

CDSS Archiving Toolkit

Chapter 6 Resources

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Chapter 6.1 Video Transcript

Intro:

CARING FOR YOUR COLLECTION

Welcome to Chapter Six: Caring for Your Collection. In this last chapter of your toolkit, we'll talk about what you need to do to care for your collection, once it's completed and available for people to use. Way back in Chapter 1, when you were thinking about planning decisions for your collection, we talked about several decisions regarding the future of your collection: whether it would be open—and you would keep adding to it over time—or closed—and you would consider the collection completed. We also talked about who would care for your collection (if anyone), and how you would cover any costs of maintaining the collection.

In that first chapter, we laid out three options for you to consider, and then described the tasks that need to happen to care for your collection, to help you choose which option was right for you:

- 1) To keep the collection within your organization and designate a person or committee to care for the materials going forward;
- 2) To try to donate your collection to an archival organization that can care for it on your behalf; or
- 3) To do nothing and let the collection just exist.

Now that you've completed your collection or at least have it underway, you have a better sense of what's in your collection and how it's going to take shape. So, now it's time to go back and review those tasks that are involved in caring for the collection going forward.

In this final chapter, there is only one video for you to work your way through: **What You Need to Know: Caring for Your Collection**. Once you've done so, you have completed all the chapters in this Toolkit. Congratulations!

So, let's begin.

Chapter 6.2 Video Transcript

What You Need to Know:

CARING FOR YOUR COLLECTION

Once the collection is created, the bulk of your work is done! However, it's not over. In this chapter, we'll review the remaining tasks and talk in a little more depth about what's involved in each one.

We've laid out three possible paths forward for you:

- 1) To keep the collection within your organization, and designate a person or committee to care for the materials going forward;
- 2) To try to donate your collection to an archival organization that can care for it on your behalf;
- 3) To do nothing and let the collection just exist.

If you've chosen Option 2—to donate your collection to an archival organization, such as an archive at a university or college library, a local library, or a state or national folklore organization—it's unnecessary to spell out a caretaker's steps; your archival organization will already have that in place. One thing you can do to make that easier for them is to make sure all your digital files as well as physical paper files are named in a way that communicates what they are (for instance, no file names that are incomprehensible to someone outside your organization), and to organize them into well-labeled folders. Any information you can give them about the context for other parts of your collection will also be very welcome. Then this is a good time to reach out to that organization to let them know you're nearing the time when you'll be ready to hand over the collection to them. They can guide you on whatever next steps they need on their end to receive your collection. But if not, and you're planning to care for the collection within your own organization, the rest of this video will be relevant for you.

Let's consider Option 3 for a moment: do nothing and just let the collection exist. For some organizations, you may decide at this point that this is all you need. For example, perhaps you are on a Morris team; one of your members has been collecting material over several decades and enjoys being the collector of that history. They've kept the material in a closet in their house, and the team knows that this is where it all lives and can access it when needed. If someone is seeking a particular item, people are content to just search through what's there. Once that person decides it's time to clean out their closets, they can simply pass it on to a next team member who is willing to store the materials at their house. This can be perfectly satisfactory for some situations. However, one caution we'll offer in this case is how to protect

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against losing the materials in the terrible instance that there is a fire or storm damage in that person's house. There is the risk without adequate protection that the collection could be lost entirely. At the very least in this case, please consider digitizing some of your material and making back-up copies where it makes sense.

And what happens when the time comes to pass on the materials to someone else in your organization to store in *their* home? To help them know what to do, we've created a brief bullet list of Tips for Storing Your Collection that you can share with them, just to give them some basic guidance on what to do as they take over the care of your organization's collection. You'll find that in the Resources PDF for this chapter.

For the rest of this video, we'll discuss Option 1—designating a person or small group of people to be caretakers of your collection. We'll go over a list of possible responsibilities you could designate for that person or people, and you can decide what makes sense for your situation.

The first task we'll describe is something you do before you make the collection available to your users:

Determine what kind of guidance you want to provide to users of your collection.

You'll need to have some kind of information about the collection to share with users of your collection, and this can mean anything from a brief verbal description to a thorough, cross-referenced index of everything in your collection. We're going to recommend a happy medium with two key pieces of information for your users.

#1: It's useful to create a descriptive paragraph that just provides an overview of your collection.

You can use this on your website, in any written communication to people about this collection, or just when talking with people. We found that writing up this paragraph was a good way to help us clarify how we wanted to describe the collection to others, and how to do so succinctly. Here's an example using our Marlboro (VT) Morris Ale collection; you can pause here to read it. The key parts of our description are to start with a couple of sentences describing what the collection is about, then what kinds of material are in the collection. Finally, we include some brief information about where the materials can be found.

We've also provided the text of this example and the others that follow here in the Resources PDF for Chapter 6.

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The Marlboro Morris Ale collection documents the first 50 years of the annual Marlboro (VT) Morris Ale, first held in 1976. This event, held on Memorial Day weekend each May, brings together hundreds of Morris and sword dancers from North America and Great Britain to dance together and to tour the surrounding towns in southern Vermont. The collection consists of both physical and digital photos, slides, and video; recorded interviews with transcripts; Ale organizational and administrative materials; written essays and correspondence; ephemera; and posters, flyers, and printed programs. Approximately 90% of the collection is digitized, and available on the Marlboro Ale website. The physical parts of the collection as well as master files of all digital files are housed with the Vermont Folklife Center in Burlington, Vermont.

Here's another example from the University of Massachusetts at Amherst's Special Collections Department. Notice that the description starts with a couple sentences describing what the collection is about, then what kinds of material are in the collection.

The New Song Library Collection

Founded by Johanna Halbeisen in 1974, the New Song Library was a collaborative resource for sharing music with performers, teachers and community activists, who in turn shared with a wide variety of audiences. Based initially in Boston, the Library was devoted to the music of social change and particularly music that reflected the lives and aspirations of workers, women and men, elders and young people, gays and lesbians, other minorities, and Third World people.

This collection contains over forty years of organizational and operational records of the New Song Library along with hundreds of sound recordings, primarily audiocassettes made at concerts, music festivals, song swaps, and gatherings of the People's Music Network. The Library also collected newsletters and magazines on folk music, and most importantly dozens of privately produced songbooks and song indexes.

<http://scua.library.umass.edu/?s=folk+song>

Here's a final example from the National Nordic Museum in Seattle, Washington. This description of the Gordon Ekvall Tracie Music Collection again starts with information describing what the collection is about, then what kinds of materials are in the collection.

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The core of the Gordon Ekvall Tracie Music Collection is material collected by Gordon Tracie from the 1940s through the late 1980s — audio and video recordings as well as written documentation of Scandinavian folk and traditional music, dance, costumes, customs, folklore, and folk art.

The collection includes more than 500 original reel-to-reel field recordings made by Tracie during his numerous research trips to the Scandinavian countries. In addition, the Tracie Music Collection currently holds audio and video recordings in numerous formats, as well as photos, posters, sheet music, dance notations, periodical collections and nearly 2,000 texts and written works. Materials include writings by Gordon Tracie related to his extensive production of dance descriptions and articles on dance and music.

<https://nordicmuseum.org/collections/gordon-ekvall-tracie-music-collection>

#2: You'll also want to share some kind of index of what's in your collection with your users.

Much of the searchable information your users need is now captured in Tab 3, and you could make some version of that available to them. However, you don't want to risk having users change or delete the information that you've got in there. So, our suggestion is to provide a separate copy of the Donations Spreadsheet for users that excludes any columns that you don't feel they need to see. You can then adjust the "Sharing" settings so that people can only view the information in the spreadsheet. [Please note: you can restrict people's ability to accidentally change the information in your spreadsheet, but they can still search the information in it.]

The remaining tasks for your collection caretaker are ones that are done on an ongoing basis once the collection is made available to your users.

One of the questions we posed to you back in the planning chapter was whether your collection would be open (meaning: you would continue to add new material into it over time) or closed (meaning: you've completed any building of the collection that you're going to do, and you are not planning on adding anything further to it). Some of the tasks we'll talk about apply to open or closed collections, and some apply only to open collections. Let's start with the ones that apply to either case.

- **You'll want your caretaker to check on the storage condition of physical materials from time to time**—are they in a dry place with a fairly constant temperature and

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humidity? The main thing to keep an eye on is that the physical materials are living in a location that is dry and has fairly constant temperature and humidity levels. Wide fluctuations in either of these—like you can get in an attic or basement—can harm your materials over time.

- **You'll want your caretaker to maintain any digital files.** This means several things:
 - **Moving toward having archival-quality formats:** Make sure all your digital files are in current readable formats, if you have not already done so. Also, double-check that all files are in formats that are best for long-term archival storage.
 - **Updating any obsolete formats: For example, do you remember Word Perfect? Or floppy disks?** As file formats or storage media move toward being obsolete, it's important to have someone who will be updating them so that you can still access digital files.
 - **Overseeing the creation of back-ups:** You'll also want someone who is making sure you have your recommended back-up copies in at least three different locations—locally, on a separate drive, and in the Cloud.
- **If your collection will live on a website, it's a good idea to establish who will be in charge of maintaining the website.** Many folk arts organizations already have an existing website, so the task of website maintenance may be something you've already established. However, if you don't already have someone in this role, now is the time to sort that out.

If you're choosing to continue to add material to your collection, there are a few other tasks your caretaker could take on:

- You'll need someone who serves as **a point person for receiving any new materials** for the collection, and who **talks with donors** of materials as they are donating.
- You'll also want someone who is **adding any new searchable information to new material** added to your collection.

So, depending on your particular situation, decide which of these responsibilities make the most sense for your collection's caretaker. From this list, you can see that there are a variety of maintenance tasks here that draw on different kinds of skills, so you may want to spread the caretaker role over a small team of people, if that's possible for you. For instance, you could

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divide up the roles so that you have **someone in charge of new donations** (a good role for someone who is both organized and enjoys being a liaison with other people); **someone in charge of adding any new searchable information, maintaining back-ups and maintaining the website** if you're putting your material there (a good role for someone who likes working with computers and information); and **someone in charge of maintaining the physical collection** (a good role for someone who remembers to check on things from time to time without being reminded!).

That said, you may not have the luxury of assembling a small army to take care of the collection; it may be down to that one person who said they would take this on, and maybe that's you! In that case, you might want to reduce the task list to these most basic caretaking steps - then add others as you're able:

- Make sure your physical materials are in a dry place with constant temperature and humidity
- and creating back-ups.

If you're not that person, you can also think about supporting that person by checking in periodically on what they need to do this job.

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You have now completed all the chapters in this toolkit; congratulations once again! We want to really applaud you for making the effort to preserve some part of your organization's history so that others can benefit from it. Many such efforts are far from perfect, but that doesn't matter as much as your willingness to share your history, your stories, and your experiences with others. Someone, somewhere in the future, will be able to benefit from your efforts here, and while you may never know who they are, we're sure they'll be thanking you.

Chapter 6.2 Summary

CARING FOR YOUR COLLECTION

We've laid out three possible paths forward for you:

- 1) To keep the collection within your organization, and designate a person or committee to care for the materials going forward;
- 2) To try to donate your collection to an archival organization that can care for it on your behalf
- 3) To do nothing and let the collection just exist.

OPTION 1: CARE FOR THE COLLECTION WITH YOUR ORGANIZATION

Determine what kind of guidance you want to provide to users of your collection.

We recommend these two supporting documents:

#1: A descriptive paragraph that just provides an overview of your collection (Examples found in the following pages.)

The key parts of our description are to start with a couple sentences describing what the collection is about, then what kinds of material are in the collection. Finally, we include some brief information about where the materials can be found.

#2: Some kind of index of what's in your collection

Much of the searchable information your users need is now captured in Tab 3, and you could make some version of that available to them. However, you don't want to risk having users change or delete the information that you've got in there. So, our suggestion is to provide a separate copy of the Donations Spreadsheet for users that excludes any columns that you don't feel they need to see. You can then adjust the "Sharing" settings so that people can only view the information in the spreadsheet.

Establish which tasks will be the responsibility of your caretaker(s).

- **Check on the storage condition of physical materials from time to time**—are they in a dry place with a fairly constant temperature and humidity? The main thing to keep an eye on is that the physical materials are living in a location that is dry and has fairly

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constant temperature and humidity levels. Wide fluctuations in either of these—like you can get in an attic or basement—can harm your materials over time.

- **Maintain any digital files.** This means several things:
 - **Moving toward having archival-quality formats:** Make sure all your digital files are in current readable formats. Also, double-check that all files are in formats that are best for long-term archival storage.
 - **Updating any obsolete formats:** As file formats or storage media move toward being obsolete, it's important to have someone who will be updating them so that you can still access digital files.
 - **Overseeing the creation of back-ups:** You'll also want someone who is making sure you have your recommended back-up copies in at least three different locations—locally, on a separate drive, and in the Cloud.
- **If your collection will live on a website, it's a good idea to establish who will be in charge of maintaining the website.** Many folk arts organizations already have an existing website, so the task of website maintenance may be something you've already established. However, if you don't already have someone in this role, now is the time to sort that out.

If you're choosing to continue to add material to your collection, there are a few other tasks your caretaker could take on:

- You'll need someone who serves as a **point person for receiving any new materials** for the collection, and who **talks with donors** of materials as they are donating.
- You'll also want someone who is **adding any new searchable information to new material** added to your collection.

You may want to spread the caretaker role over a small team of people, if that's possible for you. For instance, you could divide up the roles so that you have

- **someone in charge of new donations** (a good role for someone who is both organized and enjoys being a liaison with other people);

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- **someone (or two) in charge of adding any new searchable information, maintaining back-ups and maintaining the website** if you're putting your material there (a good role for someone who likes working with computers and information); and
- **someone in charge of maintaining the physical collection** (a good role for someone who remembers to check on things from time to time without being reminded!).

If it's just one person, you can work from this basic list:

- Make sure your physical materials are in a dry place with constant temperature and humidity
- Create back-ups

OPTION 2: DONATE YOUR COLLECTION TO AN EXISTING ARCHIVE

The organization to which you're donating your collection will have their own process for caring for your collection. You can help this process along by doing the following:

OPTION 3: DO NOTHING FURTHER

To avoid catastrophic loss of the only copy of the collection, consider:

- digitizing some of your material and
- making back-up copies where it makes sense.

When you're ready to pass on the collection to another member of your organization to care for it, you can share a list of tips with them, found at the end of this document.

Chapter 6.2

Examples of Descriptive Paragraphs of Collections

EXAMPLE 1: The Marlboro Morris Ale Collection

The Marlboro Morris Ale collection documents the first 50 years of the annual Marlboro (VT) Morris Ale, first held in 1976. This event, held on Memorial Day weekend each May, brings together hundreds of Morris and sword dancers from North America and Great Britain to dance together and to tour the surrounding towns in southern Vermont. The collection consists of both physical and digital photos, slides, and video; recorded interviews with transcripts; Ale organizational and administrative materials; written essays and correspondence; ephemera; and posters, flyers, and printed programs. Approximately 90% of the collection is digitized, and available on the Marlboro Ale website. The physical parts of the collection as well as master files of all digital files are housed with the Vermont Folklife Center in Burlington, Vermont.

EXAMPLE 2: The New Song Library Collection Univ of Massachusetts, Amherst

Founded by Johanna Halbeisen in 1974, the New Song Library was a collaborative resource for sharing music with performers, teachers and community activists, who in turn shared with a wide variety of audiences. Based initially in Boston, the Library was devoted to the music of social change and particularly music that reflected the lives and aspirations of workers, women and men, elders and young people, gays and lesbians, other minorities, and Third World people.

This collection contains over forty years of organizational and operational records of the New Song Library along with hundreds of sound recordings, primarily audiocassettes made at concerts, music festivals, song swaps, and gatherings of the People's Music Network. The Library also collected newsletters and magazines on folk music, and most importantly dozens of privately produced songbooks and song indexes.

<http://scua.library.umass.edu/?s=folk+song>

**EXAMPLE 3: The Gordon Ekvall Tracie Music Collection
National Nordic Museum, Seattle, WA**

The core of the [Gordon Ekvall] Tracie Music Collection is material collected by Gordon Tracie from the 1940s through the late 1980s — audio and video recordings as well as written documentation of Scandinavian folk and traditional music, dance, costumes, customs, folklore, and folk art.

The collection includes more than 500 original reel-to-reel field recordings made by Tracie during his numerous research trips to the Scandinavian countries. In addition, the Tracie Music Collection currently holds audio and video recordings in numerous formats, as well as photos, posters, sheet music, dance notations, periodical collections and nearly 2,000 texts and written works. Materials include writings by Gordon Tracie related to his extensive production of dance descriptions and articles on dance and music.

<https://nordicmuseum.org/collections/gordon-ekvall-tracie-music-collection>

How to Care for Your Organization's Collection

Here are some tips on how to take care of your organization's collection if you have become the caretaker.

Basic Care

- Store any physical materials in a place where there are no big changes in temperature or humidity. (e.g. Attics / Basements are not good choices.)
- If there are any physical items loose in boxes, add some packing material around them to minimize them shifting inside the box.
- Make sure any digital files are stored in three places: on a computer, on a separate hard drive and online / in the Cloud. Having back-ups ensures that if any files are lost in one place, they are not lost everywhere.
- If any of your digital files are in formats that are becoming obsolete, can you update the files to a newer format?

Extra Care

- Create some kind of document / index / table of contents that lists what is in the collection, and where to find it.
- Create a paragraph or two that describes what's in the collection, so that others after you will have that information. Your description can include answers to these questions:
 - what is this collection about?
 - what kinds of material are in this collection?
 - where do you find different things in the collection? (e.g. where are the photos stored and how are they organized, if at all? where are the costumes or kits stored? etc.)