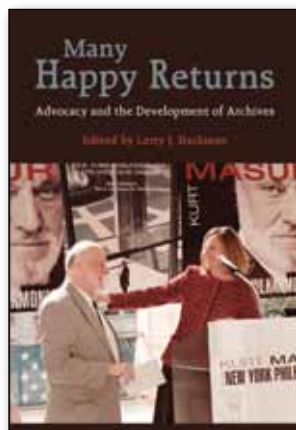


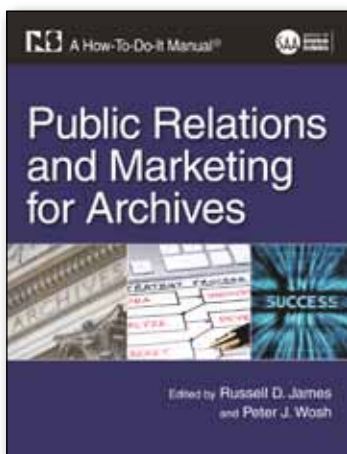
ARCHIVAL ADVOCACY



*Many Happy Returns:
Advocacy and the
Development of Archives*

“Advocating Within the Institution:
Twenty-five Years for the New York
Philharmonic Archives”

By Barbara Haws



*Public Relations and
Marketing for Archives:
A How-To-Do-It Manual*

“Media Outlets”

By Stephanie Gaub



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

“Archives 101 in a 2.0 World:
The Continuing Need for Parallel
Systems”

By Randall C. Jimerson

Compiled with an Introduction
by Cheryl Oestreicher

SAA SAMPLER

About the SAA Sampler Series

The SAA Sampler Series features collections of select chapters from authoritative books on archives published by the Society of American Archivists. Produced exclusively electronically, the samplers are designed to give readers an overview of a pertinent topic as well as a taste of the full publications, which are available at www.archivists.org/bookstore. The content has been reproduced as it appeared in layout in the original publications. Pages have two sets of folios. The running head is the page numbering from the actual book. The footers have been added to reflect page numbering for this compilation.

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Introduction to the Archival Advocacy Sampler

Cheryl Oestreicher

Larry Hackman defines advocacy as “activities consciously aimed to persuade individuals or organizations to act on behalf of a program or institution.”¹ Archives advocate when they undertake specific actions to justify their existence, to fulfill their mission, and to expand their influence. Advocacy can take place within the context of a single institution, a community, a state, a nation, or even across nations. It is integral to all aspects of archival work. Even small actions—such as interactions with researchers—can have outsize effects on an archival program’s reputation.

This Sampler offers a taste of SAA’s rich literature regarding the ways in which archivists can build advocacy efforts, discussing some of the techniques and tools developed by archivists. The content comes from three books published by SAA: *Many Happy Returns: Advocacy and the Development of Archives*; *Public Relations and Marketing for Archives: A How-To-Do-It Manual*; and *A Different Kind of Web: New Connections Between Archives and Our Users*. The individual chapters that are reprinted here provide a framework for understanding archival advocacy; additional concepts and practices can be found in the books from which they are drawn.

- 1) **“Advocating Within the Institution: Twenty-five Years for the New York Philharmonic Archives”** by Barbara Haws (pp. 186–199) in *Many Happy Returns: Advocacy and the Development of Archives* edited by Larry J. Hackman. Chicago: Society of American Archivists, 2011.

This case study by Barbara Haws provides a step-by-step approach for doing advocacy well. Though focused on advocating to the stakeholders within a corporate institution, her practices are applicable to any archives. Initially hired for three years, her first step was to identify the “power centers”—people who could support the archives’ existence long-term. Each of her “power centers” had perspectives and motivations to support the archives, such as using

archives for decision making and operations as well as preserving and immortalizing artistic contributions.

Haws deftly articulates the variety of areas to apply advocacy efforts: budget, enriching daily operations, fundraising potential, and organizational loyalty. Activities described include tours for board members and major donors; publicity; exhibits; and, most importantly, developing and maintaining relationships. While many archivists think of advocacy as talking to people, Haws communicates the importance of listening. By understanding users' and stakeholders' perspectives, she provided resources and often predicted their needs, which made her indispensable to the organization.

These relationships, particularly with board members, continue beyond their terms on the board. She also notes that advocacy must be an ongoing effort to reach new board members, connect with musicians and their families, and other activities. By paying attention and continually assessing stakeholders' interests and ideas, she built solid and long-lasting relationships. These relationships, in turn, helped her advance the archives and made it into a core function of the New York Philharmonic. Although this is an example of a unique type of archives, the advocacy messages are applicable to any institution.

Haws's case study is one of many examples of advocacy programs in *Many Happy Returns*. Divided into four parts, the book starts with an introduction by Larry Hackman outlining principles, application, and techniques that will benefit all archivists. Part Two includes case studies from government, corporate, historical societies, and academic archives and describes advocacy efforts through fundraising, outreach, setting goals, writing policies, lobbying, programming, and publicity. The third part has essays by Richard J. Cox on teaching, Kate Theimer on the role of technology, and Lee White and Heather Huyck on funding at the federal level. Concluding the book are chapters by Hackman and Janet Bunde on further recommendations and readings. The chapters include extensive notes, photographs and illustrations, and clear section headings for easy reference. From this book, all archivists will gain a thorough understanding of the necessity of advocacy as well as practical and implementable ideas for their institutions.

- 2) **“Media Outlets” by Stephanie Gaub (pp. 73–81) in *Public Relations and Marketing for Archives: A How-To-Do-It Manual* edited by Russell D. James and Peter J. Wosh. Chicago: Society of American Archivists, 2011. Co-published with Neal-Schuman Publishers, Inc.**

Publicity and developing a relationship with media outlets is one way to advance advocacy. Stephanie Gaub’s chapter outlines tactics and practices to utilize print, radio, and television outlets to promote archives and their activities. She describes how to build connections, maintain credibility, and understand their processes and deadlines.

Gaub offers an overview of the similarities and differences of the media, and how to work with each. For example, archivists are more likely to approach radio and television outlets while print journalists may reach out to archives for stories. She explains the different types of contacts and how to develop an idea into a news story, as well as tips for dealing with the media. Her straightforward examples and explanations provide archivists with a solid grounding to establish relationships with their local media outlets to help promote archives and their activities.

Working with the media is only one technique to develop and maintain publicity and marketing strategies. *Public Relations and Marketing for Archives* is a “how-to-do-it” manual that brings together several authors’ experiences and practical steps to promote archives. Part One is “Approaches” and has chapters about websites, social media, blogs, media outlets, press kits, newsletters, and visual materials. Part Two, “Audiences,” is about educational programming, public presentations, historical societies and volunteers, donors, and college students. Many chapters provide sample forms and examples, and all have sidebars with tips for quick reference. There are too many potential marketing opportunities to cover in one volume, but this edition provides a solid foundation for any archivist to start public relations strategies and practices.

- 3) **“Archives 101 in a 2.0 World: The Continuing Need for Parallel Systems” by Randall C. Jimerson (pp. 304–333) in *A Different Kind of Web: New Connections Between Archives and Our Users* edited by Kate Theimer. Chicago: Society of American Archivists, 2011.**

Randall C. Jimerson prods archivists to consider how Web 2.0 and other technology tools help support a key goal of archival advocacy: demonstrating the benefits of archives within society and to users. He puts Web 2.0

in a framework of “potential,” not necessity, to reach new audiences, create communities, and “expand social connections.” Utilizing these tools reaches new users and changes how they interact with archival resources, which contributes to the democratization of information access and knowledge. When archives provide users access to online content, whether viewing or interacting (such as tagging photos in a Flickr album), it empowers them while creating an understanding of the importance of archives to society.

Though Jimerson often references bringing in “younger” and “tech-savvy” generations of users, his theories also apply to anyone with interest in participating in online archival content. An important message in his chapter is that while Web 2.0 tools have potential to reach new audiences, there are still people without access to the Internet or technology. Jimerson reminds archivists that the focus should not entirely be on those who use technology but they should instead continue to create a hybrid of both analog and Internet access to archival resources.

One challenge of online access to archival collections is the loss of context. Frequently, archival materials appear as discrete items, isolated from other items in the collection that inform the meaning of the individual records. Additionally, there is little guidance offered to researchers on accessing this online content. While there are benefits to online content, attention should be paid to educating researchers on navigating complex collections but also to what might be missing, such as the context in which the creator collected or produced his or her collection. Jimerson also raises the issues of privacy, long-term preservation, and rapid changes in technology.

He emphasizes that archivists should explore the potential of Web 2.0, not as a goal in itself but as a collection of tools to advocate for their institutions and to respond to users’ needs. Technology can advance the core objective of advocacy—to promote the necessity of archives and archivists to provide “legal evidence, accurate documentation of the past, accountability, and representation of the diversity of cultural heritage.”

Jimerson’s essay in *A Different Kind of Web* brings together the case studies by explaining the overarching theoretical framework within which technology can enhance and advance the goals of archivists and archival institutions. The remainder of the book offers case studies and commentaries in four sections: “Something Worth Sitting Still For? Some Implications of Web 2.0 for Outreach”; “Balancing Archival Authority with Encouraging Authentic Voices to Engage with Records”; “New Tools Equal New Opportunities: Using Social Media to Archive Archival Management Goals”; and “Old

Divisions, New Opportunities: Historians and Other Users Working with and in Archives.” The case studies and commentaries are drawn from academic, ethnic, and government archives, and they discuss specific tools like Flickr, Facebook, YouTube, Twitter, blogs, and wikis. The book concludes with chapters by Terry Baxter, Jimerson, and Kate Theimer contextualizing the case studies. Taken as a whole, it offers archivists an opportunity to read about benefits and challenges of implementing a variety of social media tools as well as the means to evaluate these options and to decide which will work best within their own institutions.

* * *

Archivists must continually explain who they are, what they do, and why archives are important to society. These three books align with the core goal of advocating for archives while the selected chapters offer different approaches and techniques. Recent events, such as the near closing of the Georgia State Archives and continued funding cuts of granting agencies like the National Historical Publications and Records Commission, remind all archivists that they must be aware of what advocacy is and the benefits it reaps. Archivists need not, nor should not, wait until events require such efforts but should instead implement simple advocacy goals and activities into their mission and regular activities.

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Note

¹ Larry J. Hackman, ed., *Many Happy Returns: Advocacy and the Development of Archives* (Chicago: Society of American Archivists, 2011): vii.

Many Happy Returns

Advocacy and the Development of Archives

Edited by Larry J. Hackman



Advocating Within the Institution: Twenty-five Years for the New York Philharmonic Archives

Barbara Haws

Making the institutional archive relevant within the organization is an ongoing, daily task of outreach and advocacy. This case study describes the process of identifying the significant internal power centers of the organization and describes how it is critical for the archivist to keep in constant contact with members of these groups, building support, anticipating needs, and demonstrating the archives' usefulness to the goals and mission of the New York Philharmonic.

For a private, institutional archive, advocacy within the organization is as, if not more, important to its continued success, as collecting, processing, conserving, and providing reliable access. In 1984 the New York Philharmonic Board voted to establish a permanent archives and to employ its first professional archivist. In part, this decision was to honor the memory of Philharmonic President Connie Hogue, who had recently died and who had been a strong advocate for hiring a professional archivist. For a nonprofit board, increasing staff (which numbered around fifty-five at the time) was not an easy decision. Also, some board members and staff doubted that a professionally managed archives was necessary for a performing arts organization. The Philharmonic recognized the value of its collections dating back to 1842 but did not necessarily want to take on the cost and effort of managing them professionally.

Certain members of the board and management had considered, and probably to a certain degree had hoped, to give the historic collections to the Music Division of the New York Public Library. Amounting to well over 1,000 cubic feet and increasing annually, the collections were too voluminous for the library to accept, in its opinion. In addition, the Philharmonic used the collections so frequently that it would have been a burden on the library to provide such active and constant access. Accordingly, the Philharmonic commissioned a study, which was prepared by the chief of the library's Music Division, Ms. Jean Bowen. Ms. Bowen's conclusions were that the Philharmonic needed to professionalize staff for both the insecure space where the collections were kept and the management of the collections themselves.

In the mid-1980s, it was extremely unusual for an American performing arts institution to have an experienced professional archivist on staff. In a 1986 survey and report, "How American Symphony Orchestras Manage Their Documents,"¹ presented at the League of American Orchestras annual conference, only 29 of the 147 respondents answered "yes" to the question, "Does your orchestra currently have a comprehensive archive and records



Setting up the archives in 1984: New York Philharmonic Archivist and Historian Barbara Haws (center) with Karen LeFrak (left), who is now a Philharmonic Board member, and Marion Casey (right), then associate archivist. Courtesy of author's collection.

management program?" Of all respondents, only three major North American orchestras had someone with professional archival training on staff: Toronto, Cleveland (part-time), and New York, which had just hired me. Although most symphony orchestras recognized the value, and almost the necessity, of having an archival program, they still did not feel they could justify expenditures to address the need.

In the same survey, orchestras remarked on the dilemma presented by the need for an archives. "We think more emphasis needs to be placed on the archives of American orchestras," wrote the respondent from the Dallas Symphony Orchestra. "More valuable artifacts and documentary material could be lost unless more attention is devoted to this area. Unfortunately, with budget cutbacks in hard financial times which visit periodically, the archives are an easy target for reductions." The response card for one midwestern orchestra included the comment that "archives deserve better attention, but the strain on staff resources make [sic] this impossible." Another lamented that the "ongoing collection of materials for the archives is unfortunately one of those things that get passed over when the schedule gets too hectic. An Archival Program [would] be tremendously helpful and . . . quite necessary."

In early 1983 I had received my MA in history from New York University with a specialty in archives management and historical editing. Shortly thereafter, I was hired to establish the archives at the Bowery Savings Bank, which had been founded in 1834, and then was asked by Rachel Robinson, Jackie Robinson's widow, to organize her husband's personal material for a major traveling exhibit on the baseball legend's life. During my 1984 Philharmonic interviews, I made a case, apparently successfully, that an organization full of musicians needed a historian, in particular one with a broad humanities interest, to interpret and manage such an important cultural collection, hence my title archivist and historian. Although growing up I had played piano and flute, I was hardly hired because of my experience as a musician.

When I arrived at the Philharmonic in November 1984, I was told by the managing director that I had three years to convince "them" and to make "it" work. I asked to whom did I have to prove this, and the answer was "the institution." In an institution, especially a world-class institution that had existed for 140 years without a staff archivist, it was not necessarily or immediately apparent to the institution how the archivist or a professionally managed archives could enhance a manager's or musician's day-to-day activities. So it

was up to me to make this apparent. My mantra has always been: “For a well-run institution, the archives is as necessary as the finance department.”

To begin my work, I tried to identify who inside the institution was going to be the most influential to the archives’ success and survival, its budget, and its growth. In other words, where were the power centers within the organization that would (or needed to) support the archives, especially in times of need or stress? It was to these people that the case for the archives’ potential contributions had to be made quickly and often. Understanding who constituted the “institution” and then identifying its important players or power centers were among my top priorities because the archivist and the archives had to make a difference in those people’s professional lives.

I soon came to understand that a symphony orchestra is not a typical top-down hierarchy. For example, there are three distinct power centers within the Philharmonic: board/management, the music director, and the orchestra musicians; the latter are unionized and have tenure. For management, the archives could be useful, both in making daily decisions and in making operations more streamlined and efficient. Even though the board/management supervises and directly controls the archives budget, the music director and the musicians have a more romantic and intellectual interest in the archives. For musicians and the music director, the Philharmonic is a direct reflection of their lifelong aspirations and accomplishments, which the archives captures and preserves. For musicians, the archives also immortalizes those who make music. When the record of their aspirations and accomplishments may be in jeopardy, the music director and musicians can provide a strong countervailing influence on management’s bottom-line decisions.

Given these insights, what advocacy strategies might be applied to ensure the survival of the archives? There is one core strategy—one that might be considered defensive advocacy—that I adopted in the early days and have maintained: I keep my annual operating budget small in comparison to the rest of the organization. Consequently, in a budget crisis, the savings gained by closing or downsizing the archives is immaterial or insignificant. All large projects—acquisitions, major exhibitions, historic record releases, scanning, publications, restoration, digitization—are budgeted and staffed as one-time additions to the archives budget. I have found that I can more successfully advocate funding for a project if it has an end date, because then it is not calculated as a major percentage increase in the institution’s ongoing budget base.

There have been at least two situations when the Philharmonic management was initially reluctant to support a major project; in both cases a contributor's readiness to support the project, and in one of the cases advocacy directly from the board chair, caused management to change its mind and to spend the institution's funds.

The most enduring type of advocacy is that which is the most subtle and integrates the work of the archives with the basic functions of the institution. This might be considered simply doing a good job, but it does not happen by itself; in the case of the Philharmonic, I have found that this integration will not happen unless the other Philharmonic staff members are convinced that it will enhance their own operations.

I have frequently made the argument to management that the archival collections will generate more giving and more loyalty than it costs the institution to maintain the documents. To that end, the archives and I assist in all fundraising efforts, whether they are for archives projects or for others. Board members, major donors, and friends groups are regularly invited by the board, management, the Development Office, or myself to special viewings and talks in or about the archives. Our Young New Yorkers (Philharmonic's under-40 club) have regular events in the archives, highlighting the opportunity to hold, for example, a real Grammy or Leonard Bernstein's scotch glass. For the more serious, an "exclusive visit" to the archives is a donor perk for those who donate at least \$1,000 to the Philharmonic general operating fund. The visit includes perusing the first-edition score of Beethoven's Seventh Symphony marked by both Gustav Mahler and Arturo Toscanini. Although any member of the public can make an appointment to study the score, in these cases the donor has my undivided attention while I "walk" them through the score, identifying special features and interesting stories associated with the document. The development staff regularly asks me to give a multi-media orientation for the "new Members Breakfast" for donors at the \$75 level and higher. I doubt that the archives' prominent role in fundraising would have happened if I had not demonstrated to the development staff what the archives could offer. Development has thus built the archives into programs and activities as it came to understand our broader contribution to its cultivation and fundraising efforts.

I regularly visit the tele-fundraising staff to provide historic background on the concert season and to show archival treasures that they can talk about

with potential donors over the phone. Being able to say, “Guess what I just saw from 1842,” is a great attention grabber! Also, we sponsor contests for the tele-fundraising staff; the winners who bring in the most donations get special tours and talks in the archives. Both the annual and tele-fundraising campaigns have highlighted archival projects, such as historic exhibits or preservation. Yet, all the money raised goes into the annual campaign. Thus, the archives helps support the financial condition of the larger institution and at the same time enhances the archives’ value.

The archival collections also are used to generate support from donors who have a particular interest. For instance, donors are solicited to be “Guardians” of the “First-edition Score Collection,” and whenever these items are on exhibit or their image is used on the Web or in a publication, the donor is recognized. Or audiophiles who donate will be recognized when a particular historic recording is broadcast over the radio or released as a commercial recording. I regularly host dinner tables at galas and dinners where I pitch the archives and recruit volunteers. Due to all of these efforts, development, one of the largest and best-funded departments within the Philharmonic, now views the archives as an essential extension of itself, even though the archives does not report to anyone within that department.

Political pressure groups and lobbyists are only as good as their contacts; their success is determined by whom they know and can access. This can also be said about an advocating archivist as well. Archivists tend to be the keepers of the memories of the most powerful and influential people in their community (whether that community is a town, a church, or a symphony), both past and current. I keep track of families of all of the conductors and many of the musicians and board members, not only because they may have material enhancing the collections or could support the archives with funding, but also because often they prove to be strong advocates for the archives. It is in their self-interest that the archives flourish, keeping the memory of their family members alive. That’s why each year I attend the Philharmonic’s concert to which it invites all retired musicians and then afterward hosts a reception for them. I always attend and greet and catch up with as many of the retirees as possible. In part because of my action, when photographs, home movies, diaries, or cartoons create too much clutter at home, they come to the archives. As another example, I’ve sent Leonard Bernstein’s children family photographs they had not previously seen, and I have even passed on a copy of

a congratulatory telegram that the Philharmonic's manager sent to Bernstein when his youngest daughter was born. Former or longtime performing artists and conductors or their descendants have requested copies of concert performances, in some cases for grandchildren who never had the opportunity to experience their relatives' art. When we provide this, we include a copy—sometimes the original if we have several copies—of the printed program and any other pertinent information that will make the performance come alive. All of this engenders loyalty and gratitude for the archives. And certainly serendipity alone cannot explain why out of the blue I so often receive calls from distant relatives or even unrelated people who have archival materials of long-gone music directors or musicians asking whether I would be interested in those materials. Many of these must be at least indirectly a consequence of all of my archival promotion.

An archivist should always begin by favoring the living. It is critically important to make the music directors—for me, first Zubin Mehta, then Kurt Masur and Lorin Maazel, and now Alan Gilbert—aware of how much the archives could contribute to their work. An institutional archivist should never wait for an important potential user from the organization to come to her or him. For example, “discoveries,” in this case important scores, must be taken to music directors to make an impact. A Bruckner Fourth Symphony marked by Mahler made a strong impression on Zubin Mehta. Kurt Masur had the same reaction when I showed him the first edition of Beethoven's Fifth Symphony used at the first Philharmonic concert.

My proactive approach with music directors helped develop a loyal and important base of support for the archives' activities. When such conductors travel around the world, they talk about what they were shown from the Philharmonic Archives in New York, and the prestige of the archives continues to grow through this powerful “word of mouth.” For instance, it is not unusual for my colleague at the Vienna State Opera to tell me that he heard from Zubin what I showed him in New York. Daniel Barenboim has rarely conducted the New York Philharmonic, but he heard that we had a score of Mahler's First Symphony marked by Mahler himself, reflecting his last ideas about his earliest symphony. Mahler died in 1911 after only two seasons as music director. When Maestro Barenboim was in New York to conduct, among others, the Mahler First with his Berlin orchestra, he asked the Philharmonic's president if he could come to the archives and review the score. Accompanied



Barbara Haws with Music Director Kurt Masur (above) at the launch of his historic CD set produced by the New York Philharmonic Archives, and with former Music Director Zubin Mehta (at left) following their discussion at his book signing in 2009. Above: Photo by Chris Lee. Left: Photo by William Josephson.



by the president, I presented Maestro Barenboim with a color photocopy and discussed some of Mahler's more prominent markings throughout the score.

In 2006 Zubin Mehta published his autobiography. Barnes and Noble wanted Zubin to do an author signing at its Lincoln Center store. Although eighteen years had passed since Zubin was the Philharmonic's music director, he asked me to interview him at his New York book signing. The place was packed. It was an honor for me and for the archives and a chance to promote its contributions.

Maestro Masur has asked me to be a member of American Friends of Mendelssohn Haus in Leipzig and invited me to attend ceremonies in London, where he was made a Commander of the French Legion of Honor, and in Bonn, where he was given the German government's Furtwängler Prize. I have similar relationships with the families of Leonard Bernstein, Erich Leinsdorf, and Andre Kostelanetz. Because I have stayed in touch and kept them informed of new materials that relate to their loved ones, all three families have given the archives major score collections and other important material, which not only increasingly enhance the archives' intellectual offerings but make it more interesting to prospective donors of money or collections or both.

Taking the initiative to reach out to the board and senior staff members is equally as important as with the major artists. During my first year, I asked the managing director for a luncheon meeting. Because I did not report directly to him, he might have been slightly taken aback at having lunch with a junior staff member who was then inhabiting the cellar of Avery Fisher Hall. But he didn't refuse. My goal was to let him know directly, in a more casual setting, what the archives had to offer, updating him on my aspirations. As well, it gave me an opportunity to ask about, and listen to, his thoughts on how the archives could be of use. Listening to what the executives and staff are confronted with allowed me to find ways to anticipate their needs and provide them with the information or material that would be useful—even before they could ask for it or think of it. The object is for archival information to become indispensable for making reasoned, intelligent decisions and for the archives operations to be inseparable from the ongoing work of the institution. Today, I am a member of senior staff with a place on the Operations Committee, which meets weekly with the president. I contribute, challenge, defend, and inform, but, above all, I listen.

It is critical to have independent relationships with many members of the board of directors, even though there is the potential for an archivist to at times appear insubordinate. When the estate of an important collector came on the market, I knew it contained materials vital to the Philharmonic's history—in particular, the diary of the Philharmonic's founder, U. C. Hill. Because I had no budget for such a purchase and because the institution was in a "risk-adverse" financial stance, I went to the chairman of the board, whom I knew was an interested fellow historian. He agreed that the Philharmonic should pay for the

entire collection. In fact, receipts from strategic deaccessions from that collection have exceeded what the Philharmonic paid, and the material we kept—not only the Hill material—has vastly enhanced the archive.

These board relationships can be developed easily because the archivist maintains many of the papers of the board members that were created in their day-to-day work with the orchestra. As well, I have found that current members generally revere and have an interest in knowing more about their predecessors. When finding something that relates to their particular occupation or outside interest or family member, I pass it on, developing a direct relationship between them and the archives. These relationships do not stop when they leave the board. I have found that it always has been useful to maintain relationships wherever a powerful contact has left the board.

Do these relationships create conflicts with other departments that might have differing agendas? Absolutely. It is always a delicate balance, weighing the need against the harm to an internal relationship. Although it may cause hard feelings, I carefully assess the risk and the ramifications of my decisions and am able to forcefully defend my actions if questioned.

For the musicians, just taking the time to listen to their stories or attending their funerals or helping a widow dispose of her husband's collection has given me the reputation of constantly being there for them. None of this was done out of some cynical self-promotion or "vulture" scavenging. Rather, it all started so I could learn more about how these lives related to the archives' collections. The side benefit was that the musicians and their families learned that I was there for them, not merely for management. A devoted and loyal following developed for me and for the archives.

On the fiftieth anniversary of Leonard Bernstein's becoming the Philharmonic's music director, the Philharmonic, Lincoln Center, and The Film Society and Carnegie Hall held a series of commemorative events. The archives contributed heavily to these events, and I curated and emceed a Bernstein Discovery Day at Carnegie. As well, Leonard Bernstein's brother Burton and I coauthored an essay and photo book placing Bernstein in a cultural context while music director. This undoubtedly increased awareness of the archives on the part of many who know little or nothing about it, as well as further endearing the archives to the Bernstein family.

Publicizing the collection at every opportunity is the most obvious way of advocating for the archives, both in-house and out. With nearly 170 years of continuous history, the third oldest orchestra in the world, and with more performances than any other orchestra in the world, the Philharmonic's records are extraordinary, not only for their intrinsic value but also for the insights they offer for those times. The Public Relations, Publications, and Marketing Departments have learned not to release a fact or image without first checking with the archives. This discipline was achieved, to a certain degree, because I never miss an opportunity to correct a mistake.

The archives is directly responsible for publicizing the collections in several ways, through mounting exhibits, decorating offices and artists' areas, providing material for *Playbill*, and disseminating reproductions (either audio or paper documents) to the public. With funds from the Bruno Walter Foundation, a small exhibit gallery was created in Avery Fisher Hall. Exhibits change three or four times a year and reflect the orchestra's current programs, usually in historical context and always using material from the archives. Archive material or copies are hung on the walls of Avery Fisher Hall. It is a thrill for me to see concert goers viewing the exhibits. Better yet, it is gratifying to get a call for more information on a particular topic or questioning a fact, even to get a complaint, because we then are confident that our audience is looking and reading carefully.

In the early 1990s I had several meetings with orchestra musicians who were interested in knowing how the archives' holdings could be more broadly disseminated. I proposed creating a boxed set of archival recordings and convinced management that the archives could manage the project. With Maestro Masur we reviewed hundreds of historic Philharmonic broadcasts that had never been released commercially. Between 1996 and 2001 the Philharmonic Archives produced nearly sixty CDs of historical recordings in boxed sets with booklets crammed with accompanying reproductions of archival material and historical commentary. The archives hired the additional staff required and managed everything from remastering to promotion. Not only were these sets a critical success, but also the gift of the underlying funding for them by then-board member Rita Hauser gave her substantial worldwide recognition and excited and engaged the descendants and musicians whose performances were included on the sets. The resulting Grammy nominations also helped publicize the archives.

Tour sponsors and other corporate sponsors, who are presenting the Philharmonic in the United States and abroad, are always concerned with what makes the Philharmonic different from the other ten or so major orchestras that tour the world. It is, of course, the unique story from the nearly 170 years of history, especially the quality that history represents, that makes the orchestra stand out from others. And the archives is the ultimate resource to go to when making this point. Archival exhibits often accompany the orchestra on tour around the world—for instance, at the Barbican in London or the Philharmonie in Cologne. The exhibits also create interest from the press. BBC radio, for example, asked me to bring to the studio some of the rare marked scores that were being exhibited in London, to discuss them and our other holdings on air.

For all anniversaries, whether big ones such as the Philharmonic's 150th anniversary, or smaller, individual ones of a particular board member or musician, I am expected to find the most appropriate documents in the archives to make the event the most meaningful and celebratory. For eighty-year-old principal clarinetist Stanley Drucker's last concerts, after a record sixty years with the orchestra, I produced an exhibit in Avery Fisher Hall as well as a brief oral history film by colleagues, which was shown at his farewell concerts—and then had an extended life on YouTube.

Interestingly, and something of a surprise to me, I have become somewhat important as an official witness. When the Philharmonic made its groundbreaking tour to Pyongyang, North Korea, in 2008, the orchestra took me along. I had no official duties and was assigned no specific tasks, but the statement was made that on such an important occasion, "It is only appropriate that our archivist and historian should be there."

Today, after twenty-five years, the Philharmonic has a successful and firmly established archives. Since that first year, the archives has spent between \$15 and \$20 million for archives-related projects, ranging from the construction of a new state-of-the-art storage space and research facility, to production of historic recordings, to acquisition of useful publications and books, to comprehensive performance databases and exhibits that have reached a worldwide audience. In 2007 the archives was awarded a \$175,000 federal matching grant from Save America's Treasures. The archives is now embarking on the first phase of a ten-year program to digitize and make available through the Internet nearly 9 million pages of paper records and nearly 7,000 hours of

concert and broadcast recordings. The Leon Levy Foundation is supporting the first phase with a gift of \$2.2 million to establish the required infrastructure and to digitize 1.3 million pages in three years. By using its archives, the institution will create a digital document management system that will be able to handle its current and future digital assets. The archives' existence is no longer threatened. It now is regarded as a fundamental part of the Philharmonic's operation, even of its mission.

Still, after this quarter century of advocacy and effort, not a week goes by that I don't consider my core community and reassess how effectively the archives is reaching it. By "core community" I am not referring to the scholars, musicians, musicologists, and researchers who make hundreds of requests per year for information; instead, I am referring to those groups and individuals within the "institution" who not only use the archives in their daily work but also support or approve my annual budget and, most importantly, transfer the records they create to the archives on a regular basis.

For most people trying to get through their day, archiving office records is not high on the list of priorities. And yet, an archive is only as good as the material it receives and holds. Within an institution the completeness of the story—all departments committed to document retention—is what makes a truly great and valuable collection. Written policies, procedures, and training go only so far—advocacy to demonstrate how each person's daily activities are relevant to the long-term memory of the institution and how that memory can help them in their work is vital to making sure the documents are preserved and collected.

Because institutional archives have yet to become ubiquitous in the United States, advocating within the organization is a constant requirement, especially as new core community members arrive who have never used, much less supported, an archives. At times, the archivist may feel that she or he is not making headway for the ongoing acceptance of the archives. Then some event can be both extremely gratifying—and dramatically demonstrate that great progress has been made. Following the Philharmonic's recent announcement of a new music director—a young American, Alan Gilbert—Maestro Gilbert's first visit, without my prompting or invitation, was to the archives. He said he had heard it was important to understanding the Philharmonic he was going to lead. Also, when the twenty-six-year-old Gustavo Dudamel recently made his debut with the Philharmonic, without any prompting from me, he

spent several hours in the archives reviewing Leonard Bernstein's scores and materials prior to his first concert. In short, successful archival advocacy in an organization is based on nurturing and maintaining important relationships and never missing an opportunity to demonstrate the value of the archives to the larger institution.

Note

- ¹ The survey of 200 American symphony orchestras and subsequent report was prepared by Marion Casey and Barbara Haws. The complete report is available from the author.

Public Relations and Marketing for Archives



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Media Outlets

Stephanie Gaub

4

Introduction

As any disgraced celebrity can attest to, the media can make or break a career. The same holds true for archives and other cultural institutions. One false step with the local, regional, and national press can spell disaster for an organization. Therefore, it is important to have a positive relationship with the media so that they support you in both good and bad times. Respecting media deadlines, knowing who to contact, and understanding the tactics involved in fostering these relationships will prove beneficial for you and your institution.

Media outlets often have little understanding of what an archives does, while many archivists have minimal or episodic training in the areas of marketing and public relations. Despite this disconnect, both entities need each other. The media needs the archives to help with historical pieces, back stories, and filler on slow news days. Archivists need the media to help promote their activities and to respond to any controversies that may arise. “Archivists recognize their responsibility to promote the use of records as a fundamental purpose of the keeping of archives” (Society of American Archivists, 2005). To achieve this, it is important for archivists to have an understanding of the pressures placed on media representatives and the tactics involved in creating and sustaining mutually beneficial relationships.

Definition of Media

The media is generally understood to be the organizations and people who cover, report, edit, direct, and produce the news for television, radio, and newspapers. Each type of media has its own set of peculiarities that should be understood before embarking on a professional relationship. Media outlets can be print or online venues, as well as over-the-air broadcasts.

Print media, such as newspapers and magazines, often have deadlines that allow for changes, while television and radio spots are often live and

IN THIS CHAPTER:

- ✓ Introduction
- ✓ Definition of Media
- ✓ Cultivation of the Media
 - Developing Mutually Beneficial Relationships with the Media
 - Television
 - Radio
 - Print Media
- ✓ Determining Who within the Organization Talks to the Media
- ✓ Tips for Dealing with the Media
 - What to Avoid
 - Handling Negative Press
- ✓ Conclusion
- ✓ References

Public Relations and Marketing for Archives

Types of Media

- Print
 - Newspaper
 - Magazine
 - Journal
- Online
 - Archives website
 - Other organization's website
 - Blog
 - Online newspaper
 - Online magazine
- Broadcast
 - Radio
 - Television

Goals of the Archivist Acting as Public Relations Professional

- Create, maintain, and protect the archives' reputation.
 - Make the archives easily accessible through finding aids and indexes.
 - Ensure that staff are friendly, helpful, and knowledgeable in the archives' holdings.
 - Speak to various groups about the archives and its holdings.
 - Maintain a file of all outreach to show how the archives is contributing to the community.
- Enhance the prestige of the archives.
- Present the archives in a positive light.
 - Join other cultural institutions to promote common goals.
 - Promote the archives in tourism through the local chamber of commerce.
- Create goodwill on behalf of the archives by offering classes to local educational institutions and other organizations and ask the media to attend and report.

spontaneous. Many outlets are guilty of encouraging instant sensationalism, which can be detrimental to an institution if a story is not worded or edited correctly. You should understand the nuances of each type of media as well as recognize an interesting news story. Cultivating friendly media contacts will help you tell a positive and informative story that will benefit the media outlet as well as the archives.

Cultivation of the Media

All media outlets report the news, but their methodologies vary. This will have an impact on the ways in which you interact with various news venues. In forging relationships, it is important to think like a public relations professional as well as an archivist and to adopt the primary goals of a public relations professional.

Developing Mutually Beneficial Relationships with the Media

When developing positive relationships, you must combine professional integrity with basic courtesies. "Please" and "thank you" go a long way in fostering mutual respect. Use the following basic principles for effective public relations:

- Use honest communication to maintain credibility.
- Network with media personnel.
 - Meet the publishers, editors, and journalists whenever possible.
 - Hand out brochures and pamphlets related to the archives.
 - If a person is new to the area, give him or her additional information about the community—a little kindness can go a long way!
 - Attend events at which the media will be present, such as ribbon cuttings, government meetings, and cultural events.
- Always ask the media for a deadline; if you cannot meet the deadline, explain your reasons and see if an extension is possible.
- Send public service announcements to all local television, radio, and newspaper outlets.
 - Think of events as party invitations—they are appreciated even if possible attendees need to decline.
 - Overlooking individual outlets can create ill-will.
- Always maintain an open, consistent, and impartial relationship with the media; be sure that all media outlets receive the same press releases and notices of a newsworthy story.
- Fairness of actions will result in reciprocity and goodwill.
 - When multiple media representatives are present, be sure to speak to each of them.
 - To create personal relationships, contact individuals rather than departments.

Media Outlets

- Maintain two-way communication to build relationships.
 - Do not wait until you need the media to contact them.
 - Formally thank the media for their coverage of an event or publication of a story or photograph.
- Conduct environmental research and evaluation to determine actions or adjustments needed to maintain good working relationships.
 - Understand community issues that will benefit and potentially damage the promotion of the archives.
 - Maintain professional relationships with the media without showing favoritism.
- When calling a journalist, find out at the beginning of the conversation if he or she needs you to call back or can speak at that moment.
 - This is a professional courtesy that makes an impression and lets the reporter know that you understand the constraints placed on him or her.
 - After talking with the reporter, have materials ready to send to demonstrate that your public relations department is serious and well organized.

Television

Utilizing local television stations to promote your archives can be just as influential, if not more so, than using local radio stations. As with radio, there is a variety of types of television stations ranging from local stations to public broadcast stations. As museum public relations expert Susan Nichols has observed, “The truth is that television news departments need you just as much as you need them” (Nichols, 2001: 17). They do need to be able to locate you quickly and be satisfied that your story meets their needs. The following guidelines will aid you in responding rapidly and effectively:

- Know who makes the decisions at your local news stations.
 - Directors usually have the final editorial word.
 - In larger cities, directors are not directly involved in story selection.
 - In smaller cities, directors may also serve as anchor or assignment editor.
 - Assistant news directors, executive producers, or managing editors normally have time to plan stories for weeks or months before going on air; these individuals can be powerful allies and great assets.
 - News producers are primarily concerned with programs on air that night; however, they also have a say in which stories are covered.
 - Assignment editors are the busiest people in a newsroom, so get to know their assistants.
 - Some stations also have special projects or features editors who can be great contacts.

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- Develop your idea into a news story by asking the following questions:
 - Why is it news?
 - Who will it affect?
 - Why should the viewing audience care?
 - Is there a link between your story and a larger news story?
 - Are there images to enhance the story (Nichols, 2001)?
- If being on camera makes you nervous, do not go on; a message delivered by someone who obviously lacks confidence will suffer as a result.

Radio

Radio is an enormous resource for public relations. Most people are exposed to radio on an almost daily basis. Some radio stations exist solely for informational purposes, such as National Public Radio (NPR) stations, while others focus on playing music geared toward their listeners. No matter what the station's objective, disc jockeys are always looking for interesting stories to attract listeners, and the Federal Communications Commission (FCC) mandates that each radio station devote a certain number of minutes to public service announcements. Your archives can benefit from such announcements, because you are one of the groups that the FCC had in mind when making the mandate. Following these guidelines will help to maintain a positive relationship with any radio station:

- Submit public service announcements.
- If possible, do not go on the air live; if you must do a live broadcast, know the subject and try to anticipate any questions that may be asked.
- Be aware that a taped interview will be edited.
 - Cultivate a trustworthy relationship with the radio station.
 - Formulate answers to questions that cannot be misinterpreted if taken out of context.

Print Media

When dealing with print media, it is not uncommon for an archivist to play the dual role of public relations professional and columnist. An archivist may submit press releases and public service announcements (see Chapter 5), as well as submit information and work hand in hand with writers. Members of the print media will also often call on an archivist when fact checking or looking for interesting information to include in a story. The following tips will help you to maintain a successful relationship with members of the print media:

- When serving as a source of information:
 - Become adept at writing interesting and well-written press releases.

Media Outlets

- This will help get your story noticed as well as allow you to have better control over the “spin” of the story.
- Write the press release so that it appears to be a news story to help avoid editing on the part of the media.
- Take time to know which columnists would be most interested in stories you can tell. Find out individual specialties and contact information.
 - Once you have determined a story in which columnists might be interested, contact them directly to pitch your idea.
 - Do not play favorites with a particular news outlet.
- When serving as the columnist:
 - Keep the paper’s deadline in mind and always meet it.
 - Make sure your column grabs the reader’s attention.
 - Begin with the most important information, as many readers will not finish the entire piece.
 - Choose fun topics rather than ones that may be controversial in nature; the point is to promote the archives and create a positive image.
 - Ask patrons and colleagues what they find interesting about the archives and use this information to create a story.

Determining Who within the Organization Talks to the Media

When working with the media, in addition to cultivating relationships, it is important to protect yourself and your organization: “[J]ournalists feel that they are being obstructed and are perhaps missing out on a much juicier story direct from the horse’s mouth” (Runyard and French, 1999: 169). As such, archives must determine who has authority to speak with members of the media. Be sure to delineate such authority in your marketing plan.

Tips for Dealing with the Media

Dealing with the media in an appropriate manner can keep a good situation from going bad and a bad situation from getting worse. It is important to understand things from the media’s point of view and have an understanding of where the media’s interests lie. Many members of the media are also sensitive to the issues and pressures placed on cultural organizations. As a result, members of the media are usually receptive to receiving information that keeps them current with these organizations, people, and programs. To better deal with the media, it is important to remember the following basic guidelines:

- Plan in advance and prioritize events and issues that best meet the goals of the archives.
- Know the media; familiarize yourself with style, orientation, strengths, and weaknesses.

Determining Who Has Permission to Speak with the Media

- If your archives has a public relations or marketing department:
 - General inquiries regarding hours, policies, and activities will be handled by the staffs of these departments.
 - If the media’s query is more specific, or sensitive in nature, it is important to determine who can best answer the questions and have the public relations or marketing staff member present along with the appropriate staff person.
 - The public relations and marketing staff should talk with other key staff members and give basic pointers for dealing with the media.
 - Nothing is ever “off the record.”
 - If you are unsure of how the information will be used or think that the story may not directly reflect the conversation, ask for more information and/or stop the interview.
- If your archives does not have a public relations or marketing department:
 - First determine who can best handle the inquiry; often this is the director or department head.
 - Ask some probing questions of the media representative to determine the type of information he or she is seeking as well as the deadline.

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- Be selective in the stories you promote; overemphasizing a minor story may be detrimental to publicizing a major story later.
- Know the deadlines and preferred method of submission for each media outlet.
 - Deadlines are usually listed in the newspaper or on websites.
 - You may need to call the media outlet directly to obtain format information.
- When contacting a journalist, have several stories ready to pitch and be able to get the point across in 90 seconds or less.
- Be aware that all information considered in the public domain should not be withheld.
- Have one person designated as the media contact so that the media outlet is not inundated with press releases and other marketing materials from your institution.
- Schedule your events so that you can take advantage of slow news days such as holidays and be sure to send invitations three to four weeks in advance.
- Send a yearly press kit or letter to reporters introducing yourself and your archives and its upcoming events and programs; be sure to include your contact information. (Kotler and Kotler, 1998)

What to Avoid

After working with the media for an extended period of time, it is natural for professional acquaintances to develop into working friendships. These relationships can prove harmful to the archives if you place too much personal trust in members of the media. Thus, it is important to remember that nothing is ever “off the record” when speaking with members of the media. Recognizing that the archives and the media do not have the same missions is important. Keep the following in mind to help steer a story away from potentially damaging publicity:

- Evaluate the goal of the media entity you plan to work with; most members of the media want stories that are newsworthy and grab people’s attention.
- Do not argue with a reporter who has turned down your story.
- It is okay to send a suggestion to a reporter, but never tell a member of the media what to write.
- Understand how you as an archivist can control the direction of a story in which you are involved.
- Always promote the archives rather than your own opinion on a topic.
- Make sure that when promoting a specific collection, the collection donor is amiable to the media attention.

Handling Negative Press

Unfortunately, negative press is often the most common type of press coverage. Sensationalism attracts viewers, listeners, and readers and therefore increases ratings. Cultural institutions often are in the news as a result of some negative situation. Whether it is the theft of collections by a staff member, unethical actions by a board member, or an unflattering review of an exhibit, no archives is immune to the effects that bad press may have on support. For this reason, it is important to have a plan for dealing with the media in the event that your institution is at the center of negative news. The following list gives suggestions on how to deal with various types of negative press that an archives may face:

- Crisis management
 - A crisis is anything that can affect the archives and have an impact on its reputation:
 - Funding and staffing issues
 - Injury and damage to people, buildings, or objects
 - Injury and damage caused by others
 - Media attacks
 - Designate a communications center.
 - This should be the press office or director's office; if you cannot access your building, designate space that will serve as the communications center.
 - Have one or more telephones and Internet access available.
 - The director or designated media spokesperson will be the media contact; whoever it is should have formal training for dealing with the media.
 - Get a statement out to the media quickly, but remember that the first statement sets the tone and could be the only one on which the archives is continually judged.
 - A mass e-mail is acceptable.
 - Update information on your website, and make sure that all related press releases are on the website for easy access by all media representatives.
 - During disasters, human issues transcend collection issues.
 - Denials, "no comment," and blaming others are not acceptable.
 - The archives must begin by showing concern for the victim(s) and demonstrate that something is being done about the incident.
 - The archives must also take appropriate steps to control the situation.
 - If appropriate, set up a question-and-answer forum and invite the media.
 - Stay in control of the situation.
 - Continue to manage the story consistently and sensitively.
 - Issue regular bulletins to keep the media and the public abreast of the situation.
 - Once a crisis has ended, take steps to build confidence.

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- Negative exhibit review
 - Promote the exhibit through as many other channels as possible to alleviate the impact of a single negative story.
 - Continue to enhance the positive relationship with the reporter.
 - Do not hold a grudge.
 - Put the incident behind you and move on.
 - Do not respond in print, as this will only prolong negative publicity; keep in mind that those who did not read the initial review may read the continued dialog, which will provide the story a longer life.
 - If there are factual errors, contact the editor to clarify these and ask for a correction, but do not raise the issue of unfavorable coverage.
 - Keep track of the reporters' future work; if negativity toward the archives persists, ask to meet with the editor and the reporter to determine the source of the problem.
 - Bad press often generates interest that good press doesn't, which may result in increased attention for your organization. (Runyard and French, 1999)

Conclusion

Forming good relationships with members of the local and national media can have a positive impact on your archives. It is important to understand the different types of media, their deadlines, and the types of stories in which they are interested and to treat them with the respect that you would expect to receive if you were in their situation.

In addition to forging amicable relationships with members of the media, it is also important to understand the dos and don'ts of dealing with the press, to know who has the authority and responsibility to speak to the media, and to have a plan of action for facing negative or unwanted publicity. Having all of these actions in place will make it easier to work with members of the media and enable you to present your organization in a positive light. The main goal is good representation of the archives to elicit trust and interest in what you do. Maintaining positive relationships and getting information to the media in an expedient and timely manner will go a long way to ensuring that your archives is positively presented to the public.

THE PLAN

1. Make a list of all the media outlets you want to reach in your marketing efforts, and attach this list to your marketing plan.
2. Figure out who will be the authority on matters related to the media, and include this in your plan.
3. Formulate some crisis management guidelines for dealing with negative press, and include these in the plan.

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DIFFERENT
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WEB

NEW CONNECTIONS BETWEEN
ARCHIVES AND OUR USERS

EDITED BY KATE THEIMER

FOREWORD BY DAVID S. FERRIERO

Archives 101 in a 2.0 World: The Continuing Need for Parallel Systems

Randall C. Jimerson

The exciting promises of Web 2.0 applications have already begun to change how many archivists engage a new generation of researchers. However, the legacy of archival theory and praxis remains central to *why* we practice our craft and how archives benefit people throughout society. The lessons learned through traditional archival education remain valid, and the description and access systems employed in the past continue to be needed to provide services for many users of archives. Although Web 2.0 represents tremendous opportunities, we must remember that these resources will not solve all needs and are not available to everyone. The Internet and its many social networking features still do not provide access to all available sources of information. Many people lack the motivation or the connectivity to become active participants in online culture. As archivists begin to embrace new 2.0 technology and to explore its possibilities, it remains essential to focus on our central purposes: ensuring adequate documentation of institutions, people, and society and serving the needs of a wide variety of users. While archivists must become skillful users of the tools we need to keep in touch with tech-savvy online audiences, we must also be cognizant of the groups who are not represented in this online world. We can embrace the new 2.0 world without abandoning our professional heritage and roots.

Technology Is Only a Tool

The promises of new technology systems such as Web 2.0 applications offer seemingly irresistible temptations to archivists to enter this world of blogs, wikis, social tagging, Flickr, and social networking. As the essays in this volume demonstrate, many archivists already embrace these methods for responding to the brave new world of twenty-first-century technology. This is still a time of experimentation, testing boundaries, thinking creatively, and seeking new ways to improve the profession's responsiveness to its audiences. Using these tools, archivists can reach new constituencies, particularly the younger "digital natives" who generally bypass traditional forms of information gathering and research. As archivists respond to these challenges and opportunities, they need to think clearly about the purposes of archives, the societal needs they meet, the clienteles they serve, and the impact of new tools and new methods on the central principles of archival theory and praxis.

It is essential for archivists to remember that Web 2.0 technology is a tool, not a goal. As intriguing and addictive as these Web 2.0 apps may be, archivists must regard them as professional tools, not toys.¹ It is fine to play with blogs, Facebook, and other apps in our personal lives. But using them in the archives should be done in mindful recognition of their usefulness in achieving professional goals.

Technology has always driven the forms of human communications, records creation, and access to information.² The computer age, Internet revolution, and Web 2.0 have each transformed our methods of recording and transmitting information and knowledge. News reports often present the Internet revolution as unprecedented in human history. Yet significant eras of technological change—as profound and pervasive as the computer age—also occurred with the origins of writing, the development of cuneiform symbols and clay tablets, the introduction of the codex as an early form of the modern book, the invention of movable type and printing, and the Industrial Revolution.³ Each new form of communication technology created disruption and transformed how people communicated. However, the purposes served by these changing technologies have remained relatively constant. Since ancient times, human beings have felt a compelling

need to remember legal, financial, operational, and historical transactions and events. Electronic records and Web 2.0 applications are simply a new generation of tools with which people record, organize, and manage their interactions and ideas.

The Societal Purposes of Archives

The starting point for considering adoption of any of these Web 2.0 applications and the social and intellectual philosophy underlying social networking should be a reanalysis of the societal purposes of archives and the needs they meet for people of all backgrounds and social groupings. What is the role of archives in society? What benefits do they (or should they) provide? To whom? How can technology support these goals? If records were simply aggregates of data or information, information technology experts could manage them effectively. However, when records are needed for long periods of time as evidence or as historical documentation, archivists and records managers need to contribute their knowledge of authenticity, reliability, and context.

Services and Benefits

Archives provide essential services and benefits for society. Individually, archival repositories may meet only one or more of these needs, but collectively, the diversity of archival institutions ensures that a broad array of goals can be met. To demonstrate the significance of archives to society, archivists need to be able to explain the purposes of archives, which they have not yet done effectively. "If society is to believe in their importance, archivists must be able to articulate their purpose clearly and meaningfully," Kent Haworth declared in 1992. "In order to communicate their purpose meaningfully archivists must first understand its meaning themselves."³ Haworth recognized the essential value to society of the archival record, which provides "the impartial and authentic evidence of transactions, decisions, and information necessary for the sustenance of democratic societies."⁵ By preserving such evidence, archives protect the legal rights of citizens and enable them to hold their public leaders—governmental,

corporate, academic, religious, and institutional—accountable for their actions. When archivists support the goals of access to information, open government, and accountability, they contribute to the quest for social justice.⁶

In addition to these legal and accountability purposes of archives, they also contribute to the human need for culture and meaning. According to information scientist David M. Levy, documents enable us to create culture and “help us exert power and control, maintain relationships, acquire and preserve knowledge.”⁷ He declares that “documents—*all of them*—address the great existential questions of human life,” by serving “as sources of stability, providing meaning, direction, and reassurance in the face of life’s uncertainties.”⁸ This gives all documents “a sacred quality.”⁹ Perhaps this perspective will give archivists slogging through mountains of records or terabytes of digital data some inspiration for the work of preserving such documents.

By contributing to the care and management of cultural resources, archivists work in parallel with librarians, museum curators, and other cultural heritage professionals. They provide both secure preservation for irreplaceable documents and access by a wide range of users. Archivists thus contribute to preserving culture and enabling people to enjoy its benefits. This is a fundamental public interest. As the Universal Declaration of Human Rights stated in 1948 (Article 27): “Everyone has the right freely to participate in the cultural life of the community, to enjoy the arts and to share in scientific advancement and its benefits.”¹⁰ Culture is thus an essential human right. As part of each society’s cultural resources, archives thereby represent part of the lasting legacy of society, which all people have a right to enjoy. “We know that we each individually will die. . . . But we have an overarching shared interest that the world of ideas will go on without us,” Richard Heinberg stated in October 2009. “Cultural death—the passing of the wisdom, artistic creations, and practical knowledge of an entire people, painstakingly built up over many generations—is a loss almost too wrenching to contemplate.” As Heinberg concludes, “If we want future generations to have the benefit of our achievements, we should start thinking more seriously about what to preserve, and how to preserve

it.”¹¹ This is precisely what archivists do. It is one of their most important functions—both within their repositories, and for society as a whole.

Constituencies

As archivists define the purposes that their repositories serve, they must also determine which constituencies they serve. An institutional archives might serve primarily the legal and administrative needs of the larger organization, with most of its users and clients coming from within the institution. Government archives serve both the agency staff and the public, including legal researchers, genealogists, individual citizens, among others. Manuscript collecting repositories, on the other hand, typically serve an external audience, which might comprise one or more constituent groups, such as local historians, genealogists, students, or other researchers. All too often, archivists take for granted that potential researchers will find their way to the repository or that identifying a collecting policy or archival mission statement will be sufficient to ensure public knowledge and support. However, as Timothy Ericson declares, “it is important to keep our focus on the records we are preserving and the impact they have (or may have) on the lives of people who would benefit from using them. We should bear in mind that if people do not know what archivists are, or what they do, it is simply because archivists have not touched their lives in any meaningful way.”¹² Essential to this process is the archivist’s effort to reach out to active constituencies and to identify and target new potential users of archival resources. The purpose of each repository derives in part from the nature of the records it manages and in part from the groups of people who use or otherwise benefit from the archives.

Goal and Policies

Once archivists have identified the purposes fulfilled by their repositories and the constituencies they serve, they develop policies and procedures to help achieve their goals. In regard to Web 2.0 applications, this is the point at which archivists must decide how technology can support the repository’s mission, purpose, and objectives.

As they consider the options for adopting Web 2.0, archivists should weigh carefully the promised benefits and the potential limitations of these technologies. Because these 2.0 apps are still very new, they have only recently begun to be tested. Much of what we have to say about archival use of Web 2.0 is either speculative or based on very limited experience and small evidential samples of current practice. As Steve Bailey states, in considering how to apply Web 2.0 strategies and systems, “not only do we not currently know the answers, we are only just beginning to understand the questions.”¹³ Because most of the essays in this volume extol the benefits of Web 2.0, it is useful here to provide additional context and to consider some of the cautionary flags raised about the digital divide, and the challenges of applying these new technologies in archival repositories.

Promised Benefits of Web 2.0 for Archives

Accessibility and Democracy

First, some good news: Building on the concepts and applications labeled Web 2.0, using these tools promises important benefits. When (or if) realized, these benefits could greatly improve the levels of service, responsiveness, immediacy, and relevance of archives in modern society. The reorientation in archival thinking and practice proposed by those who embrace these new technologies prepares the way for a more inclusive and democratic approach to archival systems. Tim O'Reilly, an early pioneer of Web 2.0 applications, sees the Internet as a platform for “delivering software as a continually-updated service that gets better the more people use it, consuming and remixing data from multiple sources, including individual users, while providing their own data and services in a form that allows remixing by others, creating network effects through an ‘architecture of participation.’”¹⁴

Applying Web 2.0 to archives could expand social connections directly, with minimal mediation by external experts or gatekeepers. At heart it is a democratically inspired approach to Internet use. The key concepts underlying these applications, according to Dutch-Canadian archival entrepreneur

Peter Van Garderen, are usability, openness, and community. By *openness*, he means nonproprietary software, architecture, standards, content, and sources. The concept of community emphasizes people connecting to each other, taking responsibility and ownership of web services, technology, and content.¹⁵ Because Web 2.0 offers new ways for people to interact and to share information, it offers the possibility of reaching a more diverse audience of archives users. This can enhance social diversity by promoting a culture that is more open, creative, participatory, and nonhierarchical. Societal groups that had been marginalized by traditional approaches to archives, libraries, and museums could then employ archival resources to participate actively and contribute to the creation, preservation, and use of community memory and history.

Web 2.0 could thereby contribute to the further democratization of access to information, records, and knowledge. This is particularly true for young people, who are less and less likely to use print and documentary sources, which are the predominant staples in libraries and archives. If archivists are to connect with such an audience—both now and as they begin to reach the age at which archival sources might be more useful—archives must meet them where they are—that is, online. A 2007 marketing report found that 96 percent of U.S. teens and tweens used social networks, linking them to each other and to the only information sources they are likely to use.¹⁶ Archivists have already seen changes in public expectations regarding access to sources and services, as researchers demand ready access to archival information, available at any time and any place.¹⁷ As a 2004 library research report discovered, “users want granular pieces of information and data, at the moment of need, in the right format. . . . The mantra will be: ‘Everything, everywhere, when I want it, *the way* I want it.’”¹⁸ If archivists can meet these expectations, they can position their repositories to become vital hubs in the information and research networks employed by Internet-savvy users.

Empowerment

Such expanded access to archival resources can help to empower people and enhance their control over vital information and social connectivity.

In both the marketplace of consumer goods and the marketplace of ideas, people have come to expect a greater measure of control over their social interactions. According to Jeff Jarvis, this has been a central factor in the success of companies such as Google. The new relationship between customers and service providers requires openness, collaboration, and conversation.¹⁹ Jarvis cites Google's key concepts from the company's website: "Focus on the user and all else will follow. . . . It's best to do one thing really, really well. . . . You can make money without doing evil. . . . There's always more information out there. . . . The need for information crosses all borders. . . ." ²⁰ Adopting such concepts would change the culture of any organization, "to finally make it customer-focused and mean it," Jarvis states.²¹ These observations could easily be adapted for archival repositories seeking to redefine their orientation to the public. People will only perceive archives to be relevant to their needs if archivists pay attention to their needs and interests and seek to develop good relationships with researchers and potential users.

In the public marketplace, particularly with Web 2.0, traditional approaches and the status quo are being challenged and overthrown by popular demand. This is also true in libraries, museums, archives, and records management. "Technology has profoundly shifted the balance of power away from the organization and towards the individual," English records manager Steve Bailey declares. Web 2.0 "is a technology that strips away many of the fundamental building blocks on which records management has traditionally been based and its influence is rapidly expanding beyond the walls of the organization to pervade virtually every sphere of our cultural, social and economic life."²² The "wisdom of the crowd" has become one of the leading mantras of Web 2.0. Social networking advocates seek to replace taxonomies of information, imposed by organizations and authorities, with "folksonomies"—"bottom-up tagging done by strangers rather than expert-designed and -applied canonical classifications like the Dewey Decimal System or the Library of Congress schemes for sorting books."²³ This returns control to users of information resources. It also presumes that collectively, at least, users can provide each other with more appropriate and helpful information than can information professionals.²⁴

Creativity

As archivists participate in Web 2.0, they join an online culture that breaks down barriers—or more accurately leaps across them—marked by entitlement, authority, and privilege. According to David Bollier, the Creative Commons community established through the Internet “enlivens democratic culture by hosting egalitarian encounters among strangers and voluntary associations of citizens.” Web 2.0 systems “have democratized creativity on a global scale, challenging the legitimacy and power of all sorts of centralized, hierarchical institutions.” Bollier contends that Internet-based innovations “proliferate with astonishing speed.”²⁵ He sees great promise in this new approach to social networking and information exchange. “Through an open, accessible commons, one can efficiently tap into the ‘wisdom of the crowd,’ nurture experimentation, accelerate innovation, and foster new forms of democratic practice.” Bollier adds that these online networks “capture and project people’s everyday feelings, social values, and creativity onto the world stage. Never in history has the individual had such cheap, unfettered access to global audiences, big and small.”²⁶ Behind the inflated rhetoric of such grandiose claims, however, there is a real promise of empowerment and democracy. The question is whether the proponents of this new online world can achieve their lofty goals.

Advocates of Web 2.0 celebrate its potential to foster creativity and new ways of conceptualizing human interactions. Daniel Pink proclaims that right-brain thinkers will rule the future, because their qualities of “inventiveness, empathy, joyfulness, and meaning” meet the needs of the emerging Conceptual Age better than the left-brain qualities that powered the Industrial Revolution and the Information Age.²⁷ This new way of thinking emphasizes synthesis rather than analysis, detects broad patterns rather than providing specific answers, identifies relationships between seemingly unrelated ideas, and combines elements to create something new.²⁸ Creativity and forging new relationships with others drive the new generation of thinkers. For the most part, these are the young people who grew up with computers and the Internet, often referred to as “digital natives.”²⁹ They don’t remember a time before cell phones and online communications. Multitasking comes naturally to those who spend much of their lives

online, creating “a 24/7 network that blends the human with the technical.”³⁰ Such new forms of interaction could provide a valuable stimulus to intellectual life and to the information professions if their promised benefits can be realized.

Thinking Differently

Although advocates of Web 2.0 celebrate the new ways of thinking fostered by the online environment, skeptics wonder, as Nicholas Carr asks, “Is Google making us stupid?” The values and habits developed over centuries of textual literacy seem to be eroding in the face of web surfing and hypertexting. “I’m not thinking the way I used to think,” Carr lamented in a 2008 *Atlantic* essay. “The deep reading that used to come naturally has become a struggle.”³¹ As Marshall McLuhan observed in the 1960s, media not only supply the information for thought but also shape the process of thinking. Carr cites evidence that online reading leads to superficial scanning for data rather than detailed examination and consideration of complex ideas. This overturns the traditional process of scholarly research. It also potentially undermines the archivist’s emphasis on the need to understand context and how (and why) documents and information were created.

On the other hand, Jeff Jarvis argues that blogging and other Web 2.0 systems foster creativity, collaboration, and peer review. “Thinking differently is the key product and skill of the Google age,” Jarvis asserts.³² Archivists contemplating the future of Web 2.0 need to consider these factors, both in how they think about their own work and how it affects the users of archives and hence the reference process.

Potential vs. Real Benefits

This is the key issue as archivists experiment with Web 2.0. Can we harness the potential benefits of this new technology to achieve the promises being made for it? As with the advent of every new technology introduced since ancient times, there are both advocates and skeptics for Web 2.0. As Alecia Wolf stated a few years after the Internet first reached widespread use, “the Internet represents an exciting potential. However, at this stage in its evolution it remains just that—only the potential to move us toward a

more egalitarian society.”³³ In examining Web 2.0, as well, for now one must conclude that emphasis should be placed on the term *potential* as we consider the preliminary reports of the new technology’s applications to archival practice. The promises being made for these initiatives may well produce revolutionary changes with tremendous advantages, but at the end of 2010 these results are still largely untested.

Concerns and Limitations of Web 2.0

The Digital Divide

Even more significant than concerns about how the Internet affects patterns of thought and behavior is the argument that it widens a “digital divide” between those who have access to this powerful technology and those who do not. In 1998 Bosah Ebo stated that some critics claimed that the Internet’s “architecture of technology harbors an innate class bias and other nuances of power entitlements,” creating a cyberghetto that trapped women, minorities, the poor, and rural residents in a technology backwater.³⁴ The impact of this new technology on social justice concerns remained unclear. On one hand, the Internet promised “a windfall of publicly accessible information and a barrier-free terrain of social associations.” Yet it could also result in “the marginalization of the underclass, the subliterate, minorities, and women.”³⁵ Alecia Wolf likewise warned of the emergence of two technologically separate societies and stated that the disfranchised had little voice in shaping policies beneficial to themselves. The Internet’s promise as a social equalizer seemed “only to equalize the differences among young, college-educated, middle-class white males.”³⁶

Those with the education and abilities to use computer technology clearly possess significant advantages in the online environment. Yet rapid changes in technology require funds to upgrade equipment and continuous learning to keep pace. Poor households will find it ever more difficult to remain plugged in to online resources. In 1998 Rebecca Carrier warned, “unless measures are taken to increase information access to non-elite members of society, the distance between the information-rich and -poor will continue to grow.”³⁷ More than a decade later, the emerging

technologies of Web 2.0 raise some of the same concerns, with the answers still unclear.

In 2002 Marilyn Deegan and Simon Tanner argued that although the Internet provided significant benefits for many people and transformed modern libraries, the promise of cheap access for all still could not reach many social strata and many parts of the world due to political, financial, and cultural barriers. "The digital divide exists and could further disadvantage the poor, the undereducated and those in developing countries as the better-off, the better educated and the economically developed race into the digital future," they asserted.³⁸ Deegan and Tanner found some hope in creative efforts to bridge the digital divide. For example, in India, where only 2 percent of the population had access to computers, the post office had set up more than 200 e-post centers linked to more than 500 distribution centers. In many developing countries Internet cafés offered low-cost access, although they were mainly confined to cities. However, the authors concluded, "The digital divide will not just be about access but also about the resources available at each access."³⁹ Providing computers would be only a first step. Training, tech support, and other resources must also be available to those on the margins of the technological society.

It is impossible to obtain precise measurements of the percentage of the world's population that has adequate access to and ability to use the Internet or the newer and more sophisticated Web 2.0 applications. The same is true for access to libraries and, even more, to archives. Jean-Claude Guéron of the University of Montreal estimates that only 20 percent of the world's population benefit from good distribution of the world's available knowledge.⁴⁰ There have been several projects designed to provide computers for schoolchildren in poor districts in the United States and in developing countries around the world. For example, in addition to the initiative in India cited by Deegan and Tanner, in 2005 Nicholas Negroponte, former director of the MIT Media Lab, announced the One Laptop Per Child project. The project's goal is to provide 1 million hardy, portable computers to children in the developing world. However, as Jonathan Zittrain points out, several such prominent and well-funded projects designed to bridge the digital divide—including the Volkscomputer in Brazil, the VillagePDA,

the Ink, and the Simputer in India—have “fared poorly, stuck at some phase of development or production.” Furthermore, there seems to be a possibility that, as computer scientist Gene Spafford warns, “Access to eBay and YouTube isn’t going to give them clean water and freedom from disease. But it may help breed resentment and discontent where it hasn’t been before.”⁴¹ Thus, there may be significant unintended consequences from the introduction of advanced technology in underdeveloped countries, further widening the digital divide. However, mobile devices such as cell phones may make web access, including social networking media, more affordable in the third world.

As archivists consider adopting or expanding their use of Web 2.0 applications, they should consider both the promised benefits and opportunities and also the potential consequences of new technologies. “Web 2.0 presents great opportunities for archivists to appraise/document/acquire voices from those sectors in a society whose stories never before got to archives,” Canadian archivist Terry Cook states. “But even Web 2.0 platforms still leave the voices of those without access to or comfort with the technology outside this new world, as indeed their voices (not as they might be heard/reflected in government or church reports) were absent in the traditional paper archival world.”⁴² Cook does not discourage using Web 2.0 applications, but he does offer a valuable reminder that archivists should remain vigilant to prevent such technology from further separating the information haves from the have-nots.

The Role of Gatekeepers

A second challenge of applying Web 2.0 to archives is finding a balance of power between archivists as gatekeepers and users of archives who seek direct accessibility and control over what they see, when, and how. Despite signs of progress toward greater access, “web pages are nonetheless a very powerful form of mediation and gatekeeping,” according to archival educator Helen Tibbo.⁴³ Many researchers will access archival information through the website rather than visiting the physical archives repository. To understand archival sources fully, they need to be seen in relation to other documentation, not as isolated bits of information. Reliance on websites

for research access makes archives available to “new generations of users, with fundamentally different perspectives on the past, who will approach archives through computer interfaces rather than visiting physical archives and interacting with tangible documents.”⁴⁴ The context provided in archival finding aids and the reference guidance required for evaluating digitized documents are difficult to provide on websites.

The essays in this volume highlight creative approaches to using Web 2.0 systems and applications for archival outreach and user services. This alters the role of archivists in the reference process and creates challenges for providing context and guidance in those using virtual archives rather than tangible sources. Elizabeth Yakel observes that archivists who employ interactive access tools “have ceded some control over these core archival functions to their visitors” and are “reimagining the ways in which researchers can interact with the archival record and with fellow travelers in the virtual archives.”⁴⁵ This partial surrender of power is not easy for many archivists, but it offers some hope for improved accessibility and use of archives by people from all walks of life, including those who have seldom used traditional archives in the past. To employ archival sources effectively, however, researchers need to understand archival systems, principles, practices, and institutions—what Yakel calls “archival intelligence.”⁴⁶ Terry Cook also advocates ceding some of the gatekeeping power to users, while at the same time recognizing the potential dangers of unmediated access to and use of archival sources. “As for Web 2.0 and description and reference, the interactivity possibilities are exciting, and archivists will need to let go of the monopoly power they have (and often deny!) over these processes,” he argues, “as well as adopt monitoring/policing roles to make sure abuse and abusive comments (neo-Nazis, racists, etc.) are not permitted to be socially tagged to descriptions and finding aids.”⁴⁷ Even in the open, user-oriented Archives 2.0, some of the archivist’s traditional gatekeeper role must still persist. Archival institutions cannot allow abusive behavior or unchecked hate speech.

These discussions about the gatekeeping role of archivists echo debates throughout the field of information technology. In *The Cult of the Amateur: How Today’s Internet Is Killing Our Culture*, Andrew Keen complains about

politicians using YouTube to trash their opponents and media companies using the same web service to broadcast “reviews” of their own products. “The irony of a ‘democratized’ media is that some content producers have more power than others,” he warns. “In a media without gatekeepers, where one’s real identity is often hidden or disguised, the truly empowered are the big companies with the huge advertising budgets. In theory, Web 2.0 gives amateurs a voice. But in reality it’s often those with the loudest, most convincing message, and the most money to spread it, who are being heard.”⁴⁸ Some form of gatekeeping is necessary to filter public messages and protect consumers. In a *Wall Street Journal* debate with Keen, David Weinberger agreed that on the web “because anyone can contribute and because there are no centralized gatekeepers, there’s too much stuff and too many voices.” However, he argued that instead of imposing external gatekeeping mechanisms and powers, we can rely on site managers such as Amazon, eBay, and *Wikipedia* to provide internal policing of web-based information sources. If such commercial systems are not adequate, then community-based “trust mechanisms” such as comments from other web contributors, bloggers, and the “massness” of the Internet will root out bad information.⁴⁹ Thus, rather than rely on external authorities, Web 2.0 advocates argue that “the crowd” will determine which information and opinions are acceptable and which are not.

The assumption behind crowd-based program services such as *Wikipedia* is that errors will be corrected by the collective wisdom or knowledge of the masses. Sometimes this works. Often it does not. David Levy found this out in a relatively trivial situation. Unsure how to spell “Caribbean,” he did a web search and found thousands of hits for his spelling, “Carribean.” As he discovered, many others didn’t know how to spell the word either. “I should have known better,” Levy concluded. “Authoritative knowledge, unlike elective office, isn’t simply established by a show of hands.”⁵⁰ Archivists can gather valuable information from public users regarding their collections, such as identifying photographs. By relying on such crowd knowledge, however, they may also end up with inaccurate information, false identifications, and “knowledge” that is not reliable. We need to be judicious in soliciting such user responses

and cautious in relying on the information thereby gained. This does not mean keeping the gates locked. But archivists who solicit comments from the crowd need to become fact checkers and ensure that the information presented in, for example, finding aids is trustworthy. One can never eliminate all errors, but it is important to retain some aspects of the gatekeeper approach to provide information that is as accurate as possible.

The Web Does Not Tell Us All We Need to Know

Frequent users of the web sometimes assume that all the information they need is available on the web. With the seeming ubiquity of Internet information, it is easy to assume that anything one needs to know can be found online. This common fallacy can be dangerous. As archivists know, even with the best knowledge, resources, and good intentions, the vast documentation available in even the smallest archival repository will likely never be entirely accessible on the web. The web has already transformed how many researchers locate and use information. If it cannot be located online and accessed quickly, it is unlikely to be incorporated into research projects. “The web has become the ubiquitous starting point for discovering all types of information and conducting a wide array of research,” according to Richard Szary. Web users “expect a level of access and service that repositories are not, and never have been, expected to provide.”⁵¹

Archivists have already seen changes in public expectations regarding access to sources and services. What we need to explain to potential users is the limitations of what they can find online. It is possible for researchers to find a lot of useful information from archival sources without entering the repository. But in almost every instance, this is only the smallest sampling of the rich resources that can be accessed in person. In *From Gutenberg to the Global Information Infrastructure: Access to Information in the Networked World*, Christine Borgman states: “The claim that the Internet will replace libraries often is based on questionable assumptions. Three common misconceptions are that all useful information exists somewhere on the Internet, that information is available without cost, and that it can be found by anyone willing to spend enough time searching for it.”⁵²

As archivists vigorously apply Web 2.0 systems to reach nontraditional audiences, they need to avoid perpetuating these misconceptions.

Technological Obsolescence

Another caution in adopting Web 2.0 applications is the rapidity of changes in technology. Commentaries on the speed of technological obsolescence have become commonplace and do not need to be recited here. Yet it is important to remember that these changes will continue to affect any applications that rely on current systems and services, including those in libraries and archives. Information science expert David Levy reminds us that this not only entails economic costs but also adjustments to our altered relationship to documents themselves. "The financial implications of making this global infrastructure work are staggering: the cost of networks, of computers, of upgrades and maintenance, of training, of the reorientation and rethinking of work," Levy states. "In addition, however, we now live with certain deep confusions and uncertainties about the nature of these new documents, what they are and how they are to be preserved."⁵³ Digital documents depend on a complex technical system. The same is true with Web 2.0 applications. Who is responsible for maintaining YouTube videos, blogs, Flickr images, or other documentary evidence once it is uploaded to a commercial site? Can archives rely on such services for long-term preservation or only for temporary public access and use?

These concerns (among others) cause French historian Lucien Polastron to warn about the limitations of the mass digitization efforts under way in Europe and North America. The Google project to create a comprehensive digital "library" of the world's great books, launched in 2005, raises concerns about maintaining cultural heritage and access to such resources. Who will own the digital heritage if Google goes bankrupt?, Polastron asks. It seems "likely that the partner libraries will not be authorized to cooperate with Google's competitors" nor to distribute content that actually resides in the public domain. As he states, "it is currently impossible to measure the weight, the cost and the maintenance know-how sought by the planetary memory in the process of shaping itself." Rapid technological change further complicates the problem. "The other indisputable fact of

the electronic world is its own obsolescence,” Polastron adds: “in ten years, none of the computers today will be compatible with the systems yet to come.”⁵⁴ To the extent that it depends on hardware and software to maintain its presence and usefulness, archival use of Web 2.0 will be susceptible to this potential for technological obsolescence.

What archivists will need to do is to plan for change. The Web 2.0 tools available for use in today’s archives will inevitably change, evolve, or disappear. They are likely to be replaced by new systems and innovations. Archivists themselves may in fact engage in adapting current tools or creating new ones for specific archival applications. Above all, any archivist who participates in the 2.0 environment must be comfortable with the inevitability of change and remain “open to learning about the next generation of tools.”⁵⁵ Such flexibility, after all, is an essential component of the mind-set for all Web 2.0 practitioners and adopters. Changing technology is a limitation for Web 2.0, but it also presents opportunities for creativity and experimentation.

Preserving a Virtual Medium

Beyond the limits imposed by rapid technological change, digital media pose serious problems for long-term preservation. Archivists using wikis, blogs, Facebook, and other 2.0 apps need to consider how any information or documents needed for future use can be backed up, emulated, or otherwise protected from deterioration and loss. One of the significant changes brought by digital formats is that text and physical format “have been pulled apart,” so that the stability of documents must be established and maintained virtually rather than tangibly.⁵⁶ Another prominent difference is the instability of digital documents, which have been created on hardware and software platforms that are volatile and quickly become obsolete.⁵⁷

Richard Heinberg, a leading expert on peak oil and the energy crisis, warns that this dependence on technology makes our very culture “evanescent” and insecure. Librarians and archivists need to respond to these threats. “Preservation of digitized knowledge can become a problem simply because of obsolescence,” he warns. Billions of floppy disks produced and

used to store data between 1980 and 2000 cannot be accessed on today's computers. In an era of looming climate catastrophe, the worldwide information system becomes vulnerable to an even greater danger. "Ultimately the entire project of our digitized cultural preservation depends on one thing: electricity. As soon as the power goes off, access to the Internet goes down," Heinberg asserts. "It is ironic to think that the cave paintings of Lascaux may be far more durable than the photos from the Hubble space telescope."⁵⁸ Responding to Heinberg's article, an anonymous writer added that "what we see happening is digitization being embraced with little regard for its technical and structural limitations, much like the fossil-fuel energy system that powers it."⁵⁹ Heinberg's doomsday scenario may seem extreme, but it highlights just how vulnerable our information infrastructure has become. Librarians, archivists, and others need to ensure the long-term viability of our cultural heritage.

Privacy Concerns

One of the most significant impacts of Web 2.0 on the way people think and behave is its tendency to blur the line between public information and privacy. This should be a concern for many users of the new technology, who often seem to pay no attention to the consequences of posting intimate and private information about themselves. As Jonathan Zittrain observes, "the Net enables individuals in many cases to compromise privacy more thoroughly than the government and commercial institutions traditionally targeted for scrutiny and regulation."⁶⁰

Privacy concerns are not new for archivists. When we engage users and potential researchers in online exchanges or encourage user postings and commentaries about finding aids or archival websites, there need to be mechanisms or policies to ensure both user privacy and the protection of third parties whose documents may become part of an online access system. Privacy concerns need not prevent archivists from using such new methods of outreach and communication, but these systems do raise new requirements for privacy protection.

Becoming a 2.0 Archivist

Learning from Other Disciplines

The new challenges posed by electronic records have altered the record-keeping landscape. Similarly, the opportunities promised by Web 2.0 require archivists and other information professionals to develop and adopt new methods to meet the rapidly changing needs of their users. The new technologies employing Web 2.0 applications and related methods require archivists to modify some of their long-held assumptions about archival sources, reference services, and research strategies. Similar changes are simultaneously taking place in libraries, museums, records management, and other information professions.

Archivists, librarians, and records managers need to reconceptualize their roles for the digital future. What makes libraries distinctive, for example, is “linking information to people, managing collections, providing cohesiveness of provision and service, sustainability, preservation, authenticity and quality,” according to Deegan and Tanner. “Digital preservation is the cutting edge of digital librarianship and information management technology,” they add. “The future librarian’s role will be to find and promote islands of simplicity, and create secure harbours of stability, trust and authenticity, in this fluid world of information turmoil.”⁶¹ These considerations could just as easily be attributed to archivists, whose roles also include preservation, trust, and authenticity. The new generation of “digital natives” expect creative methods for gathering information. This has led librarians to re-imagine their role: “Instead of primarily organizing book titles in musty card catalogs and shelving the books in the stacks, they serve as guides to an increasingly variegated information environment.”⁶² Librarians, like archivists, are becoming more active as guides to information resources. This requires engaged participation to assist users in the research process.

Contemplating the possible loss of vast cultural resources in the event of a massive electricity grid failure, Richard Heinberg turns to librarians for a solution. His admonitions could as easily—perhaps even more so—be addressed to archivists. In recovering from a widespread blackout, he

declares, “it is important that the kinds of information that people would need are identified, and that the information is preserved in such a way that it will be accessible under extreme circumstances, and to folks in widely scattered places.” Essential information must be identified, preserved, and retrieved. “There is a task that needs doing: the conservation of essential cultural knowledge in non-digital form,” Heinberg concludes. “Librarians catalog, preserve, and make available accumulated cultural materials, especially those in written form. That’s their job. What profession is better suited to accept this charge?”⁶³ These functions are also central to the mission of archivists. This should be a shared responsibility.

Libraries also have a tradition and a mission of providing free access to vast information resources. As a 2008 American Library Association conference report suggested, libraries should be “more and more a place to do stuff, not just to find stuff. We need to stop being a grocery store and start being a kitchen.”⁶⁴ Heinberg observes that one of the “primary practical functions” of libraries is “the provision of free public Internet access, with computer included.”⁶⁵ Although increasingly difficult due to shrinking budgetary resources for libraries, this is one of the most commonly suggested solutions to overcome the digital divide. People who cannot afford to buy a computer or pay for Internet access fees, many writers argue, can access Web 2.0 through their local libraries. At best, though, this is only a partial stop-gap solution. There simply are not enough computers in enough libraries to accommodate the potential demands.

Records managers face similar challenges. In his provocative book *Managing the Crowd: Rethinking Records Management for the Web 2.0 World*, English records manager Steve Bailey declares that the rise of Web 2.0 “strips away many of the fundamental building blocks on which records management has traditionally been based.” Yet he asserts that “the core values and objectives of records management are still hugely relevant and necessary in this new world—provided we are willing to fundamentally rethink the way in which we strive to achieve them.”⁶⁶ Bailey reaffirms the importance of guaranteeing the quality and accuracy of organizational records, based on “authenticity, completeness, reliability and fixity.” The

growing complexity of record keeping, however, demands greater concern for “the broader picture of information creation and use.”⁶⁷

Bailey argues that Records Management 2.0 must be scalable to an (almost) infinite degree, comprehensive, and able to absorb new priorities and responsibilities as they change. This requires records management to be “a benefits-led experience for users, that offers them a positive incentive to participate.” To do so, records managers need to be “self-critical and willing to embrace challenge and change.”⁶⁸

These criteria could apply just as well to archives. Bailey strongly urges records managers to accept the spirit and culture of the Web 2.0 approach to information and cooperation. Many of his suggestions would also make sense for archivists, particularly those working within institutional or governmental repositories. Such qualities will enable archivists to participate in the 2.0 environment, while maintaining their core mission and purposes.

Promoting Essential Archival Principles

The essays in this volume indicate the scope of innovative approaches and new models currently being test-driven by archivists. These are necessary and valuable new methods of archival practice, based on changing demands and circumstances. As archivists move forward in the 2.0 world, however, they need to remember the principles and concepts on which modern archival practice has been based and to acknowledge that not all users or potential users of archives will have access to or knowledge about how to use these innovative tools.

Archivists who embrace the new technologies need to recognize the distinction between using the tools of Web 2.0 and allowing the new techniques to determine their professional direction and goals. Although there will be radical changes in the methods employed and the environment in which archivists work, the essential purposes and core principles of the archival profession must remain essentially intact. Institutions will continue to need authentic and reliable records for legal, evidential, accountability, administrative, and documentary purposes. Individuals will still require documentation to protect their rights as citizens, to hold public

and corporate leaders accountable, and to gain access to valuable information resources. Ultimately, society—all of us—must retain both legal records and cultural resources to maintain a surrogate for memory by which accurate knowledge of the past can be protected, leaders charged with carrying out the people's governance or with providing goods and services can be held accountable, and the rights and identity of the diverse groups within society can be protected. Focusing on these archival purposes amid the rapidly changing technological environment requires creativity and inspiration. "Now is not the time for designing pre-formed, ultra-detailed methodologies but, instead, for thinking more in terms of adaptable, reusable and extensible concepts," Steve Bailey declares.⁶⁹ As archivists experiment with their new tools, they should keep their attention focused on the goals they seek to achieve and on the fundamental purposes served by archives.

Web 2.0 offers archivists both new tools to conduct description, reference, outreach, and other services and also new challenges to manage the records created in this new medium. Since the introduction of electronic record keeping, archivists have debated whether it would transform and overturn their traditional methods and concepts or merely require some adjustments to keep up with new developments. This is still an openly contested issue.

Most of the core concepts of archival practice continue to be useful in utilizing and managing digital resources. "The introduction of electronic records does not appear to have changed in fundamental ways the underlying meaning of 'recordness,' at least not yet," stated information management expert Richard Barry, even though dramatic changes in record-making technologies will change how organizations conduct their record keeping.⁷⁰ These characteristics remain unchanged, whatever the medium of record. With electronic information, the essential archival functions of ensuring trustworthiness, reliability, and accountability through record keeping can be documented using metadata, according to Minnesota state archivist Robert Horton.⁷¹ This is also true for Web 2.0-generated materials.

Maintaining Analog Options

As archivists embrace the opportunities offered in the Web 2.0 environment, they will also need to maintain many of their traditional “analog” systems and services. Finding aids, reference and access services, and outreach programs still need to serve those who do not have access to or means of using new technological tools. Thus far few radical changes have occurred in archival praxis. Already a decade into the twenty-first century, archivists as a profession are still beginning the process of adapting to the digital age. Many archival concepts remain valid. The technology shift from paper to electronic records has altered how we create archives, how we use them, and how we think about archives. Yet archives have always been products of technology. “The web is infinitely more flexible than the clay tablet,” observed historian of technology Steven Lubar, “but similar in its recording of the structures of power.”⁷² Record keeping has always depended on technology, from clay tablets and parchment to paper and photographic film, from wax seals and codices to filing cabinets and digital video discs. Each new form of technology solved some problems of the old technology and created some new ones. As John Seely Brown and Paul Duguid have observed, new technologies typically “augment or enhance existing tools and practices rather than replace them.”⁷³ In efforts to ease the transition from old to new systems, digital technologies adopt conventions and terminology from their analog predecessors. The World Wide Web, for example, mimics books and paper documents, borrowing from the older technology terms such as *web pages*, *bookmarks*, *indexes*, and *tables of contents*.⁷⁴

One interesting experiment in employing the possibilities of Web 2.0 to enhance archival finding aids showed that researchers are not yet ready to exploit the full range of interactive options. In 2005 students and faculty in the University of Michigan School of Information conducted an ambitious effort to apply a combination of social media tools to create an interactive finding aid for the Bentley Historical Library’s Polar Bear Expedition Collections. The project’s central goal was to demonstrate a more transparent, user-centered, and need-based approach to archival finding aids. Researchers who did use these enhanced features reported being very

satisfied with their experience. Unfortunately, the overall result was very limited use of some of these new features, perhaps because researchers did not know how to exploit new methods of access and research.⁷⁵ Despite limited success, the project illustrates both the possibilities for creative approaches to archival access and also the need to continue providing traditional access systems. While archivists may want to accept and promote such technological tools, it is important to note that they may bear a steep price tag, that they may promise more than they can deliver, and that there remain many people unable to use these tools because they cannot afford access or cannot learn the necessary techniques.

Archives 2.0 and Society

The ultimate measure of the value of Web 2.0 tools will be how well they contribute to meeting the essential goals and purposes of archival services. It may be tempting to disparage or dismiss Web 2.0 applications because they cannot solve all of our professional problems. Yet it is important to allow archivists to experiment with these new tools and to find appropriate applications. Dire predictions of technology run amok have permeated one strand of social criticism for two centuries. During the early disruptions of the Industrial Revolution, for example, English Luddites destroyed the machinery that threatened to eliminate their jobs, threaten their livelihood, and disrupt traditional society. Internet critics such as Andrew Keen may overstate the dangers of new technologies, such as Web 2.0, but their message needs to be heard and considered.

Archivists should employ the new technologies of Web 2.0 to meet the needs of the younger generation of tech-savvy researchers. Using these tools they can connect in new ways with new groups of potential users. Yet archivists must also continue to provide traditional services and access systems to serve the interests of the many people who do not have access to newer technologies or the knowledge or interest to use these new tools and methods of Web 2.0. Ultimately, archives will be judged by how well they contribute to the fundamental purposes served by the archival record. Web 2.0 can be an effective tool in achieving these objectives as long as archivists do not confuse it for the goal itself.

In the larger context of the role of archives in society, it is essential to distinguish between these technological tools and the actual purposes, goals, and values provided by archives. The concept of Archives 2.0 centers on the distinction between methodology and theory, between *what/how* and *why*. This requires a new mind-set, a new orientation to archival practice.⁷⁶ Archives 2.0 will prove a welcome and liberating force if it enhances the contributions of archives and archivists to social needs, such as legal evidence, accurate documentation of the past, accountability, and representation of the diversity of cultural heritage. Archivists need to watch the horizon for important trends and changes, to embrace technology, to find creative and practical approaches to new Web-based tools, and to plan and evaluate methods to meet patrons' needs. Core archival principles remain valid. *How* archivists perform their responsibilities will change to meet the demands of the digital age, but *why* they do it will remain the same.⁷⁷ Archivists can bring to these discussions their expertise based on centuries of archival development, the growing awareness and understanding of society's need for reliable evidence and documentation, and techniques developed out of necessity and refined by practice and experimentation.

With a wary eye on the future and a firm grounding in principles based on past experience, archivists can and should embrace Web 2.0 technologies as one part of a new reorientation toward an approach to archival practice that is open, transparent, user-centered, and flexible. The innovative orientation of Archives 2.0 thus takes us away from a passive gatekeeper mentality and enables archivists to assert the power of archives, their essential value for society, and their capacity to contribute to the public interest. By providing both traditional and new social networking options for users, archivists can better serve the needs of all members of society. Using such tools for the public good, archivists can use their power within the information sphere to provide essential public benefits, including evidence, documentation, historical memory, accountability, and protection for the rights and interests of all people. Archives 2.0 opens the archives to new voices, new needs, and new constituencies. It can thus have a liberating impact for society.

Notes

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- ³ Charles M. Dollar, *Archival Theory and Information Technologies: The Impact of Information Technologies on Archival Principles and Methods* (Macerata, Italy: University of Macerata, 1992), 35.
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- ⁶ See Richard J. Cox and David A. Wallace, *Archives and the Public Good: Accountability and Records in Modern Society* (Westport, CT: Quorum Books, 2002); Verne Harris, *Archives and Justice: A South African Perspective* (Chicago: Society of American Archivists, 2007); and Randall C. Jimerson, *Archives Power: Memory, Accountability, and Social Justice* (Chicago: Society of American Archivists, 2009).
- ⁷ David M. Levy, *Scrolling Forward: Making Sense of Documents in the Digital Age* (New York: Arcade Publishing, 2001), 159.
- ⁸ *Ibid.*, 183–184, emphasis in original.
- ⁹ *Ibid.*, 194.
- ¹⁰ Universal Declaration of Human Rights, 1948, quoted in Lucien X. Polastron, *The Great Digitization and the Quest to Know Everything* (Rochester, VT: Inner Traditions, 2006), 118.
- ¹¹ Richard Heinberg, "Our Evanescent Culture and the Awesome Duty of Librarians," Post Carbon Institute, October 7, 2009, p. 1, <http://www.postcarbon.org/article/40397-our-evanescent-culture-and-the-awesome-duty-of-librarians> (accessed December 14, 2010).
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- ¹⁷ Richard Pearce-Moses, "Janus in Cyberspace: Archives on the Threshold of the Digital Era," *American Archivist* 70 (Spring/Summer 2007): 13–22.
- ¹⁸ Quoted in Nicholas C. Burckel, "Academic Archives: Retrospect and Prospect," in *College and University Archives*, ed. Christopher J. Prom and Ellen D. Swain (Chicago: Society of American Archivists, 2008), 20.
- ¹⁹ Jarvis, *What Would Google Do?*, 11.

- ²⁰ Ibid., 4.
- ²¹ Ibid., 22–23.
- ²² Bailey, *Managing the Crowd*, xiii–xv.
- ²³ Jonathan L. Zittrain, *The Future of the Internet and How to Stop It* (New Haven: Yale University Press, 2008), 214.
- ²⁴ “Full Text: Keen vs. Weinberger,” *Wall Street Journal*, July 18, 2007, <http://online.wsj.com/article/SB118460229729267677.html> (accessed October 8, 2009).
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- ⁴⁹ David Weinberger, in "Full Text: Keen vs. Weinberger," *Wall Street Journal*, July 8, 2007, 2 at: <http://online.wsj.com/article/SB118460229729267677.html> (accessed December 14, 2010).
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- ⁵⁵ Theimer, "Introduction to Web 2.0 in Archives," 9.
- ⁵⁶ Levy, *Scrolling Forward*, 56–57.
- ⁵⁷ Catherine O'Sullivan, "Diaries, On-line Diaries, and the Future Loss to Archives; or, Blogs and the Blogging Bloggers Who Blog Them," *American Archivist* 68 (Spring/Summer 2005): 54; Levy, *Scrolling Forward*, 119.
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- ⁵⁹ Anonymous response, in Heinberg, "Our Evanescent Culture," 7.
- ⁶⁰ Zittrain, *Future of the Internet*, 200.
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- ⁶² Palfrey and Gasser, *Born Digital*.
- ⁶³ Heinberg, "Our Evanescent Culture," 5–6.
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- ⁶⁷ *Ibid.*, 59–60.
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- ⁷² Steven Lubar, "Information Culture and the Archival Record," *American Archivist* 62 (Spring 1999): 11, 20 (quoted passage found on p. 20).

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⁷⁵ Magia Ghetu Krause and Elizabeth Yakel, “Interaction in Virtual Archives: The Polar Bear Expedition Digital Collections Next Generation Finding Aid,” *American Archivist* 70 (Spring/Summer 2007): 285–286, 306–312.

⁷⁶ For a fuller definition and explanation of the concepts of Archives 2.0, see Kate Theimer’s “Conclusion” in this volume (p. 334–346), and her essay, “What Is the Meaning of ‘Archives 2.0’?,” in *American Archivist* 74 (Spring/Summer 2011).

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