with the current course offerings, suggests some changes to those, and adds many more. Before developing a structure, the task force needed to identify and fill the substantial gaps in the curriculum as it currently exists. This structured curriculum then divides the courses into tiers of study and categorizes them by tracks of study across these tiers. This framework finally gives the course schedule a structure that allows users stratified and categorized information on courses.

B. Tiers of Study

The proposed tiers of study allow prospective students to assess their needs against the general goals of different tiers. The task force opted not to use overused terms such as “basic,” “intermediate,” and “advanced” to define tiers, deciding instead on a more active set of descriptors. (For a listing of all courses, divided into the four tiers, see “Appendix B: Simple Table of Structured Digital Archives Specialist Curriculum.”)

1) Foundational Courses

These courses focus on the essential skills archivists will need to manage digital archives. These focus primarily, but not exclusively, on the needs of practitioners, archivists who are or will be working directly with electronic records. These courses present information that an archivist might implement in the next year.

2) Tactical and Strategic Courses

These courses focus on the skills archivists need to make significant changes in their organizations so that they can develop a digital archives and work seriously on managing electronic records. These focus primarily, but not exclusively, on the needs of managers, those archivists who manage other professionals and who oversee programmatic operations. These courses present information that an archivist might implement in the next five years.

3) Tools and Services Courses

These courses focus on specific tools and services that archivists need to use for their work with digital archives. These are practical courses focused on specific software products and other tools. These courses focus primarily, but not exclusively, on the needs of practitioner archivists. These courses present information that an archivist could implement immediately.

4) Transformational Courses

These courses focus on the skills archivists need to change their working life dramatically and transform their institutions into full-fledged digital archives. These courses focus primarily, but not exclusively, on the needs of administrators, those archivists with oversight over the entire archival enterprise of an institution. These courses present information that an archivist might implement over the course of the next ten years.

C. Tracks of Study

The task force determined that the needs of SAA's members and other potential students were so broad that it would be necessary to identify different tracks of study for different potential students. The task force envisioned that each course would be assigned to various tracks, rather than a single track, and that courses would be developed with these tracks in mind. The tracks identified by the task force were Practitioner, Manager, Administrator, IT Professional, Librarian, Legal Professional, Museum Professional, and Records Manager. The task force reviewed all extant and proposed workshops and identified specific tracks for each of these. (For a listing of all courses, along with the identification of tiers and tracks, see "Appendix C: Detailed Table of Structured Digital Archives Specialist Curriculum." For definitions of tracks, see "Appendix G: Glossary of Terms.")

D. Formats of Training

The task force noted that SAA provided training events in a variety of formats (one-day in-person workshops and ninety-minute webinars, to give the two most common examples), but that there was no specific guidance on when one was appropriate over another. With this fact in mind, the task force defined when to use one format of training over another, thus adding another element of intellectual control over the course development process. (For a listing of all courses, along with the identification of tiers, tracks, and formats of training, see "Appendix C: Detailed Table of Structured Digital Archives Specialist Curriculum.")

1) One-day workshop

This is the standard format that most SAA training follows. These one-day workshops last from 9 am until 5 pm, with an hour for lunch, and are appropriate for training that focuses, in detail, on one specific aspect of archival education. The goal of such training is to give students enough information to carry out at least some of the functions taught during the training. These workshops should include exercises and discussion and may include some hands-on training.

2) Multi-day workshop

Multi-day workshops are designed to give students in-depth training on one specific aspect of archival activity. As such, they must include hands-on training and might be focused on implementing such training. These workshops last two or three days and must be designed so that one day builds upon the previous day's learning.

3) Webinar

Webinars are 90-minute online training sessions in which students log in to a website to view the training and call in to hear the course presenter speak. The course presenter is not visible, interaction between the presenter and the audience always occurs, but opportunities for interaction are limited. For this reason, these courses must be short and must focus on giving fairly general overviews of topics in digital archives. For purposes of managing the Digital Archives Specialist certification, attendees at webinars will have to procure an affidavit from the license

buyer confirming attendance or will have to register and take the online on-demand course individually.

E. A New Online Course Management System

For the future, probably by 2013 or 2014, the task force envisions SAA implementing a dynamic online course management system that potential students could use to evaluate course offerings, identify and register for courses, and even watch online recorded course offerings. This system would lay out, in tiers, the entire current course schedule for SAA, allow users to search a rich online database to see how courses fit into their needs, and provide a way for potential students to take pre-tests to determine if they were sufficiently knowledgeable to take certain courses. One major purpose of this system would be to bring the curriculum under better control, and one of the means of doing so would be to ensure the maintenance of good and helpful metadata on each course. (See Appendix D: “Course Description Data Elements for Digital Archives Specialist Curriculum” for a list of proposed metadata elements.) This system will help potential students find courses and follow a logical path through the course schedule to meet their personal needs, but it will also provide SAA with a way to better manage and conceptualize its curriculum.

F. Integrating the Curriculum Framework

Administering archives in a ubiquitously networked world is no longer a matter for archivists alone. Because born-digital materials are subject to short-lived technologies at the time of creation, their management and preservation require a highly coordinated effort. The ability to define roles and responsibilities clearly depends on the extent to which we are speaking the same language. Partnerships with IT professionals are usually absolutely necessary, so SAA’s digital archives curriculum must identify ways and means for maximizing these opportunities.

The proper management of digital archives requires early intervention and continued vigilance, and this curriculum is designed to teach these points. Archivists must learn to become involved with records from the point of creation or before, which is something simpler for institutional archivists than for manuscripts curators. But even curators of manuscripts need to learn to build relationships with creators early on, before records are discarded or become inaccessible. Similarly, the world of digital archives does not allow archivists the possibility of complacency after accessioning or the first act of preservation. Archivists of electronic records need to manage actively the records under their care, not passively, because these records are much more unstable than standard paper records. The Digital Archives Specialist curriculum is designed to teach these truths and to encourage archivists to see their world now as a constantly changing one, where digital records need early and constant care, where the skills they need will change frequently, and where they must focus on records more as active users always have rather than as curators had in the past.

The proposed curriculum accounts for horizontal and vertical transfers of knowledge through a structure of tracks and tiers. Courses structured by tracks are not solely for archivists, but also for those who work closely with them, such as IT, general counsel, librarians, records managers and other stakeholders. The tiers of study allow for a grounding in the basics that is then built upon and expanded by subsequent courses that

address specialized, advanced studies, tactics and tools useful for digital appraisal, description, management, organization and preservation.

Our goals remain consistent, but new technologies lead to evolving solutions. Taken as a whole, these courses provide an integrated framework for archivists who appraise, capture, preserve and provide access to digital collections.

G. Core Competencies of a Digital Archives Specialist

The curriculum imagined by the task force assumes a completeness that allows for the provision of a certificate to those who actively participate in a significant core of the curriculum. This curriculum would be designed to support the awarding of Digital Archives Specialist certificates to successful students. The knowledge and skill set expected of Digital Archives Specialists would require evidence that students had an awareness of technical standards, and of core archival activities (such as appraisal, arrangement and description, preservation and access) as they relate to digital archives.

Curation, storage, and retrieval of records from collections require a knowledge of primary and secondary values for efficiently managing, controlling and using original masters and access copies of digital archives. To provide dependable organization and service, Digital Archives Specialists must be able to integrate new tools within existing functions to implement strategies serving the needs of designated communities across networks. Digital Archives Specialists must be able to appraise, capture, preserve and make materials accessible through successive generations of emerging technologies, software, and media.

H. Marketing Plan for Digital Archives Specialist Curriculum

For the Digital Archives Specialist (DAS) curriculum to succeed at extending and improving an understanding of digital archives, SAA must take steps to promote the curriculum as a whole and must hold relevant workshops across the country. To these ends, the task force recommends the following promotional program.

1) Rationale

The Society of American Archivists (SAA) provides education and training to its members and others to ensure that they are aware of relevant standards and adopt appropriate practices for appraising, capturing, preserving, and providing access to electronic records.

2) Audience

- SAA members and other archivists, comprising practitioners, managers, administrators, and the other professionals they work with in large or small organizations with staff or by themselves.
- Librarians, legal staff, and records managers who have responsibility for records.
- Employers who want to ensure that their staff has the knowledge and training to address electronic records issues.
- ACA members, students, student chapters, and regional associations.

3) Position Statement

SAA's Digital Archives Specialist curriculum was developed by experts in the field of digital archives and structured in tiers of study that guide the prospective student to choose courses based on their specific knowledge, training, and needs. Successful completion of this curriculum would be confirmed by SAA with a "Digital Archives Specialist" certificate.

4) Goals for FY 2012 (7/1/11 – 6/30/12)

- Roll out Digital Archives Specialist Curriculum marketing campaign starting in May.
- Secure four regional co-sponsors to offer entire curriculum over an 18-month period.
- Secure the support of the Academy of Certified Archivists.
- Develop and present four new courses beginning with the foundational course track in the first half of FY 2012.
- Develop and present four new tactical and strategic courses in second half of FY 2012.

5) Pricing

- Offer a reduced package price (includes all required courses) to individuals who want to pursue the DAS certificate. Registrants in this category will receive priority in the registration process.
- Offer a special price for a combination of two courses and three web seminars (individual).
- Set one price for all web seminars (individual).
- Allow special pricing for entities (institutions, employers, SHRABs, etc.).

6) Promotion

- Develop a campaign that builds awareness of this curriculum and emphasizes what participants will gain, how it is different (due to its structure, self-testing, and originality, etc.), and how it will meet management needs.
- Publish an article in Archival Outlook, multiple information pieces posted to In the Loop, and an announcement on SAA's homepage.
- Announce the curriculum through news releases.
- Publish an announcement to LinkedIn, Twitter and Facebook feeds.
- Unveil content and schedule at the presidential address, and provide handouts or a brochure at that event.
- Hold a drawing in which the winner receives free registration to all required courses, with the proviso that the winner has to complete everything within a 24-month period.
- Hold a drawing for each of the first four co-sponsors to offer the curriculum.
- Publicize the curriculum to archival educators and students.
- Encourage republication of announcements in regional association newsletters.

- Identify groups based on track audiences (e.g., ALA, ACRL, lawyers, etc.) and buy email lists to attract their attention.
- Send direct mail to corporations.

7) *Resources Needed*

Technical

- At this time, SAA's database can support many of the record-keeping requirements to track progress towards completion and expiration of DAS certificates.
- Online Testing will be conducted via one of the hosted online testing service providers.
- Applications like Moodle will be utilized to standardize content between instructors.

Human

- Successful implementation of this program will require involvement across all SAA program areas. Maintenance of the program will require more effort from education and service center staff. None of this can be accomplished without an active Education Subcommittee on Digital Archives Continuing Education and the Committee on Education.

Monetary

- DAS budget details are part of the education budget in the proposed FY2012 budget for consideration by the SAA Council.

I. *Self-Testing to Determine Readiness for a Course*

The task force envisions an integrated online system that prospective students will use to learn about the curriculum and make choices about courses. Students can use each course's prerequisites to determine if they are prepared to take certain digital archives courses, but this tool alone might be too inexact to allow for accurate self-assessments. For this reason, the task force recommends that SAA develop short online self-tests that prospective students can use to measure their knowledge against the knowledge necessary for anyone to complete one of the digital archives courses successfully.

1) *Scope*

These recommendations apply to all courses, regardless of tier or track or mode of delivery (for instance, whether online or in person)

2) *Benefits*

- Provides SAA Education, instructors, and participants a way to establish baselines and benchmarks

- Ensures a reasonable quality satisfaction rate of members (At least 75% of all participants in Digital Archives Specialist courses will say they would recommend DAS courses to their colleagues.)
- Makes explicit the requirements and expectations of all courses

3) Implementation and Administration

The questions asked during the self-test should

- Measure the extent of prospective participants' knowledge of technical, technological, and functional domains of knowledge
- Offer specific measures of comprehension in these domains: reading, working, or applied knowledge
- Clarify potentially vague or ambiguous measures (for example, "good understanding of")
- Be clear regarding the scale applied for assessment (for example, what does correct responses to 2 out of 3 questions indicate?)
- Be optional yet "strongly recommended"
- Be developed collaboratively between the instructor and SAA Education office
- Be subject to review and update at least once every two years
- Be brief (perhaps three questions, each with three choices of answers)
- Be easy to administer for SAA and use existing SAA resources

4) Rationale for recommendation

These recommendations are based on the analysis of evaluations completed by attendees of SAA workshops and best practices and research into professional development.

J. Measuring Success of Courses

An essential element in this curriculum will be a method to measure the success of the curriculum as a whole and the success of its individual courses. The plan below explains a set of actions SAA can undertake to measure the level of success of this proposed program.

1) Scope

These recommendations apply to all face-to-face courses and online courses in the Digital Archives Specialist (DAS) curriculum.

In order to measure the success of the new curriculum accurately, the evaluation methods employed must assess whether individual participants accomplished specific learning objectives and goals and if the goals and objectives of the curriculum were met overall.

2) Methods

- Measure overall learning outcomes that occurred immediately after a specific course or process.

Administer an optional short quiz at the beginning and the end of the course that students download and complete or are provided at the beginning and end of the course. This quiz will come in two forms, with different questions that measure a student's grasp of the same material. This system will measure whether students have increased their knowledge during the course.

Certificate participants are required to take a pass/fail test (10 questions with multiple answers) at the end of each course.

- Measure, a period of time after the course, whether students have made any practical application of what they learned.

Contact participants at two months after and again one year after completion of a course and have them complete a survey that measures how the course changed their professional practices, using the specific objectives of the course as measurements. Assume that a response rate of 25% implementing would be high.

- Use course auditors expert in the subject matter to attend face-to-face courses to assess the course content, design, and delivery, and provide constructive evaluation. In addition, reviewers will provide constructive evaluations on online courses prior to and after the presentation.
- Ask participants to evaluate, at the end of each course, the course design, how well its learning outcomes and goals were met, and how they would suggest improving the course.
- Measure overall program learning outcomes when certificate participants have passed all required course tests.

Administer a comprehensive final exam (100 questions) that participants must pass to receive the DAS certificate.

3) Benefits

- Data collected will provide instructors with feedback on improving course content and delivery.

Consistently collecting such data and implementing changes based on it will keep courses relevant.

- Multi-modal user feedback will help to assess the relevance of individual courses and the overall curriculum.

- The interactive review and improvement cycle will support the growth of a strong and relevant program, which in turn should lead to programmatic growth while meeting the continuing educational needs of the archival profession.

4) Implementation and Administration

- Developers, instructors, and content experts must agree on what a participant should know, understand, and be able to do after each course and structure the learning outcome quiz and knowledge survey accordingly.
- Developers, instructors, and content experts must agree on what a Digital Archives Specialist would understand and be able to do after completion of the entire curriculum.
 - Each course must have learning outcomes tied to the core competencies and satisfy several.
 - Learning outcomes must be actionable and measurable and tied to Bloom's Taxonomy.
 - Foundational courses must be at Bloom's Levels 1-2, others at Bloom's Level 3.
- Developers and instructors must develop assessment quizzes and a pool of questions (20 to 25) for each course. The Digital Archives Continuing Education Subcommittee of the Education Committee will monitor quizzes for consistency and compile the final exam.

5) Rationale for Recommendation

The recommendations are based on a review of various writings on the assessment of student learning in higher education, assessment methods and measurements instruments, experience of those in professional associations, principles of good practice for assessing student learning, and advice of archival educators.

6) Assessing Successful Outcomes

Below are a number of measures SAA could use to measure the success of individual courses in the curriculum as well as the curriculum as a whole. Additional measures are possible, so this list is merely a suggestion of some valid measures of success. Although the raw numbers and percentages may seem low, the task force believes that these are reasonable measures of success, given that some archivists are focused more on paper than electronic records and that only a small percentage of members and nonmember archivists attend SAA training events. The goals below are measures the Digital Archives specialist program should see by the end of SAA's annual meeting in 2013.

- At least 2% of SAA members (ca. 112 people) will have completed the Digital Archives Specialist program.

Given the number of courses proposed for the DAS curriculum and the fact that it will take at least 18 months to develop and roll out the rest of the curriculum, this is a reasonable measure of success.

Certificate participants must take and pass four Foundational courses, three Tactical and Strategic courses, and one course in both the Tools and Services and Transformational tiers. This number of courses will provide students with adequate background in the field and is reasonable when allowing for the busy working lives of potential students.

More knowledgeable students can elect to test out of the foundational courses.

The DAS Certificate will be valid for five years. DAS Certificate holders can elect to renew the certificate by successfully completing courses and exams from the Tactical and Strategic, Tools and Services, and Transformational course tiers. Renewal of the certificate is strongly recommended because of the short-term obsolescence of some technical knowledge students will gain through the courses.

- At least 50 nonmembers will have completed the Digital Archives Specialist program.
- At least 15 of those completing the Digital Archives Specialists program will be from allied professions.
- At least 280 participants will have taken at least one course in the Digital Archives Specialist curriculum.
- At least 75% of all participants in Digital Archives Specialist courses will say they would recommend DAS courses to their colleagues.
- At least 2% of participants in Digital Archives Specialist courses will have said that taking a DAS course has helped them accomplish something relating to digital archives in their institutions within two months of taking the course.

This measure of accomplishment could include the implementation of certain activities or the addition of specific improvements to their digital archives programs or the institution of outreach or advocacy designed to put such activities or improvements into place.

K. Continuing this Program into the Future

The task force believes that the benefits of its work will be greatest only if the proposed changes to SAA's curriculum are continued into the future. To this end, the task force makes these further recommendations:

1) Integrate Digital Archives Education into the Entire Curriculum

When applicable, SAA's courses should include electronic records components. For instance, training on managing maps and plans should include discussions on managing GIS records and CAD drawings, and preservation workshops should address the issues of digital preservation. The skills of the archivist can no longer be diverted into two streams, one digital and one paper.

2) Extend the Structured Curriculum into the Entire Curriculum

The task force believes that SAA's entire curriculum could be improved by bringing structure to its development and presentation. For this reason, the task force believes that the entire curriculum should be re-evaluated and updated in the near future, probably after testing of the effects of the recommendations in this report.

3) Add a Seat for a Permanent Digital Archives Educator to the Education Committee

For Digital Archives education to flourish in the future, SAA's Education Committee must have at least one member who is there simply because of his or her knowledge of Digital Archives continuing education. Without that, the program envisioned by this task force is likely to lose momentum and fall into disrepair.

4) Create a Digital Archives Continuing Education Subcommittee of the Education Committee

Given the complexity of digital archives continuing education, the task force recommends that a Digital Archives Continuing Education Subcommittee be created and that this subcommittee report to the Education Committee. This subcommittee would be responsible for ensuring that the DAS curriculum is up to date and provides valuable information to participants. The committee would also be responsible for suggesting changes to the curriculum, overseeing the pre-assessment quizzes and the ten-question pass/fail exams developed for each course in the DAS curriculum, and creating the 50-to-100-question final exams necessary to receive the DAS Certificate.

Since any curriculum needs to change with time and since any digital archives curriculum is apt to see more frequent change, this committee is essential to ensure the continuing value of SAA's entire program of archival training.

IV. Appendices

Appendix A

Charge to the Digital Archives Continuing Education Task Force

Reports to: Committee on Education

Established: May 26, 2010

Final Report Expected: April 30, 2011

I. Purpose

The Task Force on Digital Archives Continuing Education is responsible for developing a detailed professional development curriculum on the subject of digital archives. This purpose derives from SAA's 2010 – 2014 Strategic Priorities, Technology, Desired Outcome 1: “SAA will provide education and training to its members to ensure that they are aware of relevant standards and adopt appropriate practices for appraising, capturing, preserving, and providing access to electronic records.”

II. Committee Selection, Size, and Length of Terms

The SAA Vice President shall appoint three to five members with knowledge and expertise in appraisal, capture, preservation, and access to digital archives; in adult education, and in archival practice. All appointments are effective from August 1, 2010 through April 30, 2011.

III. Reporting Procedures

The Task Force will report to the Committee on Education at appropriate intervals, with a final report and recommendations to the Committee at its winter/spring 2011 meeting. The approved curriculum is to be implemented by the SAA staff in FY 2012.

IV. Duties and Responsibilities

A. Become familiar with existing SAA education offerings and the results of recent SAA continuing education surveys.

B. Seek input from SAA committees, sections, and roundtables as appropriate for leadership and guidance on proposed hierarchy of workshop development.

C. Modify the draft curricula and work plans per member feedback.

D. Deliver final draft and recommendations to the Committee on Education at its winter/spring meeting. Task Force members will be available for consultation as the FY

2012 budget is developed for Council adoption. The final work product should consist of the following:

4. A list of workshop topics to be developed, including brief descriptions of the areas covered in each workshop.
5. A “workshop tree” indicating how workshops (including existing offerings) build on and enhance each other.
6. A list of possible developers and reviewers for each topic.

V. Meetings

The Task Force will meet one time at the SAA offices in Chicago and via conference call as needed to ensure completion of the curriculum by the deadline.

Created by the Council: May 26, 2010

Huth	Geoffrey	Chair	8/14/2010 - 5/1/2011	New York State Archives
Esposito	Jackie	Task Force Member	8/14/2010 - 5/1/2011	The Pennsylvania State University
Ghaznavi	Mahnaz	Task Force Member	8/14/2010 - 5/1/2011	Loyola Marymount University
Kay	David	Task Force Member	8/14/2010 - 5/1/2011	Little Airplane Productions
De Sutter	Solveig	Staff Liaison	8/14/2010 - 5/1/2011	Society of American Archivists
Tibbo	Helen	Ex Officio	8/14/2010 - 5/1/2011	University of North Carolina, Chapel Hill

Appendix B: Simple Table of Structured Digital Archives Specialist Curriculum

Students working to earn a Digital Archives Specialist certificate can take the courses of the curriculum in any order, though it will be best for most to start with the Foundational courses. While no specific courses are required, the number of courses required in each tier will ensure that any DAS Certificate holder achieve a broad range of experience in digital archives. Students are also required to pass the course exams and a comprehensive exam once they have taken the number of required courses and exams. More knowledgeable students can elect to test out of Foundational courses. Note that those courses marked as “Proposed” are not described in the detail the other courses are in Appendix E.

1. Foundational Courses

- a. Basic Electronic Records
- b. Basics of Managing Electronic Records: Getting You Started (Webinar)
- c. Thinking Digital (Webinar)
- d. Standards for Digital Archives (Webinar) (New)
- e. Beginner’s Guide to Metadata (Webinar)
- f. Appraisal of Electronic Records (New)
- g. Digital Curation: Creating an Environment for Success (New)

2. Tactical and Strategic Courses

- a. Electronic Records and Archives: The Next Step (Webinar)
- b. Accessioning and Ingest (New)
- c. Description of Electronic Records (New)
- d. Digital Repositories (Combine with Building Digital Collections)
- e. Preserving Digital Archives: Concepts and Competencies (New)
- f. Legal Issues in Digital Archives (New)
- g. Developing Specifications and RFPs for Recordkeeping Systems (New)
- h. Digital Archives and Libraries (Revised name)
- i. Providing Access to Digital Archives (New)
- j. Inreach and Outreach for Digital Archives (New)

3. Tools and Services Courses

- a. Achieving Email Account Preservation with XML
- b. Archival Content Management Systems (Webinar)
- c. Archivematica (Proposed)
- d. Digital Forensics (Proposed)
- e. Drupal (Proposed)
- f. iRODS (Proposed)
- g. ISO 16363 and ISO 16919 (Proposed)
- h. JHOVE (Proposed)
- i. Preservation Options of PDF (Webinar)

4. Transformational Courses

- a. Information Architecture (Webinar) (New)
- b. Managing Electronic Records in Archives and Special Collections
- c. Digital Curation Planning and Sustainable Futures (New)

Appendix C:

Detailed Table of Structured Digital Archives Specialist Curriculum

(Note: *Italicized names of instructors represent people suggested by the DACE task force, not instructors who have accepted the responsibility of creating and presenting these courses.*)

Tiers and Courses	Format	Tracks	Instructor	Status
Foundational Courses				
Basic Electronic Records	1-day	Practitioner Manager Librarian Museum Professional Records Manager	Huth	Existing
Basics of Managing Electronic Records: Getting You Started	Web	Practitioner Manager Librarian Museum Professional Legal Professional Records Manager	Huth	Existing
Thinking Digital	Web	Practitioner Manager Librarian Museum Professional Records Manager	Branco Colati	Existing
Standards for Digital Archives	Web	Administrator IT Professional Legal Professional	Ghaznavi	New
Beginner's Guide to Metadata	Web	Practitioner Librarian Museum Professional Records Manager	Branco Colati	Existing
Appraisal of Electronic Records	1-day	Practitioner Records Manager	<i>K Glick</i> <i>C Wojcik</i>	New
Digital Curation: Creating an Environment for Success	1-day	Practitioner Manager Administrator Librarian Museum Professional	Esposito	New

Tiers and Courses	Format	Tracks	Instructor	Status
Tactical and Strategic Courses				
Electronic Records and Archives: The Next Step	Web	Practitioner Manager Librarian Museum Professional Records Manager	Huth	Existing
Accessioning and Ingest	1-day	Practitioner Librarian IT Professional	<i>M Veatch</i> <i>E Wilczek</i> <i>K Glick</i>	New
Description of Electronic Records	1-day	Practitioner Legal Records Manager	<i>M Matienzo</i> <i>K Shepherd</i>	New
Digital Repositories (Combine with BDC)	1-day	N/A	Branco Colati	Merge
Preserving Digital Archives: Concepts and Competencies	1-day	Practitioner Manager Librarian Museum Professional IT Professional Records Manager	April Norris	Revision
Legal Issues in Digital Archives	1-day	Manager Administrator IT Professional Records Manager	<i>H Besser</i> <i>J Baron</i>	New
Developing Specifications and RFPs for Recordkeeping Systems	1-day	Manager IT Professional Legal Professional Records Manager	<i>Cynthia</i> <i>Gehring</i>	New
Digital Archives and Libraries (Revised name)	1-day	Manager Librarian Museum Professional	Rosko	Existing
Providing Access to Digital Archives	1-day	Practitioner Librarian Museum Professional	<i>Jane</i> <i>Kazmarek</i>	New
Inreach and Outreach for Digital Archives	1-day	Manager Librarian Museum Professional	<i>Erin</i> <i>O'Meara</i>	New

Tiers and Courses	Format	Tracks	Instructor	Status
Tools and Services Courses				
Archival Content Management Systems	Web	Practitioner IT Professional Librarian Records Manager	Spiro	Existing
Achieving Email Account Preservation with XML	½-day	Manager	Eubanks Ferrante Schmitz/ Fuehrig	Existing
Preservation Options of PDF	Web	Practitioner Manager Librarian Museum Professional Records Manager	Huth	Existing
Digital Forensics	1-day	Administrator IT Professional Legal Professional Records Manager	<i>Cal Lee</i> <i>M Kir-</i> <i>schenbaum</i>	New
iRODS	TBD	Practitioner Manager	<i>Reagan</i> <i>Moore</i> TBD	Proposed
JHOVE	TBD	Practitioner Manager	TBD	Proposed
Drupal	TBD	Practitioner Manager	TBD	Proposed
ISO 16363 and ISO 16919	TBD	Practitioner Manager	TBD	Proposed
Transformational Courses				
Information Architecture	Web	Practitioner Manager Librarian IT Professional	Ghaznavi	New
Managing Electronic Records in Archives and Special Collections	2-day	Manager	Pyatt Shaw	Existing
Digital Curation Planning and Sustainable Futures	1-day	Administrator IT Professional Librarian Museum Professional Records Manager	Tibbo McGovern	New

Appendix D:
 Course Description Data Elements for Digital Archives Specialist
 Curriculum

Item	Description
Title	Title of the course
Description	Description of the course used in promotional materials
Instructor	Name of the instructor or instructors who present this course
Scope	Type of course: 1-day, multi-day, or webinar
Version Date	Date of the latest version of the course
Tiers	Tier the course falls within: Foundational, Tactical and Strategic, Tools and Services, or Transformational
Tracks	Track the course falls within: Practitioner, Manager, Administrator, IT, Librarian, Legal, Records Manager
Functions	Archival functions covered by the course: Appraisal; Arrangement and Description; Classification, Cataloging and Metadata; Storage; Preservation; Access; Advocacy; Legal Issues; Developing Specifications (Can include multiple terms)
Target Audience	Description of target audience
Prerequisite Knowledge	Knowledge participants will need to gain the most from this workshop
Pre-Readings	Any readings participants are required to complete before participating in the course.
Keywords	Keywords that will help potential participants find and evaluate the value of this course to them
Learning Outcomes	List of objectives that each participant should attain by the end of the course
Relationship to Other Workshops	Description of this course's relationship to other courses
Standards Included	List of any standards referred to in this training
Syllabus	Basic outline of the course
Supporting Materials	List of any supporting materials associated with this course
Activities and Exercises	List of activities and exercises in the course

Glossary	List of important terms in this workshop with a link back to Richard Pearce-Moses' glossary of archival terms
Contributors	Names of people who have contributed to the development of this course
Change History	Chronological listing of versions of this course
Copyright	Explanation of the status of copyright of this course
Equipment Required of Participants	List of equipment that participants must have in hand to complete this course successfully

Appendix E: Course Descriptions for the Digital Archives Specialist Curriculum

This appendix contains descriptions for existing and new courses in the Digital Archives Specialist curriculum to provide an idea of what kind of information prospective students would see in the online course management system. This format will also serve as the Course Proposal Form potential developers or instructors would complete and submit to suggest the creation of new courses. In some cases, particularly with new courses that have yet to be designed, this information is merely provisional and subject to revision to the actual people who take over the development of specific courses.

Tier: Foundational

Title	Basic Electronic Records
Description	Participants are introduced to the principles of appraising, accessioning, preserving and providing access to records in digital formats.
Instructor	Geof Huth
Scope	1-day
Version Date	2008
Tier	Foundational
Tracks	Practitioner, Manager, Librarian, Museum Professional, Records Manager
Functions	Appraisal, Arrangement and Description, Classification, Cataloging and Metadata, Storage, Preservation, Access, Advocacy
Target Audience	This course is intended for archivists who have a good understanding of archival principles and techniques, but who need basic training in how to apply those principles to records in electronic form.
Prerequisite Knowledge	Participants are expected to have basic archival training and education
Pre-Readings	None
Keywords	Electronic records
Learning Outcomes	Upon completion of this course participants will have <ul style="list-style-type: none"> • Identified goals and objectives for addressing electronic records within your own institution's mission • Discussed and examined various technical and organizational issues • Developed a tentative plan for action within your organization.
Relationship to Other Workshops	This basic course provides a general grounding in electronic records that is essential for anyone considering taking a more advanced course.
Standards Included	PDF/A
Syllabus	1. Introduction 2. Appraisal 3. Arrangement and Description 4. Preservation 5. Access 6. Planning an Electronic Records Program
Supporting Materials	None
Activities and Exercises	None
Glossary	electronic records appraisal arrangement and description preservation access file formats migration emulation
Contributors	Currently, Geof Huth
Change History	Presented in early 1990s by Margaret Adams, Nancy McGovern, and Alan Kowlowitz ca 2000 Revised by Cal Lee ca 2002 Revised by Geof Huth

	Almost annual revisions since that time
Copyright	Retained by authors
Equipment Required of Participants	None

Title	Basics of Managing Electronic Records: Getting You Started
Description	<p>All archives must address the management of electronic records to some degree, and you may not have the background in electronic records or the confidence to tackle this daunting task! This 90-minute web seminar provides you the basics you need to start solving your electronic records problems.</p> <p>This seminar addresses:</p> <ul style="list-style-type: none"> • Common preservation formats of electronic records; • Appraising, accessioning, and preserving electronic records; • Working with records creators; and, • Promoting and continuing your electronic records program. <p>While we won't be able to cover this huge topic in its entirety, if you need a refresher about electronic records or a basic foundation of knowledge to work from, this web seminar is what you're looking for.</p>
Instructor	Geof Huth
Scope	Webinar
Version Date	2010
Tier	Foundational
Tracks	Practitioner, Manager, Librarian, Museum Professional, Records Manager
Functions	Appraisal, Accessioning, Processing, Description, Preservation, Access, Management
Target Audience	Professionals who have a basic understanding of electronic records and responsibility for managing digital archives.
Prerequisite Knowledge	Intermediate knowledge of archival practices and basic knowledge of digital archives.
Pre-Readings	None
Keywords	Digital Archives, Electronic Records, Appraisal, Accessioning, Processing, Description, Preservation, Access, Management, PDF/A, TIFF, ASCII, Unicode, Data, Metadata, Normalization, JPEG2000, Motion JPEG2000, AIFF, XML, Emulation, Migration
Learning Outcomes	To give participants the basic information needed to manage digital archives.
Relationship to Other Workshops	This is a basic Digital Archives Specialist workshop that builds on other basic workshops in the SAA curriculum, such as Understanding Archives and Arrangement and Description.
Standards Included	PDF/A, JPEG2000, ASCII, Unicode
Syllabus	<ol style="list-style-type: none"> 1. Appraisal 2. Accessioning 3. Processing

	4. Description 5. Preservation 6. Program Development
Supporting Materials	None
Activities and Exercises	None
Glossary	Digital Archives, Electronic Records, Appraisal, Accessioning, Processing, Description, Preservation, Access, PDF/A, TIFF, ASCII, Unicode, Data, Metadata, Normalization, JPEG2000, Motion JPEG2000, AIFF, XML, Emulation, Migration
Contributors	Geof Huth
Change History	Created in 2010
Copyright	Copyright with author
Equipment Required of Participants	Computer to watch DVD

Title	Thinking Digital
Description	A practical session to help you get started in “Thinking Digital.”
Instructor	Jessica Branco Colati, Greg Colati
Scope	1.5-hour webinar
Version Date	2007
Tier	Foundational
Tracks	Practitioner, Manager, Librarian, Museum Professional, Records Manager
Functions	Creation, Metadata, Preservation
Target Audience	This webinar is intended for archivists and others who need to think and act as digital archivists.
Prerequisite Knowledge	Participants are expected to have basic archival training and education.
Pre-Readings	None
Keywords	Metadata, Digitization, Management, Storage, Preservation, Delivery
Learning Outcomes	To teach participants how to think like digital archivists in digital environment.
Relationship to Other Workshops	This basic overview provides an introduction into some of the important issues related to managing digital collections for near-term access and long-term preservation and so serves as one of the introductory courses in the Digital Archivist Specialist curriculum.
Standards Included	Dublin Core, EAD, MARC
Syllabus	1. Quality 2. Metadata 3. Management 4. Storage 5. Preservation 6. Delivery
Supporting Materials	None
Activities and Exercises	None
Glossary	Interoperability, Reusability, Sustainability (Persistence), Authenticity, Scalability, Image Resolution, Bandwidth, Levels of Access, Static vs. Dynamic Representation, Digital Capture, Audio Quality, Compression, Bit Rate, OCR, Metadata, Quality Control, Processing, File Naming, Digital Content Management, Workflow, Management Systems, Digital Library, Hardware/Media, Trusted Digital Repositories, OAIS, NARA-RLG, LOCKSS, Indexing, Classification,
Contributors	Jessica Branco Colati, Greg Colati
Change History	Created in 2007
Copyright	2007, SAA
Equipment Required of Participants	None

Title	Standards for Digital Archives (New)
Description	A discussion of national and international standards for materials and collections including description, digital archives, recordkeeping, records management and electronic information.
Instructor	Mahnaz Ghaznavi
Scope	Webinar
Version Date	2011
Tier	Foundational
Tracks	Practitioner, Records Manager, Administrator, IT
Functions	Standards, Best Practices, Technical Specifications, Preservation, Interoperability, Metadata, Format
Target Audience	This webinar is intended for archivists, practitioners, managers, administrators and IT professionals.
Prerequisite Knowledge	Participants are expected to have basic archival training and education and familiarity with computers.
Pre-Readings	TBD by Instructor
Keywords	Archival Standards, Records Management, Electronic Records, PREMIS, ISAD, TRAC
Learning Outcomes	Provides participants with an overview of the most important standards a digital archivist needs to know and enough knowledge to implement parts of these in their own work environments.
Relationship to Other Workshops	This webinar serves as a core workshop on standards, which are then discussed in more detail in workshops focused on specific standards or areas of study.
Standards Included	OASIS, TRAC, DoD 5015.2, ISO 15489, ISO 19005-1, ANSI/NISO Z39.87, FISMA, ISO 15386 (Dublin Core)
Syllabus	Descriptive Standards, Structured Information, Open Standards
Supporting Materials	Published standards, Technical Metadata, International Standards
Activities and Exercises	None
Glossary	Trusted Repositories, International Standards, NISO, Information Systems, Open Standards, Metadata, OAIS
Contributors	Mahnaz Ghaznavi
Change History	Created in 2011
Copyright	Copyright retained by author
Equipment Required of Participants	Computer to access Internet or watch DVD

Title	A Beginner's Guide to Metadata
Description	This webinar provides an introduction to metadata and its creation for those not familiar with the issues relating to metadata and archival records.
Instructor	Greg Colati, Jessica Branco Colati
Scope	Webinar
Version Date	2008
Tier	Foundational
Tracks	Practitioner, Manager, Administrator
Functions	Description
Target Audience	This webinar is intended for archivists and catalogers who need to understand metadata for their work relating to digital archives.
Prerequisite Knowledge	Participants are expected to have basic archival training and education.
Pre-Readings	None
Keywords	Metadata, Metadata Schema, Typologies of Metadata, Semantics, Structure, Syntax, EAD, MARC, MODS, Dublin Core, VRA, Levels of Access, Levels of Control, MPLP, Descriptive Metadata, Cataloging
Learning Outcomes	At the end of this webinar, the participants will know how to choose the right metadata schema and metadata for their organization's benefit and for the best shared interoperability.
Relationship to Other Workshops	This basic overview provides an introduction into some of the issues related to using metadata to describe digital collections for near-term access.
Standards Included	Dublin Core, EAD, MARC, XML, DACS, NISO Framework
Syllabus	<ol style="list-style-type: none"> 1. Quality 2. Metadata 3. Management 4. Storage 5. Preservation 6. Delivery
Supporting Materials	None
Activities and Exercises	None
Glossary	Metadata, Semantics, Structures, Syntax, Interoperability, Shareability, Reusability, Archivability, Authority Control, Curation, Preservation, Authenticity, Persistence, Unique Identification, Embedded/Associated Metadata, MARC21, AACR2, ISO 2709, Control, Access, MPLP
Contributors	Greg Colati, Jessica Branco Colati
Change History	Created in 2008
Copyright	2008, SAA
Equipment Required of Participants	None

Title	Appraisal of Electronic Records (New)
Description	Basics of appraisal for electronic records management
Instructor	Kevin Glick or Caryn Wojcik (Proposed)
Scope	1-day
Version Date	2011
Tier	Foundational
Tracks	Practitioner
Functions	Appraisal, Electronic Records, Management, Records Management
Target Audience	This course is intended for practitioners tasked with managing electronic records.
Prerequisite Knowledge	Participants are expected to have basic records management experience
Pre-Readings	Undetermined
Keywords	Electronic Records, Records Management, Appraisal, Best Practices, Continuum
Learning Outcomes	Choose the right processes to appraise and manage electronic records, including storage strategies for records with long retention periods.
Relationship to Other Workshops	Introduction to issues related to appraising and managing electronic records
Standards Included	Unknown
Syllabus	1. Selection 2. Appraisal 3. Organization 4. Retention Schedules 5. Open Standards
Supporting Materials	None
Activities and Exercises	None
Glossary	Records Management, Appraisal, Selection, Organization, Storage, Electronic Records, Born-Digital Records, Records Retention
Contributors	Kevin Glick or Caryn Wojcik (Proposed)
Change History	Not yet created
Copyright	Copyright retained by SAA
Equipment Required of Participants	None

Title	Digital Curation: Creating an Environment for Success (New)
Description	The world of digital archives requires professional curatorial practices just as the world of paper archives does. This course will cover the differences and similarities between curating paper and electronic records, present a system of best practices for digital curation, and review what any institution needs to put in place to ensure the success of its own digital curation.
Instructor	Jackie Esposito
Scope	1-day workshop
Version Date	2011
Tier	Foundational
Tracks	Practitioner, Manager, Librarian, Museum Professional, Administrator
Functions	Access, Appraisal, Preservation, Description
Target Audience	Designed for professionals who will soon need to design a digital archives or who need to improve the operation of such an archives.
Prerequisite Knowledge	Deep knowledge of appraisal of records and providing access to records, as well as moderate knowledge of digital preservation and electronic records.
Pre-Readings	Douglas Ross Harvey's <i>Digital Curation: A How-to-Do-It Manual</i> , 2010, Facet Publishing
Keywords	Digital Archives, Electronic Records, Access, Appraisal, Preservation
Learning Outcomes	By the end of this course, participants will have the core information they need to design and manage a digital archives program in partnership with their local IT operations as well as ideas on how to improve their current curatorial practices regarding electronic records.
Relationship to Other Workshops	This course builds on many other workshops in the Digital Archives Specialist curriculum, including Basic Electronic Records, Thinking Digital, and Standards for Electronic Records.
Standards Included	OAIS
Syllabus	TBD
Supporting Materials	TBD
Activities and Exercises	TBD
Glossary	Digital Archives, Electronic Records, Access, Appraisal, Preservation, Open Archival Information System
Contributors	Jackie Esposito
Change History	Created in 2011
Copyright	Copyright retained by SAA
Equipment Required of Participants	None

Tier: Tactical and Strategic

Title	Electronic Records and Archives: The Next Step
Description	<p>Do you have a basic understanding of electronic records, but need an extra push to begin addressing the issue? Then attend this 90-minute intermediate Electronic Records web seminar from the convenience of your office, classroom, or meeting room. Or, incorporate this seminar into your meeting as one of the education sessions!</p> <p>This seminar focuses on systems that any archives must put in place to ensure it can manage electronic records. And it will cover how to prepare for and address a still uncertain future concerning the management of electronic records.</p>
Instructor	Geof Huth
Scope	Webinar
Version Date	2011
Tier	Tactical and Strategic
Tracks	Practitioner, Manager, Librarian, Museum Professional, Records Manager
Functions	Appraisal, Accessioning, Preservation, Access
Target Audience	Archivists and others who have a basic understanding of electronic records.
Prerequisite Knowledge	Intermediate knowledge of archival practices and basic knowledge of digital archives practices relating to appraisal, accessioning, preservation, and access.
Pre-Readings	None
Keywords	Appraisal, Accessioning, Ingest, Preservation, Access, OAIS, Media Refreshment, Backup, Archival Copies, Electronic Records, Records Management, Retention Schedules, Authenticity, Immutability, Integrity, Interoperability
Learning Outcomes	By the end of this webinars, workshop participants will have knowledge of the systems and practices they will need to put in place to manage digital archives and they will have specific information on how to put many of those practices into place.
Relationship to Other Workshops	This webinar builds on the Basics of Electronic Records workshop and the Basics of Electronic Records webinar.
Standards Included	OAIS, PDF/A
Syllabus	<ol style="list-style-type: none"> 1. Appraisal 2. Ingest 3. Processing and Preservation 4. Maintenance 5. Access 6. Planning
Supporting Materials	None

Activities and Exercises	None
Glossary	Appraisal, Accessioning, Ingest, Preservation, Access, PDF/A, TIFF, JPEG2000, Open Archival Information System
Contributors	Geof Huth
Change History	Created in 2011
Copyright	Copyright Geof Huth
Equipment Required of Participants	Computer to run DVD

Title	Accessioning and Ingest (New)
Description	This course will address efficient ways of accessioning and identifying large quantities of digital records consistent with collection policy, technical specifications, type and function of records. It will include a discussion of appraisal methods, retention and disposition schedules, and strategies for portable or exportable access.
Instructor	Matt Veatch, Eliot Wilczek, Kevin Glick (Proposed)
Scope	1-day workshop
Version Date	2011
Tier	Tactical and Strategic
Tracks	Practitioner, Librarian, IT
Functions	Accessioning, Acquisition, Appraisal, Description, Ingest, Capture, Retention Schedules, Collection Policy, Storage
Target Audience	This course is intended for archivists and records managers who understand basic principles of accessioning but need efficient and cost-effective strategies to ingest and describe large collections of electronic records or digital collections.
Prerequisite Knowledge	Participants are expected to have basic archival training and education.
Pre-Readings	TBD
Keywords	Ingest, Description, Storage, Portability, Exportability, Dissemination, Content, Context, Function, Policy
Learning Outcomes	Upon completion, participants will be able to implement strategies and use JHOVE to ingest, identify and describe large collections with automated and minimal processing.
Relationship to Other Workshops	This course p builds on foundational courses and provides better strategies for ingest, accession, storage and retrieval of large accurately-described digital collections
Standards Included	PDF/A, ISO/IEC 10918-1, ISO 12234-2, NISO Z39.87, XML, JPEG-2000 (ISO/IEC 15444)
Syllabus	Digital Repositories, Technical Metadata, Digital Objects, Repository Submission, Digital Curation, Preservation Planning, Submission Information Packages
Supporting Materials	TBD
Activities and Exercises	TBD
Glossary	Accessioning, Ingest, JHOVE, Provenance, Retrieval, Dissemination, Preservation, Metadata, File Formats, Aggregate, Validation Criteria, Bit Stream, Representation
Contributors	Matt Veatch, Eliot Wilczek, Kevin Glick (proposed)
Change History	Created 2011
Copyright	Copyright retained by SAA
Equipment Required of Participants	None

Title	Description of Electronic Records (New)
Description	This course will address tactics and strategies to describe and organize electronic records with an awareness of their provenance, integrity, evidence, accessibility and irretrievability for near-term and long-term use.
Instructor	Mark Matienzo, K Shepherd (Proposed)
Scope	1-day workshop
Version Date	2011
Tier	Tactical and Strategic
Tracks	Practitioner, Legal Professional, Records Manager
Functions	Creation, Capture, Organization, Authenticity, Retention Schedules, Migration, Information Systems
Target Audience	Intermediate-level archivists with electronic records experience and archives managers.
Prerequisite Knowledge	Some experience working with electronic records and born-digital assets and familiarity with computers
Pre-Readings	None
Keywords	Electronic Records, Appraisal, Accessioning, Arrangement and Description
Learning Outcomes	Ways to implement an integrated system before creation to ensure that records meet functional requirements according to technical specifications and standards with awareness of secondary values of records including transaction, identity, recordkeeping, and evidence.
Relationship to Other Workshops	This course provides a more sophisticated and in-depth look at electronic records appraisal using best practices and methodologies than is presented in foundational courses.
Standards Included	EAD, DACS
Syllabus	Accessioning and Processing, Workflows, Open Source Software, Open Standards, Description, Pre-Ingest, Capture, Organization, Distribution, Storage, Preservation, Inter-Institutional Model for Stewardship (AIMS)
Supporting Materials	None
Activities and Exercises	TBD
Glossary	Accessioning, Arrangement and Description, Ingest Appraisal, Transfer, Retention Schedules, Disposition Schedules, Digital Forensics, Electronic Records, Born Digital Records
Contributors	Mark Matienzo, K Shepherd (Proposed)
Change History	Created in 2011
Copyright	Copyright retained by SAA
Equipment Required of Participants	None

Title	Preserving Digital Archives: Concepts and Competencies (New)
Description	What do you need to know to preserve born-digital materials successfully once they've crossed the archives threshold? With an emphasis on modern records and technology, you'll learn about the concepts and competencies you need to construct and administer digital archives. You'll examine accepted digital archives models and implementations and emerging standards of practice, as well as preservation metadata schemas and their use in digital archives.
Instructor	April Norris
Scope	1-day workshop
Version Date	2011
Tier	Tactical and Strategic
Tracks	Practitioner, Manager, Librarian, Museum Professional, IT Professional, Records Manager
Functions	Electronic Records, Digital Preservation, Metadata, Migration, Normalization
Target Audience	Archivists, records managers, and other information professionals who are or will be responsible for the preservation of born-digital materials.
Prerequisite Knowledge	Participants are expected to know basic archival practice and have intermediate knowledge of computers and digital records management. We strongly recommend that participants complete the Thinking Digital web seminar prior to taking this workshop.
Pre-Readings	TBD
Keywords	Electronic Records, Records Management, Appraisal, Best Practices, Continuum
Learning Outcomes	Upon completion of this course you'll have: <ul style="list-style-type: none"> • Learned what it means to preserve digital materials and explored how these concepts map onto traditional archival practice; • Considered significant properties of modern digital materials (such as email and IM); social networking media, websites, blogs, and wikis; word processing documents, spreadsheets, and databases and the challenges associated with preserving them; and • Applied digital preservation concepts to specific archives collections through case studies and exercises.
Relationship to Other Workshops	Workshop builds on knowledge gained in the Thinking Digital workshop.
Standards Included	PDF/A, PREMIS, OAIS
Syllabus	Technical Specifications Digital Preservation Email Archiving Social Media

	Information Architecture Documents Spreadsheets and Databases Websites and Blogs Wikis
Supporting Materials	TBD
Activities and Exercises	TBD
Glossary	Digital Archives, Electronic Records, Digital Preservation, Metadata, OAI, textual records, wikis, blogs, websites, databases, spreadsheets
Contributors	April Norris
Change History	Created in 2011
Copyright	Copyright 2011 SAA
Equipment Required of Participants	Laptop computer

Title	Legal Issues in Digital Archives (New)
Description	Archives always need to be concerned about certain legal issues, but with digital archives those concerns increase in terms of size and number. This course will examine common legal issues faced by archives dealing with electronic records, including copyright, digital rights management, acquiring and securing ownership of records, freedom of information laws, subpoenas, e-discovery, and providing access to sensitive materials.
Instructor	H Besser, J Baron (proposed)
Scope	1-day workshop
Version Date	2011
Tier	Tactical and Strategic
Tracks	Manager, Administrator, IT Professional, Records Manager
Functions	Access
Target Audience	Archivists and others who need to address legal issues relating to the digital archives their institutions maintain.
Prerequisite Knowledge	Intermediate to advanced knowledge of archives practices and basic knowledge of legal issues in archives.
Pre-Readings	TBD
Keywords	Legal Issues, Access, Freedom of Information, Digital Rights Management, Digital Millennium Copyright Act, Ownership, Donor Agreements, Copyright
Learning Outcomes	By the end of this course, attendees will have enough knowledge of legal issues relating to digital archives to be able to understand those issues from an archivist's point of view and work closely with their own legal counsel.
Relationship to Other Workshops	This course builds on knowledge gained in other workshops in the Digital Archives Specialist curriculum, including Basic Electronic Records and Providing Access to Digital Archives.
Standards Included	None
Syllabus	<ol style="list-style-type: none"> 1. Copyright and Digital Rights Management 2. Acquiring and Securing Ownership 3. Freedom of Information 4. Responding to Subpoenas and Legal Discovery 5. Providing Access to Restricted Records
Supporting Materials	TBD
Activities and Exercises	TBD
Glossary	Access, Freedom of Information Law, Digital Rights Management, Donor Agreements, Copyright
Contributors	H Besser, J Baron (proposed)
Change History	Created in 2011
Copyright	Copyright retained by SAA

Equipment Required of Participants	None
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Title	Developing Specifications and RFPs for Recordkeeping Systems (New)
Description	The development of a fully functioning digital archives requires the development of an integrated digital repository to hold those records, store metadata on them, and support a wide range of archival processes, including preservation and access. In order to make sure whatever system you put in place will work in your organization, you must first develop a good request for proposals to help you identify that best possible system. This workshop is designed to teach you all that you need to know to do that important job.
Instructor	Cynthia Gehring and Lisa Schwartz (proposed)
Scope	1-day webinars
Version Date	2011
Tier	Tactical and Strategic
Tracks	Manager, IT Professional, Legal Professional, Records Manager
Functions	Management
Target Audience	Archivists and others who need to develop a request for proposal for a new digital repository system.
Prerequisite Knowledge	Good knowledge of digital libraries and repositories is helpful, but not required. Participants must have a good knowledge of archival processes.
Pre-Readings	None
Keywords	Digital Library, Digital Repository, Request for Proposals, Request for Quotations, Request for Information, Content Management System, Specifications, Recordkeeping Systems
Learning Outcomes	By the end of this course, participants will have enough knowledge to develop an RFP for new recordkeeping systems.
Relationship to Other Workshops	This course relates to those course in the Digital Archives Specialist curriculum relating to digital repositories: Thinking Digital, Digital Curation, Digital Archives and Libraries, Archival Content Management Systems, and Digital Curation Planning and Sustainable Futures.
Standards Included	None
Syllabus	<ol style="list-style-type: none"> 1. Defining a Digital Repository 2. Determining Your Needs 3. RFPs vs RFQs vs RFIs 4. Writing the RFP 5. Distributing the RFP 6. Making a Decision 7. Implementing the Installation
Supporting Materials	TBD
Activities and Exercises	TBD
Glossary	Digital Library, Digital Repository, Content Management System, Specifications,

	Recordkeeping Systems
Contributors	Cynthia Gehring and Lisa Schwartz (proposed)
Change History	Created in 2011
Copyright	Copyright retained by SAA
Equipment Required of Participants	None

Title	Digital Archives and Libraries
Description	Helps participants think critically in evaluating strategies, creating effective projects and processes to ensure that digital archives and libraries will serve needs consistent within institutional contexts, and with an awareness of how new and emerging technologies, social media practices and stakeholders' and designated communities' needs may change. The course will help identify stakeholders and designated communities for collaboration and budget assistance.
Instructor	Tom Rosko
Scope	1-day workshop
Version Date	Unknown
Tier	Tactical and Strategic
Tracks	Manager, Librarian, Museum Professional
Functions	Project Management, Methodologies, Semantic Web, Networked Technologies, Strategic Planning, Collection Management, Digital Initiatives
Target Audience	Archivists, Practitioners, Managers, Administrators, IT
Prerequisite Knowledge	Comprehension of how digital assets can be created described, found, and retrieved in a post-custodial model.
Pre-Readings	TBD
Keywords	Digital Archives, Libraries, Networks, Outreach, Staff Development, Interoperability, Standardization,
Learning Outcomes	Upon completion, students will have learned strategies for ensuring that digital assets can be better organized using descriptive metadata so that designated communities and users can efficiently find and use needed resources.
Relationship to Other Workshops	This course builds on foundational courses related to appraisal of electronic records, creation of descriptive metadata and metadata schemas and management of collections and digital materials.
Standards Included	DACS, EAD, EAC, METS, MARC 21, TRAC
Syllabus	Strategic Planning, Sustainable Projects, Public Service, Outreach, Archives, Libraries, Standards, Open Archives, User Experience, Workflows, Donor Relations, Public Service
Supporting Materials	TBD
Activities and Exercises	None
Glossary	Creation, Capture, Appraisal, Collection Development, Preservation, Stakeholders, Curation, Access, Open Archives Initiative, MPLP, Information Systems, Networks, Organization, Strategy, User Experience
Contributors	Tom Rosko
Change History	Name revised in 2011
Copyright	Copyright retained by Tom Rosko

Equipment Required of Participants	None
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Title	Providing Access to Digital Archives (New)
Description	This course provides an overview of useful methods to ensure that digital assets in digital collections can be organized, arranged, and described accurately, and that originals, archival masters, and access copies can be stored and retrieved efficiently when needed.
Instructor	Jane Kazmarek (Proposed)
Scope	1-day
Version Date	2011
Tier	Tactical and Strategic
Tracks	Practitioner, Librarian, Museum Professional
Functions	Access
Target Audience	This course is intended for archivists and librarians providing access to digital collections
Prerequisite Knowledge	Participants are expected to have solid archival training and experience.
Pre-Readings	None
Keywords	Digital Collections, Archives, Metadata, Metadata Schema, Access, Use, Preservation
Learning Outcomes	This course will leave participants with knowledge of how to ensure that records in a digital archives are organized, adequately described, and stored and retrieved for the near-term, middle-term, and long-term as needed.
Relationship to Other Workshops	This course provides more detail on accessioning, which is also addressed in courses like Basic Electronic Records and Digital Archives and Libraries.
Standards Included	Dublin Core, EAD, MARC, XML, DACS
Syllabus	<ol style="list-style-type: none"> 1. Digital Collections 2. Access 3. Metadata 4. Management 5. Storage 6. Preservation 7. Delivery
Supporting Materials	None
Activities and Exercises	None
Glossary	Digital Collections, Digital Archives, Access, Cataloging, Metadata, Preservation
Contributors	Jane Kazmarek (proposed)
Change History	Created in 2011
Copyright	Copyright retained by SAA
Equipment Required of Participants	None

Title	Inreach and Outreach for Digital Archives (New)
Description	This course will provide you with strategies for identifying and articulating your archives' values to its customers and stakeholders, both internal and external.
Instructor	Erin O'Meara (proposed)
Scope	1-day workshop
Version Date	2011
Tier	Tactical and Strategic
Tracks	Manager, Librarian, Museum Professional
Functions	Access, Digitization
Target Audience	This course is intended for managers and librarians who need to use inreach to provide better outreach services
Prerequisite Knowledge	Participants are expected to have basic archival training and education
Pre-Readings	TBD
Keywords	Reference Services, Archival Resources, Collection Development, Designated Communities, Stakeholders, Public Relations, Advocacy, Publicity, Public Speaking
Learning Outcomes	This course provides an overview of issues related to ways to reach out and reach in to provide exceptional services to a wide range of stakeholders.
Relationship to Other Workshops	This course assumes some knowledge of the management of digital archives, which would have been gained from any number of workshops available in the Digital Archives Specialist curriculum.
Standards Included	None
Syllabus	1. Digital Archives 2. Management 3. Storage 4. Preservation 5. Delivery 6. Access Copies
Supporting Materials	None
Activities and Exercises	TBD
Glossary	Authority Control, Curation, Preservation, Authenticity, Persistence, Unique Identification, Stakeholders, MARC21, AACR2, ISO 2709, Control, Access, MPLP
Contributors	Erin O'Meara (proposed)
Change History	Created in 2011
Copyright	Copyright retained by SAA
Equipment Required of Participants	None

Tier: Tools and Services

Note that this section does not include descriptions for a small number of proposed courses that focus specifically on specific products and standards, since the content of such courses will be obviously evident. These proposed courses are those that would focus on Archivematica, Drupal, iRODS, ISO 16363 and ISO 16919, and JHOVE.

Title	Archival Content Management Systems
Description	This course addresses strategies to select a customizable open source or proprietary archival content management system that integrates workflows to create more efficient, streamlined item- and collection-level inventories hosted locally or online.
Instructor	Lisa Spiro
Scope	Webinar
Version Date	2009
Tier	Tools and Services
Tracks	Practitioner, Librarian, IT Professional, Records Manager
Functions	Accessioning, Access
Target Audience	Archivists, Practitioners, Managers, Administrators, IT Professionals
Prerequisite Knowledge	Participants are expected to have some familiarity with basic archival organization and management.
Pre-Readings	<i>Archival Management Software: A Report for the Council of Library and Information Resources</i> (2009) by L. Spiro
Keywords	Appraisal, Accessioning, Arrangement and Description, Preservation, Finding Aids, Container Lists, Processing, Access, Catalog Record, EAD, Digital Collections, Exhibitions, Collection Management, Export, Workflows, Web Publishing, Data Migration, Customization, Batch Export, Metadata, RDI
Learning Outcomes	After completing this course, participants will have the knowledge needed to choose an archival content management system that will meet the needs of their respective institutions.
Relationship to Other Workshops	Builds on basics of Metadata and Appraisal by offering options for an efficient system in which previous descriptive work can be ingested and reports or exhibits can be easily created published.
Standards Included	DACS, Dublin Core, EAD, MARC, ISAAR (CPF)
Syllabus	<ol style="list-style-type: none"> 1. Needs Assessment 2. Usability 3. Sustainability 4. Project Management 5. Archival Description 6. Collection Management 7. Controlled Vocabularies,

Supporting Materials	CLIR Report (listed under Pre-Readings)
Activities and Exercises	None
Glossary	Archivists Toolkit, Archon, ContentDM, Past Perfect, Open Source, Metadata, Information Systems, Archival Content Systems, Organization, Strategies, Analysis
Contributors	Lisa Spiro
Change History	Updated 2011
Copyright	Copyright retained by Spiro
Equipment Required of Participants	Computer to view DVD

Title	Achieving Email Account Preservation with XML
Description	Participants will learn what tools are used to accession and process systems for email preservation at individual and institutional levels. Participants will learn why XML is used and how to apply schema in their institutions.
Instructor	Kelly Eubank, Ricc Ferrante, Lynda Schmitz/Fuehrig
Scope	Half-day course
Version Date	2009
Tier	Tools and Services
Tracks	Manager
Functions	Email, Preservation, Protocols, AIP, IMAP
Target Audience	Manager, Administrator, IT Professional
Prerequisite Knowledge	Familiarity with and access to email systems and basic archival knowledge.
Pre-Readings	None
Keywords	Electronic Mail, Retention and Disposition, Preservation
Learning Outcomes	After completing this course, participants will know how to use XML to accession and preserve records in individual email accounts.
Relationship to Other Workshops	This course is related to Appraisal of Electronic Records and Thinking Digital as it relates to protecting original order using tools and methods for individual and institutional email preservation to ensure authentic and immutable content and context (including attachments).
Standards Included	XML, RFC 2822, OAIS, PDF
Syllabus	Electronic Records, Acquisition, XML Preservation Schema, Protocols, Migration, Parser Validation, Archival Information Package (AIP), Harvesting, Schema Standards, EMCAP (Electronic Mail Collection and Preservation Tool), CERP Model, IMAP Protocol
Supporting Materials	None
Activities and Exercises	None
Glossary	Electronic Records, Email, XML, Content, Context, SIP, DIP, AIP, MBOX Files, Original Order, Authenticity, Accessible, Metadata, Virtual Machine Environment, Object-Oriented Environment, PST Files, Audit Trail, Authenticity, Encryption, MIME Types, Tree structure
Contributors	Kelly Eubank, Ric Ferrante, Lynda Schmitz/Fuehrig
Change History	2009
Copyright	Copyright retained by Eubank, Ferrante, and Schmitz/Fuehrig
Equipment Required of Participants	None

Title	Digital Forensics (New)
Description	This course will address some of the pressing digital issues related to identifying the content, context and structure of born-digital materials created in older versions of software which may need to be accessed, emulated, migrated, refreshed or will remain at risk. It also provides a discussion of the use of forensics to prove authenticity, integrity and file immutability as resources are moved from computers to servers or external networks.
Instructor	Cal Lee or Kirschenbaum (Proposed)
Scope	1-day course
Version Date	2011
Tier	Tools and Services
Tracks	Administrator, IT Professional, Legal Professional, Records Manager
Functions	Access, Digitization, Digital Collections, Digital Forensics
Target Audience	This course is intended for Administrators, IT, Legal and RM who need to understand the fundamentals of digital forensics and how they may impact legal discovery
Prerequisite Knowledge	Participants are expected to have basic archival training and education
Pre-Readings	TBD
Keywords	Digital Forensics, Data Structure, Bit Rot, Technological Obsolescence
Learning Outcomes	Knowing questions to ask regarding digital forensics may save your institution money and to gain access to electronic records in your collections
Relationship to Other Workshops	This basic overview provides an advanced survey into some of the issues related to using digital forensics to prove authenticity and file immutability
Standards Included	Digital Forensics, Computer Forensics, Preservation, Delivery, Authenticity, watermarks
Syllabus	<ol style="list-style-type: none"> 1. Introduction 2. Content Design, Organization, Strategy 3. Process and Methods 4. Navigation and Interface 5. Interaction and Experience Design
Supporting Materials	None
Activities and Exercises	TBD
Glossary	Digital Forensics, Authenticity, Versions
Contributors	Cal Lee or Kirschenbaum (proposed)
Change History	Created in 2011
Copyright	Copyright retained by SAA
Equipment Required of Participants	None

Title	Preservation Options of PDF
Description	<p>Are you faced with the challenge of preserving electronic records? Then "What are my options?" is one of the first questions that you need answered to make an informed decision.</p> <p>This seminar addresses:</p> <ul style="list-style-type: none"> ▪ The use of PDF/A as a preservation format; ▪ The limitations of PDF; ▪ The ISO PDF/A standard; ▪ Processes for converting electronic documents to PDF; ▪ Quality control procedures and general preservation management for PDFs
Instructor	Geof Huth
Scope	Webinar
Version Date	2008
Tier	Tools and Services
Tracks	Practitioner, Manager, Librarian, Museum Professional, Records Manager
Functions	Preservation
Target Audience	Archivists and others who may be considering the PDF/A standard as a preservation solution for born-digital records.
Prerequisite Knowledge	Basic knowledge of archives and computer technology.
Pre-Readings	None
Keywords	Preservation, XML, PDF/A, Normalization, Conversion, Migration, Quality Control, Metadata
Learning Outcomes	By the end of this webinar, participants will be familiar with the use of PDF/A for the preservation of born-digital records.
Relationship to Other Workshops	Builds on information presented in the Basic Electronic Records course
Standards Included	PDF/A
Syllabus	<ol style="list-style-type: none"> 1. Description of PDF 2. Overview of PDF's functionality 3. PDF/A standard 4. Using PDF/A for preservation
Supporting Materials	None
Activities and Exercises	None
Glossary	Preservation, XML, PDF/A, Normalization, Conversion, Migration, Quality Control, Metadata
Contributors	Geof Huth
Change History	Created in 2008
Copyright	Copyright retained by SAA
Equipment Required of Participants	Computer to view DVD

Tier: Transformational

Title	Information Architecture (New)
Description	<p>Are you speaking the same language as your program's target audience? Is your program's web site successful in delivering information to returning and new users? How do you improve the organization of information presented by your program's website, forms, and other deliverables on a shoestring budget? Learn practical inexpensive ways to engage with your existing and prospective audiences by applying the principles and tools used by information architects to improve access to your collections and services.</p> <p>The Society of American Archivists' glossary defines information architecture as the "structure and interrelationship of information, especially with an eye toward using business rules, observed user behaviors, and effective interface design to facilitate access to the information." While related to enterprise or technology architecture, information architecture is not contingent on the technology available to an organization. The application of its core principles to the design of everything from forms to websites serve to improve user experience.</p>
Instructor	Mahnaz Ghaznavi, Lynn Boyden (Proposed)
Scope	Webinar
Version Date	Proposed new course
Tiers	Transformational
Tracks	Practitioner, Manager, IT Professional, Librarian,
Functions	Classification, Cataloging and Metadata, Access, Advocacy
Target Audience	Participants who have strategic and/or hands-on responsibilities to deliver collections' information and services.
Prerequisite Knowledge	Participants are expected to have basic archival training and education. No technology skills required.
Pre-Readings	TBD
Keywords	Access, outreach, website design, user-centered design
Learning Outcomes	<p>Upon completion of this course participants will have:</p> <p>Identified strategies and practical ways to</p>

	<p>organize information applying the principles of user centered design.</p> <p>A road map for conducting user testing, regardless of the scale of operations or sophistication of technology infrastructure in place in your organization.</p>
Relationship to Other Workshops	This course provides a framework for organizing information in ways that are logical from user perspectives in order to improve access.
Standards Included	De facto standards in interface design.
Supporting Materials	TBD
Syllabus	<ol style="list-style-type: none"> 1. Introduction 2. Content Design, Organization, Strategy 3. Process & Methods 4. Navigation and Interface 5. Interaction and Experience Design
Activities and Exercises	Card sort
Glossary	Information Architecture, Access
Contributors	Mahnaz Ghaznavi, Lynn Boyden (Proposed)
Change History	Created in 2011
Copyright	Resides with the authors
Equipment Required of Participants	Index cards, computer with Internet connection

Title	Managing Electronic Records in Archives and Special Collections (New)
Description	This course provides a review and discussion of electronic records issues facing colleges, universities and institutional repositories, along with discussion of case studies and report findings including hands-on experience with electronic records using open source tools.
Instructor	Tim Pyatt, Seth Shaw
Scope	2-day course
Version Date	Unknown
Tier	Transformational
Tracks	Archivists, Managers, Curators, Administrators, Curators
Functions	Accessioning, Processing, Preservation, Access
Target Audience	This course is intended for digital archivists and electronic records managers, university archivists, curators and others who need to understand and articulate the challenges and solutions for managing born-digital and electronic records in archives, special collections and on a larger campus-wide or institutional level.
Prerequisite Knowledge	Understanding of archival processes, the records management policies pertaining to electronic records in their institutions, and knowledge of installing and running software.
Pre-Readings	None
Keywords	Ingest, Electronic Records Management, Persistent Archives, iRods, Organize, Share, Protect, Preserve, Micro-services, Workflows, Policies and Rules
Learning Outcomes	Understand elements of electronic records programs including policy, practices, authenticity, storage requirements, advocacy and management strategies; Discuss methods for working with records creators; Raise awareness of available open source tools for ingest and management of electronic records; Help establish recordkeeping models before record creation to be instituted on institution-wide level.
Relationship to Other Workshops	Building on other more basic courses, this course will allow participants the opportunity to understand and articulate big picture ideas so that they can implement and manage change to ensure their future system will be more efficient for ingesting and describing and preserving large quantities of data, electronic records and digital asserts.
Standards Included	OAIS
Syllabus	Ingest, Access, Format Preservation, Digital Preservation, Technology, Management, OAIS, Workflow, Functional Requirements, Scheduling, Transfer, Capture, Selection, Organized,

	Accessioning, Media, File Management, Stewardship, Curation
Supporting Materials	Open Source Materials
Activities and Exercises	Software demos of Archivematica and case studies
Glossary	Electronic Records, Records Management, Authenticity, Designated Communities, Stakeholders, Information Packages (SIP, DIP, AIP), Metadata Extraction, Automated Processes, Digital Repositories,
Contributors	Tim Pyatt, Seth Shaw
Change History	Unknown
Copyright	Copyright retained by SAA
Equipment Required of Participants	Laptop

Title	Digital Curation Planning and Sustainable Futures (New)
Description	This course will review the principles and practices necessary for promoting and adding value and interest to collections by curation including exhibitions, joint events and helping researchers to discover and retrieve materials. In addition, this workshop will focus on the advocacy and policy development necessary to maintain a digital archives far into the future.
Instructor	Helen Tibbo, Nancy McGovern (proposed)
Scope	1-day workshop
Version Date	2011
Tier	Transformational
Tracks	Manager, Administrator
Functions	Access, Appraisal, Preservation
Target Audience	This course is designed for mid-level and higher archivists who are in charge of a digital archives or who expect to develop a full-scale digital archives in the near future.
Prerequisite Knowledge	Participants are expected to have deep knowledge of archival processes, years of experience, and at least intermediate knowledge of managing digital archives.
Pre-Readings	TBD
Keywords	Access, Appraisal, Preservation, Advocacy, Sustainability, Curation
Learning Outcomes	By the end of this course, participants will have the core information they need to design, manage, and advocate for a digital archives and maintain it into the future.
Relationship to Other Workshops	Builds on the course Digital Curation: Creating an Environment for Success
Standards Included	OAIS, XML, Descriptive Metadata, ANSI/NISO Z39.87
Syllabus	<ol style="list-style-type: none"> 1. Curation 2. System Development 3. Providing Access 4. System Maintenance 5. Advocacy 6. Maintenance into the Future
Supporting Materials	TBD
Activities and Exercises	TBD
Glossary	Curation, Selection, Appraisal, Description, Advocacy
Contributors	Helen Tibbo, Nancy McGovern (proposed)
Change History	Created in 2011
Copyright	Copyright retained by SAA
Equipment Required of Participants	None

Appendix F: Guidance for Instructors

The task force believes that the most essential element in the Digital Archivist Specialist curriculum will be the instructors who create and present the courses. However, the task force believes that not all instructors will be naturally adept at all aspects of course development and presentation, so the task force recommends that prospective instructors be provided with this simple set of advice.

The Society of American Archivists recommends that course developers and instructors follow these guidelines when preparing and giving courses on behalf of SAA:

When Developing a Course

- Take SAA's Train the Trainer webinar.
- Communicate and coordinate course development with instructors who have developed or are developing related courses for SAA. The SAA Education Office will enable this communication process.
- Gain familiarity with best practices for teaching online whenever preparing a webinar. For example, see the WISE Introduction to Online Pedagogy Workshop at <http://www.wisepedagogy.org/workshop.shtml>. This resource is actually useful for all instructors.
- Identify three concrete learning outcomes or tools of assessment for your course before creating the course.
- Tailor course content, especially the vocabulary used to describe issues, and the delivery method to the expectations, knowledge, and needs of the user groups specified for this course (for instance, IT or legal professionals).
- Use visual aids when they are effective. If images are part of the instructional material (in particular, screen shots), make sure that they are effective (sufficiently large, viewable) not only when displayed on the computer screen or otherwise projected, but also as part of the packet the participants receive. (Print out larger screen shots in an appendix, and point participants to those pages when needed.)
- Include hands-on exercises that elicit participation of all members. One way to do this is to ask attendees in advance to bring a project or problem from their day jobs to the session.
- Do not use "Introduction" in the title of courses identified as Tactical and Strategic or higher.

When Preparing to Present a Course

- Review carefully the questionnaires you receive from SAA ahead of the workshop since these indicate what people would like to learn during the workshops. Use this information and responses from the audience at the beginning of a course session to help customize the training to the audience's particular needs.
- Develop a quiz to measure student's grasp of the core competencies taught in your course. This quiz should consist of ten multiple-choice questions. The quiz will be presented online, and the content of the quiz will be reviewed by SAA's Education Committee before it is given.

Appendix G: Glossary of Terms

This glossary provided the definitions of a few terms as used in this report so as to ensure the readers' understanding of the terms in this context.

administrator: an archivist in a large archives who oversees managing archivists, who is responsible for organizational planning, and who does not manage electronic records personally but who must ensure an organization's capacity to manage those records

digital curation: the selection, preservation, maintenance, collection and archiving of digital assets. Within the scope of digital curation is the processing of establishing and developing long-term repositories of digital assets. Curation includes digital asset collection, search and retrieval, certification of trustworthiness, integrity and reliability of content, semantic and ontological continuity, and data audit tracking.

IT professional: a professional in charge of various levels of the information technology management in an organization and who is responsible for providing information technology support to an archives

legal professional: a professional who is responsible for providing legal advice and support to an archives

librarian: a library professional whose primary responsibility is dealing with publications and their use, including digital publications and possibly also dealing with digital archival records

manager: an archivist who has oversight of the work of other professional archivists, and who may or may not manage electronic records personally

museum professional: a professional who has responsibility for the management and use of cultural and scientific artifacts and who may also have similar responsibility for digital archival records

practitioner: a hands-on frontline archivist who manages or will manage electronic records personally

records manager: a professional responsible for the management of the records of an organization across their life cycle and who also may have sole responsibility for the management of an organization's archives, including those in digital form