# Leveraging the Protocols for Native American Archival Materials to Support Indigenous Digital Collections: A Case Study from the Sherman Indian Museum Digital Project

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## ABSTRACT

The Sherman Indian Museum houses a rich collection of archival materials that document the student experience, institutional culture, and community history of California's sole remaining off-reservation American Indian boarding school. To broaden access to its collection for community and scholarly use, the museum partnered with the University of California, Riverside Library on a grant-funded project to digitize and provide online access to nearly 14,000 items from their collection. With a shared understanding of the unique ethical and communal protocols present in a digital project of this scope, the two repositories turned toward the standards and goals articulated in Protocols for Native American Archival Materials (PNAAM) for guidance. This case study details how the principles outlined in PNAAM were incorporated into the Sherman Indian Museum Digital Project to help guide this collaborative effort between an Indigenous and non-Indigenous institution. It discusses how PNAAM was not only utilized to establish and maintain an effective partnership between the repositories, but also to ensure that the process to digitize and make these materials accessible online was conducted in a culturally-responsible and -responsive manner. This approach highlights a framework that can then be adapted by similar cross-institutional digital projects working with Indigenous collections.

## Introduction

The United States government supported 408 American Indian boarding schools throughout the country during the nineteenth and twentieth centuries including twelve schools across the state of California.[1] With only four federally operated off-

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1. United States Department of the Interior, *Federal Indian Boarding School Initiative Investigative Report* (Washington, DC: United States Department of the Interior, 2022).

reservation boarding schools left in the United States, it has become increasingly more difficult to locate and access cultural heritage materials originating from these institutions.[2] The Sherman Indian High School (SIHS) located in Riverside, California is one of the remaining off-reservation boarding schools still in operation, and is also one of the very few to have established a dedicated program to preserve and protect its history. In 1972, SIHS founded the Sherman Indian Museum to document the student experience, institutional culture, and community history of the school and its predecessors, the Perris Indian School (1892-1902) and Sherman Institute (1902-1970). In its more than five decades of independent, continuous operation, the Museum has amassed a vast collection of materials spanning over a century, representing members of the more than 500 tribal nations that have been affiliated with the school. The Museum's collection encompasses nearly 250 linear feet of archival materials that were created or collected by school administrators, students, and staff including everything from campus bulletins, student yearbooks, and historical photographs to administrative ledgers, rosters, and correspondence (see Figure 1).[3] This collection is a rich archival resource that broadly documents the Native American experience in the



Figure 1. Image of an exhibit at the Sherman Indian Museum showcasing materials from their collection that document the history of the school, circa 2000. Sherman Indian Museum, Sherman Indian Museum Collection, https://calisphere.org/item/ark:/86086/n2w95b05/.

2.  "Indian Boarding Schools: Health and Safety Risks of Native Children at BIE (Bureau of Indian Education) Boarding Schools," United States Department of the Interior, May 2019, https://www.doi.gov/ocl/indian-boarding-schools.

3.  A complete description of the collection can be found in the Sherman Indian Museum collection finding aid available on the Online Archive of California, https://oac.cdlib.org/findaid/ark:/13030/c8fn1cfv/.

United States covering topics such as Native American education, the United States government's cultural assimilation efforts of Native Americans, and the history of American Indian off-reservation boarding schools.

Sherman Indian Museum (SIM), largely underfunded and under-resourced, has allocated most of its limited resources to collection acquisition, development, management, and outreach activities. As a result, it has been unable to broaden access to its collection in support of community-driven research and the ongoing efforts to address the informational gaps present in the boarding school narrative. In 2013, Dickinson College launched the Carlisle Indian School Project to document the history of the Carlisle Indian Industrial School by digitizing and providing online access to relevant resources dispersed across multiple repositories. This project resulted in the creation of the Carlisle Indian School Digital Resource Center and showcased an alternative pathway to collection accessibility through digitization.[4] Eager to explore this option for their collection and recognizing their limited capacity to support a mass digitization project of this scope on their own, the Museum pursued a partnership with the neighboring University of California, Riverside (UCR) Library. The UCR Library was well positioned to support such a project, having developed professional expertise and technical infrastructure in digitization and digital collection building activities from previous library-based projects. And given the Museum's long-time support for UCR faculty scholarship and graduate student research in the UCR Public History and Native American History programs, the Library was eager to partner with SIM on this effort.[5]

In 2017, the two repositories jointly applied for and received a Council on Library and Information Resources (CLIR) Digitizing Hidden Collections two-year grant for the project titled "The Sherman Indian Museum Digital Collection: Increasing Access to American Indian Off-Reservation Boarding School Archives" to digitize and provide online access to nearly 14,000 items, totaling over 55,000 pages of content from the Museum's collection.[6] The collaborators entered into this partnership with a

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4. For additional information on the Carlisle Indian School Project and Carlisle Indian School Digital Resource Center, see https://carlisleindian.dickinson.edu/.

5. Several publications based on research conducted at the Sherman Indian Museum were released by UCR affiliated faculty and students. See: William Oscar Medina, "Selling Indians at Sherman Institute, 1902-1922" (PhD diss., University of California, Riverside, 2007); Matthew Sakiestewa Gilbert, *Education Beyond the Mesas: Hopi Students at Sherman Institute, 1902-1929* (Lincoln, NE: University of Nebraska Press, 2010); Clifford E. Trafzer, Matthew Sakiestewa Gilbert, and Lorene Sisquoc, *The Indian School on Magnolia Avenue: Voices and Images from the Sherman Institute* (Corvallis, OR: Oregon State University Press, 2012); Chelsea Marybeth Herr, "Marketing Native Objects, Visualizing Native Bodies: New Deal Photography and the Sherman Institute" (MA thesis, University of California, Riverside, 2014).

6. CLIR Digitizing Hidden Collections grants are designed to support the digitization of rare and unique content held by cultural heritage organizations in the United States and Canada with a focus on materials that expand understanding of the histories of communities underrepresented in the historical record. This project was one of only 17 (from a total of 144 applicants) selected in 2017,

shared understanding of the many complexities that can surface while working with Indigenous collections. A digital project of this type has unique ethical and communal protocols, requiring a much more thoughtful and informed approach, so the project team turned toward the standards and goals articulated in the *Protocols for Native American Archival Materials* (PNAAM) for guidance.[7] These tenets were not only seen as a vital component in establishing an effective collaborative partnership between SIM and UCR Library, but also as a means to ensure that the process to digitize and make these materials accessible online was conducted in a culturally-responsible and culturally -responsive manner. This article will present examples from the project where processes were directly aligned with the principles outlined in PNAAM, providing a framework that can be adapted by other cross-institutional projects to collaboratively digitize and provide online access to Indigenous collections.

## Literature Review

Over the past decade, there has been a fair amount of discussion in the archival literature focused on the Protocols for Native American Archival Materials (PNAAM), with a growing body of research dedicated to better understanding the general application of these "guidelines for action." In "Respect, Recognition, and Reciprocity: The Protocols for Native American Archival Materials," Jennifer O'Neal examines the recommendations laid forth in PNAAM and suggests possible steps for implementing them into archival practice. O'Neal posits that PNAAM can "create opportunities for collecting organizations and tribal communities to improve existing relationships and build new interactions through respect and recognition of tribal communities that would eventually lead to reciprocity through collaboration and shared stewardship of collections."[8] Kim Walters' contribution to the 2014 publication *Through the Archival Looking Glass: A Reader on Diversity and Inclusion* discusses the influence of PNAAM on the development of institution-specific protocols for starting and maintaining relationships with Indigenous communities at the Braun Research Library, acknowledging the importance of establishing "protocols for working with tribes, especially with the concept of digital repatriation, so that we can respond to issues of cultural sensitivity relating to all museum objects and library materials."[9] And in their

receiving just over $376,000 in funding, and was completed over a two-year span from June 1, 2017 through May 31, 2019.

7.  "Protocols for Native American Archival Materials," First Archivist Circle, published April 2007, https://www2.nau.edu/libnap-p/protocols.html.

8.  Jennifer O'Neal, "Respect, Recognition, and Reciprocity: The Protocols for Native American Archival Materials," in *Identity Palimpsests: Archiving Ethnicity in the U.S. and Canada*, eds. Dominique Daniel and Amalia S. Levi (Sacramento, CA: Litwin Books, 2014), 125-142. Note: commonly or version titled as "Respect, Reciprocity, and Reconciliation: The Protocols for Native American Archival Materials."

9.  Kim Walters, "Respecting Their Word: How the Braun Research Library Works with Native Communities," in *Through the Archival Looking Glass: A Reader on Diversity and Inclusion*, eds. Mary A. Caldera and Kathryn M. Neal (Chicago, IL: Society of American Archivists. 2014), 177–94.

2015 study, Elizabeth Joffrion and Natalia Fernández explore how successful collaborations between Indigenous and non-Indigenous institutions are established and maintained, examining how PNAAM can be used throughout projects to aid in the development and implementation of policies and procedures.[10]

In comparison, there has been very little coverage in the literature concentrated on PNAAM and its application for collaborative digital initiatives focused on Indigenous collections, despite several projects in this arena such as the Carlisle Indian School Project, Genoa Indian School Digital Reconciliation Project, Mukurtu Wumpurrarni-kari Archive, and Plateau Peoples' Web Portal. Kimberly Christen's 2011 article, "Opening Archives: Respectful Repatriation," acknowledges the impact of PNAAM on the Plateau Peoples' Web Portal project, a multi-institutional project to collaboratively curate and manage a digital archive of Plateau cultural materials. Christen notes that the "methodology meshed with some of the guidelines put forth" in PNAAM and goes on to state that, "In concert with the spirit and suggested guidelines in the document, the various stages of the Portal project included primary outreach to the Plateau tribes; significant and sustained consultation in design, content selection, and upgrades; respect for cultural protocols concerning sensitive materials and constant feedback; and inclusion in all aspects of decision making."[11] However, broader discussions of the aforementioned digital projects or other initiatives centered on building Indigenous digital collections that have adopted and/or utilized PNAAM are found absent in the available literature.

Collectively, the articles mentioned above provide an excellent introduction on how to effectively build partnerships by infusing the principles outlined in PNAAM into collaborative projects. And while PNAAM itself also provides some direction here, it lacks (by design) coverage of the actual application of its guidelines in real world settings, their impact on associated work, and the outcomes achieved through their use. As Jeremey Mifflin states, "The Protocols outline what the drafters want without mapping practical strategies for how the desired outcomes could be accomplished."[12] Furthermore, Mifflin adds that "case studies of successful collaborative initiatives are perhaps the best means of outreach and advocacy, and they can be employed to advantage by Native as well as non-Native archivists."[13] Joffrion and Fernández's comprehensive national study on collaborative multi-

10. Elizabeth Joffrion and Natalia Fernández, "Collaborations Between Tribal and Nontribal Organizations: Suggested Best Practices for Sharing Expertise, Cultural Resources, and Knowledge," *The American Archivist* 78, no. 1 (2015): 192-237. https://doi.org/10.17723/0360-9081.78.1.192.

11. Kimberly Christen, "Opening Archives: Respectful Repatriation," *The American Archivist* 74, no. 1 (2011): 185-210.

12. Jeremy Mifflin, "Regarding Indigenous Knowledge in Archives," in *Through the Archival Looking Glass: A Reader on Diversity and Inclusion*, eds. Mary A. Caldera and Kathryn M. Neal (Chicago, IL: Society of American Archivists. 2014), 74.

13. Ibid., 79.

institutional projects also highlights a similar need: "There continues to be a great deal of potential for original research on the use of the Protocols, especially in relation to collaborative projects involving museums."[14] This case study aims to address a visible gap in the current literature by presenting concrete examples of the processes and strategies implemented in a successful collaborative digital project between an Indigenous museum and a non-Indigenous academic library that directly support the PNAAM recommendations.

## Building Partnerships & Maintaining Relationships

Project work was completed by building partnerships and maintaining relationships aligned with the following PNAAM recommendations:

- "Collecting institutions and Native communities are encouraged to build relationships to ensure the respectful care and use of archival material."[15]

- "Through dialogue and cooperation, institutions and communities can identify mutually beneficial solutions to common problems and develop new models for shared stewardship and reciprocity or for the appropriate transfer of responsibility and ownership of some materials."[16]

- "Document agreements with communities, through formal Memoranda of Agreement and/or other contracts, and honor commitments."[17]

Establishing respectful relationships rooted in trust is an important component of any collaborative project where two distinct entities are coming together in support of a common goal, and this is particularly the case when the collaboration involves Indigenous and non-Indigenous institutions. The Sherman Indian Museum and UCR Library had never formally collaborated on a project before, so this relationship and the ensuing partnership was something that had to be developed from the ground up. Lorene Sisquoc, longtime SIM curator, and Dr. Clifford E. Trafzer, professor of history and the Rupert Costo Chair in American Indian Affairs at UCR, led this charge as esteemed members of their respective communities. Sisquoc and Trafzer worked together on numerous collaborative projects over the years, many in conjunction with UCR students, and had already established a trusted, working relationship with one another.[18] Trafzer also worked closely with the UCR Library on several projects in his role at the University, so he was uniquely positioned to help

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14. Joffrion and Fernández, "Collaborations Between Tribal and Nontribal Organizations," 219.

15. First Archivist Circle, *Protocols for Native American Archival Materials*, 5.

16. Ibid.

17. Ibid., 6.

18. Lorene Sisquoc started working with graduate students of Clifford Trafzer from the UCR Public History and Native American History programs in the 1990s. Students interned at the museum,

bridge any potential gaps present between the viewpoints of SIM and those of UCR Library. Leveraging this previous relationship, existing outside the confines of this specific project, allowed the Museum and Library to more effectively move toward formulating mutually beneficial processes to support the shared stewardship of the Museum's collection.[19]

One of the first steps taken toward this notion of shared stewardship came during the early stages of the collaboration in the form of a pre-grant project to fully process the Museum's collection. An initial survey of the collection revealed that while SIM had taken steps to preliminarily re-house and process the collection, there was extensive archival arrangement and description work still needed in advance of the digitization effort funded by the CLIR grant. Without the requisite resources to complete this archival processing work, and grant funds restricted to digitization efforts only, the Museum turned to the Library for assistance. Understanding the necessity for SIM's collection to be arranged, described, and processed prior to it being digitized and made available online as a digital collection, UCR Library offered its support by providing the necessary resources to complete a pre-grant collection processing project. The Library did not, however, carry this work out in isolation and coordinated all tasks on this front directly with the Museum. SIM curator and staff identified materials for processing, established the necessary access restrictions for culturally sensitive materials, provided guidance on the terminology used for archival description, and ensured the accuracy and completeness of the archival finding aid once completed. The Library's readiness to provide collection processing assistance to the Museum, and to fully engage them in this activity, positively impacted subsequent work on the project. It demonstrated to SIM that UCR Library was deeply invested as a shared steward to preserve and increase the accessibility of their collection, helping to further build trust between the two institutions as they progressed into the grant phase of digitization and digital collection building.

Cooperative discussions that occurred during the grant-funded portion of the project centered on the selection of the digital asset management system (DAMS) that would be used to manage, preserve, and provide long-term access to the digitized collection. While there were several potential solutions available, the Museum and Library jointly agreed to utilize the California Digital Library's (CDL) integrated UC Shared DAMS and Calisphere platforms designed to create, manage, and provide access to collections of digital objects and their associated metadata (see

conducting research that led to numerous research papers, field reports, and dissertations. Much of this work culminated in the first decade of the 2000s with the publication of several books on the Sherman Institute, many of which were co-authored by Sisquoc, Trafzer, and UCR-trained historians.

19. For a discussion on the importance of adopting a stewardship model to support efforts documenting ethnic communities, see: Joel Wurl, "Ethnicity as Provenance: In Search of Values and Principles for Documenting the Immigrant Experience," *Archival Issues* 29, no.1 (2005): 72.

Figure 2).[20] While Calisphere is open for use to all cultural heritage repositories throughout California, the UC Shared DAMS is only available to content owned or hosted by the UCR Libraries. The under-resourced SIM, unable to build or adequately maintain an expansive digital collection of this scope on its own using subscription-based services or open-source technologies, welcomed UCR Library into this role as it provided a long-term solution for the preservation and accessibility of their collection. This also allowed the Library to ensure that the Museum's collection, which directly supports university research, remained persistently available online and available for faculty and student use. It was through this process of cooperative discussion and decision making that the two partners were able to identify and implement reciprocal solutions that were beneficial to both institutions and their key stakeholders.

As the grant project neared completion, UCR Library recognized that as a responsible partner and now steward of a rich historical and cultural online resource, it needed to make some formal assurances to SIM that its digital collection would be properly managed and maintained post-grant. To this end, the Library drafted a Memorandum of Understanding (MOU) that outlined its specific roles and responsibilities to support the ongoing preservation and accessibility of these unique digital materials and shared this document with the Museum for feedback.[21] The final MOU addressed the key areas pertinent to the management of the digital collection, including appropriate digital file and metadata backup, sustained online access to the collection, and descriptive metadata/image quality error correction. It also contained several elements that focused on those issues more unique to the culturally sensitive materials found in the Museum's collection. This included ensuring that restricted content stored in the UC Shared DAMS remained suppressed from public view, honoring requests from the Museum to remove content from public view while maintaining the accessibility of metadata-only records for these materials and forwarding any content takedown requests received in Calisphere from the public to SIM for review. The Library also agreed to notify the Museum and identify alternatives for the management, preservation, and accessibility of the collection in the event that the UC Shared DAMS and/or Calisphere were no longer viable options. The term of the MOU was set for three years from the end of the grant, after which it was set to be re-evaluated for renewal based on SIM's need for ongoing support. Having a formal agreement in-hand was a critical tool that not only provided the Museum with reassurance that the Library was committed to sustaining the collection, but that also held the Library accountable for continued support in the event of shifting institutional priorities or unforeseen staffing changes. Moreover, the

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20. CDL's Calisphere digital collections platform, used by more than 300 cultural heritage repositories in California and featuring over 2 million items from more than 20,000 historically significant collections, serves as the online discovery and display mechanism for the museum's digital collection.

21. A Memorandum of Understanding (MOU) is a document that describes the broad outlines of an agreement that two or more parties have reached.

Figure 2. Screenshot of the Sherman Indian Museum collection that is available online through Calisphere.

signed MOU signified an ongoing partnership and commitment that formally recognized the two institutions as shared stewards of this vitally important historical resource.

## Honoring Indigenous Perspectives on Access, Use, and Retention

Completed project work that honored indigenous perspectives on access, use, and retention were aligned with the following PNAAM recommendations:

- "Consult with culturally affiliated community representatives to identify those materials that are culturally sensitive and develop procedures for access to and use of those materials."[22]

- "Ensure that any restrictions or agreed upon procedures are fully implemented and observed."[23]

- "Anticipate that communities may ask a collecting institution to retain records in trust or under a co-custody agreement until such time as a tribal archives or library requests a return of the original documents for long-term preservation and local access."[24]

Issues surrounding access, use, and retention must be prioritized for discussion in projects focused on building Indigenous digital collections where materials are inherently unique and often require distinctly different treatment than their non-Indigenous digital collection counterparts. The culturally sensitive materials and data frequently found in these collections can contain sacred or confidential information that, if publicly shared, may be exploited or misrepresented causing irreparable harm to the Indigenous community. Working collaboratively with Museum Curator Lorene Sisquoc and community affiliates, the Library helped construct three levels of online access for the Museum's collection in an effort to safeguard materials against misuse. These three levels were: full online access with no restrictions (Level 1), partial online access with confidential, sensitive, or sacred information redacted (Level 2), and restricted online access with only descriptive metadata records displayed (Level 3). Access at Level 3 was designed to accommodate SIM's desire to have restricted materials discoverable online as part of the digital collection through metadata-only records, so that users could still locate and request to use these materials onsite at the Museum. After this approach was developed, a comprehensive survey of the Museum's collection to assign access levels to materials was completed by Sisquoc and community affiliates to ensure that all of the applied restrictions properly aligned with communal protocols.[25]

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22. First Archivist Circle, *Protocols for Native American Archival Materials*, 11.

23. First Archivist Circle, *Protocols for Native American Archival Materials*, 11.

24. Ibid., 17.

25. The assigned access levels for materials can be changed if the museum decides at some point in the future that a different level of access is more appropriate. For example, materials that were originally designated as Level 3 access can be changed to Level 1 or 2 access if needed. Additionally, members of the public can initiate a takedown request that is reviewed by the museum curator if they believe any of the materials available online violate their privacy or contain sacred or confidential information.

The completed collection survey revealed a considerable amount of Personally Identifiable Information (PII) present in the student boarding school records—a substantial portion of the Museum's overall collection. The project team turned to the Family Education Rights and Privacy Act (FERPA), a federal law protecting student educational records, to direct decision-making but found that American Indian off-reservation boarding school records are not protected under FERPA. These boarding schools are operated under and funded by the United States Department of the Interior, and FERPA only applies to educational agencies and institutions that receive funds from applicable programs administered by the United States Department of Education.[26] Despite the lack of formal protection under federal law, SIM and UCR Library still jointly agreed to adhere to the FERPA regulations as a framework for dealing with student PII. Most of the identified materials were found to be classed under FERPA as "directory information" which is defined as "information contained in an education record of a student that would not generally be considered harmful or an invasion of privacy if disclosed."[27] A school is not required to inform former students or the parents of former students regarding directory information or to honor their request that directory information not be disclosed without consent.[28] Furthermore, information in personally identifiable form can be disclosed without consent if the information comes from records of deceased eligible students or students who may be presumed deceased.[29] Since most of the boarding school records pertain to high school age children prior to 1926 that are presumed deceased, the decision was made to make these materials fully accessible online (Level 1) in accordance with FERPA. However, there were some items such as the high school student rosters from the 1940s through 1970s, containing student contact information, dates of attendance, and coursework completed. The Museum viewed these as a potential risk to student and family privacy, so the high school student rosters were marked for restricted online access (Level 3).

In addition to the PII concerns, a number of items containing sensitive and confidential information were also identified that needed to be either fully restricted or partially redacted from online viewing. The first set of items were Sherman Indian High School's (SIHS) "Outing System" records that referenced perceived student

26. "Family Educational Rights and Privacy Act (FERPA)," U.S. Department of Education, accessed February 2024, https://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html.

27. "Protecting Student Privacy: Directory Information," U.S. Department of Education, accessed February 2024, https://studentprivacy.ed.gov/content/directory-information.

28. "Protecting Student Privacy: May An Educational Agency or Institution Disclose Directory Information Without Prior Consent?," U.S. Department of Education, accessed February 2024, https://studentprivacy.ed.gov/faq/may-educational-agency-or-institution-disclose-directory-information-without-prior-consent.

29. "Protecting Student Privacy: Does FERPA Protect The Education Records of Students That Are Deceased?," U.S. Department of Education, accessed February 2024, https://studentprivacy.ed.gov/faq/does-ferpa-protect-education-records-students-are-deceased

aptitude and/or behavior as judged by school administrators.[30] These documents often contained highly subjective statements and offensive language that SIM considered potentially harmful to an individual or their living descendants. The decision was made to fully restrict these items online (Level 3) so that they would only be available for use at the Museum with prior approval from the museum curator. The second set of items included school registration ledgers from the late 19th through early 20th centuries. SIM wanted to make much of the information contained in these ledgers more widely available to the community, but estimates on the "Degree of Indian Blood" for individual students were also recorded in these ledgers. This data is highly sought after as it can be used to confirm or deny an individual/familial affiliation with a Native American gaming tribe, and by making it openly available online, there is an increased chance of data misinterpretation and even manipulation. The column of the ledger containing the "Degree of Indian Blood" estimates was fully redacted from the digitized ledger (Level 2) and suppressed from public view, so that only the remaining information approved by the Museum would be visible online (see Figure 3).

Working collaboratively with Indigenous communities to identify information in their collections of a confidential, sensitive, or sacred nature and developing procedures for access to and use of these materials is a key first step in maintaining data sovereignty for Indigenous communities. When building digital collections, though, efforts need to extend beyond this, toward ensuring that the discovery and access systems in use for this content are able to appropriately apply these restrictions. Library and archival repositories often prioritize open access, therefore the contemporary digital asset management and discovery systems designed for their use typically lack accommodations for the more nuanced needs of Indigenous materials and data like that found in the museum's collection. A notable exception is the Mukurtu CMS which has been built with Indigenous communities to manage and share their digital cultural heritage.[31] However, the Mukurtu CMS will not always be a viable option for repositories working with Indigenous digital collections as these repositories may lack the available funding, staffing, or technical resources needed to establish, manage, and maintain an instance of this platform. That was the case for this particular project where the Museum needed an existing, well-supported platform that they could leverage (instead of directly manage) for the long-term sustainability of their collection. And while the California Digital Library's (CDL)

30. The "Outing System" was labeled as an educational apprenticeship program in boarding schools where Native American children would be placed into the homes of white families to live and work, but effectively it pursued an agenda of cultural assimilation that forcibly integrated students into white American society. For further discussion see: Robert A. Trennert, "From Carlisle to Phoenix: The Rise and Fall of the Indian Outing System, 1878-1930," *Pacific Historical Review* 52, no. 3 (1983): 267-291.

31. For additional information on Mukurtu, a content management system designed to manage and provide access to cultural heritage materials in an ethically minded way that utilizes a community-driven approach for platform development, see https://mukurtu.org/.
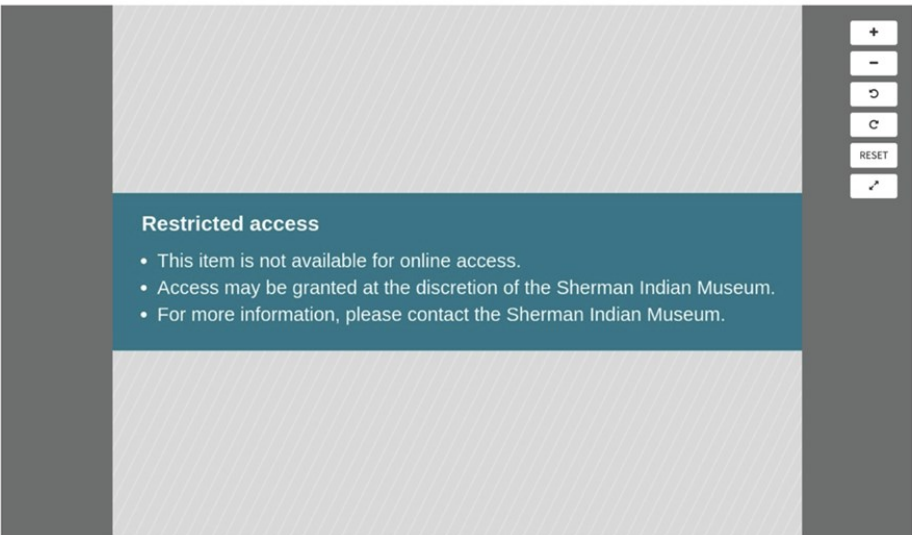
Figure 3. Page from the school registration ledger depicting the redacted "Degree of Indian Blood" column in the online digital copy.

Calisphere platform was selected for use, its system design was centered on openly accessible digital collections and it couldn't support the Level 3 restrictions required by SIM. Understanding that Calisphere's limitation likely impacted other Indigenous digital collections held throughout California, UCR Library saw this as a prime opportunity to advocate for functionality that could benefit the Museum and other Calisphere contributors with similar collections now and into the future.

UCR Library approached CDL about the possibility of modifying the technical framework of Calisphere to better support access restrictions for Indigenous collections, as well as those with similar needs to suppress sensitive content. Appreciating the need to restrict online viewing for some items while still publishing the descriptive metadata-only records for enhanced content discovery, CDL agreed to alter Calisphere's design so that it could better accommodate the various levels of content restrictions needed by their contributing repositories. After reviewing the SIM's requirements, CDL proposed a "restricted access" placeholder for each of the items in the Museum's collection that needed a Level 3 restriction. This solution allowed the descriptive metadata to remain visible online with the digital collection,

and discoverable through the Calisphere interface, while the item itself remained completely suppressed from public view. Information on the restrictions governing the use of these excluded items was also included in a publicly visible descriptive metadata field to provide context for site users.[32] Working collaboratively, the Library, Museum, and CDL jointly developed and fully implemented a solution that addressed restricting online access to the high school student rosters and "Outing System" records found in SIM's collection (see Figure 4). Metadata-only access to restricted items is now a standard feature on Calisphere, available for use by all of their statewide contributors to protect sensitive and/or sacred information in other Indigenous collections from unauthorized access.



Figure 4. Screenshot of the "restricted access" placeholder and metadata-only record for the 1972-1973 high school student roster on Calisphere.

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32.   This metadata field labeled "Rights Notes" includes the following descriptive text: This item is not available for online access. Reasons this item is not published online may include student privacy or cultural sensitivity. Access may be granted at the discretion of the Sherman Indian Museum.

Corresponding efforts focused on digital collection retention within the community for long-term preservation and local access were also embedded into this project. Standards-based digital objects and metadata in reusable formats were created so that the digitized content could be repurposed in a variety of ways and migrated forward into different systems as needed. This approach was designed to safeguard the digital collection from becoming tied to any single platform, thus reducing the risk of it becoming inaccessible should the Library's stewardship role end. This allows the Museum to more effectively respond to unforeseen changes that may occur in the administration of their digital collection and gives them the added flexibility to pursue different management and access solutions in the future should the need arise. At SIM's request, all digital objects and associated metadata from the digital collection were also replicated from the UC Shared DAMS and delivered to the Museum on external hard drives for onsite storage within the community. These files not only serve as a local backup under the full control of the Museum, but it also allows them to provide onsite digital access to materials with Level 3 restrictions since this content is not viewable online in Calisphere. It is through various combined actions such as those described here that non-Indigenous institutional collaborators can better support Indigenous communities as they work to preserve and provide access to their cultural heritage collections.

## Prioritizing Community Involvement and Knowledge Exchange

Completed project work that prioritized community involvement and knowledge exchange were aligned with the following PNAAM recommendations:

- "Invite Native American community members to participate in hiring processes, as appropriate, and employ American Indian staff in visible positions."[33]

- "Support Native American students in education and training programs — from recruitment to mentoring and study leave."[34]

- "Collapse boundaries between libraries, archives, and cultural organizations to further life-long learning and better connect people to the human experience."[35]

Prioritizing and promoting a sense of community and shared responsibility amongst partnering institutions at the onset of a cross-institutional collaborative project can serve as a key contributing factor to its success. This helps establish a supportive foundation for the project that encourages greater community

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33. First Archivist Circle, *Protocols for Native American Archival Materials*, 19.

34. Ibid.

35. First Archivist Circle, *Protocols for Native American Archival Materials*, 21.

involvement and knowledge exchange. Integrating the Museum and its community in every phase of this project, from the grant writing stage and hiring process to the completion of digitization and metadata creation, was essential in establishing an equitable partnership. Museum Curator Lorene Sisquoc played an integral role in the project by ensuring that the voice of the SIM community was always kept at the forefront of this project. She helped develop the initial project staffing plan for the grant application, where she staunchly advocated for employing Indigenous students from the SIHS Museum Studies track into visible project roles. Sisquoc was later invited to serve on the hiring search committee for the Project Coordinator position where she provided helpful insight on candidates to ensure that the selected individual possessed the needed levels of cultural sensitivity and awareness to effectively lead the project. She also participated in the recruitment and selection of advisory board members, helping to identify key individuals from the local Indigenous community that could provide continuing support and guidance for the project. Integrating Sisquoc into these processes was crucial to building a project team that reflected the Indigenous community and its values, placing direct control over the creation of the digital collection and its dissemination to the broader public directly in the hands of the community.

This project also presented a prime opportunity to engage in training and educational activities that embedded archival and digital project skills into the Indigenous community. As previously mentioned, SIHS students from the Museum Studies track were integrated into the project as paid interns. A total of thirteen SIHS students were recruited and participated in the project as digitization assistants where they learned proper handling techniques for archival materials, digitization standards and processes, metadata creation, digital object structuring, and digital asset management (see Figure 5). The SIHS students were fully trained by the project coordinator and paired with three UCR students that were also hired for the project. The UCR students served as peer mentors, working closely with the SIHS students to digitize, describe, and process approximately 10,000 items onsite at the Museum.[36] SIHS students gained invaluable experience, utilizing a broad range of technologies and were taught essential technical skills that extend well beyond the archival context and that can be broadly applied to a range of other community-based activities. The benefits of incorporating Indigenous students into this project were later documented by the project coordinator and distributed to community practitioners through a poster session at the 2018 Association of Tribal Archives, Libraries, and Museums (ATALM) conference and an interview recorded with the

36. Grant funds were used to purchase digitization equipment for the museum that consisted of an Epson Expression 11000XL Photo Scanner, Dell XPS desktop computer, Adobe Photoshop CC, and two 2TB portable external hard drives. This equipment remained at the museum post-grant to support future on-site digitization activities.

Figure 5. Image of project students digitizing and creating metadata for historical photographs at the Sherman Indian Museum (SIM).

Sustainable Heritage Network to help build a communal knowledge base that can inform future work in this area.[37]

The steps taken by SIM and UCR Library to foster a collaborative working environment helped limit the natural barriers that can exist between these related, but distinctly different types of, repositories and also encouraged a free flow exchange of ideas amongst the project staff. The impact that collaborative projects have on the people involved is oftentimes overshadowed by a project's end goals and deliverables. However, it is worth highlighting the connections people make and the information sharing that occurs over the course of a project because this is what empowers communities to continue working on these fronts. Through this project, SIM staff and SIHS students learned archival processing techniques, digitization and metadata standards, and digital collection building processes that can be carried forward to

37. "Teaching New Kids Old Tricks: Working with Students in Archives," Sustainable Heritage Network, accessed February 2024, https://sustainableheritagenetwork.org/digital-heritage/teaching-new-kids-old-tricks-working-students-archives.

future community-based digital projects. UCR Library staff were in turn exposed to the Museum's local practices for applying culturally appropriate terminology and restrictions to its collection, gaining a better understanding of culturally-responsible and culturally -responsive methods that can be applied to processing the Library's locally-held Indigenous collections. This collaborative, learning experience allowed both staff and students to view this project—and digital project work more broadly—through a shared lens where collective effort, knowledge exchange, and resource sharing can act as a catalyst for greater success. By combining UCR Library's archival and digital project expertise with the SIM's deep subject knowledge and community. the two institutions were able to successfully create a rich, standards-based online resource that ascribes to Indigenous and locally held communal protocols. While this is a fine accomplishment on its own, perhaps the greatest success of this project came in the form of the connections people made and the skills they acquired that are transferable to future work on preserving, managing, and sharing cultural heritage materials from Indigenous communities.

## Conclusion

Adopting PNAAM for this project was instrumental to its success, providing collaborators with the needed direction on how to effectively build a partnership and subsequently maintain this relationship as the project progressed toward (and even past) completion. Through collaboration, the two institutions—Sherman Indian Museum (SIM) and University of California, Riverside (UCR) Library—were able to successfully implement replicable solutions that can be repurposed by other projects working to preserve and provide access to Indigenous collections for community and research use. Despite the overall success of this project, there were some areas identified for improvement upon its completion. Most notably, incorporating the PNAAM principle of arranging "reciprocal visits to weave a stronger community fabric and establish long-term trust relationships" could have been easily implemented and highly beneficial.[38]

Our project efforts focused on making regular site visits to SIM as a way of centering the attention on their space and community. The benefits of hosting museum contributors at University of California, Riverside (UCR) to provide them with an introduction to library spaces, staff, and collections were not realized at the time. In hindsight, doing so could have further fostered and strengthened ties between the two institutions by providing additional points of connection. The examples provided detailing how PNAAM principles were successfully integrated into the Sherman Indian Museum's digitization project can serve as a useful guide for future Indigenous-based, cross-institutional digital projects. However, it is worth noting that while PNAAM can be used to guide efforts, it should not be viewed as an all-in-one solution. Projects of this scope are more nuanced, requiring a combination

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38. First Archivist Circle, *Protocols for Native American Archival Materials*, 21.

of project partners and participants that wholeheartedly embrace and respect the diversity of values, beliefs, and approaches found in the Indigenous community. And perhaps most importantly, non-Indigenous repositories will need to relinquish control, embrace unfamiliar methodologies, and settle into a supportive—rather than lead role—to better assist Indigenous repositories as they strive to protect and preserve their cultural heritage.