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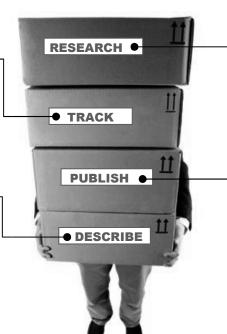
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#### Archives on the Go

Learn how mobile technologies are being used to promote collections.

Aimee Morgan

#### Facebook Me, Then Follow Me on Twitter

How can archivists conquer social media?

Janet Olson, Jay Gaidmore, Jackie Esposito, and Tim Pyatt



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#### **COVER PHOTO**

Preserving 2Pac. Rapper, actor, and poet Tupac Amaru Shakur's legacy lives on at the Atlanta University Center. A goal of the center is to teach the creators of hip hop the value of their work to American history and culture. Read about the first publicly available collection of a major rap artist on page 4. Courtesy of Interscope Records.

Top Left Image: Advertising ephemera for a Florida ostrich farm, 1909. Courtesy of

Top Middle Image: More than 900 million individuals actively use Facebook today.

Top Right Image: Medical index cards corresponding to patient files, separated and sealed for confidentiality. Courtesy of Melanie Meyers.



#### PRESIDENT'S MESSAGE

**Gregor Trinkaus-Randall** 

Massachusetts Board of Library Commissioners gregor.trinkaus-randall@state.mass.edu

### **Access to Archives**

As archivists, we pride ourselves in collecting, processing, preserving, and providing access to records—historical or current. Records and manuscripts, in whatever format, do not benefit anyone if they are locked away in a vault or safe where no one can access them. Obviously, there are occasions when some parts or a whole collection must be restricted for some reason and for some period of time, but the bottom line is that we are there to provide access to our holdings.

This has long been our mantra and yet has been the source of much angst as backlogs pile up in many of our repositories. However, no matter how one proceeds, collecting and providing access to our holdings is what we are about. This phenomenon, curiously enough, is not limited to archivists in the United States. Moreover, the problems of providing access are not unique—backlogs, lack of proper finding aids, lack of or minimal promotion of one's holdings, preservation issues, disasters, political pressure, etc. The list could go on and on. Providing access to holdings is not a given in some countries, and the International Council on Archives (ICA) is attempting to address this issue as only an international organization can.

At the most recent ICA/SPA (Section on Professional Associations) meeting in Edinburgh, Scotland (August 31–September 3, 2011), two documents were highlighted: the *Universal Declaration on Archives* and a draft of the *Principles of Access to Archives*, "a draft set of principles . . . that are intended to be applicable across linguistic and cultural divides, and in different political regimes."

No matter how one proceeds, collecting and providing access to our holdings is what we are about.

The former document was approved by the ICA General Assembly in Oslo, Norway, on September 17, 2010, and is worth perusing as a succinct and yet general statement on archives (www.ica.org/6573/reference-documents/universal-declaration-on-archives. html). It is important to remember that even though there may be some areas that we feel could have been included or expanded upon, it is a document that is meant for the international archival community and had

to be general, to some extent. The second document is currently out for review, and the ICA staff welcomes comments, through January 2012 (www.ica.org/9400/news-events/principles-for-acces-to-archives-give-your-opinon-now.html).

"[The purpose of] the Principles of Access to Archives [is to] provide archivists with an external baseline against which to measure their existing access practices and to support archivists who seek to adopt new or modify existing access rules." SAA has been asked to comment formally on the document and the SAA Council has asked the Privacy and Confidentiality Roundtable, the Reference, Access, and Outreach Section, and the Cultural Property Working Group to respond so that we can incorporate their comments into our formal response. At the same time, other interested archivists are encouraged to submit their own comments to the Council for inclusion in SAA's response or directly to ICA at access@ica.org. To have your comments considered by the SAA Council, please respond to me by December 1, 2011, at gregor.trinkausrandall@state.ma.us.

## ARCHIVAL **OUTLOOK**



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The Society of American Archivists serves the education and information needs of its members and provides leadership to help ensure the identification, preservation, and use of the nation's historical record.

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# Add 11 TO W!

### Donate to the "75 for 75" Campaign

It's not too late to participate . . . in the "75 for 75" campaign!

The campaign kicked off last January to commemorate SAA's big birthday in 2011—our Diamond Jubilee—marking 75 years of supporting, promoting, and advocating for the archives profession.

SAA's vision across this very special year was for each individual member to consider donating \$75 to the SAA Foundation. If that were to happen, SAA would raise more than \$400,000—a great start at building a financial undergirding that will work for the interests of archives and archivists for years to come!

The SAA Foundation is a 501(c)(3) organization that stands out for its potential to serve the ongoing development

of the field. The Foundation's mission is: "To enrich the knowledge and enhance the contributions of current and future generations by championing efforts to preserve and make accessible evidence of human activity and records of enduring value."

What might a strong Foundation accomplish for the profession?

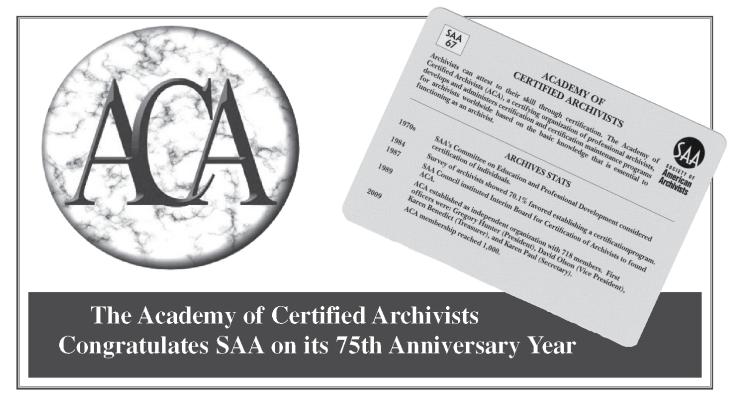
Here are a few examples of what the Foundation is doing already:

- Supporting development of the Digital Archives Specialist curriculum;
- Supporting development of the next iteration of the Archival Fundamentals Series; and

• Supporting minority student scholarship.

But the future will bring a wide variety of timely opportunities to further enhance development of continuing education products, provision of graduate-level scholarships to a diverse applicant pool, and ongoing funding for collection and analysis of workforce statistics.

Without a strong Foundation, it is unlikely that much of this work can be accomplished. Before our Diamond Jubilee year ends, please support the SAA Foundation by giving "75 for 75." Add your "Wow" now at www2@archivists.org/foundation.





## Hip Hop and the Tupac Amaru Shakur Collection at Atlanta University Center

#### Courtney Chartier, Atlanta University Center Robert W. Woodruff Library

Rapper Tupac Shakur's powerful lyrics speak to people. His albums sell millions. And his drive-by shooting death in 1996, which still ignites controversy, did not extinguish the hip hop artist's mass appeal. Until recently, there was no place for scholarly study of Shakur's creative legacy.

Collecting hip hop is new for the Archives Research Center of the Atlanta University Center Robert W. Woodruff Library, which in September 2009 received the manuscript collection of rapper, actor, and poet Tupac Amaru Shakur. It's the first publicly available collection of a major rap artist and serves as an example for the systematic preservation of archival collections related to hip hop music and culture.

#### The Rise of "2Pac"

Shakur was born in Harlem in 1971 to Afeni Shakur, an active member of the Black Panther Party. Afeni was both a single mother who struggled to raise two children in the face of extreme poverty and drug addiction, and a creative intellectual who punished her son by making him read *The New York Times* from cover to cover.

The Shakurs were frequently homeless. Despite this poverty, Tupac was raised surrounded by culture, music, and politics, and made his debut at 13 in an Apollo Theater production of "A Raisin in the Sun." He later attended the Baltimore High School of the Arts, moved to California and

began practicing his art full time, first with a local teacher who ran an arts program for children, then with his own rap group and also as a dancer with the hip hop group Digital Underground. His first recorded rap track, gold record, and film appearance were all as a member of Digital Underground.

Beginning with 1991's 2Pacalypse Now, Shakur released six studio albums and acted in television shows and in six films.

Despite this, Shakur remained a troubled and self-destructive young man. He was publicly blamed for inspiring the shooting of a Texas State Trooper; charged with the

shooting of two police officers in Atlanta; convicted of assault and battery; and sued for assault. He was shot five times while leaving a recording studio in an armed robbery attempt, and in 1994, convicted of sexual abuse.

In September 1996, Shakur was shot in Las Vegas by still unknown assailants and died several days later. This year marks both the 15th anniversary of his death and what would have been his 40th birthday.

#### Legacy

Shakur is one of the best-selling musical artists of all time and is the second best-

selling rap artist of all time. He remains an active earner, with eight posthumous albums, an Academy Award-nominated documentary, and a recent development deal to produce one of his screenplays. The song "Dear Mama" was added to the National Recording Registry by the Library of Congress in 2010. It is one of only three hip hop recordings to be included in the registry. Most importantly to his legend, there is a widespread and longstanding

belief that Shakur is not dead, but is still living in an undisclosed location—the mythic status of a "hip hop Elvis."

Another ontributing

factor to his legacy is the staying power of his creative output. Shakur created music that tied the political to the party, and explored themes common to African American urban life, including domestic alienation, violence, black masculinity, and black womanhood. His music endures because his message endures.

#### **Shakur Collection**

It is our responsibility as

archivists to also teach the

creators of hip hop the value

of their work to American

history and culture.

At first glance the Shakur Collection closely resembles the manuscript collection of any well-known figure. The bulk of the material is handwritten manuscripts and newspaper and magazine clippings. There

Just picture me rollin
Flossin a Benz on rims that isn't stolen
My dreams is censored, my hopes are gone
I'm like a fiend that finally sees when all the dope is gone
My nerves is wrecked, heart beatin and my hands is swollen
thinkin of the G's I'll be holdin, picture me rollin

"Picture Me Rollin" lyrics by Tupac Shakur.
Photo courtesy of Interscope Records.

is a small amount of correspondence, and a large amount of fan mail. Other materials document Shakur's fan club and production company. There are also some records related to Shakur's stint in prison.

The series with the most research value is easily his writings, which are all handwritten and include song lyrics, poetry, short stories, screenplays, track lists, album notes, and video treatments. There are also more whimsical pieces, like plans for "POWAMEKA CAFÉ," which detail the menu, music, décor, and general vibe of a restaurant.

#### **Building a Brand**

Shakur's writings expose the sometimes excruciating writing process to researchers. Like many poets, Shakur wrote and rewrote constantly, and many of the lyrics in his manuscripts were scrapped in the recorded versions of his songs. Song titles were also constantly changed.

The collection reveals the business side of hip hop. From his manuscripts we can see that Shakur was a prototype of the rapperbusinessman. Shakur wrote out his ideas for album marketing, including packaging and storyboards for commercials. He has been credited as a pioneer of what is now a commonplace practice: that of an artist as a construction; a person with a great amount of business savvy.

His manuscripts demonstrate his awareness of rapper as brand. Shakur was frequently criticized during his lifetime for the portrayal of women in his lyrics and behavior. He in turn portrayed women as strong, frequently as single mothers struggling with poverty, drug addiction and abandonment by black men, or as aggressively sexual voids with no other purpose than to service male pleasure.

Shakur's work is a large contribution to black political discourse, bringing to light themes of black struggle. He graphically details the conditions of poverty, including drug abuse, hunger, and the violence that comes from frustration. He was unafraid to name politicians and policies that he felt negatively impacted the black community,

or historical trends that conspired to rob racial, ethnic, and financial minorities of their voice in America. Shakur used music as an outlet for his rage at the status of young black men in American society, and to bring attention to the struggles of the ghetto.

#### Valuing Hip Hop

There is an unfortunate popular view of hip hop: that it has only a negative value. Shakur's work embodies much of the negative aspects of rap, but also the unflinching realities of ghetto life and positive celebrations of the strength and resiliency of black Americans. The release of the Tupac Amaru Shakur Collection can only work to change this image, and teach people from multiple generations and races of the cultural and political value of rap and hip hop. Shakur famously rapped, "Picture me rollin." As in picture him at the top of his game. It is our responsibility as archivists to also teach the creators of hip hop the value of their work to American history and culture. Yeah, rolling...



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## Using Mobile Technologies to Promote Your Collections

Aimee Morgan, Stanford University

It's easy to roll your eyes at the winding line of people wrapped around the Apple store for the latest iPhone. That is, if a smartphone hasn't become part of your daily life.

A June 2011 survey by Google and the Mobile Marketing Association revealed that more than 31 percent of U.S. adults own a smartphone. Mobile technology is changing the way people seek information, as well as raising their expectations for the availability of information. For archivists, the rise of smartphones represents a new prospect for achieving what is, for most of us, an ongoing goal: connecting users with collections.

## Navigating the Mobile Landscape

This is new territory for archives, and there are many approaches. Should you develop a custom application, or "app," that's tied to a single platform, like the iPhone, or focus resources on creating a mobile-friendly version of your existing website? Should you build a presence for your repository on a location-based service like Foursquare—and if so, which one? The mobile landscape is changing rapidly. It's hard to know which service or application is the next big thing, and which are passing fads. There are questions related to collaboration. Should you work to build connections with those

who are responsible for the mobile outreach strategy of your parent institution—if those people exist—or should you take a more grassroots approach?

And then there are big-picture issues: How might archivists use mobile technology to complement, rather than compete with or replace, more traditional outreach activities? How should we define success when trying unconventional new outreach strategies? How do we justify experimenting with new technology when not every experiment succeeds—and when all too often it's a struggle just to accomplish the basic day-to-day work of running an archives?

There is no single answer to questions like these. At the SAA Annual Meeting in Chicago in August 2011, four session panelists addressed such questions. They described different approaches to using mobile technology to enhance connections between users and collections.

#### What's a QR Code?

A Quick Response code, better known as a QR code, is a square-shaped two-dimensional code that can be scanned by mobile devices with built-in cameras. Scanning them provides users with information that can include text, images, and links to online resources.

"They're similar to bar codes, but can store vastly more information, explained Laura Botts, head of Special Collections at Mercer University. "Increasingly recognized by mobile device users, they can be created and customized with free Web applications."

Botts implements QR codes in numerous ways at her repository: to add supplemental content to an exhibit, on handouts given to students during instructional sessions, and on flyers promoting library events. Other possibilities include incorporating them into processing; codes on boxes and folders could provide researchers with information on how to cite the resources they contain.

#### iPhone App

As the commercial says, "There's an app for that," which is definitely true at Duke University. Lynn Eaton, reference archivist at Duke, worked on a project to incorporate her repository's digital collections into DukeMobile, a first-of-its-kind iPhone

app for members of the Duke University community.

"DukeMobile currently provides access to more than 32,000 images from the John Hope Franklin Research Center for African and African American History and Culture; the John W. Hartman Center for Sales, Advertising, and Marketing History; the Archive of Documentary Arts; and the Duke University Archives," Eaton said.

Creating an access portal for their collections in an existing application allowed Eaton and her colleagues to benefit from the expertise of third-party developers, but in some ways limited their flexibility.

"Library staff cannot add images to DukeMobile on their own," Eaton noted. "They need to work with the developers to incorporate new content." Lack of detailed statistics on use of digital content via the mobile app is another disadvantage, although overall use of digital collections has gone up since the launch of DukeMobile, according to Eaton.

For archivists, the rise of smartphones represents a new prospect for achieving what is, for most of us, an ongoing goal: connecting users with collections.

Future plans include developing mobile access to digital collections for non-iPhone devices. The DukeMobile app is available via Apple's iTunes.

## Upgrading the Campus Walking Tour

How about collaborating with IT staff and others to bring a traditional outreach tool—the campus walking tour—into the age of smartphones? That's what Tiah Edmunson-Morton, reference and instruction coordinator at Oregon State University Archives, did.

"The BeaverTracks tour was inspired by North Carolina State University's WolfWalk," Edmunson-Morton shared. "It allows users to view historical images on their phones while touring the campus." CYRUPOFFICS

NATURE

NATURE

NATURE

NATURE

SAN FRANCISCO, CAL

LOUISVILLE, MY.

Among the biggest challenges, according to Edmunson-Morton, were selecting images that represented the full scope and diversity of campus history, and providing useful and entertaining contextual information in an environment in which descriptions had to be brief.

"Although the research for the project took longer than anticipated and the audience for the tour was not large in absolute numbers," she noted, "statistics show a steady increase in usage."

## **Location-Based Outreach** with Foursquare

Mattie Taormina, head of Public Service for Special Collections at Stanford University, described an experiment in outreach using Foursquare, a location-based service that encourages social networking and loyalty to local businesses through a system of points and badges, which users can earn by "checking in" at locations with the Foursquare app.

Taormina's interest in Foursquare was piqued when Stanford partnered with Foursquare to offer a special badge to users who visited selected campus landmarks. "I worked with Foursquare staff to advertise limited-time 'specials' through their app," Taormina explained. "The 'specials' were

DukeMobile provides access to more than 32,000 images from the John Hope Franklin Research Center for African and African American History and Culture; the John W. Hartman Center for Sales, Advertising, and Marketing History; the Archive of Documentary Arts; and the Duke University Archives. Among these images are: (left) an undated ad (early 1900s) of "Syrup of Figs—Nature's Pleasant Laxative" and (below) a 1920 ad "Kodak as you go." Courtesy of Duke University Libraries.

KODAK
as you go.

one-on-one sessions with an archivist, who provided information about and opportunities to view some of the hidden gems of Stanford's collections."

Eastman Kodak Company, Rochester, N. Y.

Although statistics show that overall turnout for these informal instructional sessions was lower than expected, Taormina feels that the audience for them could grow through use of additional social networking tools, such as Twitter and Facebook.

Archivists recognize that mobile technology can help them connect with users in innovative ways. With new mobile devices, applications, and services constantly on the horizon, there is much territory waiting to be explored.



There are more than 900 million active users on Facebook and more than 175 million Twitter accounts. With such gaudy usage statistics, archivists now have unprecedented opportunities to document organizations. Although organizations may not always maintain appropriate archival records, the coordination and communication of activities among their members through a social media tool or website allows the information to be harvested. How can archivists conquer these interactive-dialog platforms?

A session at the 2011 SAA Annual Meeting in Chicago, "Acquiring Organizational Records in a Social Media World:
Documentation Strategies in the Facebook Era," attempted to tackle that question by touching on 1) identifying and making connections with organizations whose membership is obscure (if not secret), 2) capturing Facebook pages of a group that no longer uses the institution's crawled website to document its activities, and 3) building an audience with a targeted Twitter feed.

#### "Secret" Societies

Searching for information about ubiquitous, exclusive student groups on college and university campuses apparently is not that difficult.

"The 'secret' of these societies is that most are not all that secret," said Tim Pyatt, head of Special Collections at Pennsylvania State University. "They want the public to know their mission, and sometimes even who their members are. Most are devoted to public service and promoting their institution, and they often have administrative backing for their activities."

The "secret part" is generally how members are selected and ceremonially initiated.

Although yearbooks may supply some

information about the mission and activities of these groups, the Web and social media have made it easier to fill in information gaps. Secret societies often have their own Web pages and Facebook sites, or even a Wikipedia page.

Pyatt noted that armed with information from these sources, the archivist can revert to more traditional methods of meeting with members of the society to earn their trust, and to convince them of the value of preserving their history in the safety and security of the archives.

#### **Facebook Phenomenon**

Jackie Esposito, university archivist at Penn State, compared current difficulties in capturing student organizations' activities with a situation just a few years ago, when student organizations maintained pages on the parent institution's website in order to announce meetings and programs and provide access to foundational documents, meeting minutes, and membership lists. Web crawling allowed university archives to capture this vital information along with the content of the institution's administrative and academic sites. Then came Facebook.

"Student groups now conduct their business on a site with multiple postings per day, hundreds of photos, links, commentary, and chat capabilities," Esposito explained. "And most Web-capture vendors will not crawl Facebook or Twitter, for a variety of legal reasons."

Esposito's case study, "Capturing Facebook Documentation for the Interfraternity Council Dance Marathon," provides a template for connecting with organizations and documenting their Facebook activities. She found that by working closely with key students in the group, and by assigning certain responsibilities to them, she could ensure that her scheduled snapshots of specified

pages (saved to CD-ROM as an interim storage method) were providing documentation of this significant annual event.

"The real trick to using social media to document target audiences' activities is to engage that audience in the process," Esposito said. "This is the updated version of every archivist's normal outreach effort, but it is enhanced by new capabilities for learning about the groups and forming alliances early in the lifecycle of the records—whether electronic or analog."

## The best way to reach an organization that uses social media is through social media.

Esposito further recommended establishing contact with and offering rudimentary training to a selected member of every organization, its "historian" or "archivist," so that the individual becomes responsible for collecting and turning over records each year.

Identifying such contacts is particularly important in collecting secret society records, because the members (once found) would have to be assured that such records would be treated with respect and restricted according to the wishes of their organizations.

#### 140 Characters

Northwestern University's Twitter experiment has been less successful in achieving interactivity and establishing connections leading to collections, according to Janet Olson, NU's assistant university archivist. But she is quick to add that the venture into social media has been a success in terms of outreach and exposure.

As of August 2011, with 348 tweets, NU Archives "followed" 295 Twitter feeds and

# Follow Me on Twitter

had 483 followers, despite the fact that the archives set two unique limitations on this project. Its targeted audience—those whose feeds it follows, and thus most of those who follow it—is limited to Northwestern students, alumni groups, and administrative and academic units. Content is limited to a daily "On This Day in NU History" tweet (repurposed from a defunct blog).

The Northwestern-centric factoids in these tweets appeal to many different affiliations and interests within the NU community, and often include links to the archives' online finding aids, virtual exhibits, and Facebook page. Entries are posted on the archives' home page so that they can be read by people without Twitter feeds. Unfortunately, because a "re-tweet" or reply would appear as an anomalous entry on the Web page, early expectations of using Twitter as a two-way communication method are thus far unrealized.

But the number of followers and "re-tweets" indicates that the archives is producing a popular product. Many of the Twitter

"mentions" do not refer to tweets, but to other archives activities, such as Facebook entries or comments on staff and collections.

"Our hope is that in the future NU Archives will be able to use Twitter more effectively to establish contacts and perhaps to offer advice on collecting and preserving tweets," Olson concluded.

#### New Modes of Media, New Approaches

Although the evolution of social media has made it easier to find information about organizations and reach out to them, its use does come with challenges. Because Facebook and Twitter are replacing traditional websites as a way to communicate information, archivists are not always able to harvest this information through the usual Web crawl.

Archivists must take a more proactive approach when documenting the history of organizations. They should utilize social

media to learn more about organizations and engage members to

raise awareness of the archives and its mission. Archivists can gain important trust by being acquainted with the history of an organization and having an understanding of its purpose. The best way to reach an organization that uses social media is through social media.

Given the difficulty of capturing content from social media sites, archivists should work more closely with creators to ensure that documentation is being preserved. One approach involves training key members of the organization in basic archival principles and reinforcing the importance of documenting its history. Acquiring the records of organizations is important to documenting society, and archivists should explore the potential and navigate the demands of social media tools to accomplish this most effectively.



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Hannah Sommers, National Public Radio

It's not exactly your traditional archives.

The National Public Radio (NPR) archives uses a toolkit of tactics for preserving content. The goal is to make stories from 30 years ago just as accessible to users as a story from yesterday. Yet, public media archivists often find themselves on the fringes of the archival community, thanks to so many permanently active records used to report new stories, and organizational missions that drive us to continually harness the power of the latest disruptive technology.

#### **A Hybrid Archives**

NPR stations are not cultural heritage institutions, but they create, manage, and advocate for cultural heritage every day. Our content lifecycle management strategy is continually evolving as we endeavor to balance all of our business needs—producing stories on deadline, reaching

listeners where they are (increasingly often not near a radio), developing applications for mobile devices, scanning the horizon for innovative ideas, and streamlining the production and delivery of content. It's a relentless cycle of telling a story once and reusing it many times, downloading it, clipping from it, providing access to a presidential speech or performance chat from last week or 15 years ago with the click of a mouse. What kind of archive exists in a place like this?

NPR archives are not places that stories go once they are no longer needed to support the business function for which they were created. However, in our industry, staffing an archive at all is a luxury few can afford. In 2009, the Corporation for Public Broadcasting found that 5 percent of public media organizations have resources to professionally manage content post-production. The organizations that participated in the panel discussion at

SAA's Annual Meeting in Chicago in August 2011—Minnesota Public Radio/APM, WNET, WNYC, NPR—represent the lucky ones.

NPR, which just celebrated its 40th birthday, has long recognized that keeping track of stories is important. What's new is an emerging recognition that our content lifecycle management strategy (aka preservation/access strategy) needs to be an evolving one. Isn't that what best practices are for? To avoid reinventing the wheel? Isn't consistency a big "value add" in the archives profession?

The metadata we capture about stories hasn't changed much since 1971. What's changed, of course, is technology and, with it, the expectations of our users. Our ability to continue to scale up staff to meet increased demands has changed. Making the most with what we have today is our mandate. That means they need to be accessible to NPR's application programming

interface (API), and that means our archive platform needs to be more open than ever. An API platform is currently in development.

#### The NPR Toolkit

What's in our toolkit as we embrace the challenges of this time? The following thoughts are ones that have guided NPR's archive team as we make strategic decisions about extending the life of our stories—for the long term.

**Develop a pilot mentality.** With resources as scarce as they are, no one wants a large-scale catastrophe from a software development effort or any other type of project. Looking for a way to test an idea on a smaller scale can facilitate buy in and give stakeholders a chance to offer feedback before an investment is committed.

**Use an agile approach.** Being able to incorporate feedback into a project is critical. NPR has adopted Scrum as a process framework for tackling complex creative projects. The project team prioritizes requirements, works on them in short

development cycles, and solicits feedback from users on a regular basis. Hearing user feedback before the launch of a project helps to further define and prioritize remaining requirements. The agile approach has roots in software development, but can be used to manage any process where time is of the essence and funds are limited.

#### "Content survives because it is used."

Tim O'Reilly made this observation to a group of digital preservation specialists earlier this year. Usage isn't the only criteria to consider when deciding what to preserve, and at NPR we certainly don't have plans to throw anything away. But we do need to articulate preservation priorities. Content that is used actively is more likely to persist. Acknowledging that "not all content is created equal" even within a single series or collection, can help bring preservation priorities into better focus.

"The skills to innovate and the skills to sustain are two different sets—we need to cultivate both." National Digital Stewardship Alliance's Martha Anderson made this observation about staffing. Making an innovative process sustainable

over the longer term is a strategy that requires some thought near the outset of a project. Establishing a pathway to bring innovations happening at the cutting of society or an institution into the "core" of institutional operations is another important move that leaders can make. (Credit for these thoughts: Smithsonian's Michael Edson.)

#### The user is the hero in her own epic.

Kathy Sierra, author and user advocate, reminds us to keep our focus on the user. Our profession inspires us to steward the materials in our care to the best of our ability, but what if we focused the same effort and level of dedication on the user? Are there ways in which shifting the spotlight to the user might actually benefit our collections? What are the obstacles users face in locating our content? Actual knowledge that the material exists? Distance? A slow connection? Academic credentials? Most of us wouldn't be in this profession if we didn't believe that connecting a user with the best, most credible information makes everyone a little more heroic.



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## HIPAA-cratic Oath?

### Processing and Access under the Health Insurance Portability and Accountability Act

Melanie Meyers, Center for Jewish History

Archivists managing collections on the history of medicine perform an often tense balancing act associated with the effect of the Health Insurance Portability and Accountability Act (HIPAA) on processing and access. The tension results as we try to balance providing access to these collections for legitimate scholarly purposes with ensuring compliance with HIPAA and the

Medical notebooks and school materials separated and boxed for preservation. *Photo courtesy of Melanie Meyers*.

provisions for protected health information in order to limit institutional liability.

Unfettered access was not a given pre-HIPAA, although security prior to 1996 wasn't as tightly controlled as it is today. There have always been varying levels of restriction, depending on the institution, when managing historical collections that may contain confidential information.

Most libraries and archives, whether they were covered by the HIPAA provision or not, had some sort of policy that protected potentially sensitive information within the collections, such as closing collections or parts of collections for a specific time span, or redacting patient names and other information prior to researchers viewing the documents. Not all repositories that house these collections are considered "covered entities" by the HIPAA definition. Repositories that are subject to these provisions are archives or special collections that meet the Department of Health and Human Services guidelines on what constitutes a covered entity.

#### **Protected Health Information**

Where HIPAA becomes troublesome for libraries and archives that are covered entities is in defining "protected health information" or PHI. The definition of PHI is so broad and covers such a wide range of data that it can render collections unusable due to the large amount of such information that may be contained within the archival documents. HIPAA forbids disclosure of any information that may be used to personally identify a patient, which

includes data such as names, addresses, and phone numbers, but also includes past, present, and future medical conditions, general demographic data, and photographs. It applies to both electronic and paper records.

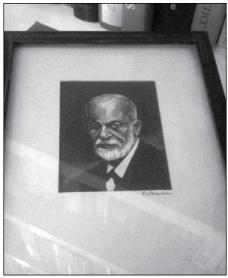
This also affects processing of these collections, as a far more intensive, item-level process must be implemented in some cases to assess for PHI and make appropriate access recommendations. This document handling level also slows down the processing rates considerably, which clearly has implications for work flow and cost of maintaining the collections.

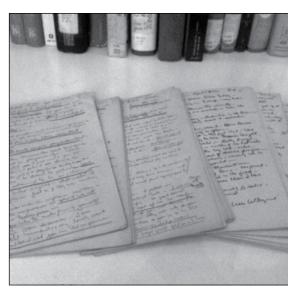
## Confidentiality vs. "Acceptable to Reveal"

Although many archives are not technically considered to be covered entities, the overarching concern is that HIPAA sets the standard for what information is acceptable to reveal and what is to remain protected and confidential. As a result, many archives are revising their access policies to generally conform with HIPAA because the prevailing sense is that the HIPAA guidelines predict the direction the law is moving, covered entity status or not. HIPAA protects a very broad range of information, some of which previously had not been considered sensitive.

As many of these records were created pre-HIPAA (i.e., 1996), there was a very different standard as to what information was considered confidential, and also what was appropriate to be included in a medical record. Because demographic data and







HIPAA sets the standard for what information is acceptable to reveal and what is to remain protected and confidential. From left to right: A medical school notebook, Berlin, 1929. A framed picture of Sigmund Freud. Medical index cards corresponding to patient files, separated and sealed for confidentiality. *Photos courtesy of Melanie Meyers*.

information about medical conditions is protected, this has very broad implications for scholarship in the history of medicine, and necessitates changes in processing, access policies, and acquisition and collection development.

HIPAA also has created problems for collections that deal with the history of psychology/psychoanalysis and the evolution of the treatment of mental illness, as there is seemingly no consensus on whether psychotherapy notes are protected.

The overarching concern is that HIPAA sets the standard for what information is acceptable to reveal and what is to remain protected and confidential.

Patient case records are confidential, but psychotherapy notes are somewhat ambiguous because they may potentially contain a huge amount of PHI, but are not necessarily part of the formal patient record. For scholars engaged in studying the history of psychology, these notes are often revelatory.

I processed the collection of a noted psychoanalyst who published extensively

and was considered a pioneer in the field. The vast majority of his published articles were case studies based on his experiences treating specific patients. The finished publications had removed any identifying information, but he frequently kept his case notes and early drafts together with the finished product. The personal patient information often was not changed or disguised until the final version.

In terms of the scholarly value, a researcher could see the evolution of theory from draft to draft, so the material in this collection clearly had probative and research value. Also, given the highly subjective nature of psychotherapy and psychoanalysis, a researcher could make a very compelling argument that seeing the original case files and earlier drafts is necessary in order to validate (or invalidate) the eventual conclusions.

#### **Chilling Implications**

The basic problem with the HIPAA privacy rule is that it was not written with historical research or libraries and archives in mind. It was written to ensure confidentiality of information to protect the medical consumer, which is certainly an admirable and necessary initiative. To protect the consumer from being personally identified, however, a large amount of information is now considered protected data.

Unfortunately, this policy is so broad, and the penalties for violating it are so severe, it has had somewhat of a chilling effect in terms of restricting legitimate scholarly access to these collections in the history of medicine. And this is where the tension is localized, as the archivist at a covered entity must keep the HIPAA guidelines in mind when creating access policies and processing strategies for those collections. The rules governing what is or is not protected information can often undermine our goal of making these materials available for scholarship and research.

## **SAA Submits Comments** on Proposed HIPAA Rules

At the recommendation of the Privacy and Confidentiality and Science, Technology and Health Care roundtables, SAA submitted comments on a proposed rule, "Modifications to the HIPAA Privacy, Security, and Enforcement Rules Under the Health Information Technology for Economic and Clinical Health Act." Read SAA President Helen Tibbo's September 13, 2010, letter at www2.archivists.org/sites/all/files/SAA\_HIPAA\_091310.pdf.

## Terabytes and Beyond . . .

#### NARA's Electronic Records Archives

Megan Phillips, David Lake, and Deborah Steel, National Archives and Records Administration

The National Archives and Records Administration's Electronic Records Archives (ERA), built to hold the avalanche of electronic records being created by the federal government, has reached a major milestone

On September 30, 2011, ERA's initial development phase ended, and the operations and maintenance phase began. NARA announced on September 29 that IBM would be the operations and maintenance contractor for the ERA. Lockheed Martin had been the contractor during the development phase.

Begun in 2005, ERA incrementally deployed important functions starting in 2008, when NARA started ingesting its existing collection of electronic records into ERA.

As of September 30, ERA was storing more than 124 terabytes of records in a wide variety of formats from the Congress, federal agencies, and the George W. Bush White House.

This volume is just the beginning of what ERA will store, though. NARA has just received over 300 terabytes of electronic records from the 2010 Census, currently being prepared for ingest into ERA.

ERA's Online Public Access system will make increasing numbers of our open electronic records available to the public online, including an initial public release of selected born-digital photographs from the Bush Administration this fall.

In addition to this, NARA has embarked on an ambitious plan to have every federal agency use ERA for scheduling and accessioning records in all formats by the end of 2012, and many agencies have already started.

NARA is relying on ERA every day to perform a key part of its basic mission.

Without ERA, NARA would have been hard pressed to store and search the volume of electronic records received in the last four years.

ERA consists of several important subsystems, known as "instances," that were designed to meet the particular requirements of records governed by different laws. The federal Records ("Base") instance now stores more than 16 terabytes of records from federal agencies. It provides a webbased means for federal agencies to schedule and transfer records to NARA, a repository for electronic records, and important preservation functions with a framework for managing migration from obsolete formats to accessible ones and a standards-based approach to preservation metadata using the PREMIS data dictionary.

The Executive Office of the President (EOP) instance stores 82.3 terabytes of presidential records. NARA staff has done approximately

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100,000 searches in EOP and delivered electronic documents, e-mails, audio, video, and photographs in response to special access requests (requests from the incumbent or former president, Congress, or the courts). The EOP instance also enables archivists to review records for public release under FOIA, including the ability to securely redact restricted content and to maintain releasability decisions with archival originals and any public use version created.

The Congressional Records Instance holds almost 17 terabytes, and Classified and Census instances are preparing for first use.

The Online Public Access System (http://www.archives.gov/research/search/) provides search of records and information about records and an appealing and useful display of textual records, video, images, and/or traditional databases, and digitized paper records. The OPA System pulls together information from many sources at NARA to provide a one-stop search and access mechanism for users.

#### **ERA Vision**

In 1998 NARA identified the need for a more flexible, scalable system to safely store the burgeoning volume and variety of electronic records being created by federal agencies and the White House—and to make them available over time. The first phase was collecting requirements for the new system.

An important decision made during the requirements gathering phase was to include functions to allow federal agencies to conduct records management transactions with NARA electronically.

The records management part of the system would support creation of records retention schedules and transfer documentation for records in all formats, not just electronic records. In addition to modernizing records management for the federal government, the agency could then collect archival metadata in the same system that would house electronic records. That way, a newly ingested transfer would be associated with its records schedule and accession information from the moment it entered the system.

#### **Acquisition and Development**

After the requirements document was developed, NARA initiated the federal acquisition process. In 2005, NARA chose the winning development contractor to build ERA

In 2008, NARA received the first functional part of the system, which came to be known as the Base instance of ERA for federal records. This included the basic electronic records storage system at a secure off-site location, connections to NARA facilities, and the records management workflow for scheduling and accessioning.

The Base system incorporates federal records management processes and metadata that presidential records don't have; the two types of records are governed by different laws. The Base system did not need the very specific rapid ingest and access capabilities needed to fulfill NARA's responsibility for presidential records. NARA would get the records of the George W. Bush White House by law in January 2009 and needed to be able to search them right away, so NARA decided to create a specialized instance of ERA for the needs of presidential records. This second instance of ERA went live in late 2008 and started ingesting Bush records on schedule in January 2009.

In 2009, NARA staff started the detailed articulation of requirements for a format migration framework to support preservation and a public access system, both of which were received in prototype in 2010. NARA also deployed a simple system specifically to meet the needs of congressional records in January 2010.

In 2011, NARA added an instance specific to the restricted records of the 2010 Census and an instance for National Security Classified records. Both of these bodies of records require special restrictions on access and could not be stored in the Base system for federal records.

Because of the early decision to manage presidential records in a system optimized for their needs rather than in the original Base system, NARA developed a flexible ERA architecture that allows for a system of interrelated systems. This introduced some architectural challenges in providing a suite of shared services (basic infrastructure,

public access, preservation) across several different platforms. In addition, not all archival steps happen the same way for all electronic records. Different instances of the system are optimized for different needs, and not all capabilities are now available to all records. However, the flexibility to meet the specific needs of each type of record, each with its own set of legal requirements, has been invaluable.

#### **Next Steps**

Although ERA is providing many sophisticated new capabilities for electronic records, it does not yet do everything described in the original vision. By the conclusion of development in 2011, ERA had met 68% of the original requirements. ERA provides a foundation for electronic records services for the federal government, but there are five areas NARA plans to refine over time as resources allow. NARA will:

- Improve the public's ability to access electronic records through the Online Public Access (OPA) system;
- Make record submission processes more streamlined, scalable, reliable, and flexible;
- Improve advanced search tools for NARA staff;
- Improve processes for capturing, storing, and updating metadata in ERA; and
- Improve ERA architecture to promote more scalable, evolvable, and cost-effective storage and records management services.

#### **Conclusion**

As this new phase begins, ERA is storing and providing access to a collection of electronic records that is vast by the standards of what the agency has managed before. ERA is also providing federal agencies a way to perform records management actions with the National Archives electronically for the first time.

ERA will evolve as electronic records change and new technology options become available to us; that's what the system was designed to do. With ERA, NARA has laid the groundwork for a flexible and evolvable archive to meet the ongoing challenge of managing and preserving permanently valuable electronic records, and although major development has ended, refinements will continue.

# 1940 Census Captures Great Depression

#### Constance Potter and Diane Petro, National Archives and Records Administration

Every 10 years, in accordance with the 72-year restriction on access to census schedules, the records of a past U.S. Census of the United States are released.

In these documents, not only can you find names of people, but you can learn more about the communities where those people lived. On April 2, 2012, the National Archives and Records Administration will release the 1940 census, which describes the United States near the end of the Great Depression of the 1930s as World War II was beginning in Europe. There are some new things about this census release:

- The census will be released in digital format only.
- There is no name index, but NARA indexed the census by state; county; city, town, or minor civil division; and enumeration district.
- And, as with every census, there are some new questions—and answers—that provide a more complete picture of American life in 1940 and the decade that preceded it.

Citizenship: Beginning with the 1900 census, people were asked their naturalization status. Were they naturalized, had they filed their papers, or were they aliens? In 1940, the Census Bureau added the category "American Citizen Born Aboard [Am. Cit.]," which covered people born abroad or at sea.

**Education:** Although questions about education were asked in earlier censuses, the 1940 census asked for the highest grade of school completed.

**Migration:** To study internal migration, the Bureau asked each person where he or she lived on April 1, 1935—the midpoint in the decade. The census notes if a person

was living in the same house in which he or she was living on that date; if he or she was not in the same house, it provides the name of the state and the city or township with a population of more than 2,600.

**Employment:** The schedule has 17 questions about the employment status of people 14 years old and older during the week of March 24–30, 1940. Included were new questions about wages and salary earned and whether a person received income of \$50 or more from sources other than his or her regular employer.

The answers to the new questions—and the old—will tell us, in detail, what the United States looked like on April 1, 1940.

The census also asked if anyone in the household during the week of March 24–30, 1940, was at work on, or assigned to, public emergency work projects of the New Deal, including the Works Progress Administration, the National Youth Administration, or the Civilian Conservation Corps.

**Supplemental Schedule:** The Bureau asked two people on preselected lines on every page a set of questions on a supplemental schedule at the bottom of the page. This gave a five percent sample for the general population.

In this section only, veterans were asked if they had served in the World War, Spanish-American War, Philippine Insurrection, or Boxer Rebellion and if in a Regular Establishment (Army, Navy, or Marine Corps), peacetime service only, or another war or expedition. For the first time, the census did not ask if a person served in the Civil War. The wife, widow, or under-18-year-old child of a veteran was also required to answer the questions if her/his name appears on the supplement question line.

The supplemental schedule also asked if deductions were taken out for Social Security or the Railroad Retirement Board. Although Civil War pensions may be considered the first large-scale pension program in the United States, the pensions did not cover people of all ages. By 1910, more than 90 percent of the remaining Civil War veterans were getting a pension; however, this comprised only about 6 percent of the population. Various state and private insurance plans were tried before the 1930s, but the advent of the Great Depression made a program of national insurance a necessity—and Social Security and Railroad Retirement were born.

For more information on the 1940 census, such as the questions asked on the census, frequently asked questions, instructions to enumerators, and Bureau of Census movies about the census, visit www.archives.gov/research/census/1940/index.html. Additional information about the census is in the Family Tree Friday blog at http://blogs.archives.gov/online-public-access/. As soon as it is available, NARA will publicize the Web address at which the digitized copies of the census schedules will be found on April 2, 2012.



The column by Archivist of the United States
David S. Ferriero will
resume in the January/
February 2012 Archival
Outlook.

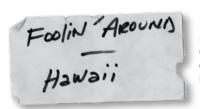
#### Archival Op-Art in The New York Times

SAA member Shannon O'Neill had something to share about archives in *The New York Times*. The archivist and reference librarian at the

Atlantic City Free Public Library saw her letter and images run on the op-art page of *The New York Times* on October, 16, 2011. "Checking Out" talks about the present state and future of libraries and archives. Illustrating her role in documenting

history were several images. Read the article at www. nytimes.com/2011/10/16/opinion/sunday/checking-out. html?\_r=1.

Items like these two that Shannon O'Neill pulled from the trash cans of various libraries were highlighted in the op-art section of *The New York Times*.



#### See Stars at St. Louis Archives

What do Elvis Presley, Jimi Hendrix, and Jackie Robinson have in common? All served in the United States military, and all have military personnel files that are open to the public at the new National Personnel Records Center facility in St. Louis. Visit www.archives. gov/st-louis/military-personnel/public/persons-of-prominence.html.

#### **NEH Grants Newberry 300k for Archives Project**

The Newberry Library has begun a \$300,000, two-and-one-half-year project to arrange, describe, and make electronically accessible the archives of the Chicago, Burlington & Quincy Railroad Company, which comprise 2,760 linear feet of materials documenting company activities from 1840 to 1965. The project is made possible by a grant from the National Endowment for the Humanities Division of Preservation and Access. Visit <a href="http://publications.newberry.org/cbq/">http://publications.newberry.org/cbq/</a>.

## NHPRC Grant Reveals Collections through Northwest Digital Archives

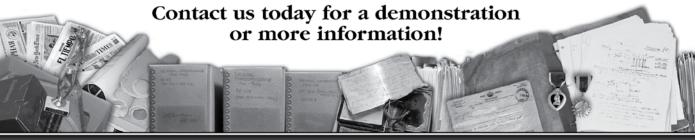
More than 100 additional archival collections at liberal-arts colleges in Washington and Oregon are now accessible on the Northwest Digital Archives website. Funded by a \$123,188 grant from the National Historical Publications and Records Commission, the project is assisting seven small liberal-arts colleges in Oregon and Washington with archival program development and expose basic information about their collections to researchers. Visit <a href="http://nwda.orbiscascade.org/index.shtml">http://nwda.orbiscascade.org/index.shtml</a>.

#### **Bruce Springsteen Archives Finds New Home**

Monmouth University recently acquired the Bruce Springsteen Special Collection, which contains almost 15,000 objects and documents. The university is located near the Jersey Shore watering holes where Springsteen first performed as a young musician. Visit www.friendsofthespringsteencollection.org.



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# Setting the STANDARD

#### Archival Standards, Guidelines, and Best Practices Portal Launched

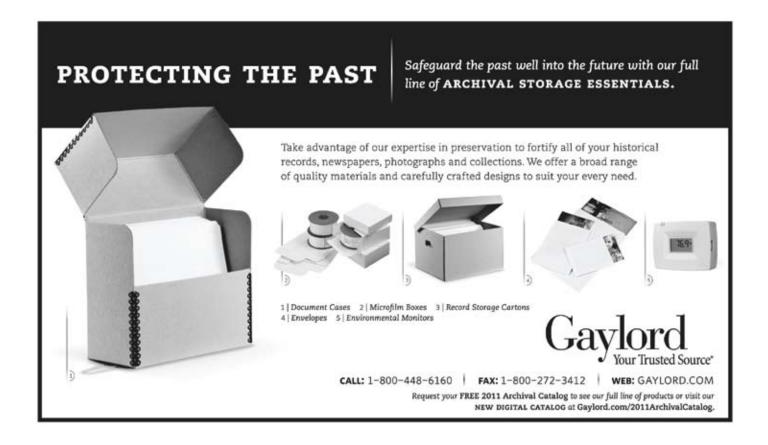
#### Marcy Flynn and Cory Nimer, SAA Standards Committee Co-chairs

Are you curious about what's going on in the world of archival standards, but unsure of where to turn? Then head online and take a look at the newly released SAA Standards Portal at <a href="www2.archivists.org/standards">www2.archivists.org/standards</a>. Announced during the 2011 Annual Meeting in Chicago, the Standards Portal is a free online resource that provides information on archival standards, guidelines, and best practices.

Maintained by SAA's Standards Committee, the portal is a gateway to three general types of information: official SAA standards, archival standards that are endorsed by SAA but created and maintained by outside groups, and correlated resource links contributed by members. At this time, the portal showcases 14 SAA standards developed since 1994.

The portal is intended to be an online clearinghouse of information about archival standards, guidelines, and best practices. The site is designed to support online communication and resource sharing. SAA's goal is to use the portal as an educational tool, to enhance the application of standards to practice, and to disseminate information about partnerships with information standards organizations with mutual interests and concerns.

Development of the portal also serves at least two desired outcomes addressed in SAA's strategic plan: "SAA will develop standards, or endorse appropriate standards developed by other organizations, to improve the appraisal, capture, and preservation of, and access to, born-digital records, and will promulgate those standards to



the archives community" (Technology Desired Outcome #2) and "SAA will make increasingly effective use of current and emerging technology in order to enhance communication with internal and external audiences and stimulate collaboration among its constituents" (Technology Desired Outcome #3).

#### In the Beginning

The Standards Portal is the culmination of long-expressed needs of the Standards Committee, and is a successor to Victoria Iron Walch's *Standards for Archival Description: A Handbook* (Society of American Archivists, 1994).

The portal is intended to be an online clearinghouse of information about archival standards, guidelines, and best practices.

In the fall of 2010, SAA contracted with a Boston-based Web development firm, CommonPlaces, to engineer the portal using Drupal, an open-source content management framework. SAA's Communications Technology Working Group (CTWG) developed the general specifications for the portal. CTWG is composed of members charged by the SAA Council to investigate, evaluate, and recommend strategies for the effective management of online content created and/or maintained by the Society.

The Gladys Krieble Delmas Foundation contributed \$4,000 in support of software development work in early 2011. With that grant support, SAA completed the initial programming for the portal in time for its debut at the Annual Meeting.

#### **Content of the Portal**

The Standards Portal home page features a list of standards categorized by topical subject, such as Administration and Management, Arrangement and Description, and Reference and Access. Each entry on the home page includes a short summary and a link to more detailed information available on a microsite. Only standards developed and maintained by SAA appear on the home page; external standards are accessible via a link provided at the end of each topical subject.

The portal's microsites are maintained by the Standards Committee, Technical Subcommittees, the Standards Development and Review Teams, or other SAA groups. For example, the Technical Subcommittee on Encoded Archival Description (TS-EAD) maintains the EAD microsite and the Museum Archives Section maintains the Museum Archives Guidelines microsite. Standards without a current maintenance group are linked to the Standards Committee page.

The microsites deliver information and news about the status of standards-based documents that are endorsed, in transition, or

emerging. They can include the text of the standard, a link to the SAA bookstore if the document is not available online, or a link to an external website. Microsites also contain file attachments and information about the status of the document and its maintenance agency.

The Standards Committee is developing procedures for submission and review of portal content. In addition, the committee plans to begin to work with representatives from SAA sections, roundtables, and other component groups to populate the site with more standards-based information related to archival practice.

#### **Contributing Community Resources**

While the portal serves to provide authoritative information about SAA standards, it also provides an opportunity for the archives community at large—as represented by SAA members—to contribute references to related resources (books, articles, case studies, events, reference materials, reports, tutorials, webinars, workshops, and other resources), thus enabling interactivity and generating a body of knowledge around archival standards.

The SAA Standards Portal is still in its initial stage of development. We encourage you to explore the site, learn more about archival standards, and share your resources and expertise with the community.

#### 45th Annual Georgia Archives Institute June 11–22, 2012 Atlanta, Georgia



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Designed for beginning archivists, manuscript curators, and librarians, the Institute provides general instruction in basic concepts and practices of archival administration and management of traditional and modern documentary materials. The two-week program is held at the Georgia Archives and includes one week of classroom instruction in basic concepts, one day of preservation instruction, a one-day Digital Records Boot Camp, plus a three-day internship in an area repository.

Tuition is \$500 and enrollment is limited. **Deadline is March 1, 2012** for receipt of application and \$75 application fee (refunded if not admitted to Institute).

Tuition scholarships are available from: The Society of Georgia Archivists (www.soga.org) and The Friends of Georgia Archives and History (www.fogah.org)

For an application to the Institute or additional information, please visit www.georgiaarchivesinstitute.org or contact:

Georgia Archives Institute, P. O. Box 279, Morrow, GA 30260-0279 GeorgiaArchivesInstitute@yahoo.com

## NETWORKING

#### NBC Calls on Archivist for TV Episode

Spike Lee's gotta have it. The film director, producer, writer, and actor needed infor-mation about his ancestry for an episode of NBC's genealogy documentary series "Who Do You Think You Are?"

Lee's search took him to Dublin, Georgia, where he met SAA member Melvin Collier, an archivist at the Robert W. Woodruff Library-Archives Research Center at the Atlanta University Center. Collier was happy to assist the celebrity in uncovering information about his great-great-grandmother Lucinda Jackson for an episode that aired on April 30, 2010.

Collier spent eight hours with Lee, finding a newspaper obituary for Jackson who was born into slavery and died in 1934. Collier recounts his NBC experience.

#### Q: How were you selected to appear on "Who Do You Think You Are"?

MC: The production company (Wall-to-Wall Production, based in London) first contacted the Atlanta History Center, seeking someone who conducts African American genealogy research. Familiar with my work and the release of my first book (Mississippi

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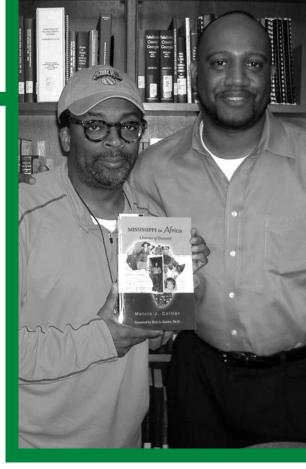
Ph: 414-229-6929 E-mail: sois-archivesinfo@uwm.edu

www.uwm.edu/sois/programs/cas

to Africa: A Journey of Discovery), Wesley Chenault (who was the archivist of the Atlanta History Center at the time) directed them to me.

#### Q: What were your initial thoughts on being asked to participate?

MC: In NBC's initial contact with me, they did not mention the show or the celebrity.



Independent filmmaker Spike Lee and archivist Melvin Collier worked together for an episode of "Who Do You Think You Are?"

They presented it as a documentary production piece that involves highlighting the genealogy research of the family of someone well-known with Georgia roots and wanted to discuss it further with me in person. Even before the celebrity's name was disclosed, the project sounded very interesting.

#### Q: What was the process like from the onset?

MC: When the production team (two individuals) came to the library to discuss this further with me, that's when they disclosed that it was Spike Lee, but I had to keep it a secret until NBC announced the show and the celebrities involved. NBC's production team already had a team of researchers to do their own investigation. I was shown what was already uncovered and allowed to interject my expertise in African American genealogy research. The production team was specifically interested in someone who could speak about some of the issues related to the genealogy research of African American families and aspects of African American history before and after slavery.

#### Q: How would you describe Spike Lee?

**MC:** Spike Lee was very down-to-earth and very comical. This made the production fun and exciting. He was very fascinated by the things one can uncover from conducting genealogy research. During production, while we were viewing census records on ancestry.com, he discovered the names of other family members he'd never heard of. With excitement, he immediately picked up his cell phone and called his sister to let her know what information he was learning about their grandmother's family just from census records.

## 2012 **FELLOWS** OMINATIONS AND AWARDS COMPETITION

The Society of American Archivists annually names Fellows and recognizes out- $\mathbf{I}$  standing achievement in the archives profession through an awards competition. SAA offers a variety of opportunities for professional recognition and financial assistance, with concentrations in the following areas:

#### Contributions to the Archives Profession

- Fellows
- Distinguished Service Award
- Sister M. Claude Lane, OP, Memorial Award
- Spotlight Award
- Diversity Award NEW
- Archival Innovators Award NEW
- Emerging Leader Award NEW

#### Advocacy/Public Awareness

- J. Franklin Jameson Archival Advocacy
- Philip M. Hamer and Elizabeth Hamer Kegan Award

#### Writing/Publishing

- C.F.W. Coker Award
- Fellows' Ernst Posner Award
- Preservation Publication Award
- Theodore Calvin Pease Award
- Waldo Gifford Leland Award

#### Scholarships

- F. Gerald Ham Scholarship
- Mosaic Scholarship
- Josephine Forman Scholarship

#### Travel Assistance

- Harold T. Pinkett Minority Student Award
- Oliver Wendell Holmes Travel Award
- Donald Peterson Student Award



For more informatio, go to: www.archivists.org/recognition Deadline for nominations: Feb. 28, 2012, with exceptions noted.

#### **Annual Meeting Task Force Established**

The Society created an Annual Meeting Task Force, which is charged with analyzing current practices related to the SAA Annual Meeting as well as possible future approaches, and delivering to the Council a report with recommendations as to which current practices should be changed and what new practices should be implemented. The task force will consider how issues of social responsibility should be addressed; how meeting sites, including hotels, are selected; the current meeting model and meeting structure; increasing diversity in meeting sites; how to limit cost of meeting attendance for participants; how to best make meeting content available to those who cannot attend; and the extent of SAA's dependence on the annual meeting for budget revenue. A call for volunteers was issued on August 27.

#### **Share Your American Archives Month Story**

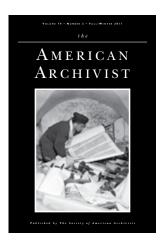
American Archives Month activities were in full swing in October, and SAA wants to hear from you! Tell us what you did to raise awareness about the value of archives and archivists this October. Send a description of what you did to participate in American Archives Month to saahq@archivists.org.

#### "Fundamental Change" Working Group Meets

SAA's "Fundamental Change" Working Group met for the first time in early November in Chicago to begin research and development on the next iteration of the Archival Fundamentals Series. The 11-member group discussed short- and long- term product development, a modular approach to content, and the possibility of implementing distribution options that would include eBooks. Stay tuned for more details!

## American Archivist Marks SAA's Milestone

The significance of 75 has worked its way throughout the journal. The Fall/Winter 2011 American Archivist commemorates SAA's 75th Anniversary year with a special section in the journal. Articles include "The Society of American Archivists at Seventy-Five: Contexts of Continuity and Crisis, A Personal Reflection," "ARMA v. SAA: The History and Heart of Professional Friction," "National Archives and



International Conflicts: The Society of American Archivists and War," and "Open Access Publishing and the Transformation of *American Archivist* Online." There are nine other articles plus book reviews. Read the issue online at <a href="http://archivists.metapress.com">http://archivists.metapress.com</a>.

#### **Member Needs Survey in the Works**

SAA has contracted with Indiana-based Association Metrics to conduct a comprehensive member needs and satisfaction survey in January 2012. Originally proposed by the Membership and Diversity Committees, the purpose of the study is to gather demographic information about SAA's members, to gauge the performance and value of the Society's programs and services, and to identify emerging needs and priorities. The survey will be conducted online. All individual and institutional members will be invited to participate. Stay tuned for more information!

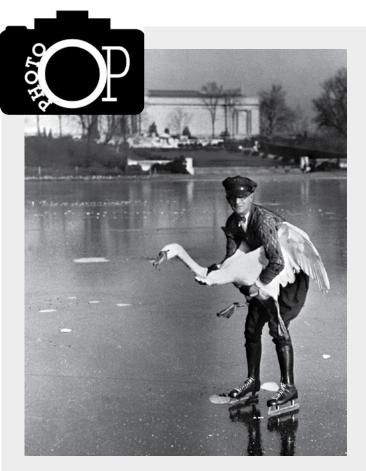


#### "Using Archives" Teaches Public about Archives

Share this resource with your users! SAA recently published an online guide for the public to learn more about archives, Using Archives: An Effective Guide to Research by Laura Schmidt (archivist at The Marion E. Wade Center. Wheaton College). The online publication outlines the functions and procedures of archives, and is designed both for first-time archives users and scholars who have already conducted research in archives. The content covers



how archives function, how to identify appropriate archives for your research, and how to access historical materials and research at an archives. Visit www2.archivists.org/usingarchives.



**Swan Song.** In the mid-20th century The Cleveland Museum of Art owned a pair of nesting swans that summered in the Fine Arts Garden lagoon and wintered on a nearby farm. One year winter came early, necessitating their rescue. *Photo courtesy of Leslie Cade, The Cleveland Museum of Art.* 

#### **DAS Updates!**

DAS (Digital Archives Specialist Curriculum and Certificate Program) is SAA's exciting new continuing education suite, designed to ensure that archivists have the knowhow and tools for appraising, capturing, preserving, and providing access to born-digital records. Demand for DAS programming is growing and



Society of American Archivists

we've been working with the Midwest Archives Conference (MAC), New England Archivists (NEA), and Society of Southwest Archivists (SSA) to finalize schedules that will bring DAS programming to their areas. In addition, talks with the Conference of Inter-Mountain Archivists (CIMA), the Society of North Carolina Archivists (SNCA), and the Society of California Archivists (SCA) are underway.

Registrants who completed DAS courses between August 2009 and August 2011 received notification, by the end of October about taking exams for those courses between November 1 and December 30.

When the SAA Education Committee came up with the idea to find an archivist who would take the required DAS courses, pass the quizzes and comprehensive exam, and blog about the whole experience, Erica Boudreau volunteered. Check out her "Diary of a DAS Student" on the DAS home page, www2.archivists.org/prof-education/das.

Thanks to all who have contacted us about the DAS Program. If you have questions, check out the FAQ page or read more about the program at <a href="https://www2.archivists.org/prof-education/das">www2.archivists.org/prof-education/das</a>. And if your questions still aren't answered, contact education@archivists.org.

## Quotable

The new profession of archives has taken its place beside law, medicine, theology, history, political science, and other older arts in the pattern of American life. Like the lawyer, doctor, and historian, the archivist professes that he has the requisite special knowledge, mastery, and inclination for devoting his time and energy to the service of others by practicing his chosen art for considerations not wholly or primarily commercial.

—Albert Ray Newsome's presidential address in the 1939 issue of *American Archivist* 

## **Ballot Set for 2012 Election**

Sixteen candidates vying for four different offices are slated for SAA's 2012 ballot. Danna Bell-Russel, educational outreach specialist at the Library of Congress, and Leon Miller, head of the Louisiana Research Collection at Tulane University, will square off for the top spot of vice president/president-elect. The candidate elected vice president will serve a one-year term beginning in August 2012 and then will become SAA's 69th president in 2013–2014. SAA members will also elect a new treasurer who will serve a three-year term beginning in August and running through the SAA Annual Meeting in August 2015.

There are three available seats on the Council. Those elected will serve three-year terms beginning in August and running through the 2015 SAA Annual Meeting. The three candidates elected to the 2013 Nominating Committee will serve one-year terms beginning immediately.

The complete slate of candidates is listed in the box on the right. All candidates have been asked to respond to a question regarding their potential position. Candidates' responses to the questions listed below, along with their biographical information, will be posted to the SAA website in January.

**Vice President/President-Elect:** Describe your vision for accomplishing the strategic goals of technology, diversity, and advocacy/public awareness as outlined in the Strategic Priority Outcomes and Activities document.

**Council:** Taking into account SAA's strategic priorities, in which specific initiatives would you take a leadership role? How would you go about implementing these given the competing priorities of the organization while remaining responsive to members and their needs?

**Treasurer:** What actions should the treasurer take to ensure that SAA remains fiscally strong and solvent while pursuing its strategic priorities and responding to opportunities and proposals that may exist outside of the strategic priorities?

**Nominating Committee:** An essential component of the nomination and election process is identification of new leaders within SAA who embody the diversity of the archives profession. Describe what you believe to be the core responsibility of the members of the Nominating Committee, and outline your ideas for identifying the next generation of SAA leaders to ensure that new or distinctive voices and perspectives contribute to the future of the profession.

(SAA's strategic priorities are posted at http://www2.archivists.org/sites/all/files/0511-StratPlan\_PublicPosting\_060111.pdf.)

These questions were developed by SAA's 2012 Nominating Committee: Chair Adriana Cuervo (University of Illinois, Urbana-Champaign), Rebekah Kim (GLBT Historical Society), Kelcy Shepherd (Amherst College Library), and Council members Thomas Frusciano (Rutgers University), and Deborra Richardson (National Museum of American History).

#### Slate of Candidates for the 2012 Elections

The Nominating Committee has slated the following SAA members as candidates for office in the 2012 election.

#### **Vice President/President-Elect**







Leon Miller Tulane University

#### Council

- Michael Bullington, McDonald's Corporation
- Geoffrey Huth, New York State Archives
- Michele Light, University of California, Irvine
- Arlene Schmuland, University of Alaska, Anchorage
- Kenneth Thibodeau, National Institute of Standards and Technology
- Tanya Zanish-Belcher, Iowa State University

#### **Treasurer**

- Mark Duffy, Episcopal Church Archives
- James Roth, John F. Kennedy Presidential Library and Museum

#### **Nominating Committee**

- Erica Castaño, University of Arizona
- Courtney Chartier, Atlanta University Center Archives
- John LeGloahec, National Archives and Records Administration
- Susan Laura Lugo, Government of the Virgin Islands
- Lisa Mix, New York-Presbyterian/Weill Cornell Medical Center
- Sammie Morris, Florida State University Libraries

#### **Casting Your Vote**

Any eligible member of SAA may be placed on the ballot by submitting a petition signed by 50 individual members. Petitions must be received at SAA headquarters in Chicago by February 10, 2012. Voters may also write in candidates on the ballot.

SAA members who are eligible to vote can then cast their votes online between March 12 and April 12, 2012. This is the fourth year that SAA is partnering with VoteNet Solutions, a leading provider of secure online voting software for nonprofit associations. If you wish to receive a paper ballot contact Carlos Salgado at csalgado@ archivists.org once voting is open.



Michèle Cloonan, dean of the Simmons Graduate School of Library and Information Science (GSLIS), will step down at the end of this academic year. Cloonan, who served 10 years as dean, will continue her scholarly work at Simmons as a researcher and professor, specializing in the preservation of cultural heritage and book trade history.



**Tawny Nelb**, Nelb Archival Consulting Inc., was one of 200 women honored at the Midland (Michigan) Center for the Arts exhibit Voices: Extraordinary Women of Midland County. The exhibit celebrates area women's accomplishments and contributions in the county. The exhibit was on display through the fall of 2012 and a book about the exhibit and the honorees, co-published with the Midland Daily News, is being prepared for publication in December 2011.



John Slate, CA, Dallas Municipal Archives, was a guest in September of the Budapest Municipal Archives in Hungary, the Istanbul Municipal Archives, and the Office of the Prime Minister (Republic of Turkey) Ottoman Archives, also in Istanbul. The informal tours included demonstrations of each archives' advanced digitization projects and conservation programs. The highlight of Slate's visit was viewing a manuscript commerce treaty between the United States and the Ottoman Empire from 1862, certified with a pristine oversized wax seal of the United States and bearing the signature of President Abraham Lincoln.



**Bradley Wiles** was named the first archivist of the American Public University System where he will manage the university's growing archives of physical and electronic records dating back over the last two decades.



Sister Aquin Gilles passed away on April 23, 2011. Sister Aquin's contributions to society were many. She

served in leadership in the province as provincial superior until 1965 and in Rome from 1965–1990 as vicaress, general councilor, and general secretary. Her six years as general secretary gave her first-hand knowledge of historical documents of the Congregation, which served to prepare her for her ministry after returning to the United States, her home province, in 1990. After a much deserved sabbatical, Sister Aquin took up her duties in the Provincial Archives, while also spending three months a year organizing the General Archives in Rome and organizing and conducting the annual meetings of the Mother Mary Study Group. As a member of the International Historical Commission of the Society, Sister Aquin was one of the key persons for providing translations and publication of material on Father Jordan and Blessed Mary. These books are vital for the formation of new members in all English-speaking countries.

## It's about time. Your time. Your researchers' time.

#### **Aeon: Managing Special Collections**



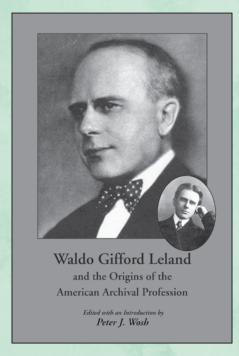
"If Atlas can make Aeon work for us (and they have), it will work for any institution that wants to maintain better control of its special collections and improve service to researchers."

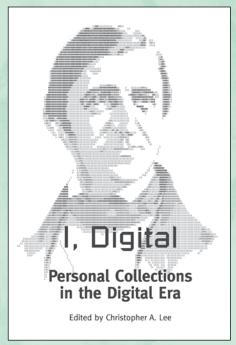
Time for software that works for you and YOUY USEYS.

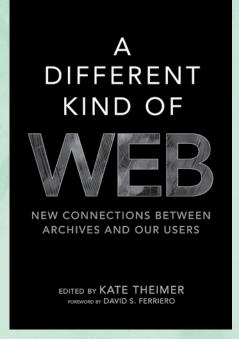
Contact us at www.atlas-sys.com to schedule an online demo.

**ATLAS** Promoting Library Excellence Through Efficiency SYSTEMS









#### Waldo Gifford Leland and the Origins of the American Archival Profession

Edited with an Introduction by Peter J. Wosh

List \$62.95 SAA Member \$44.95

## I, Digital: Personal Collections in the Digital Era

Edited by Christopher A. Lee

List \$69.95 SAA Member \$49.95

#### A Different Kind of Web: New Connections Between Archives and Our Users

Edited by Kate Theimer

List \$69.95 SAA member \$49.95



Putting a name to a face is often helpful, and now SAA members can do just that. This department spotlights one member at a time with the goal of helping all members get to know each other.

## Erin O'Meara

Meet Erin O'Meara, electronic records archivist at the University of North Carolina at Chapel Hill.

## SAA: How did you know you wanted to work in the archives profession?

**EO:** I majored in Anthropology at the University of Arizona, so as an undergraduate I got a student job in the anthropological museum on campus. After working in the archives at the museum, I realized that I was more interested in the lives and documentary evidence of the anthropologists than the field work itself. That's when I realized I wanted to be an archivist.

## SAA: Describe an interesting project on which you have you have worked?

**EO:** I have been lucky enough to have IT resources here at University of North Carolina that have focused on building digital preservation services. I serve as the archives stakeholder (and tester) for an open source workflow and collections processing tool for digital objects that we built called Curators Workbench (www.lib.unc.edu/blogs/cdr/index.php/about-the-curators-workbench/). The tool allows archivists to build a complex METS file and maps existing metadata to MODS elements within an easy-to-use interface. Building tools collaboratively with our IT staff has been a great experience.

#### SAA: Share how you got involved in SAA.

**BO:** I got an MAS at the University of British Columbia but knew I would end up back in the United States after graduate school. My professors stressed the importance of participating in professional associations, so I became an SAA student member. My first two experiences with SAA were with the mentorship program and a poster presentation at the 2004 Annual Meeting in Boston.

## SAA: What is one thing you look forward to experiencing with your SAA membership?

**EO:** The Annual Meeting is what I look forward to the most. It's a time to see old friends and make new ones. I always feel so inspired after the meeting. It's wonderful to see so much passion for the profession and innovation around issues we face in our work.

#### SAA: Do you have a hobby when not working?

**EO:** I am an avid lace knitter and spinner (not cycling but spinning raw wool into yarn). I also love to cook. I also serve as a model for Archival Clothing (www.archivalclothing.com/), a heritage apparel brand that a close friend started recently.



A snapshot of Erin O'Meara in 2008 in front of the Riksarkivet—the Swedish National Archives in Stockholm.

#### **Kids and Collections!**

Treasures at the Museum





Author and SAA member Deborra Richardson wrote this book to get children interested in learning about and, more importantly, creating and preserving family, local, and regional history. "This story should appeal to children in grades K-4," Richardson says. "Besides drawing children in with the story and illustrations, there is an activities section in the back that

children, their teachers, parents, or others can use to expand on the experience."

\$5.99

The Elevator Group, 2011 61 pp., Soft cover ISBN: 978-0-9824945-1-6 www.theelevatorgroup.com



#### FROM THE EXECUTIVE DIRECTOR

Nancy P. Beaumont

nbeaumont@archivists.org

## **Grand Central**

We love it when members visit the office. and lately it's been like Grand Central Station around here.

Thanks to a grant to SAA from the SAA Foundation, the "Fundamental Change" Working Group met to "reimagine" SAA's Archival Fundamentals Series, the seven books that have long been our bestsellers because they contribute so significantly to meeting the education and information needs of archivists and archives students. The group examined all aspects of the series—from content to format to distribution method—in developing a plan to ensure that the information is up-todate, published in a timely manner, and packaged to serve both practitioner and student audiences. Our thanks to Working Group Chair Helen Tibbo (University of North Carolina, Chapel Hill) and members Paul Conway (University of Michigan), Tom Frusciano (Rutgers University), Greg Hunter (Long Island University), Donna McCrea (University of Montana), Nicole Milano (AFS Intercultural Programs), Chris Prom (University of Illinois, Urbana-Champaign), Michael Shallcross (Bentley Library), and Peter Wosh (New York University).

Helen and I met the following day with **Diversity Committee** Chair Bergis Jules (Black Metropolis Research Consortium, University of Chicago) to discuss the feasibility of applying for a grant—possibly in partnership with one or more allied associations—to support development of SAA's Mosaic Program, with a goal of providing more scholarship, mentoring, and leadership development opportunities for minority students in archives programs.

We hosted newly named **Annual Meeting** Task Force co-chairs Kathy Marquis (Albany County [Wyoming] Public Library)

and Fynnette Eaton (Eaton Consulting, Washington, DC) for a day-long briefing about the "fundamentals" of the annual meeting. The Task Force will "analyz[e] current practices related to the SAA Annual Meeting as well as possible future approaches," with emphasis on access, content, the meeting model, and social responsibility issues.

And, as in the past many years, the **Program Committee** met to discuss, negotiate, and ultimately select from among the 150 session and 22 professional poster proposals submitted in response to the Call for Proposals for Beyond Borders: SAA's 2012 Annual Meeting in San Diego. Each Program Committee member reviewed and rated each session proposal before arriving at the meeting. The group's face-to-face time focused on ensuring that the program is stimulating, well balanced, and offers something for everyone. . . .

For more information about the charges of these groups and who's on them, click on "Groups" on the main navigation bar at www.archivists.org.

As we enter the "season of giving," I'm reminded to remind you to **consider the** SAA Foundation in your charitable giving plans. The Foundation is doing good work!

• In FY12, the SAA Foundation awarded grants to SAA to ensure that we're able to continue important research and development activities to reimagine the Archival Fundamentals Series and to launch the new Digital Archives Specialist Curriculum.

- The Foundation awarded a National Disaster Recovery Fund for Archives grant of \$2,000 to the Slate Valley Museum, Granville, New York, to assist the repository in transporting and conserving archival materials damaged due to flooding from Hurricane Irene in August. (Despite widespread publicity about the availability of NDRFA funding, the Slate Valley Museum was the only repository that applied for a grant this year. Please spread the word about this important Fund!)
- Rose Chou (San Jose State University) and Helen Kim (University of Texas at Austin) received \$5,000 Mosaic Scholarships to support their graduate education, thanks to one \$5,000 scholarship from the Foundation and one from SAA (out of operations).
- · SAA President Gregor Trinkaus-Randall was able to represent the U.S. archives profession at the September meeting of the International Council on Archives' Section of Professional Associations in Edinburgh, thanks to the Foundation's Margaret Cross Norton Fund.
- · And we've begun discussing a grant proposal, to be administered through the Foundation, for the next iteration of the Archival Census and Education Needs Survey in the United States. A\*CENSUS was conducted in 2004, and there is a critical need to follow up on that baseline survey in 2014 to ensure that we collect and analyze key information about the archives workforce and profession over time.

May you and yours enjoy a happy and healthy holiday season!

#### 2012 SAA ANNUAL MEETING AUGUST 6-11 · SAN DIEGO, CA

# Call for Student Paper and Poster Presentations

The 2012 Student Program Subcommittee is accepting proposals for two special sessions dedicated to student scholarship during SAA's Annual Meeting in San Diego, August 6–11, 2012. Work from both master's and doctoral students will be considered. Proposals that address the program theme are especially encouraged.

#### **Program Theme**

Thinking "Beyond Borders" enables us to envision new opportunities beyond our institutions and specializations, to expand our perceptions of history, culture, memory, and recordkeeping to arrive at a more inclusive and holistic view of the great work of archives. In 2012 we have the opportunity to free ourselves from the imaginary borders of our past and leverage the opportunity, knowledge, and experience that lies beyond.

How can we use the power of our professional diversity to do more with less? How can we advance archival knowledge and increase resources by collaborating with partners we've never imagined before? How can archives work together to overcome real or imagined barriers to our success? The 2012 Annual Meeting is your chance to strive for a world of archives without borders!

#### **Graduate Student Paper Session**

The work of three current archives students will be selected for presentation during a traditional open session format. Each speaker will be allotted 15 minutes to present a paper. Thirty minutes will be reserved for audience questions and discussion. Proposals may relate to the student's research interests as well as research pertinent to the profession. Incorporating the Annual Meeting theme into proposals is highly encouraged. Participant selection will be based on the quality of proposals submitted. Presenters and topics will be listed in the Preliminary Program.

#### **Graduate Student Poster Session**

The 12th annual Graduate Student Poster Session will showcase the work of both individual students and SAA Student Chapters.

**Individual posters** may describe applied or theoretical research that is completed or underway; discuss interesting collections with which students have worked; or report on archives and records projects in which students have participated (e.g., development of finding aids, public outreach, database construction, etc.). Incorporating the Annual Meeting theme into proposals is highly encouraged. Submissions should focus on research or activity conducted within the previous academic year (Fall 2011–Summer 2012).

**Student Chapter posters** may describe chapter activities, events, and/or other involvement with the archives and records professions. Incorporating the Annual Meeting theme into the poster proposals is highly encouraged. A single representative should coordinate the submission of each Student Chapter proposal.

### Submission Instructions and Deadlines

To submit a paper or poster proposal, please complete the proposal form at <a href="https://www2.archivists.org/conference/2012/san-diego/student-call">www2.archivists.org/conference/2012/san-diego/student-call</a> no later than **February 1, 2012.** E-mailed submissions or submissions in any other format will not be accepted.

SAA encourages broad participation in its annual meeting. Presenters are limited to participating in one session. Presenters include speakers, session chairs, and commentators. Please alert the 2012 Student Program Subcommittee if you have agreed to participate in another accepted proposal.

Student paper and poster presenters must register and secure institutional or personal funding. Student presenters who are from outside the United States and Canada may be eligible for complimentary registration upon request.

## Proposals are due on February 1, 2012.

Proposals received after this date cannot be considered. If you have any questions, please contact Student Program Subcommittee Chair Tomaro Taylor at studentsessions@archivists.org.





17 North State Street, Suite 1425 Chicago, IL 60602-3315 USA

# SAA Caps Off 75th Year saa@75

## 75 Ways to Catch up on SAA History

Seventy-five Trading Cards feature prominent people (deceased), places, events, organizations, and ideas that have played a role in SAA's history. (Plus 5 bonus cards promote current activities.) Cards are randomly pre-packaged in packs of 20. SAA Members: \$6 per pack includes shipping. (List is \$10 per pack and includes shipping.) Two-pack minimum purchase. Take advantage of "\$25 Special": Four packs of Trading Cards in a 75th Anniversary Collectible Tin. **Visit www.archivists.org/bookstore.** 

#### "75 for 75" Campaign

Celebrate this milestone by participating in the "75 for 75" campaign, which seeks to build the SAA Foundation for the advancement of the archives profession. The campaign's goal: Each SAA member donates \$75 to the Foundation. The result: More than \$400,000 provides the financial undergirding to advance the Foundation's work on behalf of archives and archivists for years to come! **Visit** www2.archivists.org/foundation.



## Chart SAA's History on 75th Anniversary Timeline

Learn about significant people, places, and things in SAA's history via the online timeline. Since SAA's founding in 1936, many influences have contributed to its growth and vitality. To see how far the Society has come, **visit** www2.archivists.org/history/timeline.