

# N.C. STATE HISTORICAL RECORDS ADVISORY BOARD

Minutes

March 28, 2016

109 E. Jones St.; Room 308

10:00 a.m.

## **I. Call to Order:**

The spring 2016 SHRAB was held on March 28 in the third floor conference room. Attendees included: Jim Martin, Josh Myers, Billy King, Marcellaus Joiner, Kyle Wilkins, Karen Paar and departmental staff, Andrea Gabriel, Sarah Koonts, and Kim Hayes and contract employee Jo Ann Williford.

Introductions were made and the meeting was called to order at 10:04 a.m. by Sarah Koonts, Director of the Division of Archives and Records, N.C. Department of Natural and Cultural Resources, and SHRAB deputy state coordinator.

## **II. Approval of the Minutes:**

Sarah reviewed SHRAB term lengths and reiterated that members are appointed by the governor. Appointments are not always made by the time the term is up, so members may continue to serve past their original term.

Prior to approval of minutes, Ms. Koonts gave a brief background on SHRAB programs and projects. Andrea Gabriel discussed finishing the past grant project, "The Next Generation" which trained seasoned archivists about the TAP, the Traveling Archivist Program. Materials and training tools were added online to the SHRAB site. During the current grant, "Teaching Digital North Carolina," the SHRAB website will be redesigned. Typically, the NC SHRAB applies for and receives a grant each year to implement programs that reflect the mission of the NHPRC (National Historical Publications and Records Commission).

Sarah discussed TAP, its genesis and how TAP assists smaller repositories around the state that applied for and needed help with their collections. The State Archives of North Carolina continues to fund TAP, begun originally through a grant from the NHPRC through the SHRAB. Other states have SHRABs also; some have their own field services program, similar to TAP; some have preservation programs.

Karen Paar added how important and helpful the TAP has been to those smaller institutions, that don't have the funds to preserve documents. Marcellaus Joiner commented on the project that came to Bennett College where he had been employed. He mentioned Hal Keiner's [the original traveling archivist] who worked closely with repository staffs and spoke about how he personally benefitted from the program.

Sarah then referred to the minutes of the most recent conference call that were e-mailed to all members. There were no corrections. Kyle Wilkins made a motion to approve the minutes and Marcellaus seconded; the motion passed.

### **III. Report of the State Coordinator/Deputy Secretary:**

Sarah reported on departmental news on Dr. Kevin Cherry's behalf. The most significant news from the recent legislative session merged certain divisions of the N.C. Department of Natural Resources [the North Carolina Zoo; the Museum of Natural Science, Division of State Parks, etc.] with the N.C. Department of Cultural Resources becoming the Department of Natural and Cultural Resources. In part the merger was completed to easily cross market state attractions and create efficiencies. She reported that the department had legislative successes, for example, the modified program of tax credit to rehabilitate historic buildings and the bond package that will bring improvements to the zoo, state parks, and other state facilities. The department is focused on holding public meetings to get input regarding a new monument on the grounds of the state capitol that will highlight contributions of African Americans. The proposed monument will be the first added to those grounds in several decades. The Division of State Parks celebrates its 100<sup>th</sup> anniversary this year. State Parks and the North Carolina Symphony have collaborated on a film highlighting all the parks and natural areas and the film is shown during a concert.

Marcellaus asked if there was legislation specific to archives and museums. Sarah reported that there is interest in determining ways to cross promote archives collections within the expanded department; this was emphasized from Kevin Cherry that divisions work together to creatively commemorate historic events—for example, the State Archives can collaborate with other divisions, like Historic Sites, to exhibit documents, or otherwise support an activity. Karen asked if it's harder to get money for the State Archives since it belongs to such a larger department; Sarah replied that the merger has had little impact on our budget. The department is seeking ways to be more efficient as the merger takes place. Right now, all State Archives operating money comes from ARM (Archives and Records Management) fees. There is currently an effort underway to study the impact of entrance fees for the Museum of History and Museum of Natural Science.

### **IV. Report of the Deputy State Coordinator:**

During her report, Sarah spoke more specifically about State Archives initiatives in the access, outreach, and preservation of records.

Access and outreach. The exhibit, *Treasures of Carolina: Stories from the State Archives*, runs through July 31. *Treasures* is displayed at the Museum of History across from the Archives and features materials that preserve evidence of rights and liberties, document government actions and decisions, and tell the story of North Carolina. The exhibit catalog was passed around and Sarah mentioned that there was much programming and publicity around the exhibit and that the exhibit was a great way to reach the public and members of the community normally not reached—the museum exhibit allows public access to the records and the works of the State Archives. There was much media coverage;

WRAL produced a short piece as did several other TV stations. The exhibit brings a lot of good exposure for archives.

There are other opportunities to display archival materials and records. The commemorative program, "It's Revolutionary!" brings American Revolutionary War-era documents to various historic sites such as Brunswick Town, Halifax, and Tryon Palace. Sites can decide which documents to exhibit; the Archives has designed several themes around the materials—Declaration signers; the Stamp Act; politics; military and personal responses. Another traveling exhibit takes copies of the 1776 and 1868 state constitutions to sites throughout the state including museums, historic sites, and the Western Regional Archives. There will be accompanying materials such as the 19th and 26th amendments on display. These traveling exhibits represent ways to reach the public who wouldn't ordinarily view archival documents. There is now a new constitution-related collection of materials online to complement the traveling exhibit.

The State Archives Digital Services Section (DSS) has posted a new collection of materials—STEM—science, technology, engineering, and math—which reflects some of the department's new areas of interest. The DSS continually adds to the World War I collection. Other upcoming outreach programming includes an African American genealogy workshop in July and the Friends of the Archives will present a program on the Lost Colony at the annual meeting June 6. Sarah encouraged all SHRAB members to attend these programs.

Records access. Several registers of deeds within the state have been compiling indexes in their counties of the names of enslaved people. There is a movement to create a statewide index of these, hosted on the Digital Library on American Slavery at UNC-Greensboro. To this end an ad hoc advisory group was formed, led by Sarah, to determine database fields and structure. As the plan progresses, images and transcriptions will be added; this effort may require grant funding and volunteers to crowd source. This project is one exciting way to open up records for broader use by genealogists and historians. Marcellaus Joiner added that there has been an effort to publicize this project and collection and to ensure that no audience or stakeholder group is ignored. What began as a small project has grown rapidly to include more N.C. counties. The goal of this project is to get people interested in records, getting people to index, reaching out to the next generation—teaching the users that records can serve more than one purpose. Karen Paar mentioned that her students at Mars Hill University went through deeds to extract names and it was a positive experience for them. Marcellaus added that this index will be important to all types of researchers. Sarah mentioned that bills of sale are straightforward, easier to input and standardize. Karen said it is helpful to focus at the state level because county lines have changed over the years and people may not know what to look for. The first and most important step in this project is to standardize fields and search protocol and once those are established to build upon the database. This type of index may serve as a good foundation for other projects such as bible records.

Sarah again mentioned the WW1 centennial and the department's efforts at cross marketing involving online resources, programming, and travelling exhibits. The department's next major push is in 2019 for the 100th anniversary of passage of the 19<sup>th</sup> amendment and women's suffrage. The State

Archives will be involved in digitizing and enlarging the digital collections around women's suffrage, creating and delivering programs and promoting the commemoration through social and traditional media.

The National Genealogical Society will hold its annual meeting in Raleigh in May 2017 and will bring in thousands of participants, many of whom will conduct research in the Archives' Search Room. The Friends of the Archives will be helping with programming and promotion. Karen asked about the potential income opportunity for the Friends but the greater part of the income will come to the N.C. Genealogical Society. When the 2009 annual NGS meeting was held in Raleigh in 2009, the Search Room offered extended hours and staggered entry times. The State Archives may offer tours during the conference.

Preservation. The State Archives is undertaking a new method of record scheduling. Functional scheduling streamlines the process by consolidating and standardizing schedules for similar governmental functions such as budgeting, legal procedures, and regulations, relying less on writing specific highly individualized schedules. In the age of digital records, this approach of examining similar functions of agencies and determining schedules streamlines the process of records management. This will be a major change for agencies and hopefully an improvement.

Another preservation initiative is one on email management—TOMES—Transforming Online Mail with Embedded Semantics. With a grant from the NHPRC, the State Archives is examining ways to categorize permanent, long-term and short-term state agency emails by office function or position. For example, emails at a division director's level or higher may be saved but not emails at a lower level. Karen asked about preserving email and Sarah replied that the grant will test natural language processing tools to sort and flag individual e-mails that contain particular words or phrase parameters including those that could detect personal/confidential information. The other piece of the grant will examine software that will enable robust searching of e-mails. State agencies currently use Office 365 to preserve emails in a PST format; the grant will test PST and other preservation formats such as XML. One major goal is to collect good data on testing tools for processing and searching email quickly, and identifying restricted information.

Marcellaus asked about the long term viability to preserve mails by county, and Sarah reiterated that this grant is to test emails for state agencies, though counties may be able to use the model if successful and would be included if there are shared emails between counties and state agencies. Determining what email is of historical value is challenging because so much of email is not really archival. Agencies need to be specific about the properties of email they create.

## **V. Old business**

Sarah recognized Andrea who discussed progress on the current grant, "Teaching Digital North Carolina" (TDNC) and Andrea gave a synopsis about the overall goals of the program. Project archivist Jo Ann Williford was introduced and spoke about her experiences as a teacher and assisting History Day students by teaching them to analyze primary source documents and drawing conclusions from their examination. Through History Day, Jo Ann spent time learning about history curricula in the state. For

TDNC, the goal is to give teachers tools to use. The original plan was to survey 850 repositories but it was less cumbersome to identify primary source documents held in North Carolina repositories by mining those collections hosted by the Digital Public Library of America. Sarah mentioned that one goal of the NHPRC and the National Archives is to connect students with original materials.

Andrea gave a brief presentation reviewing several digital images that had been selected for consideration and these included photographs, newspaper clippings, oral history transcriptions, and film. Images selected represent a variety of repository types from small historical societies and history museums, to medium-sized public libraries, to large university collections. Examining the collections is ongoing and Andrea and Jo Ann are working to narrow down the list of records and will then meet with N.C. Department of Public Instruction (DPI) to get further guidance. Andrea then passed around examples of the kind of lesson plans that will be developed. Jo Ann added that lesson plans may be developed for elementary as well as high school and middle school levels. Sarah mentioned the WWI posters in the collections at the State Archives as a possible group to include use when developing lesson plans. Andrea acknowledged that it was a great help for SHRAB members to help mine these collections.

The tutorials will be posted to the SHRAB website also. Sarah suggested one idea for a tutorial—how to create a lesson plan using primary sources, stressing the importance of using language that connects people from different backgrounds to ensure that all audiences understand what a primary source is versus a secondary source. Andrea said that TDNC is quite different than other projects the SHRAB has implemented but that it is a great one and reminded everyone that the grant wraps up in a year. Much of the time during the first year was on surveying collections around the state. There will be an effort to attend and present this project at next spring's Social Studies Conference. It is a challenge to target homeschool students, so building networks outside of the public school environment is important.

## **VI. New Business**

There was discussion of the SHRAB website. Sarah said the department has moved their website from DNN to Drupal and that this has created technical difficulties for the websites on the old platform. SHRAB's site is one that will be moved so it is an opportune time to decide how it should be redesigned and structured. Andrea brought up that the SHRAB website underwent a major redesign 5-7 years ago so this is a good time to reconsider changing it. TAP training materials are on the website as a result of the last NHPRC grant but overall, the site hasn't been updated in a year or so. The new site will conform to the color palette and layout of the department's site. Karen, Marcellaus, and Sarah Koonts had reviewed the site and compared it with other SHRAB sites some time ago; Sarah asked if Marcellaus and Karen would be willing to make comments about the NC SHRAB site again. This time it will be mainly cosmetic changes. During the previous review when there was discussion about changing the website, there was a consensus that the NC SHRAB site was actually better than other state's SHRAB sites. There will be an attempt to make quicker updates to the site once on the new platform.

The next item up for discussion was the Traveling Archivist Program (TAP) and its future. During the last SHRAB conference call meeting there was discussion about continuing TAP with archivists that were trained during the Next Generation grant. Andrea created a fillable pdf online application to be sent out April or May. The TAP program started from a SHRAB strategic plan goal to develop a field services program that would provide assistance to smaller repositories since there are so many small repositories that are volunteer run or that have minimal staff in need of guidance about preservation and access. TAP began with Hal Keiner and later then Dick Lankford. With “The Next Generation” grant, TAP moves to a different model—one that is sustainable by training archivists to conduct TAP visits within their regions. Right now there are six archivists trained and willing to travel; the model hasn’t been fully implemented yet. The next round of applications will be distributed soon and the trained archivists will be worked into the program along with Lankford. In the long run this approach will save money and connect repositories with experts in their regions. The mechanics of budget and payments within the department are to be worked out.

Karen Paar mentioned the tone of the visits that Hal set – that it’s important not to go out and lecture people because they are probably working with very limited resources. Andrea mentioned the importance of rapport with those TAP visiting and that both Dick and Hal are good at talking with people about their records. Andrea said the applications will ask participants to help promote the TAP, for example, working with local media to get newspaper coverage. TAP aids in strengthening institutions to feel they can rely on the expertise of the State Archives and build their own expertise.

Marcellaus commented being fresh out of graduate school when at Bennett College, the TAP visit was his first experience in delving into documents and physical collections. When Hal Keiner conducted the first TAP visit at Bennett, Hal stressed getting support from the administration. He wasn’t presumptuous and presented the TAP report in such a way they could make the decision of how to move forward. Keiner did a great job of gauging the relationship between the archivist, administration, and environment and negotiating the budget environment. Marcellaus stated that the experience with Hal helped him grow as a professional.

Sarah said that SHRAB members will be asked to review the applications once the new rounds are received. Karen asked if TAP participants were asked to help notify their legislators. Andrea acknowledged that this was a good idea and that TAP should emphasize not only media outreach but promotion to their legislators. Andrea also stated that that the new application requests help promoting the program as TAP visits are completed. Karen commented that the NC Humanities Council has this requirement and it’s very helpful to the success of their program. Andrea stated a desire to build some tools for this and that by building and posting a searchable TAP the program may get a little more publicity.

## **VII. Other business**

Lobbying. Sarah has been involved with CoSA (Council of State Archivists) over the last few years and is on their advocacy committee. Through this involvement, she has visited congressional offices to talk about preserving documentary heritage. During her last visit to Washington, DC, she went to

several congressional offices including that of North Carolina's Representative David Price, a big supporter of the humanities. Sarah spent time with administration of various committees. She met with the Chief of Staff of Congressman Jason Chaffetz of Utah about NHPRC and NARA (National Archives and Records Administration) and how federal and state records affect one another. She may go another time to the Appropriations Committee. If there are people who have been helped or impacted by the records program, it is important to get that story across because all the records work together. Overall, Sarah reported, the meetings were productive in raising awareness about archives. One idea that emerged from the meetings was to pursue the work of Government Accountability Office or Congressional Research Offices, about the importance and interrelatedness of recordkeeping in their work.

Sarah distributed the latest version of NHPRC's strategic plan. One of the main goals addresses the activities and programs that SHRABs are implementing—expanding access and connecting people to the work of archives. The last goal addressed the capacity of smaller institutions to apply for federal grants. There is a challenge for smaller repositories to have the resources to actually apply for grants. The strategic plan emphasizes working to get people actively involved in their local history and records. The plan is fairly broadly written. There is a push for online access, engaging the public including crowdsourcing projects, and developing resources for education. There is a new exhibit up at the National Archives, *Amending America*, about the process of amending the constitution. A database was created to log every proposed amendment and whether or not it passed and is hosted on Data.gov. NHPRC's strategic plan should be finalized in May. Karen asked if we'd had any grants to review, Sarah reported that there were no grants to review and it would be nice to see some of the smaller historical associations apply for a grant. Sarah stated that the NHPRC acknowledges that they have a lot of smaller grants available, and some institutions have a hard time applying because it's a very cumbersome process. The NHPRC would like to streamline the grant process.

Sarah then covered departmental expense reimbursement and travel forms. The department requires a W-9 form on file in our budget office to process payment. Kim Hayes explained the travel reimbursement process form.

### **VIII. Adjournment**

With no further business, the meeting was adjourned at 11:55 a.m.