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## History Allies: Helping Protect Your Past: Resources on Managing Archives & Records for Community-Based Organizations

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# History Allies: Helping Protect Your Past

Resources on Managing Archives & Records for  
Community-Based Organizations

# Topics

- Historical value of archives
- Appraisal/Selection
- Inventory
- Preservation and storage
- Providing research access and doing your own research
- Digitization/online access
- Exhibits and outreach

# Historical Value of Archives



# What are Archives?

## Materials



- All formats
- Eye-witness accounts

## Physical place



- Storage, research, office

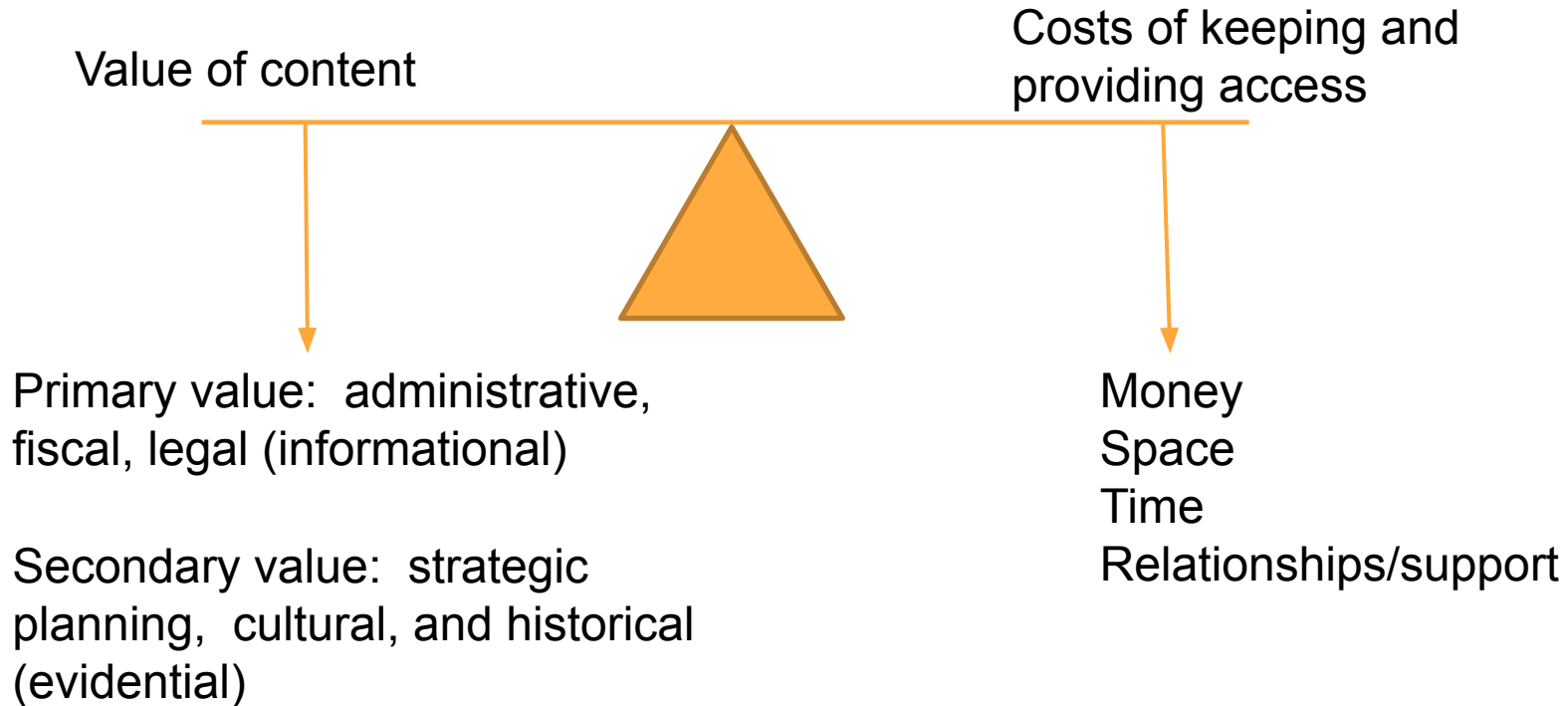
## The repository



- Staff
- Policies, procedures, decisions
- Mission, outreach, development

# Selecting Archives

# Selecting what to keep and what to discard



## Primary value: administrative, fiscal, legal uses

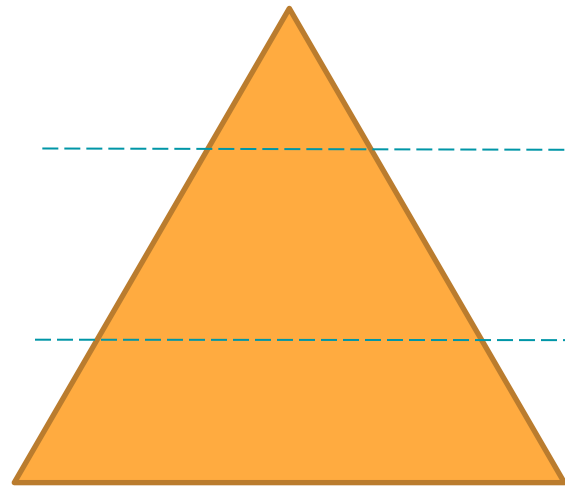
- Records are in active use (or semi-active use)
- Active use time period varies by type of record
- Records schedules can help identify record types and how long they should be kept

## Primary value: records schedules

- Example records schedules:
  - Episcopal church
  - Shred Corp sample retention schedule
  - (Kentucky State University Model Records Retention Schedule)

# Secondary value: planning, cultural, historical

- After primary value time period is finished



Pyramid of organizational records

Most unique/most policy  
--often created by offices, individuals,  
or committees at top of organization  
--most likely to keep permanently

Most voluminous/most routine  
--often created by offices or individuals  
at lower levels of organization  
--least likely to keep permanently

## Secondary value: who, when, what

- Look for the who (creator), when (date)
- Is the what (content) central to the organization's function/mission/role/community?
- Is the what (content) from the founding of the organization?
- Is the what summarized in another format?

## Secondary value: who, when, what

- Physical format and condition?
- Private or confidential?
- Keep 1-2 copies
- Examples:
  - Southern Sociological Society
  - Delta Kappa Gamma
  - List in SAA's "Donating Your Organization's Records"



## A note on collecting documents

- Appraisal decisions
- Document the property transfer

# Creating an Inventory

## Basic categories of information

- What is it? (title, description)
- What dates does it cover? (can be estimate)
- How big is it or how much space does it need?
- Where does it live?

# Levels of Inventory

The entire archive:

Baptist Church archives, Lexington, Kentucky  
Description by Ruth Bryan, 11/19/2015

The archives includes 20 boxes, 2 filing cabinets of 5 drawers each, and 7 shelves of records of the Baptist Church in Lexington, Kentucky, dated 1880-2014. The archives is stored in room 119, the closet to the right of the pastor's office, and in the home of Mrs. Smith.

The records include baptismal, membership, marriage, and funeral ledgers (1880-1930); church bulletins (1940-1960, 1980-1988); hymnals and prayer books (1900, 1950, 1965); building records (1940-1946); financial reports; and pastor-congregation correspondence (1950-1955).

# Levels of inventory

Big groups:

	A	B	C	D	E
1	<b>Group name</b>	<b>Dates</b>	<b>Size</b>	<b>Location</b>	
2	Baptismal records	1880-1930	12 ledgers; 2 shelves	Closet next to pastor's office	
3	Financial records	1967-1956	3 boxes	Mrs. Smith's house	
4	Bulletins	1940-1945	1 box	Room 119	
5	Bulletins	1965-1985	3 boxes	Mrs. Smith's house	
6					
7					
8					
9					



## Where to record the inventory?

- Use columns
- Ledger or computer spreadsheet
- Label containers, drawers, folders

# Organizing Genealogical Research

- Consider audience:
  - Yourself
  - Others
- Organize by family name/individual name
- Alphabetize!



# Organizing Genealogical Research

- Different categories:
  - Research files
  - Family papers – original documents
- Why separate groupings?
  - Preservation concerns
  - Easier to find the “old stuff”

# Preserving Records

# Where not to store records?



- Damp and dirty basements
- Hot attics
- Warehouses without climate control
- Near water pipes
- Pest infected area
- Nowhere that a human wouldn't feel comfortable

# Where to store paper records?

- Air conditioned and heated atmosphere
- Purchase humidity temperature sensor
  - 35-50% RH; 35-65F
- Avoid direct sun or light exposure
- Provide a secure and clean area
- Utilize metal cabinets or sturdy shelving



# Container basics?

## **Boxes and lids, cabinets, folders**

- Keep out light and dust
- Big enough to hold records without crushing them
- Supportive enough to prevent slumping or fraying
- Use pencil to label inside container

# What archival containers can I use?

- Acid free folders
- Archival document cases
- Pencil instead of pen or marker
- Correct sized archival box
- Specialized enclosures



# Archival companies and online resources

- Gaylord
- Hollinger Metal Edge
- Light Impressions
- [Conserve O Grams](#)
- [Image Permanence Institute](#)

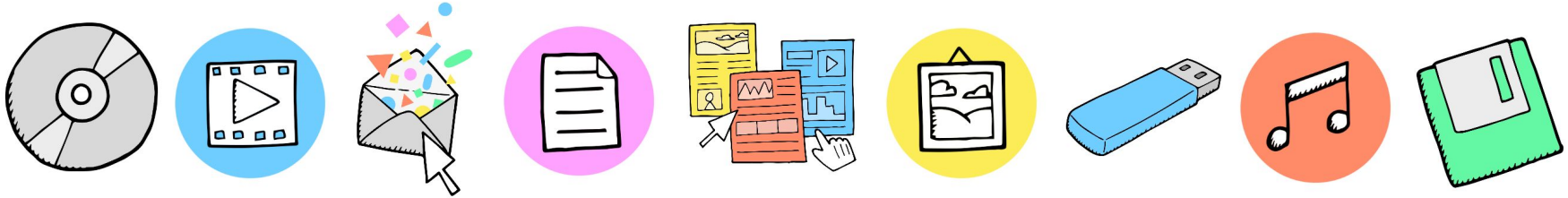


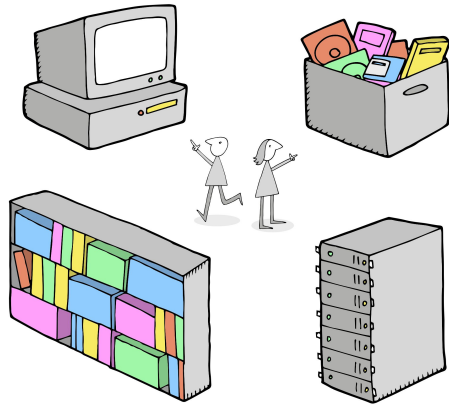
# Preserving Digital Records



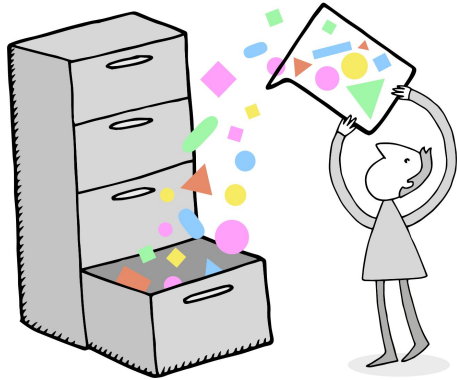
# Common digital materials

- Documents
- Spreadsheets
- Photographs
- Music
- Videos
- Email





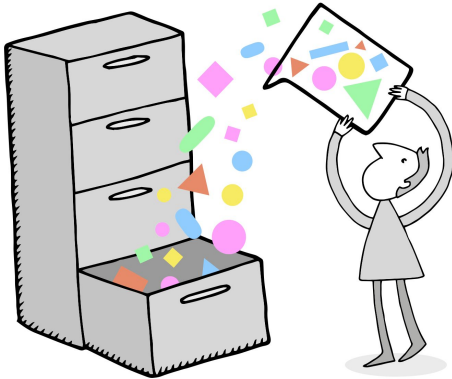
**1. Determine what you have  
(and want to preserve)**

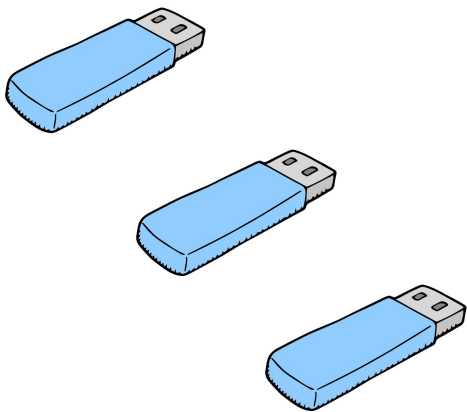


**2. Save it in the same place  
(Does it need to be  
reformatted??)**

# Batch re-formatting tools:

- Images: XnConvert, Zamzar
- Audio: fre:ac, FreeAudioConverter
- Video: VLC MediaPlayer
- Text and documents: Adobe Acrobat, Word

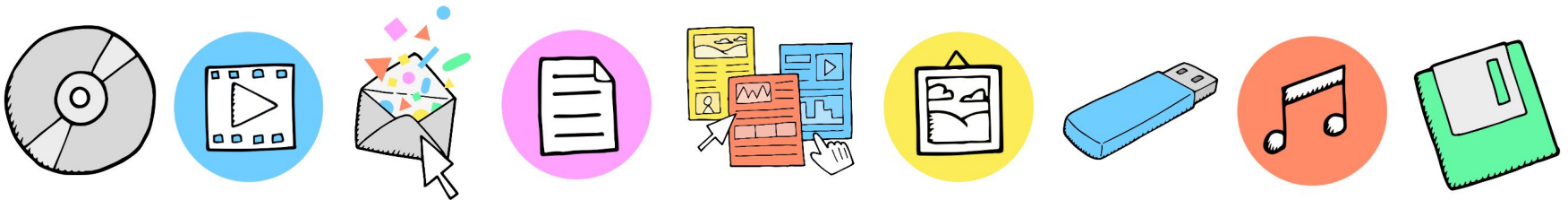




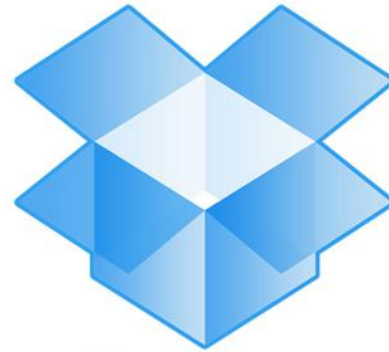
# 3. Make copies

# File Names

- Simple and consistent
- Basic description and date
- Short
- No funky characters



# Options for storing copies



**Dropbox**



Google Drive

# Inventory

	A	B	C	D
1	<b>Group name</b>	<b>Dates</b>	<b>Size</b>	<b>Location</b>
2	Baptismal records	1880-1930	12 ledgers; 2 shelves	Closet nxt to pastor's office
3	Financial records	1956-1967	3 boxes	Mrs. Smith's house
4	Financial records	2005-2008	2 GB	Google Drive; external drive 1
5	Bulletins	1940-1945	1 box	Room 119
6	Bulletins	1965-1985	3 boxes	Mrs. Smith's house
7	Bulletins	2010-2018	90 GB	Google Drive; external drive 1
8	External drive 1	2005-2018	92 GB	Room 119- Secretary's file cabinet drawer 2
9				

# Considerations

- Who else can access the files?
- Is it the final version? (Is there a final version?)
- Is it a stable format?





# Managing Joint Accounts

- Share access with your colleagues
- Use a password manager
  - LastPass
  - MyKi

LastPass...



# Email and Social Media

- Platforms often have tools to export and archive



# Website Preservation

- Webrecorder
- webrecorder.io

## Webrecorder

Collect & Revisit the Web

URL to capture

Add to collection

Select browser

▶ Session settings

[Start](#)

Our Mission

### Web Archiving for All!

Webrecorder is a web archiving service anyone can use for free to save web pages. Making a capture is as easy as browsing a page like you normally would. Webrecorder automatically archives the page, along with any additional content triggered by interactions.

This open-source project is brought to you by [Rhizome](#) at the [New Museum](#).

The [Andrew W. Mellon Foundation](#) is lead supporter of the Webrecorder initiative. Additional outreach and research is made possible by the [Knight Foundation](#) and the Institute of Museum and Library Services.

# Volunteer Projects

# Staffing/volunteers: Part of archives management

## Other management areas:

- Statistics
- Review of operations
- Future planning
- Finances: planning for costs and reporting on revenue and expenses
- Fundraising and development
- Celebration



# Archives Volunteer Resources

**SAA** SOCIETY OF American Archivists  
Promoting the value and diversity of archives and archivists.

Join/Renew | Contact | Donate | SAA Connect | Login

About Archives • About SAA • Careers • Education • Publications • Advocacy • Membership

altarama www.altarama.com RefTracker Web-based solution for managing reference and information requests LEARN MORE

HOME » STANDARDS » BEST PRACTICES FOR VOLUNTEERS IN ARCHIVES

## Best Practices for Volunteers in Archives

Administration and Management | SAA Standards: Approved | Best Practices

*Best Practices for Volunteers* is a set of suggested guidelines for archives institutions and organizations about the use of volunteers. The best practices may also be of interest to individuals who are considering volunteer work in an archives institution or organization. *Best Practices for Volunteers* includes the following sections: Introduction, Recommendations, and Additional Resources. It is a companion to *Best Practices for Internships as a Component of Graduate Education*.

The document was drafted by a subgroup of the SAA Council based on the Council's discussions in September 2013 and January 2014 and in response to member feedback. It was presented to the Council by email in March 2014, and after feedback from the Council, the draft was distributed to selected SAA component groups for initial comment between April 4-21, 2014.

Approximately 50 comments were received on the first draft. The majority of comments suggested other topics that might be addressed within the best practices document, including differentiating between larger institutions and those organizations which rely primarily on volunteers; developing more specific language in regards to volunteers not doing the work of paid staff; stating the difference between interns and volunteers; revising the language regarding voluntary work must be voluntary (and not coerced); fixing the links to various URLs; expanding the categories of volunteers; and developing additional resources.

**Standards: What's New!**

- Guide to Implementing Rights Statements from RightsStatements.org
- Handling and Storage of Audio and Video Carriers
- Guidelines on the Production and Preservation of Digital Audio Objects
- Safeguarding the Audio Heritage: Ethics, Principles, and Preservation Strategy

**The Standards Portal is maintained by the SAA Standards Committee.**

**SAA Members:** Contribute related resources (e.g., journal articles, case studies, etc.) by using the links at the bottom of listed standards.

**Other Related Resources**

- List of Major Standards and Guidelines Adopted by SAA from 1972 to 1994
- Standards for Archival Description: A Handbook (1994)

## Resources for Volunteer Programs in Archives

**NATIONAL ARCHIVES**

**SAA** SOCIETY OF American Archivists

# Volunteers

- Recruiting and managing one or more people to help with archival duties
- Only for non-profit or public organizations
- Only for support and augmentation of paid employees
- Volunteers must offer services freely and without coercion

# Volunteers need



- Clear and shared expectations/outcomes
  - Position descriptions/qualifications
  - Tasks, instructions
  - Work schedules
  - Confidentiality and ethics
  - End of project or conflict resolution
- Training
- Supervision



# Volunteers need

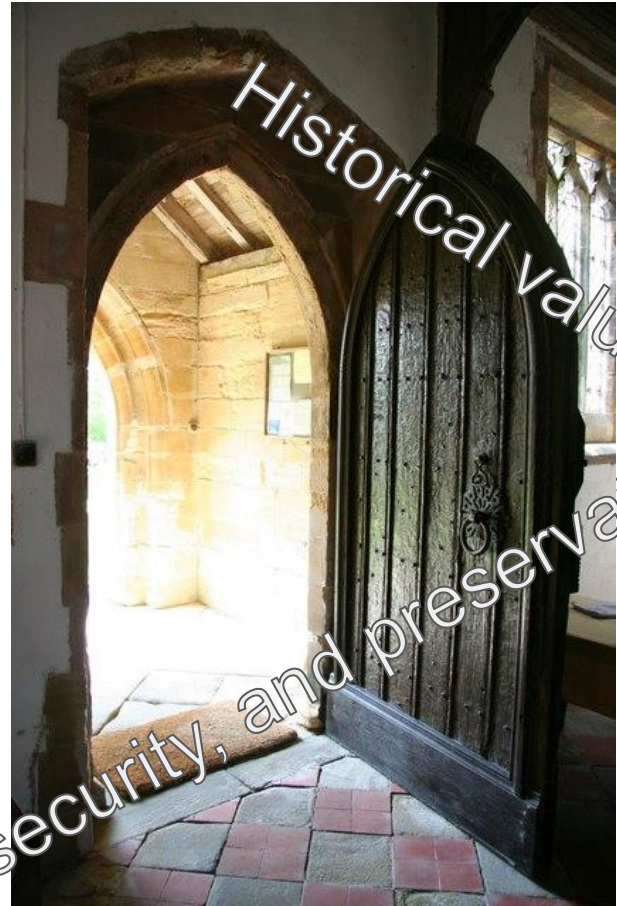
- Evaluation/statistics (# of people, hours, and work done)
- Feedback
- Safe work space, protection
- Satisfaction and celebration!



# Providing Access

# Who are your users?

- Who in general can have access to the archives?
  - Anyone/the public
  - Members only
  - Staff/Officers only
- Can people research in the archives themselves?
  - Remote questions
  - On-site users
- Balance security with convenience



# Restrictions on specific items



- Physical state
- Wishes/policy of individuals or organization



## Private/sensitive information

- Personnel
- Financial
- Medical
- SSNs

Inventory!!

# Process

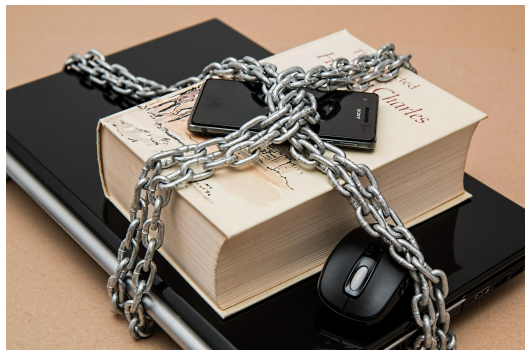


How should users request materials or ask questions?

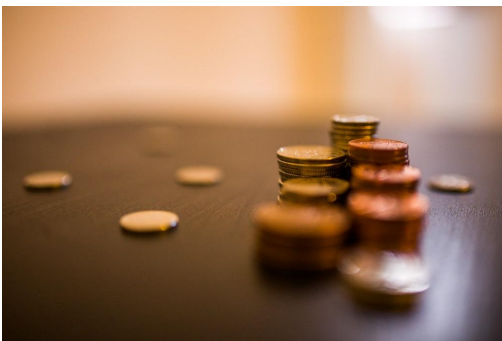


Researcher sign in/registration,  
scheduling on-site research time

# Tracking Use: Security, Justification



Security of materials



Request funding

S19									
	A	B	C	D	E	F	G	H	I
1	2015 Church Records Use								
2	Number	Date	Item Used	Collection Title	Item Location	Researcher	Research Purpose	Total Time Used	
3	1	11/4/2015	Ledger, 1956	Church Financial Ledgers	Room 004	Elder John Smith	Purchase information on stained glass windows	30 minutes	
4	2	11/12/2015	Church Directory, 1999	Church Directories	Main Office, Filing Cabinet 6	Jan Smith	Seeking last known address for church leader	5 minutes	
5	3	11/19/2015	Easter Luncheon photographs, 1987	Church Photograph collection	Room 107, Storage Cabinet	Jack Smith	Looking for duplicates in order to create church memory scrapbook	45 minutes	
6	4								
7	5								
8	6								
9	7								

Track use

(number of users; type of use; what was used)



# Tracking Use: Reporting and Planning



Digitization and inventory  
priorities



Report on archives activities

# On-site research environment



## Space

- Secure
- Flat, clear, open

## Staffing

- Security
- Assistance



## Supplies

- Note taking
- Making copies

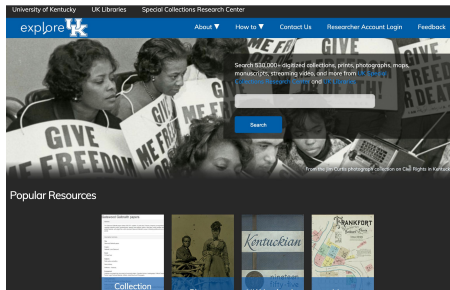


# Personal Research

# What to Consider Before the Visit

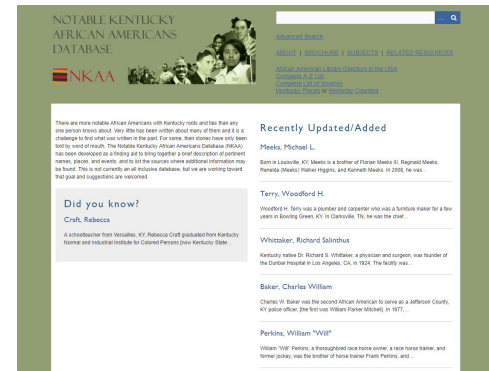
- ❑ Hours - winter vs summer
- ❑ Fees - copying, scanning, retrieval etc.
- ❑ Library policies on - food, cell phones, digital cameras, laptops, personal scanners
- ❑ Do you need to check personal items into a locker
- ❑ What do they require: gloves? pencils? Type of ID?
- ❑ What to bring - notepaper, thumb drive, change, pencils
- ❑ Visit their online catalogue and finding aids before you visit
- ❑ Prioritize your requests before visiting
- ❑ Ask staff for assistance
- ❑ Be sure to take good notes and citations

# Archives Research at



ExploreUK:  
--[ExploreUK.uky.edu](http://ExploreUK.uky.edu)

Notable Kentucky African Americans database:  
--[nkaa.uky.edu/nkaa/](http://nkaa.uky.edu/nkaa/)



Louie B. Nunn Center for Oral History:  
--[kentuckyoralhistory.com](http://kentuckyoralhistory.com)



Many archival collections are not online. Ask us:  
<http://libraries.uky.edu/ContactSCRC>

# Archives Research at



- Topics: Kentucky broadly
  - University of Kentucky
  - Appalachia
  - Military/veterans
  - Public policy/government
  - Judiciary
  - Photography
  - Built environment/historic preservation
- Open to anyone: online and 10-4:30, M-F

# Research at Lexington Public Library

## **Kentucky Room Collections**

Permanent collection with information about people, places, and events in Kentucky history, with an emphasis on central Kentucky

Books    Periodicals    Microfilm

Directories    Photographs    Databases

Vertical files    Yearbooks    Newspapers

Central Kentucky Cemeteries Maps

Local Government Documents

Digital Archive    Local History Podcast

## **Services:**

Book A Librarian / walk-in assistance  
eLibrarian email service / chat / phone  
Grants consultation / Free scan/fax

[www.lexpublib.org/ask](http://www.lexpublib.org/ask)  
(859) 231-5500 ext. 1008

# Digitization

# When and why?

- Share
- Promote
- Educate
- Preserve (keep the original!)
- Additional information (crowdsourcing)
- Fundraising



## How? | Equipment



Flatbed scanners are a good place to start

Check with your public libraries



# How? | Format



Preserve



Share



Search

# How? | Format

Don't forget to backup your files and update inventories!



	A	B	C	D	
1	<b>Group name</b>	<b>Dates</b>	<b>Size</b>	<b>Location</b>	
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8					
9					

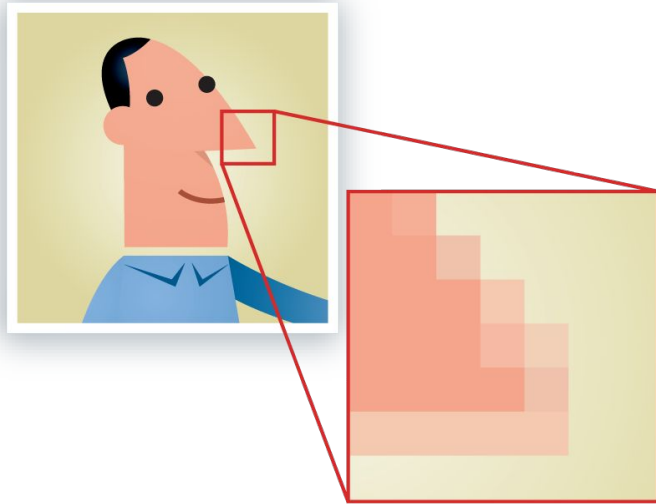
# How? | Color vs. grayscale



VS.



# How? | Resolution



Higher resolution

- More detail
- Larger file size

Lower resolution

- Less detail  
(more blurry)
- Smaller file size

**It depends!**

# How? | Resolution

Image at 300dpi 100%



Using the correct image resolutions will ensure you get the best from your images / print

Image at 72dpi 150%

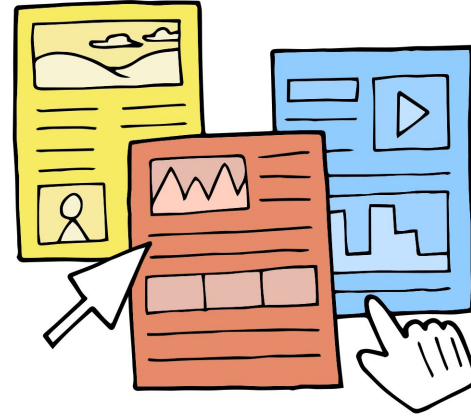


Don't ruin your design by using low quality or over scaled images they will look fuzzy

Due to screen reproduction this may look different to printed result

# Providing Access

- Social media
- Websites
- Blogs



# Considerations

## Legal issues

- Do you own the rights?
- What is the privacy policy of the chosen platform?
- Does the media to be shared contain sensitive information?
- Maintaining control?

## Discoverability

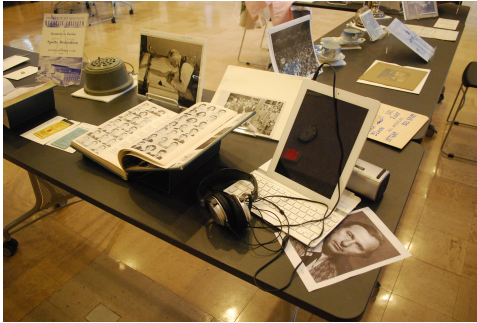
- Assign metadata
  - Names
  - Dates
  - Locations
  - Events
  - Subjects

# Outreach and Exhibits



# Types of Outreach: bring out the archives

## Open houses



## Events



## Identification or inventory parties



## Podcasts



# Types of Outreach: bring out the archives

## Celebrations



*Love's Not Here Yet* (182)

### MEN OF NOTE

Lexington's Big Band

A Tribute Concert

Celebrating the Men of Note Collections

Presented by the UK Jazz Ensemble and the UK Repertory Jazz Band

University of Kentucky Singletary Recital Hall  
March 31, 2016  
7:00 pm

**The Bands**

Men of Note was the Lexington area's largest contemporary performing big band, spanning the years 1951 to 2004. It began as a 17-piece repertory group of unaffiliated, part-time musicians with a Board of Directors comprising several faculty and the band's music director; the band was seasonally self-managing through the 1960s and 1990s. The band played dance band, jazz, and other genres of big band music at weddings, outdoor events, dinners, corporate and private parties, government organizations, street fairs, and more. A special member of the band, Steve Fink, worked on the band's identity, distinguished the band from other big band ensembles in the area. London's music director, band arranger and saxophonist, Dave Anderson and Steve Rosenow (1952-2009). The Men of Note Collection housed at UK Libraries will provide access to the music and history of this important organization for generations to come.

The University of Kentucky Jazz Ensemble under the direction of Alan Olszewski has received national attention for its performance at the International Association of Jazz Educators Conference and the Midwest International Band and Orchestra Clinic. UKJE has performed at the world's most prestigious jazz festivals in Europe, and recently returned from a tour of China. The UKJE has also been awarded the Outstanding Jazz Ensemble award at the annual Ohio State College Jazz Festival and multiple times at the Elizabethtown Jazz Festival.

The University of Kentucky Jazz Repertory Band under the direction of Brad Turner is a world-renowned ensemble that focuses on a wide range of jazz repertory literature. The group travels from across the region to perform at established sites and serves as a leading band for student musicians. The ensemble has been recognized as one of the best in the region and has performed at numerous jazz festivals and jazz camps.

Men of Note personnel photographs and more lyrics, 1950s. (Men of Note Library and Songbooks)

## Presentations



## Exhibits



# Exhibit pointers

- Storytelling
- Focus on visuals
- Many formats/ways
- Physical or online
- Originals or copies?



UK Libraries  
Special Collections Research Center

Home > Verse in Type

Search

Verse in Type

- Home
- Browse Items
- Browse Collections
- Browse Exhibits
- Map
- A Student's View of Campus Then & Now
- Sam T. Conkle Appalachian Collection
- Famous Authors in the Special Collections Research Center
- Henry Clay: Images of "The Great Compromiser"
- Margaret Lantz: A Lifetime of Research
- UK Women: Leaders in Time
- Verse in Type
- Neatline Time

This image visually represents "Verse in Type." On the left is the gallery tray containing George Ella Lyon's poem,

KENTUCKY  
Also known as  
RECORDINGS

The Lomax Kentucky Recordings  
A collaborative project that has been made possible by a grant from the  
Library of Congress and the University of Kentucky

- About the Project
- Listen to the Songs
- Discover the Artists
- Explore the Genres
- Browse by APC Collection
- Additional Resources
- Contribute to the Project
- Contact Us

Recently Added Items

- Raty Dorey
- Omie Wise (part 2)
- Omie Wise (part 1)
- Hark, the Voice of Jesus Crying (part 1)
- The Day Is Past and Gone (part 2)

View All Items

the PROJECT the LOMAXES  
the TECHNOLOGY the SONGS

<https://lomaxky.omeka.net/>

# Outreach funding sources

- **Local public:** (LFUCG Division of Grants and Special Planning, Community Development Block Grants, Community Action Council)
- **Local private:** (KY American Water, Lexmark, Beaux Arts Foundation)
- **National:** (Council on Library and Information Resources, Knight Foundation, National Endowment for the Humanities)

Lexington Public Library offers help with grants!



# Contact Us!

Ruth Bryan - [ruth.bryan@uky.edu](mailto:ruth.bryan@uky.edu)

Sarah Dorpinghaus - [sarah.dorpinghaus@uky.edu](mailto:sarah.dorpinghaus@uky.edu)

Reinette Jones - [rjones@uky.edu](mailto:rjones@uky.edu)

UK Libraries Special Collections Research Center

[libraries.uky.edu/ContactSCRC](https://libraries.uky.edu/ContactSCRC)



Libraries

*Special Collections Research Center*