

2015

Developing and Organizing an Archival Education Training Opportunity for Oregon's Tribal Communities: The Oregon Tribal Archives Institute

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Recommended Citation

Fernandez, Natalia M. and Lewis, David G. (2015) "Developing and Organizing an Archival Education Training Opportunity for Oregon's Tribal Communities: The Oregon Tribal Archives Institute," *Journal of Western Archives*: Vol. 6 : Iss. 1 , Article 5.
Available at: <https://digitalcommons.usu.edu/westernarchives/vol6/iss1/5>

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Cover Page Footnote

Special thanks to the Oregon Tribal Archives Institute team members including Laura Cray, Tiah Edmunson-Morton, and Larry Landis; our project partner the University of Oregon Special Collections and Archives; and all of the Institute attendees.

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Natalia M. Fernandez
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ABSTRACT

In 2012 Oregon State University hosted the Oregon Tribal Archives Institute (OTAI), a week long archival education training opportunity specifically designed for Oregon's nine federally recognized tribes. This article describes the OTAI project development, organization, and implementation. The authors offer various lessons learned that can be applied by others who wish to offer a similar archival education institute.

Introduction

Establishing formal and sustainable archives and records management programs by Oregon's tribes has been difficult in part due to the lack of affordable and location-accessible training opportunities for tribal archivists. In 2012, Oregon State University hosted the Oregon Tribal Archives Institute (OTAI), a week long gathering that addressed the need for in-depth archives and records management training for Oregon's nine federally recognized tribes. The Institute was based in Oregon at no or low cost to tribal participants and covered the basic concepts and requirements for tribes to establish or improve their archives and records management programs. This article describes the OTAI project development, organization, and implementation. The authors conclude with lessons learned that can be applied by others who wish to offer a similar archival education institute.

Background

In the intervening 160 years since the passage of the Indian Appropriations Act of 1851, which authorized the establishment of the first reservations, the federal government created numerous agencies to manage nearly every aspect of tribal life. Many federal institutions, including the Bureau of Indian Affairs, the Department of War, and the Smithsonian Institution, collected libraries of records regarding Indian management and cultural activities. For most of this time federal institutions stored the records in far-removed archives outside of tribal communities. Tribes did not begin to develop their own government collections until the 1970s. Before then, tribal archivists were nearly non-existent. It was only under federal pressures of termination and restoration of the tribes that tribal communities began to develop their own libraries and archives to maintain tribal governments' federal recognition and treaty rights.

In total, Oregon terminated sixty-three tribes—more than any other state. In 1954, the state passed Public Law 588, which terminated all sixty western Oregon tribes and with Public Law 587, terminated the three tribes of the Klamath Reservation. In the decades that followed, tribal communities felt the resultant poverty and loss of tribal identity, and they realized that termination was a failed experiment. Beginning in the 1970s, Oregon's tribes began working towards restoration and federal recognition, a struggle ultimately successful for six tribes in the 1970s and 1980s. Their political activities necessitated the gathering of vast libraries of information.¹ The Coquille Indian Tribe in particular, following restoration in 1989, created a collection of information gathered from southwestern Oregon. The archival collection helped with the restoration of the people's cultural identity and brought together the federal records that proved to the federal government that they have existed through time. It continues to act as a method to defray any possible efforts of termination in the future. The collection is called the Southwest Oregon Research Project (SWORP) and is housed at the University of Oregon.²

While SWORP brought attention to the value of archival records, the tribes in Oregon did not have many trained archivists or archival programs. Government collections were reported to be stored in people's offices and cultural collections were rumored to have gone home with tribal staff, causing losses of the records. Few tribes nationally had developed comprehensive archival programs, and because of termination many tribes were at least a decade or two behind in the development of archival repositories. The SWORP project did, however, train a number of tribal

1. For more history on the creation of archival collections, see David G. Lewis and Deanna Kingston, "The History and Context of Oregon Tribal Language Archival Collections," Chapter 4 in *Teaching Oregon Native Languages*, ed. Joan Gross, (Oregon State University Press, Corvallis, 2007).
2. Southwest Oregon Research Project (SWORP), 1995, 1998. The collection is housed at the University of Oregon, Knight Library, Special Collections and University Archives. One of SWORP's goals was to gather copies of relevant archival matters from across the country so that they would be locally accessible to tribal communities.

people in archival techniques, and the effects of these trainings on the tribes began to be felt in the mid-2000s. Programs initiated at Coquille, Coos, Siletz, Grand Ronde, Warm Springs, Umatilla, and Smith River Rancheria were indirectly or directly aided by the SWORP collection.

In 2005, conversations began with archivists at both the University of Oregon and Oregon State University regarding the need to promote professional archival programs within all of the tribes. A major issue was that many people managing the tribal collections did not have training in archival techniques. This was a serious matter because tribes held the equivalent archival holdings of small cities as they sought to govern their citizenry, their reservations, economic developments, and cultural resources. The result of these conversations was the Oregon Tribal Archives Institute, a full week of training that assisted Oregon's tribal archivists manage their collections.

Need for Archival Education Opportunities for Tribal Archivists

The need for archival education and training opportunities for tribal archivists is a reality in both theory and practice. One of the topics addressed in the *Protocols for Native American Archival Materials* is “reciprocal education and training,” with a goal of cross-cultural exchanges for the benefit of both tribal and non-tribal communities. As part of the guidelines for action addressed to Native American communities, the *Protocols* suggest that Native American archivists “actively participate in and consider joining regional and national library and archives professional organizations and networks that offer opportunities for sharing resources, problem-solving, and cross-cultural training.”³ But these suggestions invariably raise questions such as “what opportunities are available?” and “how can tribal archivists afford such opportunities?” In the 2012 report “Sustaining Indigenous Culture,” national data showed that in terms of personnel, the greatest need for tribal archives, libraries, and museums is funding for staff, specifically for trained Native personnel. Unfortunately, the data also shows that there are significant barriers to employee training opportunities including lack of funding for training, expensive registration fees, distance, and lack of time, leaving the organization lacking in staff, culturally relevant training, information about training opportunities, and quality training.⁴

Granted, these barriers do not mean that there have not been training opportunities for tribal archivists over the years. Especially within the last decade, various educational gatherings specifically designed for tribal archivists have been

3. First Archivist Circle, “Protocols for Native American Archival Materials,” last modified 2007, <http://www2.nau.edu/libnap-p/index.html> (accessed May 2014).
4. Association of Tribal Archives, Libraries, and Museums, 2012. *Sustaining Indigenous Culture: The Structure, Activities, and Needs of Tribal Archives, Libraries, and Museums*, http://www.atalm.org/sites/default/files/sustaining_indigenous_culture.pdf (accessed May 2014).

offered on a national scale. In the summer of 2003, the Western Archives Institute hosted an Institute for Native American and Tribal Archivists through an NHPRC grant awarded to the Society of California Archivists. The two-week institute took place in Redlands, California; it covered the management, use, and preservation of Native American tribal records and included twenty-seven participants. This particular institute was application-based and participants bore the costs of travel, lodging, meals, and tuition.⁵ In 2002, the Arizona State Museum and the Arizona State Library, Archives and Public Records co-sponsored the first National Conference of Tribal Archives, Libraries, and Museums held in Mesa, Arizona. Soon after, beginning in the mid-2000s, various gatherings took place featuring archival training components. These gatherings laid the early foundations for the organization now called the Association of Tribal Archives, Libraries, & Museums (ATALM). For the past few years ATALM has organized at least one conference or institute each year. ATALM gatherings tend to include about five hundred participants and the organization offers scholarships to cover the \$250 registration fee.⁶

Although the ATALM gatherings are an excellent and consistent archival training opportunity, the main findings of a 2012 ATALM report were that “ATALM staff members prefer targeted, hands-on, how-to, short-course training programs that are culturally relevant and affordable...[and] offered close to home.”⁷ While the ATALM gatherings may address many of the educational needs of tribal archivists, they may not be an affordable option to all and depending on where they are hosted, they may not be considered “close to home.” In a review of the list of attendees at the 2009 ATALM conference, which was hosted in Portland, Oregon, seven of Oregon’s nine federally recognized were represented with a total of twenty Oregon tribal archivists. Not surprisingly, in the years prior and after, when the conferences were not held in Oregon, the numbers dropped significantly with only four tribes and nine participants represented at the 2007 Oklahoma conference and one tribe/participant represented at the 2011 Indigenous Materials Institute in Colorado.⁸

Oregon tribal communities’ need for “closer to home” gatherings holds true for other states as well. In recent years, Arizona and Wisconsin have begun organizing local trainings. In October 2012, the Arizona Archives Alliance hosted a one day

5. Institute for Native American and Tribal Archivists NHPRC Grant 2003-062 Final Report. Coll. 2006-288, Western Archives Institute Administrative Files, 1997-2004. California State Archives, Office of the Secretary of State, Sacramento.
6. Association of Tribal Archives, Libraries, & Museums, *2014 Conference*, <http://www.atalm.org/node/63> (accessed May 2014).
7. Association of Tribal Archives, Libraries, & Museums, *Preserving Tribal Language, Memory and Lifeways: A Continuing Education Project for the 21st Century*, <http://www.atalm.org/sites/default/files/FinalReport2009-2013.pdf> (accessed May 2014).
8. Association of Tribal Archives, Libraries, & Museums, 2007, 2009, and 2011 Conference Programs.

Native American Archives Symposium in Flagstaff, Arizona.⁹ Perhaps most well known are the conferences held in Wisconsin. What began as a service learning experience for graduate students at the UW-Madison School of Library and Information Studies evolved into an LIS course and is now the Convening Culture Keepers (CCK) mini-conference series. The CCK is a series of six one-day gatherings that allows Wisconsin's tribal archivists, librarians, and museum curators to gather for professional development and networking opportunities. The gatherings took place in the fall and spring from 2010 to 2012, with each conference hosted by a Wisconsin tribal community.¹⁰

While there have been some archival education opportunities specifically for tribal archivists and their needs in Oregon, they have not been comprehensive and have not gathered together all of the state's tribal communities. In August 2009, the final report of the *Envisioning Oregon: Planning Toward Cooperative Collection Development in Oregon's Historical Repositories* grant project outlined several goals to foster collaboration and cooperation among Oregon's archival repositories. The report's Goal 3, Objective 2 recommendation was to "Connect with tribal repositories," including the recommended activity of a tribal records workshop.¹¹ That next year, the Oregon State University Oregon Multicultural Archives, a component of the university's Special Collections & Archives Research Center, applied for a grant to provide a week long archival education training opportunity specifically designed for Oregon's nine federally recognized tribes; it was called the Oregon Tribal Archives Institute (OTAI).¹²

Project Background, Goals, and Team Members

Oregon State University (OSU), located in Corvallis, Oregon, is a land grant institution with a history of collaboration with tribal communities across the state, especially through its Extension Program. In the early 2000s, to support the university's commitment to strengthening its relationships with the tribes, staff members of the OSU Libraries' University Archives collaborated with the Anthropology Department to offer a couple of training opportunities developed for

9. Arizona Archives Alliance, *Native American Archives Symposium*, <http://arizonaarchives.org/symposia/na/> (accessed May 2014).
10. Tribal Libraries, Archives, and Museums Project at UW-Madison SLIS, <http://www.tlamproject.org/convening-culture-keepers/about-cck/> (accessed May 2014).
11. Gabriele G. Carey, *Envisioning Oregon: Planning Toward Cooperative Collection Development In Oregon's Historical Repositories*, <https://scholarsbank.uoregon.edu/xmlui/handle/1794/9792> (accessed May 2014).
12. Oregon's nine federally recognized tribes are: Burns Paiute Tribe; Confederated Tribes of Coos, Lower Umpqua & Siuslaw Indians; Coquille Indian Tribe; Cow Creek Band of Umpqua Tribe of Indians; Confederated Tribes of Grand Ronde; Klamath Tribes; Confederated Tribes of Siletz Indians; Confederated Tribes of Umatilla Indian Reservation; and Confederated Tribes of Warm Springs.

individual tribes. The trainings included a one and a half day archives and records management workshop for the Klamath Tribes in the summer of 2002 and a half-day workshop in the summer of 2003 that was attended by participants from several Oregon tribes. While the Archives maintained relationships with some of the tribal communities and offered professional expertise when requested, it was not until 2009 that staff developed the idea to organize and host an archival education and training opportunity for all of Oregon's tribal communities. In April 2009, OSU and the Confederated Tribes of Warm Springs signed a Memorandum of Understanding, which addressed the tribe's need for assistance with archives and records management issues. This need was one of the key areas identified by the Warm Springs Tribal Council. Through informal conversations with archivists from several other tribal communities it became apparent that Oregon tribes felt a strong need for a longer and local training opportunity.

In 2005, the OSU Libraries established the Oregon Multicultural Archives (OMA) with the mission to assist in preserving the histories and sharing the stories that document Oregon's African American, Asian American, Latino/a, and Native American communities.¹³ While the OMA actively acquires physical collections, its main goal is first and foremost to assist communities in developing their histories on their own terms.¹⁴ Supporting Oregon's tribal archivists with a professional development training opportunity was a natural extension of the OMA's mission. As a result, in the summer of 2010, the OSU Libraries' OMA applied for a Library Services and Technology Act (LSTA) grant offered through the Oregon State Library. The grant proposal was for a two-year project to take place during 2011 and 2012 to develop, plan, and offer a tribal archives institute for Oregon's tribal archivists.

The Oregon Tribal Archives Institute (OTAI) was designed to address the need for an affordable, in-depth archives and records management training for Oregon's nine federally recognized tribes. The goal was to support and facilitate the preservation of Oregon's tribal nations' cultural sovereignty through their archival collections and records. The first year of the project focused on conducting site visits with all nine tribes' records and archives personnel to create needs assessment reports based on discussions with staff and tours of the facilities. The end of the first and beginning of the second year focused on designing a curriculum based on the identified needs in order to plan and host the Institute. A primary objective throughout both years of the project was to build or strengthen relationships with the

13. OSU Libraries' Oregon Multicultural Archives, <http://scarc.library.oregonstate.edu/oma/index.html> (accessed May 2014).
14. Natalia M. Fernández and Cristine N. Paschild, "Beyond a Box of Documents: The Collaborative Partnership Behind the Oregon Chinese Disinterment Documents Collection," *Journal of Western Archives* 4, no. 1 (2003). In this collaborative project entitled the Oregon Chinese Disinterment Documents, the OMA enabled a community archive to retain custody of its physical records while hosting and providing access to digital surrogates.

tribal archivists. The bulk of the second year grant covered the costs for eighteen OTAI participants, two from each tribe, for travel, lodging, and meals.¹⁵

The core of the OTAI team included members of Oregon State University's Special Collections & Archives Research Center staff.¹⁶ The overall two-year project consisted of four phases: site visits to each of the nine tribes, curriculum development, planning the Institute, and of course, hosting the Institute itself.

Project Description

The Site Visits to Each of the Nine Tribal Communities

The first year of the project began in the spring of 2011 with the main objective to connect with the nine tribal communities in Oregon and conduct a needs assessment of their current tribal records and archival programs. In order to complete the needs assessment, the OTAI team arranged site visits to meet with the tribes. The team used the needs assessments in the curriculum development process to specifically address the tribes' archival education needs. During the summer of 2011, team members traveled to each of the nine tribes to meet with archivists, records managers, and any other tribal staff interested in the project.¹⁷ The site visits were a unique opportunity to discuss individual archival and records management programs, as well as to strengthen existing relationships and build new ones with members of each of the tribes.

The planning process for the site visits included making arrangements with each tribal community regarding the appropriate dates and times for the visits, as well as arranging for transportation and lodging for OTAI staff. The meeting agendas were intentionally left open-ended to facilitate each tribe discussing the issues that most concerned them. After explaining the project plan of the 2012 Institute and the goals for the planning process, the remainder of the time was used to conduct the needs assessment; this included tours of any facilities the staff members were willing to share. There was also a discussion of current challenges and future plans for

15. The first year grant totaled \$20,000, which included \$10,000 local in-kind funds mostly for staff time. The \$10,000 in LSTA funds covered the costs of an intern and travel to the nine tribes. The second year of the grant totaled \$35,800, which included \$17,400 in local in-kind funds, again, mostly for staff time. The bulk of the \$18,400 in LSTA funds covered the costs of a total of 18 tribal archivists to attend the Institute.
16. OTAI Team: Natalia Fernández, Oregon Multicultural Librarian; Tiah Edmunson-Morton, Instruction and Outreach Archivist; Larry Landis, Director of the Special Collections & Archives Research Center; and Laura Cray, OTAI Intern and OSU History of Science Ph.D. candidate.
17. During the first year of the grant, in the summer of 2011, OTAI team members included Landis, Fernández, and Cray. They conducted the site visits to each of the nine tribes. On several occasions James Fox, Director of the University of Oregon Special Collections and University Archives, joined the OTAI team.

development of both administrative records and cultural archives programs. Each of the site visits was a half or a full day depending on the development of the tribes' current programs and the amount of material to be covered. In the weeks following each site visit the team wrote a brief report listing the tribal members they met with, a summary of the project, a description of the tribe's current archival programs, areas for future development, and institute logistics specific to each tribe. The team shared the reports with all meeting attendees.

There were challenges and lessons learned regarding the site visits. One of the major challenges was determining the correct people to contact. In some cases the tribes' websites did not list staff members of archives and records management departments; the team had to call some of the tribes' main lines in an effort to connect with an appropriate staff member, specifically someone who was an archivist or had interest in the archives. Sending emails was usually insufficient; the majority of the contacts were made through phone calls. Once connected, the next challenge was aligning schedules on both ends to make the visits possible. The summertime is an extremely busy time for tribal communities whose schedules are filled with summer camps, restoration ceremonies, Pow Wows, and a number of other special events. The team worked to accommodate the communities' schedules and in total, conducted nine trips in eleven weeks from July through mid-September.

Another major challenge to conducting the site visits was maintaining a level of consistency between each meeting in terms of the content discussed. While the team had an agenda, time was allowed for the conversation to flow depending on the tribes' needs. The team thought about including a lengthy written survey for each tribe to fill out in addition to the in-person meeting in order to have a more consistent set of data, however, the drawback to this would have been the very prescriptive nature of a standardized survey. The advantage to an open ended agenda was that the team was able to focus more on the people they met with and their needs rather than seeming like another entity just gathering data. The team members thought it best to focus on building relationships through in-person conversations and note taking without the addition of a written survey.

During the nine site visits conducted, the team had the opportunity to talk with a total of fifty-five tribal members who filled a number of roles from tribal council chair members to museum directors, archivists, and records clerks. The site visits were a critical part of the relationship building process. Those in attendance learned about the project and got to know the team members on a personal level in more detail than what would have been possible over the phone or email.

Curriculum Development and Planning

After the first few site visits, the team noticed that though each community was unique, there were overlapping archival education needs. During the first two quarters of the grant period the team began to develop a list of preliminary topics.

Upon completion of the site visits in October 2011, the OTAI curriculum planning team formed and met on a weekly basis for the next six months.¹⁸

The curriculum development process began with determining the major topics to be addressed. Over the course of the site visits, there were overlapping needs that stood out and the team began by working with those topics. Also, to get a sense of what other tribal archives trainings had covered, the team reviewed the curriculums of the Western Archives Institute for Native Americans held in California in 2003; the Convening Cultural Keepers gatherings held in Wisconsin; and various programs from the conferences of the Association of Tribal Libraries, Archives, and Museums. For the most part, the team found that the major topics on its list paralleled the topics covered in these gatherings. The team brainstormed which sessions should come earlier in the week and which should go together on specific days. Because it was a weeklong gathering, the curriculum team knew that the week's content needed to flow in a way that kept attendees interested, but not overwhelmed. As part of each day's schedule, the team planned breaks and ensured individual sessions did not last more than one and a half hours. For the most part, individual sessions ranged from one to one and a half hours however, they made the schedule flexible enough for changes as needed.¹⁹

18. Fernández and Landis created an OTAI curriculum planning team and brought on OSU Instruction and Outreach Archivist, Tiah Edmunson-Morton, to assist with curriculum planning and development.
19. The schedule was purposely padded to allow for extra time and flexibility, and due to the small size of the group and the lack of concurrent sessions, session facilitators were able to make adjustments based on the immediate feedback from the attendees. Changes were more common on the days the Institute took place at OSU, and though the field trip days were a bit more constrained, changes were made as needed on those days as well. Schedule changes included changes in session length, room locations, and session order.

OTAI Curriculum Topics

Funding Opportunities Research	Archives 101
Collection Management Systems	Facilities Planning
Disaster Planning	Collection Maintenance and Care
Digitization Best Practices	Sound Recordings, Best Practices
Digital Asset Mgmt. Systems and Metadata	Born Digital Records
Exemplary Digitization Projects	Digital Preservation
Reference and Access	Records Retention
Researching Strategies	Outreach and Social Media
Model Programs	Grant Writing
Northwest Archivists Discussion	Oregon Folklife Network Discussion

Table 1. Curriculum topics. See also Appendix A, “OTAI Schedule at a Glance.” The entire program, which includes descriptions of all the sessions, is available online at <http://ir.library.oregonstate.edu/xmlui/handle/1957/35378> (accessed May 2014).

One of the major topics of discussion for the team was whether or not to hold concurrent sessions or single sessions for all attendees. The benefits to holding concurrent sessions are that more content could be covered in a day and attendees could choose which sessions were more applicable to their needs. The disadvantages to holding concurrent sessions were that the goal of the Institute was to build community and relationships between attendees and with a small group of participants the individual sessions would be quite small. Additionally, since the Institute was scheduled to last a full week, it did not seem necessary to make time for more sessions.

The curriculum team also wanted to plan field trips to make the training more dynamic and meaningful through real-world experiences. Of the five-day Institute, two days included field trips to three facilities. Since the Institute was going to be hosted at the OSU campus, the team wanted to showcase the Valley Library facilities however, since the Special Collections & Archives Research Center is not a tribal community facility, it was not appropriate to have it be the only facility the attendees toured. The team wanted to make sure attendees saw the applicability of the content learned in the sessions, such as space planning and special facilities for artifacts, and based on the site visits, the team knew that many tribes had wonderful

facilities that could act as models for other communities. The two closest tribal communities to OSU are the Confederated Tribes of Siletz Indians and the Confederated Tribes of Grand Ronde. Each community is about an hour away and the team decided that those locations were a reasonable distance from OSU. Both communities graciously agreed to host Institute attendees. For the field trip to the Siletz community, the curriculum team decided that the most appropriate sessions were the facilities planning and disaster planning sessions, since that community was in the facilities planning process, and time for tours was included in the schedule. Another facility included was the Benton County Historical Society (BCHS) located in Philomath, about ten minutes from the university and on the route to Siletz. BCHS had recently constructed a state-of-the-art collections facility and a trip to the Siletz community and BCHS was planned for the same day. The field trip to the Grand Ronde community was scheduled for the fourth day of the Institute since the closing dinner would be held at the tribe's casino.

After the curriculum team developed a curriculum and schedule, it shared the information with the people they had met during the site visits and encouraged feedback. By the time the second year of the grant began in February of 2012, the curriculum team had a set list of topics and a tentative schedule. The next steps were to confirm or select facilitators for each session and for all facilitators to develop the content for their sessions.²⁰ All facilitators were experts in their topics and were responsible for developing their session's content, so the curriculum team did not anticipate needing to revise the session content. The team asked facilitators to make their session content at a beginner to intermediate level to accommodate for attendees who were relatively new to the field. Facilitators emailed their presentation content prior to the Institute so the OTAI team could create curriculum binders with slides of the presentations, session handouts, and the Institute program with brief descriptions of each session.

Tribal Specific Context of Archives Addressed in the Curriculum

As part of the curriculum development process, the OTAI team made sure to incorporate the special status and intention of tribal archives. Tribal communities need to create archives to secure their political position in relation to the federal government. In addition, they have some specific records that may be restricted based on tribal cultural laws and codes that do not normally surface in non-tribal repositories. For example, tribes must contend with questions of whether there needs to be intentional gender bias when viewing records in the archives. Some tribal communities believe in the power of stories and information to affect their wellbeing and so, some records require a special designation. In addition, tribal governments

20. The main session facilitators included OTAI team members Landis and Edmunson-Morton as well as Jennifer O'Neal, University Historian and Archivist for University of Oregon, and David Lewis, Tribal Historian and Manager of the Cultural Exhibits and Archives Program at the Grand Ronde Tribe. Other invited facilitators included staff members from the University of Oregon Libraries, the Benton County Historical Society, and the Oregon Folklife Network.

are normally a collection of related family members. Many tribes have internal political strife that can be affected by and influenced by information about other tribal members or families. Therefore, access restrictions may exist to certain types of information such as oral histories, genealogies, and similar information about people. Also, tribes that had been terminated saw a need to create collections that supported their continuation as dependent tribal nations under United States laws. Consequently, the need and intention is much different for some tribes than others who have never experienced termination, and for most other archival repositories that are not created within a similar political context. As such, many tribal archives have vast amounts of second-generation records, copies in digital or photographic form, culled from the National Archives, the National Anthropological Archives, and other non-tribal research collections from throughout the world. These additional issues related to tribal archives were a learning opportunity for the Institute attendees who were in the midst of creating policy regarding their archives. Because the Institute gathered representatives from all of the Oregon's tribal communities, attendees were able to share their experiences regarding these issues in sessions specifically designed to meet their archival education needs.

Planning the Conference Elements of the Institute

During the project's second year, the bulk of the planning included typical conference elements such as setting the date for the Institute; confirming the list of attendees; arranging logistics such as lodging, meals, and classrooms; and compiling and creating the Institute attendee materials.²¹ After reviewing all of the tribal communities' summer event calendars and planning within the summer timeframe set by the university's housing and dining office for use of the residence halls, the OTAI team selected the week of August 20th.²² Unlike conferences in which it is the attendee's responsibility to register, the OTAI team individually contacted each potential attendee to confirm his/her attendance. All arrangements for lodging, meals, classroom logistics, and curriculum materials were made through various university services. Lodging accommodations were offered at one of the university residence halls.²³ An opening dinner was scheduled on the OSU campus for Sunday

21. The majority of these elements were planned by Fernández and Cray between late June and August of 2012; Cray had resumed her role as OTAI intern in early July.
22. The thought process behind conducting the site visits and hosting the Institute one year apart and in the summertime was twofold. First, the timeframe for LSTA grants is February to January. With the site visits in the summer, the turnaround time to plan and host an Institute within a few months after that and during OSU's academic year would not have been feasible. Second, because the Institute was hosted on the campus, as previously mentioned, the team was restricted to selecting dates when the residence halls would be open.
23. The idea to use the residence halls was to keep costs low and to build in an opportunity for attendees to share a communal space. These accommodations were not as comfortable as a hotel would have been and in hindsight, the team would have opted for making accommodations at a local hotel in Corvallis.

evening and a closing dinner took place on Thursday at the Grand Ronde tribe's casino and resort, Spirit Mountain Casino.²⁴ Institute materials included a flash drive containing digital copies of both the program and the curriculum binder. Also, all sessions were recorded and made available online so that attendees would have the option to review the content they learned and share it with interested colleagues.²⁵



Figure 1. Upon arrival each attendee received his/her conference materials including the program and the curriculum binder.

Hosting the Institute

In total there were eighteen attendees, with at least one representative from each tribe, from a variety of positions including archivists, record managers, and

24. At the opening dinner, keynote speaker Jennifer O'Neal, spoke about her journey as a tribal archivist; O'Neal is a member of the Confederated Tribes of Grand Ronde. At the closing dinner Dr. George Wasson, a Coquille tribal elder, shared his archival research experiences. Dr. Wasson was initiator of the Southwest Oregon Research Project (SWORP) and field director of the project in 1995. The collection was organized by David Lewis and is at the University of Oregon; see David G. Lewis, "Natives in the Nation's Archives: The Southwest Oregon Research Project," *Journal of Western Archives* 5, no. 2 (2014).
25. For privacy purposes the video recordings were uploaded to a YouTube account just for OTAI recordings and the privacy settings for the videos are such that you must have the link to find the

archeologists.²⁶ The Institute took place from Monday to Friday.²⁷ The majority of the attendees were the same people met during the site visits however there were a few exceptions. Due to the length of time (one full year) between the site visits and the Institute, professional or personal circumstances of potential attendees changed. In terms of professional demographics, the majority of attendees had records management and/or cultural archives responsibilities and some were museum curators or archeologists. About half of the attendees had between two to ten years of experience in their field, with a few having just one-to-two or as many as fifteen-to-twenty years of experience. In some cases the attendees knew one another, but the majority of participants had never met in person. Over the course of the week, group discussions became livelier and attendees became more willing to share their experiences, both the challenges and the triumphs, in their communities.

Project Assessment

The main goals of the Institute were to provide basic to intermediate archival education to attendees and a networking opportunity for the participants; on both counts, the Institute was successful. In order to assess the project, the OTAI team created and implemented an assessment of both of the Institute and the two-year project as a whole. The assessment took place on the last day of the Institute and five months later in January of 2013.²⁸

The assessment tools used included two paper-based questionnaires and one in-person discussion. One of the questionnaires was specific to the individual sessions and the other asked about the Institute overall. There were both individual *and* group assessment tools to allow attendees to feel comfortable expressing themselves privately and to have the opportunity to give feedback in a group to allow for conversation. For the assessment regarding the project as a whole, the OTAI team created and implemented a post-assessment questionnaire via phone interviews with

content. Individuals cannot search for the videos on their own. These recordings are not available to the general public.

26. The year two grant budgeted for eighteen Institute attendees; two members of each tribe could receive full funding for transportation (mileage reimbursement), lodging, and meals. All tribes, however, were welcome to send more than two attendees. In total, some tribes were represented by three or four members while most were represented by one or two members.
27. OTAI blog posts with photographs and summaries of the Institute are available at <http://wpmu.library.oregonstate.edu/oregon-multicultural-archives/tag/otai/> (accessed June 2014).
28. All OTAI assessment tools—Evaluation of Individual Sessions, Overall Experiences Paper-based Questionnaire, Facilitated Group Discussion Questions, Phone Interview Questions, and Two Year Project Assessment—are available online: <http://hdl.handle.net/1957/45501> (accessed June 2014). The questionnaires were adapted with permission from assessments used at Association of Tribal Archives, Libraries, & Museums conferences as well as Convening Culture Keepers gatherings.

fifteen of the eighteen OTAI attendees. The interviews occurred during the last two weeks of January 2013, five months after the Institute. Some were individual interviews, while others were in pairs; interviews lasted between thirty minutes to an hour.

Notably, as part of the process of building relationships and establishing trust, the OTAI team decided they would not publish the specific results of any assessment tools used. However, there are some general patterns that the team can share. Overall, the feedback received from the attendees was very positive. In the months since the Institute, many said they had shared their OTAI experiences and knowledge gained with other colleagues; many said they had applied the content they learned; and all said that they would like to gather again for future trainings. The majority of responses indicated that future gatherings should be shorter, maybe a maximum of three days; additionally, because they had the experience of basic to intermediate level training through OTAI, they said they would be ready for an intermediate to advanced level of training regarding specific topics.

In addition, the OTAI team used surplus funds from the year one grant to purchase memberships to the regional archival organization Northwest Archivists (NWA), and they used year two grant surplus to offer to each tribe a \$775 grant to buy archival supplies of their choosing. Both actions offered an indirect form of assessment. The feedback gathered from the discussion regarding the benefits and drawbacks of joining a regional archival organization was used to assess the need to keep future trainings local to Oregon or include states in the region. With regards to the money for supplies, during the phone interviews, many attendees stated that they found it particularly helpful to be able to purchase the materials needed to put into practice what they learned. The OTAI team was able to assess which sessions were especially impactful.

Project Publicity, Website, and Staying Connected

Since the completion of the project, one of the OTAI team's objectives has been to promote it to the professional archival community through conference presentations, articles, and the project website. In May 2013, Fernández, O'Neal, and Lewis gave a presentation to the Pacific Northwest archival community at the joint annual conference of the Northwest Archivists and Archives Association of British Columbia in Vancouver, B.C. Shortly after that, Fernández represented OTAI in a session that included two other state-based tribal archives trainings as part of a panel presentation at the Association of Tribal Archives, Libraries, and Museums Conference in Albuquerque, New Mexico. Publications with articles about OTAI include the OSU Libraries newsletter, *The Messenger*; the Northwest Archivists' newsletter, *Easy Access*; and the Society of American Archivists' newsletter, *Archival Outlook*.

The OTAI website is a part of the Oregon Multicultural Archives site. It includes a project overview with information about the site visits, the curriculum development

process, the Institute, publications and presentations about OTAI, information about the Oregon Tribal Archives Network, project acknowledgements, and contact information. The site also includes links to digitized copies of the articles about OTAI, a video recording of a presentation about the project, and blog posts on the OMA blog about the site visits and the Institute.



Figure 2. The OTAI project website (<http://scarc.library.oregonstate.edu/oma/tai/index.html> (accessed June 2014)).

Based on the attendees' desires to stay connected, soon after the institute ended the OTAI team set up an OTAI Facebook page and listserv entitled the "Oregon Tribal Archives Network," or OTAN. The network is designed to facilitate communication among tribal archivists, records managers, and culture keepers to provide a forum for questions, sharing resources, and celebrating their work. As requested by the OTAI attendees themselves, the communication methods for the network include both a public (Facebook) and a private (the listserv, specifically for the OTAI attendees and facilitators) option.

Future Plans and Lessons Learned

The next major step is to organize another training institute. Unfortunately, the LSTA grant used for the project is specifically for projects that are new and innovative, so another institute would not be eligible for these funds. Another discussion is to decide if a future gathering should include non-Oregon tribes; in many cases tribal community connections exist across state lines and it may be beneficial to provide an opportunity for a boarder network. Also, grant options may

increase if training is on a regional rather than state level. Based on the feedback received, in the future OTAI administrators would organize a series of short gatherings or trainings and ask various tribes across the state to host the attendees.

In preparation for a future training, there are certain elements of OTAI that the team plans to keep the same and others that will change:

- *Site visits:* The site visits were an essential part of the success of the overall project. Through the in-person conversations the team had the opportunity to strengthen existing relationships and build new ones, and the team gathered the information necessary to build the curriculum.
- *Curriculum development and materials:* Training topics will again be based on the specific needs of the attendees. In terms of the materials, it was beneficial to have all curriculum content available to the attendees in print and electronic form and to provide video recordings of the sessions.
- *Training location, length of time, and time of year:* Future trainings will be hosted at a hotel in a tribal community; they will be shorter, perhaps just three days at most; and more focused on topics. Trainings will ideally occur during less busy times of year for tribes such as the in fall or spring months.
- *Institute coordination, time, and expertise needed:* The coordination and implementation of the site visits as well as planning and hosting the Institute is a full time job that requires event planning expertise.
- *Funds for attendees to purchase supplies:* The end of year grant funds surplus offered to the attendees to purchase archival supplies of their choosing was extremely beneficial to the overall project and would be included in a future grant. With funds for supplies, attendees were able to purchase what they needed to almost immediately apply the knowledge gained during the Institute.

Conclusion

The initial training is one step in the process for the tribes. As Oregon's tribes continue to develop and expand their operations, they will be creating museums, government records, cultural collections, and genealogical collections that are far beyond the present capacity of their programs. The Umatilla tribe alone has filled the cultural archives in their Tamástlikt Cultural Institute in fifteen years; their facility has 25,000 square feet of storage. At the Grand Ronde tribe, the government archives are at capacity and the cultural collection is being moved into the new Chachalu Tribal Museum and Cultural Center in 2014. As tribal members are hearing that the museum is opening and the archives are available, they feel more secure about giving their private collections to the tribe. The needs are increasing for trained archivists within the tribes and the OTAI team hopes to continue with future trainings for all of Oregon's tribes.

Appendix A. OTAI Schedule at a Glance

Sunday, August 19		
4:00-5:30	<i>Check-in and Registration</i>	Halsell Hall Lobby
6:00-8:00	<i>Opening Ceremony and Dinner</i>	CH2M Hill Alumni Center
Monday, August 20		
7:00-9:00	<i>Breakfast</i>	Arnold Cafeteria
9:00-11:30	<i>Welcome and Introduction to the Institute</i>	Willamette Seminar Room
11:30-12:00	<i>Funding Opportunities</i>	Willamette Seminar Room
12:00-1:00	<i>Lunch</i>	Arnold Cafeteria
1:00-5:00	<i>Funding Opportunities cont., Archives 101, & Collection Management Systems</i>	Willamette Seminar Room
5:00-7:00	<i>Dinner</i>	Arnold Cafeteria
7:00-8:00	<i>Optional Walking Tour of OSU</i>	Halsell Hall Lobby
Tuesday, August 21		
7:00-7:30	<i>Breakfast</i>	Arnold Cafeteria
7:30-9:00	<i>Travel to Siletz</i>	Halsell Hall Lobby
9:00-12:00	<i>Facilities and Disaster Planning</i>	Siletz
12:00-12:45	<i>Lunch</i>	
12:45-2:00	<i>Travel to Benton County Historical Society</i>	
2:00-5:15	<i>Archival Preservation and tour of facilities</i>	BCHS
5:15-5:45	<i>Return to OSU</i>	
5:45-7:00	<i>Dinner</i>	Arnold Cafeteria
Wednesday, August 22		
7:00-8:30	<i>Breakfast</i>	Arnold Cafeteria
8:30-12:00	<i>Digitization, Sound Recordings, & Digital Mgmt.</i>	Autzen Classroom
12:00-1:00	<i>Lunch</i>	Arnold Cafeteria
1:00-5:00	<i>Born Digital Records, Exemplary Projects, & Oregon Folklife Network</i>	Autzen Classroom
5:00-7:00	<i>Dinner</i>	Arnold Cafeteria

Thursday, August 23		
7:00-7:30	<i>Breakfast</i>	Arnold Cafeteria
7:30-9:00	<i>Travel to Grand Ronde</i>	OSU Library
9:00-12:00	<i>Digital Preservation, Reference and Access</i>	Grand Ronde
12:00-1:00	<i>Lunch</i>	
1:00-5:15	<i>Records Retention, Researching Elsewhere, & Northwest Archivists</i>	Grand Ronde
6:00-8:00	<i>Closing Dinner</i>	Spirit Mountain Casino
Friday, August 24		
7:00-9:00	<i>Breakfast</i>	Arnold Cafeteria
9:00-12:00	<i>Outreach, Model Programs, & Grant Writing</i>	Willamette Seminar Room
12:00-1:00	<i>Lunch</i>	Arnold Cafeteria
1:00-3:00	<i>Institute Reflection</i>	Willamette Seminar Room
3:00-4:30	<i>Checkout for those not staying Friday Night</i>	Halsell Hall
5:00-7:00	<i>Dinner for those staying Friday night</i>	Arnold Cafeteria
Saturday, August 24		
7:00-9:00	<i>Breakfast</i>	Arnold Cafeteria
11:00	<i>Checkout</i>	Halsell Hall