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Build It—And Advocate for It—And They Will Come: Lessons from a Collaborative Project in Archives Advocacy and Program Development

Jodi Allison-Bunnell, Linda Morton-Keithley, and Elizabeth Knight

ABSTRACT

Libraries at small- and mid-sized academic institutions continue to re-define themselves as journal and monograph collections go online, budgets and staffing remain flat or reduced, and value to student learning and the institutional mission needs to be apparent. This all spells opportunity for archival programs which, with a strong focus on advocacy and daylighting formerly hidden collections of unique content, can re-invigorate the library and spotlight the active role today’s service- and user-oriented archives can play in supporting student research, fostering ties with constituents, and ensuring the preservation of an institution’s stories and history. A recently-completed National Historical Publications and Records Commission (NHPRC)-funded grant project involving seven private institutions in Washington and Oregon utilized a focus on effective advocacy and consulting archivists to move archival programs to the next level. Despite limited resource levels at most of the institutions, tangible and sustainable progress was made on describing collections, establishing best-practices and policies, and perhaps most importantly, cultivating a strong ethic of persistent, creative, low-cost advocacy and outreach.

Introduction

It’s a familiar feature of many an archives tour: the person leading the tour points to a quiet office or a neatly arranged stacks area now dusty with disuse and says, “We had a grant back in 1998 and got all these catalogued, but the grant ended and we haven’t been able to do much with it since. I don’t really know what’s here.”
This scenario is unfortunate not only for the potential users of these collections and the institutions that hold them, but for the national, state, and local grant-making institutions as well. Particularly as grant-makers' budgets decrease, there is an increasing emphasis on sustaining projects beyond the grant period in order to ensure that public and private money is well invested in the long term. Grant panels scrutinize these sections with great interest, and the viability of a project in the long term is a major factor in competitions for grant funding.

In order to expose significant collections without repeating the forgotten-closet scenario, the Northwest Digital Archives (NWDA) program at the Orbis Cascade Alliance developed the Supporting and Building Emergent Archival Programs in the Northwest project. Its aim was to give institutions a reason to support their archives and special collections programs after the conclusion of the grant by focusing on advocacy as well as collection description and access. Marrying these two aims has brought success by developing programs, expanding audiences, and contributing to the documentary record in the Northwest.

**Overview of Project**

The project sought to expand the presence of archives and special collections in the region by assisting seven small colleges in Oregon and Washington with archival program development, advocacy for sustained institutional support, and exposing basic information about their collections to researchers worldwide. The project utilized two consulting archivists who spent six weeks at each institution to develop a customized advocacy and outreach strategy, perform collection surveys, and fill in gaps in local staff knowledge of current best practices in archival processing and management. All seven institutions involved in the project are members of the Orbis Cascade Alliance, a consortium of academic libraries in Washington, Oregon, and Idaho that strengthens member libraries through collaboration. All seven institutions joined the Northwest Digital Archives (NWDA) program during the course of the project, which ran from July 2010 and June 2012. Northwest Digital Archives is one of the Alliance’s programs and includes thirty-seven member institutions in Washington, Oregon, Idaho, Montana, and Alaska. Formed in 2002 by archives and records repositories who wanted to accomplish things that they could not do as individual institutions, the program supports a suite of collection management and access services that allow participating institutions to focus local staff and resources on other functions. Members also find a ready community of colleagues to consult and play a substantial role in governing and directing the program. The NWDA Program Manager heads the program and serves as coordinator by marshaling the

grant application, hiring and supervising the consulting archivists, and ensuring that all project objectives were met. The project was funded by a grant from the National Historical Publications and Records Commission awarded to the University of Oregon, which administered grants for the Alliance at that time.

Prior to this project, George Fox University, University of Puget Sound, Seattle University, Seattle Pacific University, Linfield College, Concordia University, and Pacific University all held important collections—particularly about regarding the role of religious institutions in the development of the Northwest—but had relatively little capacity to support the discovery and use of those materials in terms of staffing, policies, and facilities. While grant funding is a common means for completing collection descriptions for archival materials, nearly all of the institutions involved in this project had never applied for or administered grants before. The two consulting archivists, Elizabeth Stiles Knight of Seattle, Washington, and Linda Morton-Keithley of Melba, Idaho, worked closely with selected local staff members and library administrators to identify and resolve many of the sticking points that were preventing the archival program from moving forward. These included problems such as incomplete documentation of current holdings; limited staff knowledge of archival arrangement, description and processing techniques (and how they vary from standard library practices); limited and already overburdened staff available to do archival work; collections stored in disperse locations throughout the library; and a need to refresh and better communicate the mission, vision and value of the archives.

Inclusion of consulting archivists in the project design was based on a successful NHPRC-funded traveling archivist project in Montana in 2000-2001, where thirteen institutions received up to four weeks of onsite support from a professional archivist. That project concluded that training and support delivered onsite with a repository’s collections was far more effective in the short and long term than asking institutions to send staff to workshops.

The project resulted in 4,414 linear feet of collections surveyed, 286 finding aids created and made available through NWDA’s database of Encoded Archival Description (EAD) finding aids (http://nwda.orbiscascade.org/), and 309 MARC records added to local catalogs, the Alliance’s Summit catalog (http://summit.worldcat.org/) through WorldCat. Other project documents, including policy and procedure manuals, processing guides, and advocacy plans, are available through http://orbiscascade.org/index/nhprc-grant.

After the consulting archivist visits concluded, a final forum on advocacy provided project participants with an opportunity to share ideas and challenges, expand their toolkit of advocacy skills and possible outreach activities, and inspire one another to keep moving forward. At the forum, participating institution staff and the consulting archivists were joined by colleagues known nationally and throughout the region for their effective advocacy work: Terry Baxter of the Multnomah County
Archives, Michael Paulus of Seattle Pacific University, Jeremy Skinner of Lewis & Clark College, and Janet Hauck of Whitworth University.2

Ultimately, the project helped create increased institutional support of all seven participating colleges and universities. Linfield College and the University of Puget Sound were able to hire their first archivists, and Pacific University increased its funding for an archivist from 0.1 FTE to 0.5 FTE. The project also helped create a notable increase in collection use on site, remotely, and online. And the support for increased use has continued: one year later, participating institutions report continued increases in collection use, program visibility, and continued support.

This project not only exposed important collections and raised awareness of the archives on each of the campuses, but provided participants with an opportunity to try out some fundamental advocacy practices and activities, many of which will be useful for sustaining support for their archival program now that the grant has concluded. Clearly, a project like this that focuses a group of similar institutions on working on advocacy together is an effective method for jumpstarting these efforts and getting stalled archival program moving again.

The Emerging Literature on Archival Advocacy

As Larry Hackman suggests in his book, Many Happy Returns: Advocacy and the Development of Archives, not advocating is no longer an option.3 It probably never was, but economic conditions now mean that a program that does not advocate is vulnerable not just to suffer at budget time, but also to be eliminated. Over the last ten years, the archival profession, particularly the Society of American Archivists, has responded to the real threats of program elimination by focusing more resources on effective advocacy. With vastly expanded focus on American Archives Month each October on a national and state level, the advancement of the Preserving the American Historical Record (PAHR) initiative for federal formula grants, the final forum on advocacy led by Kathleen Roe and Rand Jimerson’s, the SAA MayDay focus on disaster preparedness and response, the profession has gone far beyond its formerly rather bland efforts at advocacy.4 Hackman’s book is a major contribution to this effort. With an overview of advocacy topics and inspiring case studies from across the country, he offers a framework for effective advocacy no matter the characteristics of the institution or program.

Institutional Profiles

While the seven institutions involved in this project were largely similar in institution type, program size, and staffing, each institution was also quite distinct. The following offers a short description of each institution, its collections, and the state of its program prior to and during the project.

Concordia University

Concordia University in Portland, Oregon, is one of ten universities founded by the Lutheran Church—Missouri Synod in 1905, with approximately 3,000 students. The Concordia University Archives supports the mission of the university—a Christian university preparing leaders for the transformation of society—by serving as the permanent repository for records that document Concordia University’s past and present, as well as the history of the Northwest District of the Lutheran Church—Missouri Synod. The Archives is part of Concordia’s George R. White Library & Learning Center, a spacious building completed in 2009 with generous space devoted to archives storage in anticipation of the relatively new collecting responsibilities with the Northwest District. Also a part of the Archives, the Center for Volga German Studies holds a variety of materials, including photographs, manuscript materials, monographs, and maps. Concordia is fortunate to be located in a metropolitan area that has a number of dynamic and active archival repositories.5

Concordia’s collections have strong potential to support undergraduate teaching and research, administrative needs of the Northwest District and the university, and international research interest in the Volga German community. The Archive is staffed in part by one of the library’s cataloguers and in part by volunteers, with assistance from the library’s director.

George Fox University

George Fox University is a Christian university affiliated with the Friends Church (Quakers) with more than 3,500 students at its campuses and centers in Boise, Idaho as well as Newberg, Portland, Salem, and other teaching sites in Oregon. It was founded as Friends Pacific Academy in 1885. The George Fox University/Northwest Yearly Meeting of Friends Church Archives (GFU/NWYM) holds a rich body of materials dating back to GFU’s days as Pacific Academy including the broad array of activities undertaken by the Friends Church in the American Northwest; its mission work across the globe; and the professional lives of many prominent Quakers, most associated with GFU or the NWYM in some way.6 The Archive is located within Murdock Learning Resource Center on the Newberg campus.

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The collection holds great potential for students at GFU, Quaker historians, members of the Newberg community, and family historians whose ancestors were Quakers. The program is staffed by a part-time archivist with other library responsibilities; additional support comes from the library director and the technical services librarian.

**Linfield College**

Linfield College is located centered in McMinnville, the center of Oregon’s premiere wine country. It is a regional liberal arts institution with three programs: the bachelors programs at the McMinnville campus; the nursing and health science program at the Portland campus; and the Adult Degree Program, which is primarily online. Linfield was founded in 1858 by American Baptists who admitted both men and women; its School of Nursing is the oldest west of the Mississippi River. It advances a vision of learning, life, and community that promotes intellectual challenge and creativity and values both theoretical and practical knowledge.7

The Linfield College Archives, located within Jereld R. Nicholson Library, has existed for a number of years and enjoyed a moderate amount of use, primarily on-campus access by history students and student journalists, and for alumni activities. It holds materials that relate to the American Baptists that founded the college, Linfield’s nursing school, and other subjects. As part of a class projects, students had also begun collecting original source material on the history of Oregon’s wine industry for inclusion in Linfield’s institutional repository.

**Pacific University**

Located in Forest Grove, Oregon, Pacific University was founded by Congregationalist missionaries in 1849 as a school for orphans of the Oregon Trail. Modeled on the liberal arts colleges of New England, today Pacific enrolls over 3,200 students and is noted for its focus on teaching undergraduates, as well as for its graduate programs in the allied health professions.8

Pacific’s collections include the records of the university and its predecessor, Tualatin Academy, manuscripts that document the history of Forest Grove and Pacific alumni, historic photographs, university publications and theses, research files, and thousands of rare books. Original Oregon Trail diaries and manuscripts from pioneers such as Marcus Whitman and Henry Spalding are highlights of the collection. The archival program has been in place for over 20 years and is staffed by an archivist with other library responsibilities.

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Seattle Pacific University

Seattle Pacific University, located in Seattle’s Queen Ann Hill neighborhood, was founded by Free Methodist pioneers in 1891. It serves 4,000 undergraduate and graduate students. Its signature commitments include knowing and understanding what’s going in the world, embracing the Christian story, mastering the tools of rigorous learning, modeling grace-filled community, and graduating people of competence and character equipped to change the world. 9

The records contained in the SPU archives show the school’s place in the history of religious higher education in the Western United States. The archives also hold unique records pertaining to the civic and religious history of Seattle, particularly in the Queen Anne neighborhood. SPU’s Free Methodist affiliation has caused it to keep records of the denomination. Some of these records are duplicates of records kept at the Marston Historical Center at the Free Methodist Denomination Headquarters in Indianapolis, Indiana. However, the records of the Marston Center are not available online, so the SPU records are an important and more accessible resource for scholars in the western part of the United States.

Prior to this grant project, SPU did considerable and very effective advocacy work to create its archives program. The archivist position had been vacant since the late 1990s. In 2009, the library hired the current archivist, who manages the archives half-time and has other library duties. The library director also began the process of seeking tangible university support, including a collecting mandate. By the time the project began, the program was poised to expose its collections and to build the blocks of a sustainable and well-managed archival program.

Seattle University

Seattle University is a Jesuit Catholic university founded in 1891 in Seattle’s Capitol Hill neighborhood. It serves more than 7,700 students in undergraduate and graduate programs. 10 Its mission is to “educate the whole person, to professional formation, and to empowering leaders for a just and humane world.”

Special Collections is a division of the Lemieux Library and McGoldrick Learning Commons, an award-winning renovation of an existing library building that was completed in 2010 with substantial space devoted to special collections alongside student learning and collaboration spaces. Prior to the renovation, the archival collections were in an unfinished storage room. Now, collections reside in a climate-controlled collections storage space. A processing space, archives research room, and

an office for the future archivist are also in place. Work from this grant project enabled library staff to maximize these new spaces and prioritize collection needs going forward.

SU’s collections include documentation of the university and a substantial collection related to Montessori teaching. Since the departure of the library’s archivist in 2004, the Collection Development librarian is responsible for overseeing special collections and archives, fulfilling research requests and working with students to inventory and organize collections.

University of Puget Sound

The University of Puget Sound is located in Tacoma, Washington, and serves 2,600 undergraduates. It was founded in 1888 by the Methodist Episcopal Church but retains no religious affiliation. University of Puget Sound is an independent predominantly residential undergraduate liberal arts college with select graduate programs building effectively on a liberal arts foundation. The university, as a community of learning, maintains a strong commitment to teaching excellence, scholarly engagement, and fruitful student-faculty interaction.12

The university’s archives in the Collins Memorial Library contains the documents, publications, photographs, and ephemera that document the history of the university as well as thirty-eight manuscript collections. The mission of the Archives is to serve as a resource center for institutional history, to preserve the unique collections, and to promote the value of primary source document research as part of the education and lifelong learning experience.

Prior to this project, UPS had for some time pursued formal support of and staffing for an archives program. The archives program was the part-time responsibility of a designated librarian. In 2005, a preservation self-assessment was completed and in 2006, an advisory committee comprised of representatives of key campus offices and departments was established, a series of outreach activities focusing primarily on faculty was implemented, and an emeritus volunteer commenced digitization of the photograph collection. In 2009, a new library director expanded advocacy and outreach efforts and made the archives program a priority—including participation in this project.

Advocacy Plans and Results

As part of the grant project, each participating institution worked with their consulting archivist to complete an advocacy and program development plan for their archives and special collections program, in addition to substantial work on collection description and staff training in descriptive standards. The four Oregon

schools worked with consultant Linda Morton-Keithley and the three Washington schools with Elizabeth Stiles Knight. Morton-Keithley and Knight recommended a series of general and specific advocacy and program development activities for each institution based on local needs:

- Pursue formal administrative recognition of the archives as the official home of permanent institutional records for those not currently serving that function
- Keep high-level leadership informed of all successes of the program
- Use all available print and social media outlets to keep students, faculty, staff, alumni, and others up-to-date on activities and holdings
- Ensure that reference and circulation staff are kept informed of access protocols so that collections are easily available
- Enhance collection information on library webpages (and in several cases, create an archives-specific web presence)
- Integrate collections into the curriculum, including courses outside of the history department
- Seek additional ways to use collections in support of overall institutional goals
- Establish a vision, mission, and strategic direction for the archival programs (that align with institutional priorities)
- Provide refreshed or expanded policy and procedure documentation, lists of novel and sustained outreach, and advocacy activities
- Gain practical knowledge of how to develop a user-oriented, service-centered, twenty-first century archives.

Each of the schools saw notable success in the course of the project. A list of the highlights by institution:

- Concordia University included collection descriptions in the NWDA database with measurable success. Concordia added its first finding aid to NWDA on July 1, 2011; within just a few days, the first researcher who had found a collection as a result of using NWDA had arrived for an onsite research visit.
- George Fox University saw moderately increased use and the archivist, Zoie Clark, saw great responses to her outreach activities with the program’s new brochure, particularly at the Friends retirement home near campus and at an annual community celebration.
- The importance and potential of Linfield College’s archive program completely transformed in the course of this project due to a fortunate
convergence of effective advocacy prior to the grant and a solid connection between original source material held by the library and undergraduate education at Linfield. With development of the Oregon Wine History Archives in 2011, its attendant publicity, and the hiring of Linfield College's first archivist at 0.6 FTE, 13 tremendous opportunities exist to garner new collections and overall support for the Linfield College Archives and create substantial collaborative experiences for Linfield students. Linfield had not expected to have an archivist at this point in the project and now has the basis to build an even more dynamic program that will become an essential part of the campus and its educational mission. With the development of the Oregon Wine History Archives, the archives staff now has an active role with the Pinot Noir Celebration held annually on the McMinnville campus.

- Pacific University increased its support of the archivist position from 0.1 FTE to 0.5 FTE and hired a new archivist. The new energy on this project also spurred its pursuit of and funding through an LSTA grant from the Oregon State Library for the Washington County Heritage Online project, a collaboration with local heritage organizations. 14

- Seattle Pacific University was able to complete a collecting mandate by university administration in Spring 2011 that designated the archives as the official repository for university archival records. It also consolidated and expanded onsite collection storage space by reconfiguring some underutilized library spaces, and creating an inviting and very visible archives research lab which also serves as a showcase for some of its memorabilia collection and most-used collections.

- While Seattle University continues to pursue an archivist position, the existing archive team, whom has impressive knowledge of university history, special collections management, description, and preservation, continues to create finding aids, accession materials, and fulfill reference requests. An experienced metadata librarian joined the staff in 2011 and collaborates in processing and preservation activities. Advocacy and outreach activities are shared among the archive team and other key library staff.

- University of Puget Sound’s Archives & Special Collections was featured as the cover story in a recent issue of the alumni magazine, funds a summer archives student research fellowship, used yearbook drawings as custom greeting cards sent by the president, and approved funding for a full-time archivist position. Puget Sound also hired Knight for some additional consulting and project-based work to maintain the momentum and fresh progress made during the grant project.

13. This position has since been increased to full-time.
Changes and Challenges

Like any project planned well in advance of its actual execution, this project encountered some challenges, some changes, and some things that wisdom of hindsight would encourage us to do differently.

First, the forum on advocacy was effective near the end of the project as a place to share stories of successes and challenges and to provide inspiration for moving forward post-grant. It might have been even more effective if scheduled mid-project or earlier to provide project participants with cohesion and to foster the habit of collaborating with one another.

Second, other assignments and distractions for project participants were a natural and expected challenge both during and after the project. How the consulting archivists were scheduled was critical. Large blocks of time, with the daily continuity of the consulting archivist’s presence, were commonly more effective than shorter blocks of time that were unfortunately the norm at times due to scheduling challenges. However, the longer blocks of time worked less well for those institutions that set aside other responsibilities to focus on this project, leading to a buildup of other priorities that took over once the archivist’s visit was over, making them lose momentum on this project. Additionally, having considerable scheduling flexibility to work with local conditions is essential. But clearly, and just as the Montana project found, having the consulting archivists visit more than once was very important.

Last, this project highlighted the NWDA program’s need for a more defined process for adding members in order to ensure good communication and smooth transitions. NWDA leadership spent the winter of 2012-2013 creating this process, and it is now in place for all prospective members.

Conclusions

The results listed above provide insights on program advocacy and development for each of the seven institutions involved in the project. Based on the consulting archivists’ recommendations, discussions at the final forum on advocacy, and the outcomes that these programs created, applications by other archive programs can be drawn beyond the general importance of advocacy.

First, and most important, effective program advocacy emphasizes the services that the archives can offer its constituents rather than the collections that it holds. In “Building an Archives for Butte, America,” a case study on successfully advocating for a $7.5 million building renovation for the Butte-Silver Bow Public Archives, archives manager Ellen Crain expresses how she built her program on offering the services that the citizens of Butte needed, specifically by expanding open hours, answering every question that came to them (whether or not it was about archives), working with K-12 teachers to bring archives into their classrooms and their students on walking tours, and becoming vitally involved in the designation of the city as a
National Labor History Landmark. More recently, at OCLC’s “Libraries Rebound: Embracing Mission, Maximizing Impact” conference, a session on aligning special collections with the institutional mission focused on this essential strategy. Regular, sustained, and creative advocacy and outreach involves most library staff and even students, not just archivists or those directly involved with the archives.

Second, and closely related to emphasizing services, is the need to become an essential service. In her presentation at the final forum on advocacy, Janet Hauck cited numerous examples in which she connected her archives program at Whitworth University to the university’s mission to educate undergraduates. She has spent considerable time preparing materials for professors to use in their courses and pursued teaching and learning grants to facilitate these partnerships. In so doing, she’s made herself indispensable to the university—and grown her position from part-time temporary to full-time and tenure-track in ten years. Likewise, the success of Linfield College’s archives has its basis in collecting initiatives that began with students in the classroom—the core focus of the college. Being part of essential services for the organization is, for program support, far more important than what is in the stacks.

Third, collecting mandates are important, particularly for private institutions. Without either formal recognition of a program’s status as the official repository or the backing of records management laws, it’s difficult for a program to gain even informal status as essential. Formal collecting responsibilities can be an outcome of good advocacy, leading in turn to more effective advocacy for program support.

Fourth, not every institution needs a full-time archivist. Part-time, team management, and regular use of a consulting archivist can work as well. Too often, archivists focus too much on the full-time position as the ideal, which may not be a useful starting point for a program. Positions that include archives along with other duties are also a viable way to gain better program visibility and integration into the life of the organization. And participation in programs such as NWDA, which move some functions and services from local staff to the network level, can make part-time assignments far more viable and effective.

Fifth, the participants in this project learned the importance of colleagues at peer institutions, finding that sharing ideas and inspiration is very fruitful. As NWDA

program members, they'll have opportunities to build and utilize a peer group, building relationships through participation in governance and working groups. Participation in the regional professional association, Northwest Archivists, has proven fruitful for all concerned. Not going it alone and seeking effective collaboration are of paramount importance. And since most of the participating institutions had not applied for or administered grants until this project, having the consortium to provide a ready group of colleagues to conceive of grant projects, grant seeking strategies, and offer management services, is a key for success.

Last, advocacy work should be one of the most fun and creative endeavors that archivists do. Portland’s Oregon Archives Crawl was a multi-institution day-long event modeled on a pub-crawl that drew thousands of people each year from 2010 to 2012. Organized by the Portland Area Archivists, the event took as its starting point the idea that archivists can make effective connections with people by showing them, in a fun environment, how the services that archives can offer are relevant to them. It built on relationships, the fundamental business of what archives are all about.