Overview Video Transcript

Welcome to the CDSS Archiving Toolkit! We're the authors of these materials. I'm Susan Creighton. I'm a professional archivist, and also a Morris dancer of many years.

> And I'm Pat MacPherson. I'm a retired book editor and oral historian for the Country Dance and Song Society–also known as CDSS–and a long-time English, contra, and Scottish dancer and musician. We're really excited to be able to share these materials with you.

These materials grew out of a project that began in 2021 at the request of the organizing committee of an annual festival, the Marlboro Morris Ale. With the approach of its 50th anniversary in 2025, the committee wanted to find a way to create an archive of the festival over its 50 years. CDSS agreed to financially support the project if we could also create a set of resources that would enable other dance and music organizations to replicate the process of archiving their own materials. The festival's collection is now complete and available, and the toolkit of resources for CDSS begins with what you see in front of you. This, and all the other materials, are free and available on the CDSS website.

We field tested these materials with four different folk dance groups–Morris dance teams, in particular–and we'd like to thank them for their many hours of review, feedback and conversation to help us improve these materials. A huge thanks goes to Dan and Jane of Sound and Fury Morris in Seattle, Washington; to David, Temple, Larry, and Hassan and the other members of Minnesota Traditional Morris in the Minneapolis / St. Paul area; to Hara of Ring 'o Bells Morris in New York City; and to Bill, Jan and the other members of Kingsessing Morris in Philadelphia.

These materials can serve several different purposes. If you're part of a dance organization that has been performing dances done by your grandparents or great-grandparents and want to make sure that these dances are not lost, you can use these materials to help you figure out how to preserve that repertoire.

Or you may be part of a performing group that has a number of older members and perhaps a crop of newer, younger members. As the older members are aging out of the group, you may want to make sure that what is distinctive about your group is not lost; these materials can help you preserve stories, pictures and information to share with the younger members about the group's history.

You may be the person on your Morris dance team who has been the keeper of team history for a long time and has it all stored in your closet at home. These materials can help you make it

easier for other team members to look through that material without having to go to your house and search through the bags and boxes that are there.

Or perhaps your folk song organization has collected a large repertoire of a certain genre of songs. These materials can help you make it available to others who are interested in this same genre, and who might carry on the collection and performance of these songs.

We have designed these resources to be both informative and manageable. There are six chapters with videos and supporting documents that walk you through the process of creating an archival collection of your organization's history.

We've also tried to give you the information you need without getting too bogged down in some of the more esoteric aspects of archiving material. That said, if you have someone in your organization who has experience with archives, museums, or libraries, by all means get them on board with this project, as they will be an invaluable asset. But regardless of whether you have that person or those people, we're here to guide you through the process.

We have also designed these resources with some basic assumptions about what you are creating:

- First, we're assuming that you want your collection to survive in perpetuity, or at least for a VERY long time.

- We're assuming that you will be making your collection available to the public. This can mean simply to members of your own organization, or to the broader general public. We'll talk more about what this means in Chapter 1.

- Because you'll be making your collection available to the public, we're also assuming that people are welcome to look at the materials in your collection, either in person or online, however you make them available (as long as you have permission from the donor to make them publicly available), and that in order to protect the integrity and condition of the materials in your collection, people cannot "check out" the material to take home with them. The materials stay with the collection. We're also assuming that material donated to your collection is considered a permanent gift to the collection, not a loan. And finally, we're assuming that if you make a digital copy of something physical, like a document or a photograph, you do not discard the original. You'll be keeping originals as a safeguard to anything happening to any of your digital files.

We'll be discussing how each of these assumptions affects your choices in the next chapter.

Next, there are several things we'd like to say about how to use this toolkit:

First, we have divided the toolkit into six "chapters" that each focus on one part of the overall process. It's important to go through these chapters in order, since each one assumes you have the information from all the preceding chapters. In particular, Chapter 1 outlines a number of important questions for you to think about in order to be successful with your archiving project, so start there!

Chapters 2-5 will include three or four videos each: an introduction to the chapter, some background information you need to know, and a guide to the concrete steps you need to take for that part of the process, outlined in the spreadsheet we provide for you. If you go through the videos in that order, you'll be in great shape.

In addition to the videos, each chapter will include an accompanying PDF document. The PDF will include a transcript of the video, as well as summaries of key information from the video. It may also include checklists, reference sheets, or other tools to use as you implement the steps of that part of the archiving process.

We've written this toolkit in response to working with the annual festival–the Marlboro Morris Ale–and the examples we give throughout will reflect this focus on ritual dance. However, these materials are adaptable to small groups and large organizations and can be used in different contexts–whether you have a song circle, a rapper team, or a long-running dance series.

Now let's take a look at the steps of creating an archival collection:

We'll use this graphic throughout the chapters to both illustrate the process, and as a kind of roadmap, to help you see where you are in the process. Here, we'll use it to give you a big-picture preview of what the entire process will look like. (See diagram on next page.)

In Chapter 1, "Planning for Your Archival Collection", we'll talk about setting your intentions about creating an archive, establishing goals, assembling your team, and setting a realistic timeline. We'll also talk about common misconceptions about archives and archival collections. We'll then walk you through a series of important planning questions that will help set the direction of your particular archiving project.

Chapter 2: "Setting Up a System to Receive Donations" is about donations of material for your archival collection and is for those of you who will be collecting your archival material or adding to what you already have. We should clarify that as we use the words "donation" or "donor" throughout these resources, we mean donations of material to the archival collection and the people that give you that material, not financial donations or donors.

In this chapter, you'll be talking to people about donating photos, slides and videos, memorabilia, dance kits or costumes, and whatever else you'll want to include in your collection–something that you will decide in Chapter 1. We'll also talk about what your donors need to know as they donate material to you. We'll go over what to say to your donors, and how to have those conversations. We'll also go over how to set up your system for keeping track of all the various material donations to your collection that you take in, and we'll introduce a spreadsheet designed to help you keep track of everything you receive, and more.

Many organizations want to capture the fun stories or the personal memories that people have to share about the history of the organization, its activities, or their own experiences. If you're planning to do that as part of your collection, you will be recording conversations with various people who have some part of that story to tell. So, in Chapter 3: "Recording Conversations", we'll talk about recorded conversations as a special type of donation to your archival collection,

about ways to do that successfully, and then how to store the resulting audio, video, or image files.

In Chapter 4: "Organizing Your Collection", we'll talk about how to make things easy to find in your collection–easy for you, and easy for whoever is using your collection. To do that, we'll draw on professional archival practices to offer some guidelines about effective ways to organize the materials.

In Chapter 5: "Making Your Collection Searchable", we'll talk about how to accurately and sufficiently label the material, so your collection is easy to search. The list of searchable information can be as short or long as you want, so we'll guide you through your decisions about what information to provide to your users as well as how and where to provide them with that information.

We'll also provide some guidelines on the different ways you can make your collection available to your community. In Chapter 1, you will have made some decisions about where you want your collection to eventually live: a team website? a local historical society? a local college or university? In Chapter 5, we'll also talk about the steps that go with any of these decisions.

Once your collection is complete, and you've got it stored with a member of your organization, posted online somewhere or donated to another organization for safekeeping, you can congratulate yourself for a job well done, right? Yes, you certainly can! However, even though you've reached an important milestone, there is a little more to do in the future so that your collection remains available to those who want to use it. In Chapter 6: "Caring for Your Collection", we'll go over what to do for your collection once it's complete.

So, now you're ready to dive in and get started. In Chapter 1, there will be just one video to watch with some planning questions and exercises to do, to plan with your team. Find the Chapter 1 video and start there to begin your own archiving project!