



TRAVELING ARCHIVISTS: What You Need to Know BEFORE You Hit the Road

Harry Keiner, Ph.D.
Consulting Archivist & Historian





WORKSHOP PURPOSE:

To provide selected individuals with the information and training necessary to undertake the work of a Traveling Archivist:

- To determine the suitability of applicants for assistance
- To conduct successful site visits and prepare useful follow-up reports
- To manage the administrative details of the program in coordination with NC State Archives' supervisors.



WORKSHOP OUTCOMES:

So, I hope you leave here with these takeaways:

1. Knowledge of the history and development of the Traveling Archivist Program
2. The program's goals in relation to the state's smaller repositories of historical records
3. The procedures for identifying eligible repositories and the methods for conducting successful site visits
4. The tools available, based on archival management best practices, for you to use to effect positive changes in preservation and access to a repository's special collections



TAP ORIGINS: The State Historical Records Advisory Board

The SHRAB is the primary body charged with advising state officials on the condition of historical records throughout North Carolina and making recommendations to improve preservation and access.

- The SHRAB and NHPRC
- Membership
- Activities

SHRAB OUTREACH PROJECTS TO NC's SMALLER REPOSITORIES

20 Years of Accomplishment:

- 1996 *Insuring the Future of Our Past: A Brief Guide to Selecting or Starting an Archival Program.*
- 1996-2000 NHPRC Re-Grant Project: \$150,000
- 2004-2005 In Partnership with SNCA, basic training workshop on archival management (aka Boot Camp)
- 2006 Publication of *A Manual of Basic Archival Practices*



The Impact of NC ECHO's Survey

North Carolina Explore Cultural History On-Line

- A Project of the North Carolina State Library
- Strategic Plan Goal: Promotion of state-wide digitization efforts
- NC ECHO Advisory Board and the Digital Divide
- Survey of Holdings/Survey of Institutions with Special Collections
- Road Trips
- Report: 1,000 Repositories and their needs

The Next Logical Step: Field Services

As the ECHO survey neared completion and the last NHPRC-funded Boot Camps were being taught, members of the SHRAB and the NC ECHO Advisory Board began to think about ways to build upon what we had learned.

- Boot Camp demonstrated that more archival training for the staff of smaller repositories was needed
- The ECHO survey demonstrated that field services: sending professional archivists and librarians to repositories was an effective way of providing high quality assistance.

SHRAB's 2006 Strategic Plan: The Traveling Archivist Program is born

The SHRAB's response was a discussion at the planning retreat that defined the goals for the new strategic plan.

The result was a goal calling for the design and implementation of a pilot field services program administered by the North Carolina State Archives.

The Traveling Archivist Program was approved for funding under an NHPRC SNAP grant in 2009

TAP I (2009-2010): Getting Organized

Small Team:

- Dick Lankford, State Archivist
- Andrea Gabriel, Head of Resource Management Branch
- Hal Keiner, Contract Archivist

Program Development (August-December, 2009)

- Contracts: Defining the Scope of Work, Estimating wages and travel, 40 site visits, two Rounds (Jan-May, July-Nov)
- Developing Grant Application Forms and Instructions
- Advertising program and soliciting applications
- Establishing procedures to review applications

TAP I: First Site Visits

LOGISTICS:

- 24 Sites plotted on an NC map.
- Divided into two groups: day trips, or less than 100 miles from Asheville. Overnights, or more than 100 miles.
- Latter sites grouped by proximity so TA could get to two or three efficiently.
- Home for 10 days to 2 weeks writing reports and getting ready for next trip.

TAP I: First Site Visits, cont'd.

Lessons:

- Planning : need to acquire more info BEFORE site visit
- Too much time on telephone/need for a follow up form (The Pre-Visit Questionnaire) to the application
- Site visits need to be structured and ALWAYS begin with a survey/walk through of the facility.
- Afternoon devoted to teaching: either a scheduled workshop, or by informal discussion with staff emphasizing how to improve preservation and access
- Explain recommendations



TAP I: Second Round (July-Nov, 2010)

- Announcement in March
- Sites chosen in May
- Second Round completed in November, 18 Site Visits with all reports written and submitted by December 15.
- TAP I: 42 Sites Total

TAP II: March, 2011 – August, 2012

- TAP I report well-received by the SHRAB which recommends TAP II
- TAP II underwritten with ARM funds
- Revisits Included
- Supplies from the Friends of the North Carolina Archives
- ACCOMPLISHMENTS: 24 Site Visits, 21 Revisits



TAP III: 2012 - Present

- Site Visits conducted by former State Archivist Dick Lankford
- Underwritten with ARM funds

TAP IV: A New Paradigm?



ORGANIZING SITE VISITS: Selecting Repositories

- Announcements
- Applications
- Review



ORGANIZING SITE VISITS: Notification, Scheduling, and Information Gathering

- Notification: Acceptance and Rejection Letters
- Scheduling: Planning trips, negotiating acceptable dates, coordinating site visits with other work.
- The Pre-visit Questionnaire
- Web Research



INTERNAL HOUSEKEEPING

- Files
- Schedule
- Mileage Book
- Supply Kit
- Teaching Tools



CONDUCTING SITE VISITS

- Arrival
- Introductions: Setting the Tone



THE SURVEY: Procedure

Conducted as a Walk Through

1. Be thorough
2. Take notes
3. “Teaching Moments”
4. The type of repository and its holdings will dictate the survey’s course and duration

THE SURVEY: Storage Rooms

- If exhibition areas not present, start with the storage rooms
- Issues to address:
 1. Security
 2. Integrity of roof, windows , walls
 3. Environmental Controls: HVAC Systems
 4. Shelving
 5. Enclosures









THE SURVEY: Reference/Reading Rooms

- Separate Accommodation for Researchers?
- Lockers/Closets
- Reference Books, Files, Microfilm, Finding Aids
- Procedures: Registration, Written Rules, Call Slips

THE SURVEY: Work Rooms

- Processing areas?
- Equipment available for processing and preservation
- Work Flow system



TOURS
TABLE
30

FOR
PIECES
LOT ONLY
5 TILES

Not
Arch

5 324 H TG 13-50 39365 47 1065
COLOMBIAN Supreme
100% Colombian Coffee



THE SURVEY: Administrative Areas

- Offices
- Admin Files:
 1. Membership
 2. Acquisitions
 3. Accounting
 4. Public Relations



AFTERNOON ACTIVITIES

- Lunch
- Instruction Time: Informal Discussion or Structured Workshop
- Review and Recommendations

TEACHING TIME

- Prearranged Workshop: Preservation or Access customized on the fly to address survey concerns
 1. Preservation Workshop: based on Boot Camp Module 4
 2. Access Workshop: based on Boot Camp Modules 2 and 3 (Acquisition and Cataloging)

OR

Informal but structured discussion and demonstrations based on what you saw on the survey and what you have brought with you to help address the problems the survey has revealed.



TEACHING TIME TOPICS:

1. Repository Organization and Governance
 - Mission Statement
 - Collection Policy
 - Deed of Gift
 - Donor Records

TEACHING TIME TOPICS (cont'd)

2. Preservation:

- Building Integrity and Security
- Environmental Controls
- Storage: Organization, shelving, enclosures
- Preservation and Processing

TEACHING TOPICS (cont'd)

3. Arrangement and Description

- Accession Records
- Finding Aids
- Digitization
- Web Site Access/OPAC Access



TEACHING TIME TOPICS (cont'd)

4. Reference and Research Services

- Physical Considerations
- Rules and Procedures
- Registration



TEACHING TOPICS (cont'd)

5. Money: Internal/External Funds

- Membership and Programming
- Shops
- Community Fundraising
- Planned Giving
- Grants

GRANT OPPORTUNITIES

- Federal Programs: NHPRC, NEH, IMLS
- State Programs: NCPC, NC ECHO
Digitization Grants, Private Foundations
- Local Programs: Lowes, Community
Foundations, County Travel and
Development Funds, NCNG

RECOMMENDATIONS and WRAP UP

Site Visits terminate with a final meeting, usually with the repository manager and the TA

- Discussion summarizing survey findings and results of instruction
- Discussion of the Recommendations (usually from 3 to 5) that will be included in the written report
- Definition of Next Steps:
 1. Leave kit and documents, pamphlets and brochures
 2. Provide contact information: names, email, etc.
 3. Recommend a Re-visit (if warranted)



R.O.'s
SAUCE, SLAW & DIP
Famous since 1946

R.O.'s
BARBECUE
Famous Sandwiches Since 1946
GASTONIA, NC
704-913-1421
WE DO CATERING

R.O.'s
BARBECUE
Famous Sandwiches Since 1946
GASTONIA, NC 704-913-1421

www.rosbbq.com

www.rosbbq.com



RE-VISITS

PURPOSE: To provide specialized training and assistance to repositories that have received a TA site visit, primarily to assist in the implementation of a specific recommendation. **ENGAGEMENT!!**

APPLICATION

ORGANIZATION AND CONTENT

RE-VISIT EXAMPLES:

- Forsyth County Public Library
- Bennett College

SITE REPORTS

- Example: Yadkin County Public Library
- Organized into Sections:
 1. Contact Information
 2. Introduction
 3. Description of the Special Collections
 4. Preservation
 5. Access
 6. Recommendations



RE-VISIT REPORTS

- Example: Yadkin County Public Library
- Structure:
 1. Contact Information
 2. Introduction
 3. Purpose
 4. Work Accomplished
 5. Recommendations

REPORTS TO THE SHRAB, SUPERVISORS, GRANTING AGENCIES

These Reports are Required for Program
Management:

- Summaries of Work
- Statistical Component
- Justification of Program and Expenses
- Used by Supervisors to Report Upward
- Provide Opportunities to Lobby for Enhancements



EVALUATIONS

- Required
- Sent with Site Visit Report
- Follow up
- Value



Thank You

**Good Luck in Your TRAVELS across
the Old North State**