



Beth Kattelman, Editor
George Bain, Features Editor

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It's All About STEWARDSHIP



SOA's Upcoming Spring Conference and Business Meeting

This year the Society of Ohio Archivists will hold a one-day conference and its annual business meeting on Friday, April 9th, 2010. The theme of the conference is **STEWARDSHIP** and the day will include sessions on grant applications, patent collections, regional digitization, de-accessioning, electronic recordkeeping, collaboration among art and artifacts collections, collection management tools, and disaster planning. The Society's annual business meeting will be held during lunchtime that day.

Registration Fees: \$25.00 for members
\$30.00 for nonmembers (If you register in advance, it includes lunch. If you register on site, we can't guarantee lunch for you, but there is a cafeteria in the building.)

Date: Friday, April 9, 2010

Time: 8:30 a.m. – 3:45 p.m.

Conference Site: The Conference Center at OCLC
6600 Kilgour Place, Dublin, OH 43017
614-764-6000
www.oclc.org/conferencecenter

Online Registration: <http://www.ohiohistorystore.com/Society-of-Ohio-Archivists-2010-Spring-Meeting-P7921C0.aspx>

Dear SOA Members,

As we look forward to the 2010 SOA spring conference I would like to take this opportunity to thank our outgoing Treasurer, Stephen Paschen, and council members Judy Wiener and Kim Brownlee for their work and commitment to SOA. Vice-President Louise Jones has also left Council after taking a new position in Kentucky. Louise was a vital asset to SOA, the Ohio Historical Society, and many other organizations with whom she worked. Thank you, Louise, for your commitment to history and archives for so many years. Council voted to have Judy Wiener fill the Vice President position for the final year of Louise's term.



We changed the spring conference format this year, making it a single day in order to accommodate busy schedules and shrinking budgets. Attendance at SOA conferences and events has been low as of late, and I hope that this change in format may allow more people to attend. We also need more SOA members to participate in the many opportunities SOA has to offer and to share in the responsibilities. As a small organization, SOA is only as active, enthusiastic, and pro-active as its members. We need people to work on Archives Month, people to judge Ohio History Day, people to participate in Statehood Day, people to staff our committees, and people to present at our conferences and help plan them. We need you!

You have probably noticed that the SOA web site is now the SOA wiki. The new wiki format allows us the ability to add, edit and change content more quickly and easily. The wiki continues to be hosted by our partner, the Ohio Historical Society. And, if you're on Facebook, SOA has a group there – look us up!

Finally, you may notice a few changes to this newsletter. Beth Kattelman, editor, has developed new guidelines for the newsletter which will help guide its production. If you're interested in writing an article, or have information or announcements you'd like to have included in the Ohio Archivist, please let Beth know.

SOA has a longstanding tradition of bringing together the archival community for learning, networking, and outreach. Please help us continue that work by getting involved!

"SOA has a longstanding tradition of bringing together the archival community for learning, networking, and outreach."

Judy Cobb

President

by Doug McCabe, Ohio University Libraries

Ohio University Libraries, WOUB Center for Public Media, and the History Department at Ohio University are pleased to launch a new collection of historical resources on the internet – the Cantigny First Division Oral History Project-Phase II. Ohio University received a generous grant from the Cantigny First Division Foundation in Wheaton, Illinois, to interview veterans of the First Infantry Division – the “Big Red One.” This project preserves the dramatic memories and compelling experiences of those dedicated veterans for their fellow soldiers, family member, scholars, and future generations of Americans. Paul Herbert, Executive Director of the Cantigny First Division Foundation said, “Preserving veterans’ memories is a critical dimension of military history that greatly enriches the narrative derived from documents. Their testimony reminds us of all that we ask of our fellow citizens in uniform. Partnering with great institutions like Ohio University gets an important job done that we can’t do ourselves and is a win all the way around: for us, for the University and its students, for the veterans and for the future.”

During the summer and fall of 2009, four Ohio University graduate and undergraduate history students learned about oral history interviewing techniques and the history of the First Infantry Division. They then interviewed 22 veterans of that unit, whose service date from World War II to the present conflicts in the Middle East. With support from the WOUB Center for Public Media and University Libraries, their efforts resulted in more than 40 hours of video footage and hundreds of pages of interview transcripts. These interviews can now be accessed on the Libraries’ web site at <http://media.library.ohiou.edu/cantigny/index.html>. Gerald Goodwin, Ohio doctoral student in history, said, “I was very grateful to be involved in the project and I found it to be an educational, humbling, and humanizing experience.”

***“...an educational,
humbling, and
humanizing
experience.”***

Master videos and transcripts will be permanently stored with the Mahn Center’s manuscripts collections, where they complement other significant military collections, including the Cornelius Ryan Collection of World War II Papers. Doug McCabe, Curator of Manuscripts at Alden Library’s Mahn Center said, “The breadth and depth of these interviews are a valuable new resource for students and scholars and a valuable addition to our military collections.” Videos and transcripts will also be available at the McCormick Research Center, part of the First Division Museum at Cantigny, in Wheaton, IL.

This project was co-directed by Dr. David J. Ulbrich, formerly of Ohio University, and Dr. Michael Wm. Doyle of Ball State University. Doug McCabe also provided invaluable support throughout the project, including several trips to supervise the students as they interviewed the veterans.



For further information on this project, contact Doug McCabe, Curator of Manuscripts, Mahn Center for Archives and Special Collections, Ohio University Libraries, mccabe@ohio.edu, 740-593-2715.

by Andy Leach, Director of Library and Archives

The Rock and Roll Hall of Fame and Museum's Library and Archives will open its doors in late 2010. The Library and Archives' newly constructed 22,500-square-foot facility is located within Cuyahoga Community College's Center for Creative Arts, which is approximately two miles southeast of the Museum. In December, our small-but-growing staff moved into our offices in the new facility, and since then, we have transferred about a third of our existing library and archival materials from offsite storage and have begun the hard work of processing, cataloging, and preserving these materials for future generations of researchers.

Our plan is that the Library and Archives will be the world's preeminent research collection of written and audiovisual materials relating to the history of rock and roll. Its collections will include books, dissertations, periodicals, sound and video recordings, and thousands of boxes of archival materials (including personal papers, correspondence, photographs, song manuscripts, business records, contracts, press kits, posters, flyers, and clippings). We will serve the research needs of scholars, educators, students, journalists, critics, and the general public.

From what we have seen so far, our archival collections contain exciting materials that promise to serve as valuable resources for researchers. Recently, our Archivist, Jennie Thomas, and I were looking through the personal papers of Atlantic Records founder Ahmet Ertegun (1923-2006) for the first time. It is simply amazing what one can discover perusing his correspondence, which includes letters from individuals such as Mick Jagger, Henry Kissinger, and Barbara Walters, along with numerous holiday cards sent from the White House over the years. In Ahmet's appointment books, you learn that he attended a birthday party for Ray Charles on one night and had dinner with the Kissingers on another. And in printed lists of individuals who called when Ahmet was hospitalized just prior to his death, you see that these people included Robert De Niro, Aretha Franklin, Mick Jagger, and Jerry Wexler.

This is the kind of thing that makes me excited about getting these archival materials out of storage after all these years and making them accessible to people for the first time. Seeing these collections has been a welcome reminder to me of how important archives are. Ahmet Ertegun's papers illustrate that Ahmet, in addition to being a significant figure in American music history, was much loved as a person and clearly meant a great deal to many people. This is

a great example of how one can learn from an archival collection. While individually these documents might merely be interesting, as a group they begin to tell a story. And sometimes, it may be a story that hasn't yet been told.

On a final note, in late February and early March, we were fortunate to receive some good media coverage about the Library and Archives, including stories in newspapers, radio, television, and online sources. In case you missed them, take a look at the articles that ran in Cleveland's *The Plain Dealer* (<http://tinyurl.com/rrhfmla-pd>) and the *Cleveland Scene* (<http://tinyurl.com/rrhfmla-cs>).



Rock and Roll Hall of Fame Library and Archives

<http://rockhall.com>

We hope to see you then!



by Dorothy Gruich

In a sense, Psychology is the fortunate science. While we can trace antecedents back to the Greeks and beyond, the discipline as we know it today was established in the late 19th Century. Records were kept, data was collected and filed. Letters, documents, apparatus and even home movies were preserved by institutions, associations and families. The historical record is still intact for those who wish to study it.

Founded in 1965 at The University of Akron (UA) in Akron, Ohio, the Archives of the History of American Psychology

(AHAP) has emerged as the national clearinghouse and protector of these irreplaceable artifacts. As the largest repository of its kind in the world, the AHAP seeks to bring greater exposure to the study of the human sciences by collecting, preserving and making available primary source and rare materials that support the teaching and research of the complete historical record of psychology. As a thematic repository, the AHAP preserves material from the diverse fields of psychology and from all psychologists.

The AHAP was the creation of UA psychology professors John Popplestone and Marion White McPherson when they realized that the availability of primary sources and research in the history of psychology was limited and could be improved by having a dedicated archive. This came to fruition in October 1965 when the Board of Trustees of The University of Akron approved the establishment of the AHAP. The founding involved no budget, a desk in an office within the library and a student assistant.

COLLECTIONS

The AHAP collections consist of personal manuscript papers, artifacts, photographs, records of organizations, monographs, psychological tests and audiovisual materials. Here is an outline of the materials housed at AHAP, with deposits and donations arriving regularly:

- *Over 750 Manuscript Collections, which include the personal papers of individual psychologists and the archival records of various psychological organizations.*
- *The Still Image Collection, containing over 20,000 images of individuals, groups, research and laboratory settings and personal photos.*
- *Over 8000 films, from research to home movies, are preserved at the AHAP in the Moving Image Collection.*
- *Over 3000 audio recordings of lectures and oral histories are preserved at AHAP in the Audio Holdings collection.*
- *AHAP's collection of over 1500 instruments and apparatus is among the largest in America.*
- *The AHAP Test Center contains over 12,000 three-dimensional and paper-and-pencil tests.*
- *The AHAP Special Collections includes rare books, textbooks, professional and trade publications with over 50,000 volumes acquired since its inception.*

ACCESSIBILITY

Within the past several years, the AHAP has made continual efforts to create increased accessibility to its finding aids through electronic means. Several of our largest finding aids have been scanned and posted to our website in fully-searchable PDF format. Our latest efforts in making our finding aids accessible on a much wider scale include the AHAP's involvement in a statewide initiative to develop an online tool and repository for archival collections housed in various institutions throughout Ohio. Using Encoded Archival Description (EAD) standards, the EAD Finding Aid Creation Tool and OhioLINK Repository provide a solution for institutions wishing to create and deliver finding aids according to these standards. EAD is an international standard for encoding archival finding aids, making them standardized in structure as well as more predictably searchable in collaborative electronic repository environments. The AHAP has been a leader in this initiative from its inception in 2004, having representation from two of its staff members on the EAD Task Force.

Since then, the OhioLINK Finding Aid Creation Tool and Repository (or O-FACTory) has been launched and now has nearly 500 collections represented by 27 institutions in the state of Ohio. The finding aids for 20 AHAP collections—including the Irwin A. Berg Papers, the Calista V. Leonard Papers, the Ronald Taft Papers, and the Don C. Fitzgerald Papers—are in the Repository, and the remaining AHAP manuscript collections are in queue to be uploaded to this Repository. The ongoing – and rather daunting – project that AHAP now faces is

converting these paper-based inventories to the OhioLINK Finding Aid Creation Tool so they can be uploaded to the Repository and made available to researchers worldwide. To see the AHAP collections currently in the Repository, go to <http://ead.ohiolink.edu/xtf-ead/>, then browse by Contributing Institution and choose "A" from the Index.

Another research tool that will be available soon involves digitized content from our collection. In 2008, in a partnership with American Psychological Association (APA) publishing, the AHAP has provided the majority of content found in the PsycBooks and PsycExtra databases. During the year, 2000 books and 15,000 technical reports, conference proceedings, abstracts and newsletters were scanned. Portions of this digitized content will also be available on the AHAP website by the end of the year.

The AHAP also has an online presence using services such as Flickr and YouTube, to make images and digitized film available electronically to the general public.

OUTREACH

For over four decades the AHAP has supported research in the history of psychology, providing both on-site and off-site services to aid researchers. In addition to providing assistance to researchers, the AHAP is committed to serving the academic, professional and public communities. Through participation in education and outreach programs, presentation of exhibits, and accessibility of collections, the Archives provides the public with increased awareness and education of the diverse and changing roles psychology has played in contributing

to advances in science and practice.

Over the past decade, the AHAP has hosted six national conferences, 38 colloquium speakers, hosted or co-sponsored five workshops covering such topics as "Encoded Archival Description (EAD)", "The Care and Handling of Nitrate Film", "Integrating the Psychology Exhibition into the Classroom," a three-part series exploring the AHAP book collection and a workshop highlighting material from AHAP's film collection. Over the years, AHAP programming has attracted hundreds of visitors from all across the United States and Canada as well as international visitors from many countries including The Netherlands, Spain, Germany, China, Japan, Australia, Portugal, France, Ireland and Switzerland.

To increase awareness within the University and surrounding community and encourage usage, AHAP has collaborated with UA Archival Services to host an annual Open House, coinciding with American Archives Month. Some of themes over the years have included exhibits detailing what archives are and why they are important. A number of different archival supplies have also been displayed describing each item and how it is used in an archive. Other themes ranged from the psychology of fear to parapsychology and ESP. A variety of archival material such as photographs, documents, three-dimensional objects, and wire audio recordings have been represented in the displays.

Since its founding, the AHAP has loaned materials to other institutions for special exhibits. Institutions include: The National Zoo in Washington D.C., for an exhibit on

measurement of intelligence; Ellis Island, which is exhibiting tests used to evaluate immigrants; and the Deutches Hygiene-Museum in Germany, for an exhibit on Darwin and Darwinism. The most recent loan was to the Evansville Museum of Arts, History and Science for an exhibit on the history of psychology. We are always pleased to share the remarkable materials in the collection and look forward to working with others to create traveling exhibits.

The AHAP was excited to present the exhibit "Psychology: It's More Than You Think!", a first-time collaborative effort between the AHAP and the National Inventors Hall of Fame. The exhibit opened to the public on January 16, 2004 to the largest crowd in the museum's history. Though the exhibit was initially slated to close after six

months, it was extended several times before finally closing in 2006 after two and a half years on display.

The work of the AHAP finds its way into many outlets that educate and inform. The AHAP has been featured in such diverse venues as The New York Times, Cleveland Public Television, APA Monitor on Psychology, APS Observer, Discovery Channel, History Channel, Akron Beacon Journal, Cleveland Plain Dealer, Village Voice, the National Psychologist and Northern Ohio Live.

SMITHSONIAN RECOGNITION

In 2002, the AHAP was accepted into the prestigious Smithsonian Institution Affiliations program becoming the first archives to be granted affiliate status. Smithsonian Affiliations offers museums across the country, Panama, Puerto Rico and Canada, the opportunity to have access to Smithsonian collections and resources. Unlike traditional museum loan programs that place artifacts on loan

for periods normally less than a year, the Smithsonian Affiliations program permits the long-term loan of artifacts. In addition to borrowing objects from the Smithsonian's collections, the AHAP has the opportunity to utilize outreach services offered by the Smithsonian Institution and attend to annual conferences.

The AHAP also participates in the annual Smithsonian Museum Day held during the month of September. A celebration of culture, learning and the dissemination of knowledge, Museum Day emulates the free-admission policy of the Smithsonian Institution's Washington, DC-based properties. Visitors from the University and surrounding community are treated to special exhibits and behind-the-scenes tours. For more information about Museum Day,



Participants in the wallbreaking included, from left, Ted Curtis, UA vice president for capital planning and facilities management; Dr. Luis M. Proenza, president of UA; Dr. Ludy T. Benjamin Jr. a donor to the archives; Suzanne Morgan, chair of the Margaret Clark Morgan Foundation; Dr. Nicholas Cummings a donor to the archives; Dr. David Baker, director of the archives and interim UA provost; and Aaron Glavis of the Smithsonian Institution.

visit <http://affiliations.si.edu/>.

FUTURE HOME OF THE CENTER FOR THE HISTORY OF PSYCHOLOGY

In April 2005, Roadway Express donated a 70,000 square foot building to the AHAP for the creation of the Center for the History of Psychology. A \$260,000 grant from the Margaret Clark Morgan Foundation (MCMF) allowed for completion of a design study in 2007. That same year, the MCMF announced the largest gift in its history, a \$2.1 million endowment of the directorship of the AHAP. This generous endowment allows us to greatly expand our programming and show the myriad ways in which the history of psychology benefits the greater good.

In 2008, Dr. Nicholas and Mrs. Dorothy Cummings provided a generous lead gift of \$1.5 million to establish the

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2010 SPRING CONFERENCE SCHEDULE

8:30am – 9am Registration

9am - 9:30am Welcome

9:30am – 10:30am Concurrent sessions

OHRAB: your resource for preparing NHPRC grant applications

Presenter: Galen Wilson, Great Lakes Region National Archives and Records Administration

This forum session is open to all those who have thought about applying for an NHPRC grant but feel overwhelmed by the process, as well as to past successful and unsuccessful applicants. The Board will discuss NHPRC grant guidelines and the review process each grant goes through. The Board will also discuss strategies for creating projects that are fundable by NHPRC.

Patents as Historical and Genealogical Resources

Presenter: Ran Raider, Wright State University Libraries

This presentation will cover basic information about researching patents, their use as historical documents, and the kinds of information that can be found in them. The presentation will also cover the Patent and Trademark Depository Library Program. Since 1790, more than 7 million patents have been issued by the United States Patent Office. Patents offer a historical perspective of the technological advancement of the nation. The patents themselves provide a wealth of genealogical, business and legal information. Since they are federally issued sometimes local genealogical or business information that were lost by courthouse fires or weather related disasters, can be found in them. Basic information about a person such as their name, where they live, any legal name changes, business partners,

probate, marriages, close relatives acting as witnesses, and their country of origin may be found in patent documents. In the 19th century some inventors would also register their patents with the local county clerk of courts office. Patents offer a rich historical context to a local area's economic activity, its people and their inventiveness.

10:30am – 10:45am Break

10:45am – 11:45am Concurrent sessions

Building a Regional Digitization Program: Participating in the LYRASIS Mass Digitization Collaborative

Presenters: Laurie Gemmill, LYRASIS and Janet Carleton, Ohio University

LYRASIS established the Mass Digitization Collaborative to assist members with their digitization needs. The initial focus is on mass digitization of text; the first goal is the digitization of 20,000,000 pages. The digital assets created through the service will be available through Internet Archive as well as participating institutions' own digital collections. Attendees will learn about the project and how they can participate including selection, costs and digitization details. Representatives from Ohio University will discuss their experience with the collaborative.

Deaccessioning – When Collecting Institutions Say “Goodbye” to Objects in their Collections

Presenters: Jason Crabill, Ohio Historical Society; Kevin Grace, University of Cincinnati; Cameron Wood, Ohio Historical Society

Deaccessioning is one of the most difficult – and controversial – functions that take place in any collecting insti-

2010 SPRING CONFERENCE SCHEDULE

tution. This panel discussion will focus on the parts and pitfalls of deaccessioning, including collection reappraisal, process and procedures, handling media interest and ethical considerations ... Members of the panel will use examples from their institutions and attendees can ask questions related to the deaccessioning process.

11:45am – 1:15pm Lunch and Business Meeting

1:30pm – 2:30pm Concurrent sessions

Trustworthy Electronic Recordkeeping: 21st Century Stewardship of Our Documentary Heritage

Presenter: Dan Noonan, The Ohio State University

As the 21st century grows older we are increasingly relying on electronic records to conduct the business of our agencies and organizations. While electronic records allow our organizations to be more efficient and effective, we are dependent on sophisticated technology to be able to interact with and utilize them. Further, the technology is quickly obsolete, and the records inherently more fragile and more easily manipulated into something fraudulent. Based on the Ohio Trustworthy Information Systems Handbook, created by the Ohio Electronic Records Committee, this session will discuss what 21st century archives, records, and information management personnel need to consider to be effective stewards of their technology dependent documentary heritage.

Cultural Artifacts and the Art Library: New Paradigms of Collaborative Collection: Development for Visual Collections

Presenters: Gary Ginther and Janet Carleton, Ohio University

The Yao Cultural Artifacts Collection at the Frederick & Kazuko Harris Art Library of Ohio University provided an

ideal opportunity for collaborative collection development. Making this unusual collection accessible required an innovative approach in terms of material handling, research and online presence. The emergence of unique digital collections in the art library is indicative of the evolving role the art librarian plays in the creation of new visual information.

2:30pm – 2:45pm Break

2:45pm – 3:45pm Concurrent sessions

Linking Special Collections: Developing a Shared Collection Management Tool

Presenters: Morag Boyd and Jenny Robb, The Ohio State University

The Ohio State University Libraries includes ten separate, decentralized special collections that had numerous home-grown databases to manage non-traditional library materials including works of art and historical artifacts. A shared museum collection management system was implemented to facilitate more effective management of each special collection and provide opportunities to link the holdings across collections.

Disaster Contingency Manuals and Implementation

Presenters: Lonna McKinley, National Museum of the United States Air Force and Jason Crabhill, the Ohio Historical Society

Disasters are much too common and inevitable to ignore. In order to be proper stewards of archival materials, repositories should not only be prepared to handle anything that comes their way which could potentially harm their collections, but they should also take an active role in preventing such harm. Going through the steps of preparing for disaster can make a tremendous difference when the inevitable happens.

STATEMENTS OF THE COUNCIL CANDIDATES

Emily Lockhart

*Archives Associate Senior, Archival Services,
The University of Akron*

*M.L.I.S. Kent State University, expected
graduation 2010*

M.A. Public History, Kent State University

B.S. History & English, Heidelberg University

Previous Positions

Processing Archivist, Oberlin College Archives

*LMTAII, Youngstown State University Ar-
chives & Special Collections*

Professional Associations

Midwest Archives Conference

Society of American Archivists

What skills and experiences can you offer to SOA as the Treasurer on Council?

If elected treasurer, I would draw on my professional experiences and skills to provide responsible and accurate fiscal duties for SOA. I have been a member of SOA for four years and have attended each annual meeting during that time. In 2009, I had the opportunity to serve on the Program Committee and helped plan, publicize, and budget the conference. Additionally, I was a moderator and note-taker for two sessions. I learned many important aspects of SOA, especially the hard work and dedication it takes to make a successful conference. Having worked in a variety of archival settings – county government, historical society, public library, and academic archives – for ten years as a student, an intern, and a professional, I have experience and passion for the profession that I would bring to SOA. I also possess organizational and time-management skills and am conscious of meeting deadlines. A team environment is where I feel comfortable, and I look forward to the opportunity to work with SOA Council.

Kristin Rodgers

*Collections Curator, Medical Heritage Cen-
ter, The Ohio State University*

*M.L.I.S. with Archival Studies Specialization,
University of Pittsburgh*

*B.A., History of Art, The Ohio State Univer-
sity*

Previous Positions

*Project Archivist, Ohio State University
Medical Heritage Center*

Professional Associations

Society of Ohio Archivists,

Society of American Archivists,

Ohio Academy of Medical History

What skills and experiences can you offer to SOA as a council member?

I believe the skills and experiences I can offer SOA as a Council Member as the same ones that make me an excellent archivist. For all intents and purposes, what those skills and experiences boil down to is having a passion for archives and everyday explaining to non-archivists what archives are and why they absolutely matter. At the Medical Heritage Center, I work to preserve the health sciences legacy of central Ohio for present and future generations.

As is the nature of an archivist, I am a highly organized person excellent at multi-tasking. In my current position, I work closely with individuals in a variety of capacities including donors, colleagues, researchers, and advisory committee members as well as supervising students and volunteers. I presently serve on three committees within my organization, one of which I chair. I have experience handling a multitude of historical material: rare books, archives, artifacts, textiles, art, and multimedia.

SLATE OF CANDIDATES

Candidate for Treasurer

EMILY LOCKHART

Archives Associate Senior
Archival Services
The University of Akron

Candidates for Council
(2 seats to fill)**KRISTIN RODGERS**

Collections Curator
Medical Heritage Center
The Ohio State University

JACKY JOHNSON

Archivist
Western College Memorial Archives
Miami University

LONNA MCKINLEY

Museum Manuscript Curator
National Museum
of the U. S. Air Force

JILLIAN CARNEY

Electronic Records Archivist
Ohio Historical Society

STATEMENTS OF THE COUNCIL CANDIDATES

Jacky Johnson

Archivist, Western College Memorial Archives, Miami University, Oxford, Ohio

B.A., English, Limestone College, Gaffney, South Carolina,

M.L.I.S., School of Library and Information Science, University of South Carolina

Previous Positions

Special Collections Cataloger, Miami University Libraries, Oxford, Ohio

Reference Librarian, Horry-Georgetown Technical College Conway, S.C.

Professional Associations

Society of Ohio Archivists, Chairperson Membership Committee, 2010-

Society of American Archivists

American Library Association

What skills and experiences can you offer to SOA as a council member?

I love working as an Archivist and am excited with the opportunity to unite history and research.

I enjoy working with people, am a good listener, can relate to my colleagues and remain open to suggestions and advice. I am always developing collegial relationships with others and would do the same when working with Council members as well as all members of SOA.

I consider myself to be a forward thinker in that I try to anticipate upcoming challenges to the profession. SOA is a forward thinking organization, which keeps its fingers on the pulse of new ideas, so I would hope to be an integral part of communicating with other archival professionals in the Ohio area on how to continue to move the organization in the right direction.

I am committed to professional development and work to acquire the skills which enable me to be aware of the latest developments in Archives. I would work with

Lonna McKinley

Museum Manuscript Curator, National Museum of the U. S. Air Force

M.A., Museum and Archival Administration/Public History, Wright State

B.A., History with Specialization in Historical Preservation, Michigan State

Previous Positions

Assistant Curator, Carillon Historical Park, Dayton, Ohio

Professional Associations

Miami Valley Archives Roundtable (MVAR) member since 1995; Chair 1999 – 2001; SOA member since 1997; Archives Week Poster Committee Chair 2004-2006; SAA member since 1997; Served on the Wright State University Public History Advisory Board since 1999.

What skills and experiences can you offer to SOA as a council member?

I have served as the Museum Manuscript Curator for the National Museum of the US Air Force for over 13 years. During this time I have overseen and implemented several improvements to the Research Division Archives. Initially, I restructured the donation acceptance procedures and developed a Collection Policy and a Procedures Manual. I also directed a relocation of the entire archival collection – over 9,000 linear feet. I have improved the preservation capabilities of the Archives with the creation of an archival processing lab and construction of a cold storage environmentally-controlled Film Vault with 11,000 cubic feet capacity. I am currently working with the Museum's Operations Division and Base Civil Engineers on a complete overhaul of all the HVAC systems for the Research Division's storage and work areas. I also have experience with Disaster Planning. I wrote the NMUSAF Collection Disaster Continuity Manual and am currently involved in training Museum staff. In addition to these organizational skills and experiences with preservation concerns, I have had experience working with and mentoring un-

Jillian Carney

Electronic Records Archivist, Ohio Historical Society

B.A., Communication and Business Administration, The Ohio State University

M.L.I.S., Library Science, Kent State University

Previous Positions

Assistant Curator for Digital Projects, Ohio Historical Society

Circulation Services Assistant, Ohio Dominican University

Professional Associations

Columbus Young Professionals

Society of Ohio Archivists

What skills and experiences can you offer to SOA as a council member?

Being a young professional in the archives field, I feel that becoming active within a professional organization is the best way to gain a better understanding of the importance of the issues facing the field. Last year I had the pleasure of working on the Program Committee for the Annual Spring Conference. Also, I have recently become the Ohio Historical Society liaison to the Ohio Historical Records Advisory Board and Ohio Electronic Records Committee. From these experiences I have learned the importance of reaching out to the public to bring about a better understanding of the challenges facing archives and records managers.

In addition to what I am learning from these organizations, I have been able to enhance my time management and organizational skills. I have found at times it is difficult to manage the competing needs of each task, but by prioritizing, and sometimes compromising, a great result can be reached. These skills have also been valuable to my role at OHS and will be fundamental to the SOA Council.

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STATEMENTS OF THE COUNCIL CANDIDATES

Johnson, *continued.*

Council members to do the same for the organization.

The Society of Ohio Archivists is a great organization. Since I began work as the Archivist of the Western College Memorial Archives, I have hosted lectures and panels in celebration of Ohio Archives Month as well as submitted images which appeared on the SOA Archives Month Poster in support of Ohio Archives Month. In 2009 I served on the Planning Committee for the 2009 SOA Spring Meeting.

I would welcome the opportunity to serve as a Council Member. I would work hard to make it the best organization possible through education and commitment. I love that the organization is currently involved in Statehood Day and State History Day. It is these types of events that help to promote

McKinley, *continued.*

dergraduate history students and graduate public history and library science students for over 17 years. I have also taught numerous classes within the Air Force History and Museums Program on Intellectual and Physical Control of Archival Materials and Disaster Planning as well as classes for other organizations on database management, relocating archival collections, and the uniqueness of archives within museums.

As a Council member, I would put these skills and experiences to work for SOA. My goals would be to help SOA continue to grow, increase educational experiences for existing and new archivists, and expand networking opportunities. SOA is an excellent organization, and I look forward to the opportunity to be its advocate. Thank you for considering me for Council.

Carney, *continued.*

If elected to the Society of Ohio Archivists Council, I feel that I would bring with me the desire and enthusiasm to accomplish the goals that have been set by SOA. Community outreach is something that I feel very passionate about and would be eager to assist in any way possible. It would be an honor and a privilege to serve as a SOA Council Member. Thank you very much for your consideration.

ARCHIVES OF THE HISTORY OF AMERICAN PSYCHOLOGY, *continued from page 6*

Center for the History of Psychology. As a result, on February 26, 2010 the AHAP hosted a 'Wall Breaking Ceremony', marking the start of renovations to the future Center. Major donors and supporters came from the local community and across the country to witness the historical event. Longtime AHAP supporter and guest of honor, Dr. Nicholas Cummings, sat atop a hydraulic excavator to ceremoniously break through one of the building's many plaster walls.

By the fall of 2010 the AHAP will move into the renovated first floor and basement of the new facility. The first phase of the building project will provide expanded space for AHAP's growing collections and plans include a museum, reading room, space for

visiting scholars and greatly expanded space for processing and storing archival material.

Upon its completion, the Center will be the largest resource dedicated to the history of psychology in the world and the first permanent museum at The University of Akron. The Center will continue the AHAP tradition of advancing knowledge of the science and practice of psychology, and bringing greater exposure to the study of the human sciences by collecting, preserving and making available primary source material in the history of psychology.

MORE INFORMATION

To learn more about the AHAP visit our website www.uakron.edu/ahap. The Archives of the History of American Psychology is open Monday through Friday 8:00 am – 5:00 pm and Saturdays from 10:00 am – 4:00 pm. Researchers are welcome anytime by appointment and complimentary tours of the facility are available by appointment as well. AHAP can be reached by telephone (330.972.7285), fax (330.972.2093), or email (ahap@uakron.edu).

YouTube:

<http://www.youtube.com/user/AHAP65>

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Donate online:

<https://www.uakron.edu/donate/ahap/>

by Kelly M. Broughton, Assistant Dean
Research And Education Services, Ohio University Libraries

Ohio University Libraries has received a basic processing grant from the [National Historical Publications and Records Commission](#) to process and raise awareness of important primary source materials residing in the [Robert E. and Jean R. Mahn Center for Archives and Special Collections](#). The collections of the Mahn Center document the life, culture and development of the first higher education institution in the Northwest Territory, nearly two centuries of life in southeastern Appalachian Ohio, and the works and other personal papers of nationally significant scholars, artists and leaders.

The grant provides \$116,514 over two years, the majority for personnel and student employee expenses. As the newly hired grant-funded project archivist for the Mahn Center, Holly Deakyne will oversee the project to make thousands of linear feet of valuable manuscript and Archives collections discoverable through the libraries' online catalog, [OhioLINK](#)'s EAD Finding Aid Repository and [WorldCat](#). This project will make accessible a wealth of material that before now has been virtually unknown to the general public.

Deakyne's past experience with a variety of institutional archives and her technical skills make her the perfect candidate to make this project a success. Prior to her job at Ohio University, Deakyne was a project archivist for the Solomon R. Guggenheim Museum in New York City. She graduated from Florida State University in 2002 with a B.A. in Art History and a minor in Museum Studies. She continued her education at the Pratt Institute in New York City where she graduated with a M.S. in Library and Information Science in 2008.

"This grant and Ms. Deakyne's work gives us the opportunity to make so much of the underappreciated richness of University history accessible to people everywhere..."

Since arriving in Athens, Deakyne has updated existing finding aids, making sure each has the minimal information required for future uploads to the EAD Repository. She has also begun surveying the unprocessed collections of the University Archives, a collection that dates back close the University founding in 1804. Following the "less process, more product" philosophy, the basic processing grant allows for minimal processing of large backlogs. Ohio University Archivist and Records Manager Bill Kimok enthusiastically stated that he is "absolutely thrilled to have someone with Ms. Deakyne's background and skills on board." He concluded, "This grant and Ms. Deakyne's work gives us the opportunity to make so much of the underappreciated richness of University history accessible to people everywhere, whether they are scholarly researchers inside and outside of the University community, nostalgia-seeking alums, or Google jockeys who are just looking for interesting information about life and history at Ohio University in general."

Once her work with University Archives is completed, Deakyne will begin working with unprocessed manuscripts collections. These materials document the history of Appalachian Ohio, including southeastern Ohio businesses, industry, labor union activity, politics, local social organizations, and more. Along the way, Deakyne will also train student assistants to upload the new and newly "optimized" finding aids into the OhioLINK EAD

Repository. When the training has been completed, basic, minimal processing techniques for all new acquisitions will be in place and finding aids will routinely be entered into the repository.

by Charlie Arp, Enterprise Content Manager at Battelle Memorial Institute

SharePoint sites are collections of electronic records structured around projects or functions that records managers and archivists may need to manage or document. We can capture and ingest (harvest) these collections into electronic record keeping systems to keep them for prescribed periods to meet the legal or regulatory requirements of our institutions, or maintain them permanently as archives. In this brief article I will describe how Battelle is harvesting SharePoint sites and our plans for dealing with future implementations of SharePoint.

Microsoft (MS) defines SharePoint as "an integrated suite of server capabilities that...provide comprehensive content management and enterprise search...this collaboration and content management server provides IT professionals and developers with the platform and tools they need for server administration, application extensibility, and interoperability."¹ SharePoint is one of MS's most successful applications. MS has sold more than a million licenses for SharePoint Server and considers the collaboration platform to be one of the fastest-growing products in its server portfolio. Gartner describes the depth of SharePoint adoption by saying that "50% of organizations, both large and small, have piloted or deployed WSS (Windows SharePoint Services) or MOSS 2007 (MS Office SharePoint Server 2007) as key elements of their overall information infrastructure."²

SharePoint is a collaborative platform that is easily adapted to meet almost any set of circumstances; essentially it is a web portal that manages lists

and digital objects via a database. SharePoint uses web parts to modify the content, appearance, and behavior of sites. The strengths of SharePoint are its easy customization, wide-spread implementation support services, acceptance by IT organizations, and the ease with which new sites (especially child sites) can be created.

SharePoint has three main functionalities: search, document libraries, and lists. Search is self-explanatory and irrelevant to our discussion. SharePoint document libraries are used to provide access to and control of files. Access to the site and the files on it are governed by permissions at both the site and library levels. The type of document control (version control) used by the libraries within a site is defined for each specific library. SharePoint lists are ordered groups of information referred to as items defined and configured at the site level. SharePoint lists include tasks, announcements, events, contacts, blogs, wikis, and whatever variations of this function site administrators can envision. List items can also contain attachments.

Microsoft attempted, with limited success, to add records keeping functionality to SharePoint so that it could truly be all things for all people. The MOSS 2007 version of SharePoint was offered with an add-on records management service pack that enabled it to meet the Department of Defense electronic records keeping standard 5015.2.³ I am not aware of any institutions that successfully implemented this records management add-on pack. I do know that the level of re-

cord management functionality in SharePoint – often referred to as "records management light" within the RM community – did not meet our needs. MOSS 2007 cannot manage physical objects; it has metadata limitations, document library size constraints, and limited records retention trigger functionality that made it difficult for Battelle to use it as a records management application.

Early reports are that the record keeping functionality of SharePoint 2010 has not dramatically changed – so our analysis of our records keeping needs remains valid. Gartner's report on SharePoint 2010 reinforces this when they state that, "Organizations looking to SharePoint to support large volumes of static content or transactional processes will find their needs better met through partner-built solutions extending SharePoint or competing ECM offerings."⁴ MS seems to have recognized that trying to add records keeping functionality to SharePoint has met with limited success. Gartner and others have reported that they believe that the new version of SharePoint (SharePoint 2010) will not attempt to meet the DoD5015.2 record keeping standards.

TRIM from HP⁵ is the Enterprise Content Management (ECM) tool Battelle uses to complement our SharePoint deployment. TRIM meets DoD5015.2 version 3 and most other international records keeping standards (European Union's Model Requirements [MoReq2]⁶, the Australian VERS standard⁷ and ISO15489)⁸. TRIM is not the be all and end all of ECM applications; many other ECM applications have integrations with SharePoint or they have specific ap-

plication attributes designed to enhance the services that SharePoint provides. AIIM has a nice site devoted to ECM applications that connect with and enhance SharePoint.⁹ Part of our jobs as archivists and records managers is finding the ECM application that best meets our institutions' needs and circumstances – because all of them have different strengths and weaknesses. Battelle chose TRIM because one of the DOE Labs we manage (the Pacific Northwest National Lab) had extensive experience with it and because it meets all the major records management standards, including Chapter 3 of DoD5015.2, which deals with classified records.

To give you some context about our use of TRIM and SharePoint, in 2003 the Records Management Office (RMO) had one license of TRIM. Our initial use of the application was as an electronic repository for permanent reports - we added preservation metadata to these reports in TRIM and we only took PDFs. Our use of TRIM has expanded, nine different groups use TRIM and we hold over 1.5 million files in it. Battelle started using SharePoint at roughly the same time (2003). Our commitment to SharePoint is substantial. We use it for portal development, as a platform for some business applications, and as a team collaboration site for both internal and external partners. Today we have over 1,500 SharePoint team sites used in support of projects, and over 6,000 top level SharePoint sites which includes sites established for individual staff members.

While SharePoint sites can contain many different types of records, the majority of our experiences have revolved around harvesting project records held in team sites. Project re-

cords are comprised of three groups of records – project working files, periodic project records, and project final reports. Periodic project reports and project final reports are ingested into TRIM as individual items, while project working files are ingested en masse into a project folder. The project folder has administrative metadata assigned to it describing the project, which all the records within it inherit. Project final reports have administrative and descriptive metadata attached directly to them.

The procedures we use to harvest a SharePoint sites are based on project records – but they are valid regardless of the types of records contained within the SharePoint site being harvested with minor modifications. At a very high level, our current procedures are:

STEP 1

When a project closes, the site administrator contacts the SharePoint team and tells them the project site can be harvested. Site permissions and any lists including blogs or wikis that need to be retained must also be copied and included in one of the site document libraries as a Word or Excel file. Depending on their importance, documents attached to list items may be moved into document libraries as separate items rather than part of a list item. Moving these documents into the libraries separately makes indexing and their search and retrieval easier.

STEP 2

Once we are notified of a site being turned over to us for harvesting, RMO staff creates a project working file folder for that specific project in TRIM.

STEP 3

RMO staff open the project SharePoint site document libraries in explorer view and block and copy the files to the correct project working file folder in TRIM.

STEP 4

Once RMO staff has copied all the files from the SharePoint site document libraries, the site is deleted.

ISSUES:

1. There are a number of SharePoint attributes that are not harvested:

- A. The look and feel of the site
- B. Graphics, unless they are contained within document libraries
- C. List items including any attachments are not retained unless project staff takes the additional measure of blocking and copying them into Word or Excel and then placing them into document libraries.

2. Project staff often creates hierarchical arrangements of folders within document libraries. RMO staff must open all these folders up in explorer view and block and copy the files into TRIM. This increases our workload and the likelihood that one or more of these subfolders will be missed by staff. In a recent harvest of a site we had 223 files in 22 subfolders housed in 3 document libraries. In one case there were five levels of subfolders – and some of the subfolders did not even contain files! Harvesting this site should have been a simple, quick job but it was turned into a long and complicated task by a site administrator who over-engineered the structure of the site.

REMEDIES:

It is important to include prohibitions on creating subfolders within document libraries and attaching files to

list items within your institution's SharePoint governance document. A SharePoint governance document defines how SharePoint will be used and deployed within your institution.¹⁰ Even with such prohibitions, you must be ready to deal with subfolders and attachments to items, as they will surely occur.

FUTURE DEPLOYMENTS OF TRIM AND SHAREPOINT

The current version of TRIM (6.2) has an integration module for SharePoint that allows users to place records in TRIM and search and retrieve records from TRIM via the SharePoint interface. We were very interested in this functionality but found we could not implement it as the integration is a 32-bit application and our SharePoint environment is 64-bit.

The TRIM SharePoint integration has been significantly upgraded in the new version of TRIM (TRIM 7). In addition to letting users place records in, and search and retrieve records from TRIM via a SharePoint interface, TRIM 7 is a 64-bit application that allegedly has the ability to capture all types of SharePoint-generated content, including list items – blog entries, wikis, calendar entries, attachments, and even workflow events.¹¹ This is a major improvement as it lets us automatically capture and manage all SharePoint content – not just documents held within document libraries. It also alleviates the issue of subfolders in document libraries as all content – including subfolders – is captured. The link in the endnote takes you to a HP demo that illustrates the TRIM SharePoint integration¹² (you will have to register and select preferences for follow on communications from HP to view the video).

CONCLUSION:

The TRIM 7 SharePoint integration and archiving functionality will allow Battelle to automate managing and archiving SharePoint content. I am certain other ECM applications either have similar capabilities now, or will have them in the near future.

These capabilities allow records managers and archivists to manage active records through SharePoint in the flow of everyday activities without our users knowing that their records are being managed. This is a huge step for us, as one of the biggest hurdles in implementing electronic records keeping systems is asking our users to do something (anything) to manage their records on an on-going basis – they balk at doing any additional steps for records management.¹³

Electronic records management must be done in the flow of everyday activities to be successful – it cannot be an intrusion, an extra task for our users – because they are often too busy to manage their records.

From a knowledge management perspective we can use ECM SharePoint integrations to push content held in archives or records management repositories out to professional “communities of practice” where the content can be exposed to and used by a wider audience without our involvement. These communities can be SharePoint sites where users communicate with one another and share content on matters of interest. Searching for and locating content that answers their questions and fuels their discussions will be one of the foundations of these communities. In turn the users of these communities can apply social tags (metadata) to the records held in our repositories, making finding content easier. These tags will also allow community users

to provide additional context to the content and comment on its usefulness. Our content will be enriched by its exposure in these communities of practice and our involvement in these communities will raise our institutional exposure and credibility.

SharePoint combined with TRIM 7 will give Battelle a records management tool capable of dealing with a large portion of our unstructured records. And the best thing is that we will be able to manage these records without intruding on our users. I will do a follow up article later this year to let you know our progress in implementing TRIM 7.

NOTES:

1. <http://sharepoint.microsoft.com/Pages/Default.aspx>
2. Gartner, “SharePoint 2010 Steps Up to the ECM Plate”, 2/26/10, pg. 2, ID number G00172077
3. <http://jitic.fhu.disa.mil/recmgt/>
4. Gartner, page 1
5. <http://h71028.www7.hp.com/enterprise/w1/en/software/information-management-trim.html>
6. <http://www.moreq2.eu/moreq2>
7. <http://www.prov.vic.gov.au/vers/vers/default.asp>
8. http://www.iso.org/iso/catalogue_detail?csnumber=31908
9. <http://www.aiim.org/sharepoint/>
10. AIIM has resource for SharePoint governance documents - <http://www.sharepointgovernance.org/default.aspx>
11. <http://www.infoworld.com/d/data-explosion/hp-trim-preserves-sharepoint-ages-762>
12. http://h41112.www4.hp.com/promo/imhub/registration/registration_required.html?url=http://h41112.www4.hp.com/promo/imhub/trim/SharePoint/HP_TRIM_Version_7_Integration_for_SharePoint.htm&linkText=Watch%20the%20HP%20TRIM%20SharePoint%20Demo
13. See the State of Michigan, Final Report, Records Management Application Pilot Project, 12/30/02 http://www.michigan.gov/documents/HAL_MHC_RM_Final_Report_63480_7.pdf

MISSION

Founded in 1968, the Society of Ohio Archivists' mission is to exchange information, coordinate activities, and improve professional competence in Ohio's archives and manuscript repositories. Membership in the society is open to the public, and we invite anyone with an interest in archives and manuscripts to join.



www.ohioarchivists.org

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