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Managing Sustainability and Scalability with Successful Archival Projects: Two Lone Arranger, Dual-Role Archivist Case Studies

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Introduction

This article will describe two case studies from lone arranger archivists that demonstrate innovative ways for dual archivists/librarians to teach using collection materials while allowing students to develop technical skills and career-relevant experience. Presenting case study examples rather than more theoretical discussions can be particularly helpful to lone arrangers, as they provide concrete models that can be replicated at other institutions among a variety of departments and community partners. The archivists originally collaborated on a conference presentation outlining these two case studies in the fall of 2022, and the positive reception, feedback, and follow-up questions from audience members spurred the decision to expand the presentation into a full article.¹

In both cases, the archives were either not widely known to faculty on campus or were under-used by faculty, and the lone arranger, dual-role archivists were not always recognized as a teaching resource outside of their liaison librarian areas. Independent of each other, both lone arrangers recognized that building partnerships with faculty and students was a bridge to developing additional collections for their institutions. Both lone arrangers leveraged the possibilities of using traditional or existing library software and collection materials and used archival resources, skills, and technology not readily available to teaching faculty to facilitate these collaborative projects.

Literature Review

While the management of archives by lone professionals likely occurred alongside the development of the profession, the term “Lone Arranger” was first used by the Society of American Archivists (SAA) in the early 1980s as part of *Problems in Archives Kits (PAK)* training development tools.² The term describes a formally trained archivist as the only member of staff although it does not limit the existence of non-archivists or untrained staff. In the late 1990s and early 2000s increased prevalence and activity of these archivists led to the creation of a formalized Lone Arrangers section within the Society of American Archivists.³ The group facilitated communication among those that self-identified as lone archivist, lone arranger, and provided means of information sharing. The still very active section facilitates this through a variety of services including a section newsletter and active listserv, which is often used by archivists to impart practical professional knowledge to one another. In 2023, the Lone Arrangers Section included 788 active members.⁴ Lone Arrangers rely quite heavily on these informal

¹ Autumn M. Johnson and Ann E. Merryman, “You’ve Never Had it So(lo) Good: Managing Sustainability and Scalability with Successful Archival Collaborations,” (presentation at the 2022 Society of Georgia Archivists Annual Meetings, Jekyll Island, GA, October 26-28, 2022).

² Society of American Archivists, “Lone Arranger,” *Dictionary of Archives Terminology*, accessed January 23, 2023, <https://dictionary.archivists.org/entry/lone-arranger.html>.

³ Society of American Archivists, “Lone Arrangers Section,” *Society of American Archivists* accessed January 23, 2023, <https://www2.archivists.org/groups/lone-arrangers-section>.

⁴ Society of American Archivists, “Lone Arrangers Section:Members and Membership ,” *Society of American Archivists* accessed January 23, 2023, <https://www2.archivists.org/groups/lone-arrangers-section/members-and-membership>

vehicles of communication for practical advice addressing the complex and varied needs of this group that are comparably absent from the professional literature.

David W. Carmichael's *Organizing Archival Records: A Practical Method of Arrangement & Description for Small Archives* is one of the earliest attempts to provide practitioners a down-to-earth guide on processing functions for smaller archives. While the volume has served as a practical tool for lone arranger archivists across three editions, its intended audience is the non-professional and those with little to no formal training.⁵ Thus, much of the information Carmichael provides is foundational and does not go far enough to address the multiplicity of roles lone arrangers face. Professional contributions addressing the needs of "small archives" and "small repositories" like these are somewhat prevalent throughout the 2000s and typically address a singular aspect of archival work for non-professionals.

Professional literature addressing the various needs of professionally-trained Lone Arrangers is largely underrepresented. It was not until the mid to late 2000s that examinations of the Lone Arranger roles started appearing in the professional literature and even then with alarming infrequency. In one of the earliest attempts to provide such guidelines, lecturer and archivist assistant Susan Pevar offers the use of electronic tools as a way to curtail workloads in 2005's "Success as a Lone Arranger: Setting Priorities and Getting the Job Done."⁶ Although most archival processes have indeed been automated in these ways since, Pevar's observations that the need to set and identify priorities amidst copious and often competing tasks still resonates today. More recently, graduate student Lauren E. Murphree examined the management practices of Solo Archivists in their Master's paper, "Wrangling the Lone Arranger: The Management Practices of Solo Archivists." Murphree recognizes the need to identify the daily practices and responsibilities of lone arrangers and sets out to interview members of the SAA Lone Arrangers section. Murphree found most of the respondents to be formally trained and a part of educational (university/college) institutions.⁷ Significant discussion is given to the need to prioritize and how archivists, particularly those in University Libraries, balance complex workloads.

In 2012, Christine Zamon, Head of Archives and Special Collections at Emerson College was the first to attempt an in-depth examination of the vast and varying roles of Lone Arranger archivists in their book *The Lone Arranger Succeeding in a Small Repository*. Zamon provides an overview of all facets of archival work from Administration and Management to Collections Management to Programming from the perspective of a lone arranger archivist.⁸ Throughout, Zamon provides in-depth theoretical discussions alongside more practical case studies from over a dozen contributing lone arranger archivists. One of the contributors to these case studies is Alison Stankrauff, Campus Archivist and Associate Librarian at Indiana University South Bend, who provides insight on how they manage reference and outreach services as a lone arranger at their

⁵ David W. Carmichael, *Organizing Archival Records: A Practical Method of Arrangement & Description for Small Archives* (Walnut Creek, GA: Altamira Press, 2004) 2.

⁶ Susan Pevar, "Success as a Lone Arranger: Setting Priorities and Getting the Job Done," *Journal of Archival Organization* 3, no. 1 (2005), 51.

⁷ Lauren E. Murphree, "Wrangling the Lone Arranger: The Management Practices of Solo Archivists," (master's paper, University of North Carolina, 2018), 21.

⁸ Christine Zamon, *The Lone Arranger: Succeeding in a Small Repository* (Chicago: Society of American Archivists, 2012), v-vi.

institution. Almost a decade earlier, Stankrauff contributed a well-thought-out piece outlining the numerous duties and expectations of their lone arranger status as they entered the first year of work in that position.⁹ They offer an overview of the competing priorities faced during the year and the simultaneous challenges of being a tenure-track faculty member. What is somewhat minimized, however, is Stankrauff's duties as a librarian and instructor.

Only recently have studies examined the diverse responsibilities that lone arranger archivists and dual role archivists/librarians face, the focus of the case studies provided here. The common link between these studies is the challenge to professionals to find time to dedicate to their ever-growing list of responsibilities, and the even more limited time to dedicate to new projects - even when they are an explicit component of their job description. Manning and Silva's survey to identify dual archivist/librarians shed light on the prevalence of these positions as well as the diverse and often challenging roles professionals face in maintaining workloads.¹⁰ "Time" and time management were identified as the major and overwhelming challenges for those with dual responsibilities. Most respondents shared that they incurred too many responsibilities and lacked the support to achieve long-term goals and projects. Manning and Silva offer that consideration of how a dual archivist/librarian might manage duties and workload is certainly needed.

Even with these observations in place, it is difficult to identify how many of these Lone Arranger archivists simultaneously self-identify as a dual archivist/librarian. Significantly absent from the professional literature is a discussion of the prevalence of these types of archivists or the unique challenges they face. Certainly, a thorough examination is needed as are considerations of how these professionals might manage what is undoubtedly a heavy workload with many competing priorities.

Case Study 1: Supporting Special Collections Digital Exhibitions Using LibGuides CMS

Background

Georgia Southern University is a public R2 institution stretched over three campuses — the Statesboro Campus, the Armstrong Campus in Savannah, and the Liberty Campus in Hinesville with almost 27,000 students. The University is served by the Georgia Southern University Libraries composed of the Henderson Library on the Statesboro campus and the Lane Library and Learning Commons on the Armstrong campus. Henderson Library's Special Collections unit houses materials of permanent and historical value to the University and local community, with a collecting focus on the history of Southeast Georgia History and the Statesboro campus.

Henderson Library's Special Collections unit has been through several administrative changes over the past five years, most notably the relocation of the unit from a technical-oriented unit to a public one. Throughout the 2000s and early 2010s Special Collections patron interactions and opportunities for instruction using archival materials were minimal. Only a few courses each

⁹ Alison Stankrauff, "On Being a Loan Arranger" *Indiana Libraries* 27, no. 3 (2008): 23.

¹⁰ Mary Manning and Judy Silva, "Dual Archivist Librarians: Balancing the Benefits and Challenges of Diverse Responsibilities," *College & Research Libraries* 73, no. 2 (2012): 164.

year incorporated resources into the curriculum and these were overwhelmingly requested by the same faculty year-to-year. In 2018, the Special Collections Librarian position was moved under the purview of the Research Services department to increase instruction, outreach, and overall engagement with the campus community.

Even with this shift, Special Collections has remained staffed by a single tenure-track faculty librarian, a non-degreed library assistant as well as paid and unpaid student staff. The lone librarian and trained archivist also has a dual role as a research and instruction librarian serving as the direct library liaison to up to five programs. This dual role has resulted in increased partnership and collaboration with teaching faculty, especially those within the Department of History. The Department offers a Master of Arts in which students can pursue a concentration in Public History, attracting students with the desire to work in careers in museums, archives, or historic sites. Special Collections often employs students enrolled in this degree program.

Project Beginnings

As part of an effort to increase engagement with the University community, Special Collections pursued a quarterly rotation of physical exhibits using materials from the collection. These were often curated by the Special Collections Librarian with the assistance of undergraduate and graduate students. With the rise of COVID-19 and the need to accommodate social distancing best practices, Special Collections began to create robust digital counterparts using the University Libraries' LibGuides CMS as a platform. This allowed the Librarian to replicate physical exhibits while providing additional resources for visitors to explore on various topics.

LibGuides CMS provided a low-cost, scalable platform for professional and student staff of varying technical skills to create and share content. Special Collections interns began to use these successful digital exhibition LibGuides as the digital requirement component for their program of study. Because these projects directly involved the work and materials of Special Collections, the Special Collections Librarian provided direct support for training, editing, and maintenance. By 2021 graduate students not employed in Special Collections began to request the use of the platform for their digital capstone requirement.

Previously digital projects curated by graduate students were hosted on third-party sites including WordPress, Google Sites, and Weebly. Project sites were frequently not maintained after student graduation despite their presence on departmental websites. When available, there were often technical issues such as lack of accessibility and mobile functionality, but also issues of information literacy including lack of web attribution. Other digital content-creation was stored on fixed-storage media severely limiting access to the important history work, much of which fell under the Special Collections collecting scope. LibGuides CMS, however, posed an opportunity for students to use a platform that would provide ongoing access up to and following graduation and supports the long-term preservation and discoverability of their work. The platform has been used previously to host a range of faculty and student projects outside of Public History including an ongoing partnership with the Digital Humanities program. The Special Collections Librarian, in their dual role as liaison librarian to the Department of History, was willing to provide support for these projects and the graduate students who expressed interest from the Public History program. In total, five graduate students requested the use of the platform in Fall 2021. Each student had an existing relationship with Special Collections, either

having worked or been employed in the unit and/or having utilized Special Collections materials as part of their original research. Faculty advisors overwhelmingly demonstrated their support for using the platform. The Special Collections Librarian drafted the following roles and responsibilities statement and began conversations with the program director about the possibility of using the platform.

Special Collections Librarian (Facilitator)

Responsible for facilitating the use of the LibGuides platform. The Special Collections librarian schedules a training session with the students and faculty advisors that will provide them an overview of editing and publishing on the LibGuides platform. The librarian performs other functions coordinated with University Libraries departments, as appropriate, to facilitate the project. Special Collections Librarian offers guidance on web accessibility and information use.

Graduate Students (Content Creator)

Graduate Students are solely responsible for the content creation of their LibGuides and must ensure content is based on original research or credit appropriately. They must adhere to University and University Libraries standards including those of copyright and accessibility compliance. Graduate students wishing to utilize the LibGuides platform for their digital component requirement must first secure permission from their faculty advisor and then reach out to the Special Collections/Liaison librarian, a semester prior to utilizing the platform. Students will be required to attend at least one LibGuide training session with the Liaison Librarian in order to develop familiarity with the platform.

Non-Thesis Committee Chair (Faculty Advisor)

While Graduate students will be responsible for the content of the guide, the faculty advisor will be responsible for reviewing and approving all guide content ahead of information being made public and discoverable

Graduate Students were provided access by the Special Collections Librarian to one LibGuide per project to edit. The Special Collections Librarian remained the guide “owner” via the LibApps platform. (This ownership will not be discernible from the publically viewable LibGuide.) The Special Collections Librarian manually added graduate students and their faculty advisor to individual guides by creating new “Editor” accounts. Student editors retained editorial rights within the guide, but could not have the ability to add or remove editors or delete the guide entirely. This method of creating accounts had the benefit of ensuring that any new account holder’s access and permissions were strictly limited to the target guide. This also assured that neither the graduate student nor the faculty advisor would be able to edit library-maintained groups, guides, or assets. Each of these LibGuides was configured to include a “Tab Layout with No Header” to ensure independent branding from the overall University Libraries. However, a University Libraries and University History Department logo, in addition to any other collaborators, was required on the homepage.

The Special Collections Librarian working with the Graduate Student and Faculty advisor determined the appropriate publication status for each LibGuide throughout the lifecycle of the graduate student project. LibGuides regulates the searchability and visibility of guide content using one of three guide publication statuses: Published, Private, and Unpublished. Published guides appear in all guide lists, widgets, and search results, are available to external search engines, and are viewable by the public without authentication. Private guides do not appear in guide lists, widgets, or search results, are not available to external search engines, and are viewable by the public only by entering the guide URL into the browser. Unpublished guides do not appear in guide lists, widgets, or search results, are not available to external search engines, and are viewable only if the user is the owner or editor of the guide and is signed into the platform. As students approached graduation, the graduate student updated their account emails to a permanent address. Faculty advisors for whom a project had been established retained Editor access in perpetuity until support for this collaboration ended, ensuring the stability of the final project.

Project Expansion

With the Special Collections Librarian inundated with requests to use the platform, the Special Collections Librarian worked with the program coordinator and the chair of the department to carefully address the growing roles and responsibilities of each person involved. The Special Collections Librarian remained responsible for training students and faculty advisors on the platform and how to edit and publish their respective guides. The Special Collections Librarian also retained technical control of the platform, working with others in the University Libraries as technical needs required. Additionally, the Special Collections Librarian reviewed the work from a technical and information use perspective reviewing content web accessibility (ie. use of alt tags, headings, color contrast, etc.) and appropriate use of information. This latter responsibility grew significantly throughout the semester as the Special Collections Librarian frequently found graduate students improperly citing archival, primary sources, or sharing content without the express permission of the holding institution including their own. This involved one-on-one training with many of the graduate students on appropriate citation style guidelines for archival materials and repository practice.

By Spring 2022, awareness of the LibGuides platform as a viable tool to curate digital exhibitions began to garner attention from other faculty in the History Department. Two faculty teaching undergraduate courses had previously met with the Special Collections Librarian to integrate a hands-on experience with collections in their curriculum. By the start of the semester, both faculty requested the use of the LibGuides platform based on their immediate observation of the graduate projects. Both faculty subsequently scheduled library instruction sessions that included hands-on archival instruction and separate sessions for LibGuide platform training. Students enrolled in HIST 3030C: History of Mexico used the Latin America & Caribbean collection to curate a pop-up and digital exhibition. The semester-long project involved six hands-on sessions with the Special Collections Librarian culminating in *Mexico's Shifting Cultural Identity through Print Media* digital exhibition. Students enrolled in HIST 5138: The New South worked with the Special Collections librarian to research campus building history using various Special Collections resources. Their research also culminated in a digital exhibition on LibGuides, *Whose House? Building Names at Georgia Southern*. Both projects involved direct training on the LibGuides CMS platform and hands-on Special Collections research. Students also frequently requested one-on-one training on both and became truly invested in their coursework.

Project Results & Challenges

With the rapid adoption and growth of the LibGuides platform as a tool for digital exhibition curation, the Special Collections Librarian experienced many successes throughout the academic year- both expected and unexpected. The graduate students' projects and the undergraduate coursework actively involved the Special Collections unit in robust experiential learning activities. Students gained direct experience working with a technical content management system and the process deepened students' learning of archival collections and the archival profession overall. The process also deepened relationship-building with the graduate and undergraduate cohorts and raised the profile of Special Collections among the University community. Students actively participated during training sessions and often sought out the Special Collections Librarian for assistance with other projects and sought professional advice in their careeplanning.

Relationship-building, particularly between the Special Collections Librarian and graduate students, also resulted in collection-building. An indirect success of the project was the increase in the number of students interested in donating their related materials to Special Collections. Many students had accumulated original documents, artifacts, ephemera, and oral history interviews as part of their respective projects. Having developed a thorough understanding of the role and value of Special Collections, several students entrusted these materials to the care of the unit post-graduation. Many of these students had also pursued research topics that examined historically marginalized groups that are largely absent or underrepresented in collections. Not only did their donations increase the diversity and inclusivity of collections but digital projects became directed pathways to helping future researchers uncover more about these groups with existing collections.

The success of the endeavor was not without its challenges. The increased interest from graduate students and faculty resulted in a considerable amount of the Special Collections Librarian's time and attention being taken away from other duties. Students often had specific questions about technical tasks. Many requested additional training through one-on-one consultations or email exchanges. Reviewing student LibGuides was also time intensive and the Special Collections unit saw a dramatic increase in reproduction requests for materials as a result of engaging in a visually dynamic platform. Faculty advisors were also reluctant to pursue LibGuides training on their own.

Overall, the Special Collections Librarian felt facilitation of the platform was worthwhile and mutually beneficial for the Libraries and the History Department. Graduate and course-based projects garnered thousands of views in the first year and the librarian established strong relationships with students and teaching faculty. Although an unparalleled success, the projects represented an overwhelming time commitment on the part of the Special Collections Librarian. The Special Collections Librarian needed to consider whether the web-based projects or even the embedded partnership was viable for the long term. As a lone arranger, dual-role archivist the Special Collections librarian simply faced far too many competing priorities and programming goals of their own. How could this successful partnership be maintained? How could the Special Collections Librarian maintain the success and caliber of projects going forward?

Case Study 2: Breaking Down Silos at USC Upstate - University Archives and GERM 311, Introduction to Translation

Background

The University of South Carolina Upstate, founded in 1967, is part of the University of South Carolina system and one of the nation's top public regional institutions serving approximately 5,000 students. The library was housed in several different spaces during the first decade of the university's existence until the opening of the dedicated library building in 1977. However, the University Archives and Special Collections is a much newer unit within the University Library, formally established with the hiring of the university's first dedicated archivist in 2014.

Growing the profile of the archives has been a priority for the unit, and many challenges existed at the outset. Although small collections of materials from a variety of departments across campus had been deposited with the library during the previous 47 years, a formal process for collecting and ingesting the official documentary record of the university had not been established. Outside the library, few faculty and academic units were aware of the archives and there were no formal procedures in place for gathering historic materials from academic and administrative units. As a result, the collections in the University Archives are fairly limited and include mainly historical university records such as Faculty Governance records, student newspapers, and yearbooks. In general, the archives remained relatively unknown to the bulk of the campus faculty and departments, and interactions with the archives were sporadic.

The University Archives and Special Collections fits the description of a "lone arranger" situation, being staffed by a single tenured librarian holding a dual-role position as a reference

and instruction librarian directly liaising with the History and Political Science departments, as well as having university service responsibilities on a variety of standing and ad-hoc committees across campus. The unit also has one full-time non-degreed library assistant, and one part-time degreed archivist for 11 hours each week during the fall and spring semesters, but not during the summer. Despite these challenges, the archivist's participation on multiple university committees and liaison-area work has resulted in several developing partnerships between faculty and the archives in recent years.

Project Beginnings

One such partnership began in May 2019 between the Archives and Special Collections and a professor of German in the World Languages department. A private collector was looking to provide accessibility through translation to historic documents he had collected over the years. His WWII-era collection contains mainly German language Nazi propaganda in the form of magazines targeting youth and women, several letters written from prisoners at various concentration camps, as well as a collection of election ballots, and some materials detailing the seizure of financial assets by the Nazi party. Seeing this as a unique opportunity to use primary source German-language materials in their GERM 311 - Introduction to Translation course, faculty approached the archives with a request to help digitize the documents so that students could translate them, without realizing there was a broader opportunity for a digital collection to develop from the course project.

During initial discussions with faculty and the collector, the archivist suggested creating a full digital collection from the translated materials and their accompanying images that could be included in the South Carolina Digital Library (SCDL), where it would be openly and freely accessible to scholars everywhere. This would be the first digital collection created in full by the archivist, so the advice and support of colleagues at nearby institutions as well as at the SCDL were instrumental in the development and execution of the project. The resulting collaboration incorporated elements of both high-impact practices (HIP) and service learning, both of which directly support the mission of the university.

The lead time for developing the revised syllabus was short, as the course was scheduled for the fall semester of 2019. Initial planning meetings during the summer focused on setting archival expectations for content and explaining the technical process of building the digital collection. A temporary loan agreement was executed between the collector and the University Library so that items could be digitized in-house according to SCDL standards. The archivist also developed and shared with the collector a very simple processing work plan and inventory list for the project to set expectations, decided on a file-naming structure, and scanned 234 items as both TIF and JPG files. While the physical collection remained the property of the collector, the Archives was given the rights to publicly display the digitized materials and accompanying translations. Once the semester began, Archives and Special Collections provided archival guidelines to the students, while translation content and processes were overseen by the teaching faculty.

As the first large digital project undertaken in-house, it was inevitable that several issues cropped up during the project that the archivist discovered only after receiving the translated materials

back at the end of the semester, impacting the time needed to prepare the documents for uploading into the SCDL. The largest issue was inconsistent document formatting used by students to prepare their translations in Word. The translations were formatted using shapes, colors, orientation changes (e.g. some text shown upside down on the Word document), and other textual elements to closely mimic what was depicted on the original document. While the students were given instructions to use Word, the archivist's inexperience with CONTENTdm meant that additional time had to be invested in cleaning up and reformatting the submitted Word documents to eliminate these elements, and then converting them into the plain text files that CONTENTdm could ingest. Another issue the archivist didn't anticipate involved file names; students altered many file names for images as well as translations, appending various information such as their names or dates translated. This required the archivist to invest a significant amount of time untangling and matching up the correct file with the original file name. These two significant obstacles resulted in the development of a draft document to improve the training process for any future digital collection partnerships.

After the translations were completed in December 2019, the archivist began working on the metadata and translation document files in preparation for uploading the finished collection to SCDL. However, the COVID-19 pandemic resulted in the shutdown of the university on March 16, 2020, and further work on the collection was delayed until the archivist was able to return to the library in June 2020, although the university remained closed and all classes remained online.

Project Expansion

In late May 2020, the faculty partner was contacted by another family in possession of a significant amount of German-language correspondence from their grandfather, Samuel Finkel, during and after World War II. The documents cover Samuel's imprisonment by the Nazis, and his deportation to England and later to Australia on the HMT Dunera as one of the 'Dunera Boys'. They also document Samuel's reunification with his daughter Phyllis, who came to the United States on March 20, 1940, as an unaccompanied minor and part of the One Thousand Children rescue, along with his search for information about his wife Laura who was unable to leave Vienna and was ultimately killed by the Nazis at the Maly Trostenets extermination camp in Belarus.

Presented with the opportunity to develop a second digital collection and provide another student cohort with real-world translation opportunities, the archivist and faculty member decided to move ahead with the second project, even though the Lephew collection had not yet been completed and placed online. This time, however, there was adequate lead time to prepare the materials for translation as the translation course would not be taught again until the fall of 2021. The archivist was able to develop some simple transcription training materials and guides for the students to use based on the experience gained from the Lephew collection. However, the additional time available didn't mean that there were no new challenges for the archives. In practical terms, the expanded timeline allowed other labor-intensive projects to take precedence over completing the original Lephew collection. Some of these projects were unrelated to archives-specific duties, such as large-scale library renovations that necessitated a move out of the building for eight months, and an NEH Landmarks of American History and Culture grant

that the archivist was developing in partnership with a team of teaching faculty. This meant that the lone arranger was managing at least three labor- and time-intensive projects simultaneously. It was not until the summer of 2021 that the Lephew collection was finished and uploaded to the SCDL.

Project Results and Challenges

As with most projects, there were positive results as well as challenges. One positive result was the realization that opportunities to create high-impact practices (HIP) are often more readily available when silos are broken down and collaboration between the archives and teaching units is pursued. The work of foreign-language translation using historical documents deepened students' understanding of the events being referenced in the materials, providing them with a multi-disciplinary learning experience. The success of this project was shared with the campus community, raising faculty awareness of the archives and the possibilities for future collaborative projects.

However, there were significant challenges as well, primarily stemming from the archivists' inexperience with digital projects. The largest of these challenges was the underestimation of the workload when preparing dual-language metadata, which added layer of complexity to an already labor-intensive process. Because the archivist did not speak or read German, ensuring that the information entered into several of the fields was spelled correctly took a lot of time and necessitated the work being done in small chunks. Additionally, the Brad Lephew WWII translation project was very ambitious, as there were only six students in the course. Neither the archivist nor the faculty member were able to estimate the amount of time it would take for students to complete the translations, as no project of this type had previously been attempted. At the end of the fall 2019 semester, two identity documents and one magazine remained untranslated; discussions in the spring of 2023 are underway to create an independent study opportunity for a student to complete the remaining documents and add them to the existing collection.

The collector was able to facilitate \$1000 scholarships for each student in the course through Dell Technologies (where he worked), further supporting the work of the students. It was a significant development, with the students being treated similarly to professional translators because of this unexpected compensation. Students involved in the project gained valuable experience that they were able to add to their resumes.

What made the partnership between the Archives and faculty significant was the hands-on training as a translator that the course provided. Students created content for a digital collection with significant historic and research value that they could include on their resume, providing potential employers with an online sample of their work. Ultimately, the collaboration between teaching faculty and the archives was a successful example for the entire campus and has led to additional inquiries from other faculty members interested in generating digital content from their courses.

Discussion

Despite the obvious differences between the two projects described, the lone arranger, dual-role archivists contributing to this article found more commonalities between their two experiences than not. Both experienced unprecedented success working with students and faculty in an experiential learning environment. The successful projects also created an atmosphere of excitement at their respective institutions leading to inquiries from University and community partners into expanding original projects or adapting to new ones. Rather than celebrating those successes, however, the lone arrangers found these requests to replicate aspects of their projects increasingly burdensome. Both considered the viability of continuing such projects despite their success and the increased awareness that they had brought to their respective institutions. In conversation with one another, both lone arrangers determined that considerations of scalability and sustainability were of the utmost concern. How can projects be scaled so that they can be manageable for the lone arranger? What were the long-term plans to ensure their success? The following sections will look more deeply at these questions and share some of the insights the lone arrangers have gained from these projects and experiences.

Scalability

When requests are made to replicate, adapt, or expand existing projects, evaluating the feasibility and scalability of the project is critical to their eventual success or failure. However, this evaluation should include a realistic and honest review of the time and resources available, both of which are too often in very short supply for lone arrangers, and being objective in this evaluation can be incredibly challenging. In an environment where lone arrangers, particularly those holding dual roles, are continually faced with having to demonstrate value to their institutions, the tendency to say yes to every project is palpable. Both authors have experienced this reality as their own projects have grown and word has spread among their respective faculty that project collaborations with the archives and special collections are possible.

Considerations of scalability would allow for requests for similarly-sized projects to be evaluated fairly quickly, particularly for those projects using the same or similar framework and producing the same end product. However, for those faculty interested in developing larger projects, even if they are using the same framework, this evaluation of scalability is significantly more important. A careful review will determine the amount of time that the lone arranger librarian could devote to the project, in the larger scheme of their other responsibilities. The possibility of collaboration with additional faculty, students, or other stakeholders could also impact the scalability of a project.

However, sometimes scaling up a popular project is simply not manageable. Therefore, scalability with sustainability in mind is essential to the success of projects. It can be easy for lone arrangers to be “married to the process” resulting from one successful project, but that success does not always translate to the next iteration or evolution, or another seemingly similar project, particularly when considering whether to take on new or continuing projects. With each iteration or new project, devoting time to careful evaluation and self-reflection needs to take place. The enthusiasm and vigor of successfully completing collaborative teaching projects like

this that have garnered the respect and interest of colleagues can lead to optimism bias, the optimistic tendency to think one can take on far more than is reasonable. Lone arrangers should guard against this as collaborative projects naturally evolve.

Sustainability

In addition to an evaluation of scalability, lone arrangers should also consider the sustainability of any new or continuing project request. As with scalability, available resources in the form of personnel and technology have a significant impact on the sustainability of collaborative projects. Collaboration remains a key factor in the success and sustainability of lone arranger project management. Working with others, including faculty and other information professionals with technical expertise, strengthens not only the project but student outcomes and experiences which is a critical piece in the retention puzzle facing institutions of higher learning.

What may get overlooked in this consideration, however, is the reality that often people are more critical to the long-term sustainability of projects than technology. Institutional memory, technical expertise, and collaborative leadership can all disappear when faculty, departmental partners, or even the archivists themselves move on, leaving the future of in-process projects in jeopardy as well as impacting the longevity and accessibility of completed and published projects. In some cases, sunsetting successful and popular projects may be the most viable option given time, resources, and personnel changes and does not indicate failure on the part of the lone arranger archivist.

Assessment

Achieving scalability and sustainability requires the third leg of the proverbial three-legged stool: assessment. First, lone arrangers must make a clear effort to evaluate the skills and abilities of project partners and consider where archival or information expertise is most needed. Being intentional about assessing project success is imperative. Taking time to evaluate the skills and abilities of project partners immediately post-project, but ideally during the project, is an effective way to determine what actionable steps should be designated to which group. Self-reflecting on what worked and what didn't work at each stage of the project and documenting these reflections is another possible way to effectively assess outcomes. Months or years can pass before an additional iteration of a project can pop up as was the case with the COVID-19 pandemic, and having accurate details of various phases will improve future projects.

Being thoughtful about accepting projects is a critical part of the assessment as well. Consider the lone arranger role in projects: what are the aspects of a project that most require information expertise? Which aspects are simply the fun or 'shiny things' that most captivate an individual's imagination and interest? Creating a balance between the two as a project partner will not only bolster the future success of the project, but will also enhance the dual archivist/librarian's enjoyment of the experience and affect their willingness to undertake future projects.

Conclusion

Lone arrangers are a subset of the larger professional archival community and rely heavily on peer connections across the country for support, encouragement, and answers to the myriad daily complexities that all archivists face. In some ways, the authors may have benefited from the COVID-19 pandemic which accelerated their opportunities for connecting with faculty and students outside of traditional, teaching silos. While discussing their shared experiences, the authors realized that specific, practical, boots-on-the-ground solutions in support of scalability, sustainability, and assessment rather than discussions of theoretical underpinnings are needed to complete these types of outsized, collaborative projects. The following suggestions have been gathered from ongoing discussions between the authors, and provide a good starting point for other lone arranger or dual-role archivists embarking on similar projects.

One of the most important suggestions for faculty and students interested in creating content and/or using a particular platform is to reach out to the archivist a minimum of one semester prior to the intended start of their project. By starting earlier, this will allow lone arrangers adequate time to assess the viability of the partnership based on their existing workload, and provide an opportunity to look for additional project support if needed. It also allows space to say “no” to projects that simply can not be accommodated at that time, in such a way that preserves the rapport and goodwill between faculty colleagues and the archives.

Another practical suggestion is to clearly document roles, responsibilities, and expectations before beginning a project, and share copies of this documentation with all contributors and partners. Provide detailed content checklists and guides, and allot time at the beginning of a project to train contributors. Lone arrangers should work with teaching faculty to schedule all necessary training ahead of the project semester if possible. Group training should be scheduled at the discretion of the archivist and should ideally be offered in the first weeks of the semester, to ensure students and faculty have ample time to seek help from the archivist. Ensure all project partners have set aside dedicated time during the project timeline to provide additional support to contributors, whether through one-on-one appointments and office hours or in group / classroom settings. Finally, the lone arranger should take care to consider the project deadlines in light of competing priorities and other job responsibilities.

Gathering feedback from students and faculty in the form of summative assessments can also provide valuable insight into the experience, as archivist perceptions might differ considerably from other stakeholders. Incorporating the experience of other project partners might also help lone arrangers identify where attention and expertise is best spent. Capture available analytics and distribute survey instruments to students and/or faculty after project completion to gauge learning and satisfaction.

Much like the rest of the country, hiring trends at both authors’ institutions have resulted in more work and more projects happening, without the benefit of additional personnel. Additionally, there has been an increasing need to show the value of archives to University Administration and other stakeholders. By developing these types of collaborative projects, lone arrangers and dual-role archivists can tie into the larger mission of many universities by allowing students the

opportunity to participate in service learning, community engagement, and other high-impact practices (HIP), benefitting student engagement, GPAs, and retention goals that are increasingly in the spotlight. Ultimately lone arrangers and dual-role archivists should remember that they are information experts, and continue to look for partnerships and ways to advocate for ourselves, our departments, and our collections.

Appendix A - Project Resources

Supporting Special Collections Digital Exhibitions Using LibGuides CMS

- African Americans in Burke County, Georgia: 1800-1865 presented by Torrey Long
<https://georgiasouthern.libguides.com/AfricanAmericansinBurkeCounty>
- Jim Crow in Savannah's Parks in the 20th Century presented by Jeffrey M. Ofgang
<https://georgiasouthern.libguides.com/savannahparks>
- More than Meets the Eye presented by Alyssa Watrous
<https://georgiasouthern.libguides.com/morethanmeetstheeye>
- Something Southern: A History of Mules in South Georgia presented by Tyler Hendrix
<https://georgiasouthern.libguides.com/somethingsouthern>
- Tracing Mexico's Shifting Cultural Identity through Print Media presented by HIST 3030: History of Mexico
<https://georgiasouthern.libguides.com/tracingmexico>
- Whose House? Building Names at Georgia Southern presented by HIST 5138: The New South
<https://georgiasouthern.libguides.com/whosehouse>

Breaking Down Silos at USC Upstate - University Archives and GERM 311, Introduction to Translation

- Brad Lephew WWII Collection
<https://scmemory.org/collection/brad-lephew-wwii-collection/#page-content>

Translator Guidelines for the Samuel Finkel Collection digital files – Fall 2021, Dr. Alex Lorenz

- Please save all translation files as Word (.doc or .docx) documents.
- Do NOT alter the file names in any way from the .jpg file names
 - I will be able to tell what the file is (e.g. translation) from the file extension when it is saved
- Do not insert the translator's name into the file name; simply add the translator's identifying information and date of translation at the bottom of the document, in square brackets (e.g. [Translation by **student(s) name(s)**, on **date**])
- “recto” = FRONT side of document, “verso” = BACK side of document; documents on a single sheet of paper with writing on both sides are named in this way.
- Multi-page letters (of **more than 1** sheet of paper) are numbered as p1, p2, p3, etc. In some instances, one image will include p1 and p4, and the second image will include p2 and p3.
 - When creating your translation documents for these types of letters, CLEARLY indicate in the translation text when you shift to the next page of the letter by indicating **[begin p2]** or **[begin p3]** when two pages of a letter are included in the same image.
- Files have been named for the person who WROTE the letter, not for the recipient

If you have any questions about any of these guidelines, please don't hesitate to contact me.
Thanks!

Ann Merryman, Coordinator of Archives and Special Collections

merrymaa@uscupstate.edu

Office – LIB 263



USC Upstate Library - Archives and Special
 Collections
 800 University Way
 Spartanburg SC 29303
 864-503-5648

Permission to Display Online

I, _____, grant my permission for the University of South Carolina Upstate Archives and Special Collections to display digital images of items from the _____ on the internet for use by researchers. In granting this permission, my intent is not to surrender my intellectual property rights to materials in the collection, but to promote scholarship by providing digital images for personal study and educational uses. The Archives may also use digitized items for non-commercial publicity purposes.

Copyright Interests *(Please initial one option only)*

- I own the copyright to the loaned material as the creator / author.
- I own the copyright to this material through an estate / will transfer.
- I do NOT own the copyright to this material and do not know who does.
- I do NOT own the copyright to this material. The copyright is held by the following:

Name of Copyright Holder

(PRINT): _____

Contact Info: _____

Signature

Date

PROCESSING WORK PLAN AND INVENTORY LIST - 2019

Collection Title: Brad Lephew WWII Collection

Collection note:

- Items are on temporary loan from Brad Lephew, a collector of WWII memorabilia from Mooresville, NC. Chain of custody = Brad Lephew (collection owner) to Dr. Alex Lorenz (professor of German, USC Upstate) on **[date here]**; Alex Lorenz to Ann Merryman, Coordinator of Archives and Special Collections at USC Upstate on **6/12/2019**, specifically to digitize the items for 1) use in Dr. Lorenz' German Language Translation course, Fall 2019 and 2) to create an online digital collection to be hosted on USC Upstate's South Carolina Digital Library page.

Estimated time to complete the digitization project:

- 6 weeks (return physical items to Dr. Lorenz by August 1, 2019; items returned to Brad Lephew by August 12, 2019 or other mutually agreed upon date)

INVENTORY LIST

Magazines (3 total):

- kriegsbücherei der deutschen jugend, heft 11 [War Library of the German Youth, issue 11]
- N.S. Frauen-Warte, heft 22 [N.S. Woman Waiting, issue 22] - die einzige parteiamtliche frauenzeitschrift [the only party women's magazine] - Jahrgang 1935/36 [Vintage 1935/36]
- Illustrierte Zeitung Leipzig [Illustrated newspaper Leipzig] – April 1943

Military Records (Max Panzer, medic – 2 total):

- Personalausweis [identity card] – tan cover, with two small holes and the Nazi swastika removed from the Reichsadler [Imperial Eagle] insignia
- Wehrpass [defense right; ***note: as best I can tell, the last letter in the title is the sz diagraph or long s and tailed z ligature, which I researched as being the equivalent of the letter "ss". When typed into a translation site, the word translated to "defense right" which I don't understand the meaning of in this context. Please let me know if this is incorrect! ☺ ***] – gray cover, with a red ink-stamped "heer" [army] at the bottom, Reichsadler [Imperial Eagle] insignia intact with swastika; inside front cover pocket are 1 dog tag, 3 small photos, a document for "shrenkreuz für frontkämpfer" [Shrine cross for front fighter] on September 30, 1935 by Reich President Generalfeldmarschall von Hindenburg, and one document listing among other things education "ausbildung laut eigenen Angaben" [education according to own data]

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