

**Society of American Archivists
Council Meeting
May 28 – 30, 2015
Chicago, Illinois**

**Arrangement and Description Curriculum and
Certificate Program**

(Prepared by Education Director Solveig De Sutter)

BACKGROUND

At the May 2013 SAA Council meeting, the Committee on Education (CoE) recommended that SAA consider creation of additional curriculum and certificate programs, based in part on SAA's positive experience with the Digital Archives Specialist [DAS] Curriculum and Certificate Program).¹ The CoE suggested that development begin with an Arrangement and Description (A&D) curriculum, given both the range of existing and potential workshops in this topic area and expressed member need.

Council members encouraged the Committee to continue to refresh SAA's A&D course offerings and requested a more in-depth report outlining a curriculum and analyzing SAA's development and implementation capacity.

DISCUSSION

To flesh out the content of a draft A&D curriculum, CoE members and staff spoke with each developer/instructor of an existing course offering and with appropriate SAA committees and sections to gather opinions and suggestions about the content of the curriculum that CoE was envisioning. Those responses and suggestions resulted in the attached plan for an Arrangement and Description Curriculum and Certificate Program.

At the same time, a group of three SAA members (CoE Chair Shelby Sanett, Ciaran Trace, and Elizabeth Yakel) and three staff members (Matt Black, Peter Carlson, and Solveig De Sutter) met via a series of conference calls to discuss SAA's capacity to develop and implement this new program while continuing to maintain and enhance the existing DAS Curriculum and Certificate Program.

A summary of the proposed A&D Curriculum and Certificate Program is presented in the Appendix. Based on CoE's work and external input, the Committee presents the following recommendation for the Council's consideration.

¹ <http://www2.archivists.org/sites/all/files/0513-V-A-AandDCurriculum.pdf>

RECOMMENDATION

THAT the Committee on Education and staff proceed with development and implementation of an Arrangement and Description Curriculum and Certificate Program (as outlined in the Appendix).

Support Statement: Based on review by the Committee on Education and staff, development and implementation of a curriculum and certificate program in the topic area of Arrangement and Description will meet an expressed member need and is within SAA's capacity at this time. It is likely that the outlined curriculum and implementation plan will change over time to ensure that the program remains current and relevant.

Relation to SAA's Strategic Plan: The program addresses Goal 2, Enhancing Professional Growth: Archivists have access to the professional resources they need to be successful and effective in their careers.

Fiscal Impact: Expenses totaling \$7,250 and gross revenues of \$12,475 (to be realized in the last two months of year one) are included in the proposed budget for FY16.

**Committee on Education Analysis and Report:
Arrangement and Description Curriculum and Certificate Program
April 21, 2015**

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I. BACKGROUND

A. Charge

At the May 2013 SAA Council meeting, the Committee on Education (CoE) recommended the creation of a new program (based in part on SAA's experience with the Digital Archives Specialist Curriculum and Certificate Program), beginning with development of an Arrangement and Description Curriculum. The proposed curriculum was based on CoE's evaluation and review of existing SAA Arrangement and Description workshops and others that might fit into an Arrangement and Description Curriculum.

Council liked the initiative, encouraged the group to continue refreshing SAA's Arrangement and Description course offerings, and requested a more in-depth report that outlines this curriculum and analyzes SAA's development and implementation capacity.

The Society of American Archivists (SAA) provides education and training to its members and others to ensure that they are aware of relevant standards and adopt appropriate practices for appraising, capturing, preserving, and providing access to all records.

SAA Strategic Plan Goal 2: Enhancing Professional Growth; 2.1.1.A.

B. Approach

Since May 2013, CoE members and staff talked with every developer/instructor, appropriate committees and sections to gather opinions and suggestions about the content of the Arrangement and Description Curriculum CoE was envisioning. The consolidated suggestions and responses resulted in the attached plan for an Arrangement and Description Certificate Program.

At the same time, a group of three SAA members (Ciaran Trace, Elizabeth Yakel, Shelby Sanett) and three staff members (Matt Black, Peter Carlson, Solveig De Sutter) met via conference calls to explore SAA's ability to develop and implement this new program as well as its ability to continue to grow, enhance, and maintain the DAS Certificate Program.

II. DISCUSSION

SAA's Arrangement and Description listings begin with introductory training on arrangement and description, including Standard courses and others in the Foundational Tier. Like the DAS program, the tiers continue to moderately advanced levels of difficulty. However, with the revisions intended for existing courses, the courses will be integrated with one another, and there is a clear path of training for a prospective student to take. This approach should lead to greater attendance at workshops, more revenue for SAA, and, most importantly, a national community of archivists and those who have archival responsibilities are better educated to fulfill their responsibilities.

CoE talked about being the provider of choice for continuing education spanning the spectrum of archives and that SAA, as part of its mission, provides educational opportunities to archivists and a number of people in allied professions. SAA's education must also consider the librarian who might need training in managing their collections/special collections/archival materials, the managers and administrators who need to oversee programs for managing all records, and even lawyers who must be cognizant of the legal complications that records carry with them.

III. RECOMMENDATIONS

A. Structured Curriculum

The structured curriculum that CoE has developed begins with the current course offerings, suggests changes to those, and adds many more. CoE also needed to identify and fill the gaps in the curriculum as it currently exists. This framework gives the course listing a structure that allows users stratified and categorized information on courses.

B. Tiers of Study

The tiers of study, based on the DAS Program, allow prospective students to assess their needs against the general goals of different tiers. (For a listing of all courses, divided into the four tiers, see "Appendix A: Simple Table of Structured Arrangement and Description Curriculum.")

1) Foundational Courses

These courses focus on the essential skills archivists use to perform Arrangement and Description (A and D) tasks/activities. These focus primarily, but not exclusively, on the needs of practitioners, i.e. archivists who are or will be working directly with institutional holdings. Courses in this category present information and strategies that an archivist can implement immediately.

2) Tactical and Strategic Courses

These courses focus on the skills archivists use to identify organizational adjustments needed to support an archival program. Courses in this category focus primarily, but not exclusively, on the needs of managers, i.e. archivists who manage other professionals and/or who oversee programmatic operations.

3) Tools and Services Courses

These courses focus on specific tools and services that archivists use to support A and D tasks/activities in their institutions. These are practical courses focused on specific software products and other tools. These courses focus primarily, but not exclusively, on the needs of practitioner archivists. Courses in this category present information and strategies that an archivist could implement immediately.

4) Transformational Courses

These courses focus on the skills archivists use to change their working life dramatically. They focus primarily, but not exclusively, on the strategic needs of administrators; those archivists with oversight over the entire archival enterprise of an institution. Courses in this category present information that an archivist might implement over time.

C. Tracks of Study

Based on the DAS Model, the A and D track identifies its audience as Practitioners, Managers, Administrators, IT Professionals, Librarians, Records Managers, Legal Professionals, and Museum Professionals. (For a listing of all courses, along with the identification of tiers and tracks, see “Appendix B: Detailed Table of Structured Arrangement and Description Curriculum.” For definitions of tracks, see “Appendix E: SAA Dictionary.”)

D. Program Structure Overview

At this time, SAA provides training in a variety of formats (half, one, and two-day face-to-face/instructor-led courses/workshops and ninety-minute webinars). CoE envisions that within the next five years roughly 50 percent of all SAA offerings will be offered in online formats.

Courses are offered with the option of taking a 20-minute examination (online) within 10 days of the offering. Students receive the result and information about incorrect answers upon completion of the examination and have the option of retaking the examination one time without charge.

1) One-day course/workshop

This is the standard format that most SAA training follows. One-day courses/workshops last from 9 am until 5 pm, with an hour for lunch, and are appropriate for training that focuses in detail, on one specific aspect of archival education. The goal of such training is to give students enough information to carry out at least some of the functions taught during the training. These courses/workshops include exercises and discussion and may include some hands-on training.

2) Multi-day course/workshop

Multi-day workshops are designed to give students in-depth training on one specific aspect of archival activity. As such, they must include hands-on training and might be focused on implementing such training. These workshops last two or three days and must be designed so that one day builds upon the previous day’s learning.

3) Online Formats

Webinars are 30, 60, or 90-minute online training sessions in which students log in to a website to view the training and call in to hear the course presenter speak. The course presenter is not visible. Interaction between the presenter and the audience occurs via structured question and answer breaks in the webinar format and opportunities for interaction are limited. For this reason, these courses must be short and focus on either general overviews or in-depth presentation of one topic aspect. For purposes of managing the Certificate, attendees at webinars have to procure an affidavit

from the license buyer confirming attendance or have to register and take the online on-demand course individually.

Other online formats include 1) synchronous online training with students at one location and the instructor at another in the 9 am to 5 pm time span; and 2) synchronous and asynchronous training combined over the span of week(s). In either instance, students and instructors see each other during the synchronous portion.

E. Course Management System

See the Education Budget Program Planner, Activity 5, n.; and Education Budget Narrative under budget assumptions.)

F. Integrating the Curriculum Framework

The proposed curriculum accounts for horizontal and vertical transfers of knowledge through a structure of tracks and tiers. Courses structured by tracks are not solely for archivists, but also for those who work closely with them, for example, IT, general counsel, librarians, records managers and other stakeholders. The tiers of study allow for instruction in the basics that is built on by subsequent courses which address specialized, advanced studies, tactics and tools useful for arrangement and description, management, organization and preservation.

Taken as a whole, these courses provide an integrated programmatic framework for archivists at various levels within their institutions, whose areas of practice include arrangement and description.

G. Core Competencies of an Arrangement and Description Curriculum

The proposed curriculum is designed to support the awarding of Arrangement and Description Certificate of Completion to successful students (i.e. those who pass a course-specific exam in each of the following areas of core competencies):

1. Arrangement: Understand the process of organizing materials with respect to their provenance and original order to protect their context and facilitate access.
2. Description: Analyze and describe details about the attributes of a record or collection of records to facilitate identification, management, and understanding of the work.
3. Descriptive Standards: Apply rules and practices that codify the content of information used to represent archival materials in discovery tools according to published structural guidelines.
4. Management: Demonstrate ability to manage physical and intellectual control over archival materials.
5. Discovery: Create tools to facilitate access and disseminate descriptive records of archival materials.
6. Ethics: Convey transparency of actions taken during arrangement and description and respect privacy, confidentiality, and cultural sensitivity of archival materials.

7. Risk Management: Analyze threats and implement measures to minimize ethical and institutional risks.

H. Time Frame for Certificate Completion

Students will demonstrate knowledge of curriculum material by attending and passing exams for six courses as follows:

- Attend and pass the two required courses from Tier 1.
Students who feel they have the required knowledge of these courses may test out.
- Attend and pass one of the courses on Privacy and Confidentiality.
- Attend and pass one of the courses in the Tactical and Strategic Tier.
- Attend and pass one course from the Tools and Services Tier.
- Attend and pass one course from the Transformational Tier.

I. Marketing Plan for Arrangement and Description Curriculum

For the Arrangement and Description curriculum to succeed, SAA must plan to take steps to promote the curriculum as a whole and hold relevant courses across the country. The program will be marketed to regional associations, state archives, individual hosts, and related professional associations in the systematic fashion that proved so successful with the DAS Program.

1) Audience

- SAA members and other archivists, comprising managers, administrators, and the other professionals who work with records or other archival materials in large or small organizations with staff or by themselves.
- Librarians, legal staff, and records managers who have responsibility for records or other archival materials.
- Employers who want to ensure that their staff has the knowledge and training to
 - a. Successfully arrange and describe institutional records using appropriate descriptive standards;
 - b. Implement appropriate risk management strategies; and
 - c. Manage the overall process fully aware of ethical considerations.
- ACA members, students, student chapters, and regional associations.

2) Position Statement

SAA's Arrangement and Description curriculum was developed by experts/practitioners in the area of Arrangement and Description and structured in tiers of study that guide the prospective student to choose courses based on their specific knowledge, training, and needs. Successful completion of this curriculum will be confirmed by SAA with a Certificate of Completion for Arrangement and Description.

3) Goals for FY 2016 (7/1/15 – 6/30/16)

- Roll out Arrangement and Description marketing campaign starting in October 2015.
- Secure four regional co-sponsors to offer entire curriculum over an 18-month period.
- Secure the CE credits with appropriate organizations e.g. Academy of Certified Archivists, etc.
- Update existing courses and create exams in the first half of FY 2015.
- Develop and present three new courses, one each in the foundational, tactical and strategic, and transformational tier in the latter half of FY 2016.
- Continue fine tuning and collaborate with CoE, instructors, developers, SAA Archival Educators R/T and other R/Ts as appropriate, as well as with students, to identify new topics and best practices during FY 2017.

4) *Pricing*

- Offer a package rate where appropriate (includes all required courses) to individuals who want to pursue the A and D Certificate. Registrants in this category will receive priority in the registration process.
- Allow special pricing for professional entities (institutions, employers, SHRABs, etc.).

5) *Promotion*

Develop a campaign that builds awareness of this curriculum and emphasizes benefits the participants will gain, i.e. how it is different (due to its structure, self-testing, and originality, etc.) and how it will meet management needs. Publish an article in *Archival Outlook*, multiple information pieces posted to *In the Loop*, and an announcement on SAA's homepage.

- Announce the curriculum through news releases.
- Publish announcements to official SAA LinkedIn, Twitter and Facebook feeds.
- Unveil content and schedule at the presidential address, and provide handouts or a brochure at that event.
- Hold a drawing in which the winner receives free registration to all required courses, with the proviso that the winner has to complete everything within a 24-month period.
- Hold a drawing for each of the first four co-sponsors to offer the curriculum.
- Publicize the curriculum to archival educators and students.
- Encourage republication of announcements in regional association newsletters.
- Identify groups based on track audiences (e.g., ALA, ACRL, lawyers, etc.) and buy email lists to attract their attention.
- Send direct mail to corporations.

6) *Resources Needed*

Technical

- The technical requirements currently supporting the DAS Certificate Program will be sufficient for initiating the Arrangement and Description Certificate Program. However, without a more robust online course management system, the DAS Program

cannot be maintained and enhanced, and the Arrangement and Description Certificate Program will lack the resources to be appropriately supported over time.

- Online Testing will be conducted via one of the hosted online testing service providers.

Human

- The additional resources required to support, enhance, and grow the DAS Program will enable staff to take on management of the Arrangement and Description Program. None of this can be accomplished without an active Committee on Education whose members are selected based on expertise who have the content knowledge needed to guide the program.

Monetary

- DAS budget details are part of the education budget in the proposed FY2016 budget for consideration by the SAA Council.

J. Self-Testing to Determine Readiness for a Course

One of the enhancements needed for the DAS Program includes an integrated online system that prospective students will use to learn about the curriculum and make choices about courses. Students can use course prerequisites to determine whether they are prepared to take certain courses.

1) Scope

These recommendations apply to all courses, regardless of tier or track or mode of delivery (for instance, whether online or in person)

2) Benefits

- Provides SAA Education, instructors, and participants with a method to establish baselines and benchmarks.
- Ensures a reasonable program quality satisfaction rate of members (At least 75% of all participants in Arrangement and Description courses will say they would recommend A&D courses to their colleagues.)
- Makes explicit the requirements and expectations of all courses.

3) Implementation and Administration

The questions asked during the self-test should

- Measure the extent of prospective participants' knowledge of technical, technological, and functional domains of knowledge
- Offer specific measures of comprehension in the domains of reading, working, and/or applied knowledge

- Clarify potentially vague or ambiguous measures (for example, “good understanding of”)
- Show the scale applied for assessment (for example, what does correct responses to 2 out of 3 questions indicate?)
- Be optional yet “strongly recommended”
- Be developed collaboratively between the instructor and SAA Education office
- Be subject to review and update at least once every two years
- Be brief (perhaps three questions, each with three choices of answers)
- Be easy to administer for SAA and use existing SAA resources

4) *Rationale for recommendation*

These recommendations are based on analysis of evaluations completed by attendees of SAA courses/workshops and research into professional development and best practices.

K. Measuring Success of Courses

An essential component of this curriculum will be a method to measure the success of the curriculum as a whole and the success of its individual courses. The plan below explains a set of actions SAA can undertake to measure the level of success of this proposed program.

1) *Scope*

These recommendations apply to all face-to-face/instructor-led courses, and online courses in the Arrangement and Description curriculum.

In order to measure the success of the new curriculum accurately, the evaluation methods employed must be robust enough to assess whether individual participants accomplished specific learning objectives and goals and whether the goals and objectives of the curriculum were met overall.

2) *Evaluation Overview*

- Objective: Measure overall learning outcomes that occurred immediately after a specific course or process.

Methodology: Administer an optional short quiz at the beginning and the end of the course (pre-test/post-test methodology) that students download and complete or are provided at the beginning and end of the course. This quiz will come in two forms, with different questions that measure a student’s grasp of the same material. This system will measure whether students have increased their knowledge during the course.

Certificate participants are required to take a pass/fail test (20/course and 10/Webinar multiple-choice questions) at the end of each course.

- Objective: Measure, a period of time after the course, whether students have successfully applied any of what they learned.

Methodology: Contact participants at two months after and again one year after completion of a course and ask them to complete a short survey that measures how the course changed their professional practices, using the specific objectives of the course as measurements. Based on past trends, assume that a response rate of 25% implementing would be high.

Additional Evaluation Methodologies:

- Use subject matter experts as course auditors to attend face-to-face courses to assess the course content, design, and delivery, and provide constructive evaluation. In addition, reviewers will provide constructive evaluations on online courses prior to and after the presentation.
- At the end of each course, ask participants to evaluate, the course design, how well they feel that learning outcomes and goals were met, and how they would suggest improving the course.

3) *Benefits*

- Data collected will provide instructors with feedback on improving course content and delivery.
Consistently collecting such data and implementing changes based on it will keep courses relevant.
- Multi-modal user feedback will help to assess the relevance of individual courses and the overall curriculum.
- The interactive review and improvement cycle will support the growth of a strong and relevant program, which in turn should lead to programmatic growth while meeting the continuing educational needs of the professional archivist.

4) *Implementation and Administration*

- Developers, instructors, and subject matter experts must agree on what a participant should know, understand, and be able to do after each course and structure the learning outcome quiz and knowledge survey accordingly.
- Developers, instructors, and subject matter experts must agree on what an Arrangement and Description Certificate Holder would understand and be able to do after completion of the entire curriculum.
 - Each course must have learning outcomes tied to the core competencies.
 - Learning outcomes must be actionable and measurable and connected to Bloom's Taxonomy.
 - Foundational courses must be at Bloom's Levels 1-2, others at Bloom's Level 3.
- Developers and instructors must develop assessment quizzes and a pool of questions (10/20/40 depending on format) for each course. CoE will monitor quizzes for

consistency and will assist the instructor/developer in the compilation of the final course exam.

5) *Assessing Successful Outcomes*

Below are a number of measures SAA could use to measure the success of individual courses in the curriculum as well as the curriculum as a whole. Additional measures are possible, so this list is merely a suggestion of some valid measures of success. Although the raw numbers and percentages may seem low, we believe that these are reasonable measures of success. The goals below are measures the Arrangement and Description Certificate program should see by the end of FY 2017.

- At least 2% of SAA members (approx. 112 people) will have completed the program.
- Approximately 40 nonmembers – who became members to get the member discount - will have completed the Arrangement and Description Certificate program.
- At least 15 of those completing the Arrangement and Description Certificate program will be from allied professions.
- At least 280 participants will have taken at least one course in the Arrangement and Description Curriculum.
- At least 75% of all participants in the Arrangement and Description Certificate program will say they would recommend DAS courses to their colleagues.
- At least 2% of participants in the Arrangement and Description courses will have said that taking an A and D course has helped them accomplish something (they learned) relating to arrangement and description in their institutions within two months of taking the course.

Given the number of courses proposed for the A and D curriculum and the fact that it will take at least 18 months to develop and roll out the rest of the curriculum, this is a reasonable measure of success.

Certificate participants must take and pass two Foundational courses; one course from the available Privacy and Confidentiality courses; one Tactical and Strategic courses; and one course in both the Tools and Services and Transformational tiers. This number of courses will provide students with adequate background in the field and is reasonable when allowing for the busy working lives of potential students.

More knowledgeable students can elect to test out of the foundational courses.

The A and D Certificate will be valid for five years. A and D Certificate holders can elect to renew the certificate by successfully completing courses and exams from the Foundational (if new) Tactical and Strategic, Tools and Services, and Transformational course tiers. Renewal of the certificate is strongly recommended to stay current with standards, legal issues, best practices, etc.

L. Continuing the Program and Others into the Future

CoE believes that Certificate Programs structured in this way makes it convenient and easy for prospective students to identify their needs and achieve their professional goals. They will be able to come away with something tangible that is not just beneficial for their professional growth but can be parlayed into recognition, work, and pay raises with their employers.

Long term, CoE envisions a catalog of certificate programs that will enable cross program credits and will result in SAA continuing to be the provider of choice for continuing education in the archival arena. Ultimately, this approach will ensure that archivists and others who bear responsibilities that include caring for and safeguarding records and other materials will be able to keep pace in an increasingly complex area of practice.

IV. APPENDIXES

- Appendix A: Simple Table of Structured Arrangement and Description Curriculum
- Appendix B: Detailed Table of Structured Arrangement and Description Curriculum
- Appendix C: Course Descriptions
- Appendix D: Course Description Data Elements Template
- Appendix E: Guidance for Instructors
- Appendix F: SAA Dictionary

Students working to earn an Arrangement and Description Certificate can take the courses of the curriculum in any order, though it will be best for most to start with the Foundational courses as some foundational courses are required. In addition, the number of courses required in each tier will ensure that any Arrangement and Description Certificate holder will have acquired a broad range of experience in this category. Students are required to pass course exams to receive credit for completing a course.

More knowledgeable students can elect to test out of Foundational courses.

Simple Table of Structured Arrangement and Description Curriculum

1. Foundational Courses (F)

- a. Fundamentals of Arrangement and Description (New)
- b. Describing Archives: A Content Standard (DACCS)
- c. MARC for Archival Description (New)
- d. Ethics for Archivists (working title) (New)
- e. Forming Names According to RDA *Web Seminar*
- f. Appraisal *Web Seminar* (Proposed)
- g. Rights and Confidentiality *Web Seminar* (New)*

2. Tactical and Strategic Courses (TST)

- a. Confidentiality and Privacy Issues in Digital Archives DAS *
- b. Arrangement and Description of Electronic Records Parts 1&2 DAS
- c. Managing Architectural Design and Construction Records
- d. Project Management for Archivists
- e. Photographs: Archival Principles & Practices
- f. Copyright Issues in Digital Archives DAS *
- g. Grant Writing for Arrangement and Description
- h. Implementing More Product, Less Process
- i. Arrangement and Description for AV Materials (one-day) (New)
- j. Arranging and Describing Ephemera (New)
- k. Applying DACCS to Single-Item Manuscript Cataloging (2016/2017) (New)
- l. Arrangement and Description for Outreach or Visualizing Description (Proposed)
- m. Essential Coding for Archivists (Proposed)

3. Tools and Services Courses (T&S)

- a. Style Sheets for EAD--Delivering Your Finding Aids on the Web
- b. Determining options for and selecting tools (working title) *Web Seminar* (New)
- c. Cross-walking Metadata *Web Seminar* (New)
- d. How DACCS fits with TEI, METS, MODS, and MARC *Web Seminar* (New)
- e. Implementing DACCS in ArchivesSpace – combo of AT & Archon (Proposed)

4. Transformational Courses (TR)

- a. Financial Management for Archivists
- b. Encoded Archival Context – Corporate Bodies, Persons, and Families (EAC-CPF)
- c. Authorities and RDF Part 2 *Web Seminar* (New)
- d. Big Data Set Management (New)
- e. Linked Archival Open Data (New)
- f. Arrangement and Description for Outreach - Processing for the Camera (Proposed)
- g. Visualizing Description (colored maps/timelines) (Proposed)

* One of the privacy and confidentiality course options.

Appendix B

Detailed Table of Structured Arrangement and Description Curriculum

Tiers and Courses	Format	Tracks	Instructor(s)	Status
		To be decided		
Foundational Courses				
Fundamentals of A and D	1-day		Hackbart-Dean; McDonald	Existing
Describing Archives: A Content Standard (DACS)	1-day		Arnold, Daines, Dean	Existing
MARC for Archival Description	1-day		Wisser	Existing
Encoded Archival Description	2-day		Fox/Kiesling	Existing
Overview of Metadata	Webinar		Avercamp	Existing
Ethics for Archivists	TBD		CEPC	New
Forming Names According to RDA	Webinar		Wisser	Existing
Appraisal	Webinar		TBD	New
Rights and Confidentiality	Webinar		TBD	New
Tactical and Strategic Courses				
Confidentiality and Privacy Issues in Digital Archives [DAS]*	1-day		Briston, Dryden, McKay	Existing
Arrangement and Description of Electronic Records [DAS]	2-day		Prom, Shaw	Existing
Managing Architectural Design and Construction Records	2-day		Lowell, Nelb	Existing
Project Management for Archivists	1-day		Pleva-Flynn	Existing
Photographs: Archival Principles and Practices	1-day		Flynn	To be revised
Copyright Issues in Digital Archives [DAS]*	1-day		Briston, Dryden, McKay	Existing
Implementing More Product, Less Process	1-day		Meissner	Existing
Arrangement and Description for AV Materials	1-day		VMS	New
Arranging and Describing Ephemera	1-day		TBD	New
Arrangement and Description for Outreach or Visualizing Description	1-day		TBD	New
Essential Coding for Archivists	1-day		TBD	New

Tools and Services Courses				
Style Sheets for EAD – Delivering Your Finding Aids on the Web	2-day		Fox, Kiesling	Existing
Determining Options for and Selecting Tools (working title)	Webinar		TBD	New
Cross-walking Metadata	1-day		TBD	New
How DACS fits with TEI, METS, MODS, and MARC	Webinar		TBD	New
Implementing DACS in ArchivesSpace/combo of AT & Archon	Webinar		TBD	Proposed
Transformational Courses				
Financial Management for Archivists	1-day		Pleva-Flynn	Existing
Encoded Archival Context - Corporate Bodies, Persons, and Families (EAC-CPF)	1-day		Wisser	Existing
Authorities and RDF Part 2	Web Seminar		Wisser	New
Big Data Set Management	TBD		TBD	New
Linked Archival Open Data	TBD		TBD	Proposed
Arrangement and Description for Outreach - Processing for the Camera	TBD		TBD	Proposed
Visualizing Description (colored maps/timelines)	TBD		TBD	Proposed

Course Descriptions for the Arrangement and Description Curriculum

This appendix contains descriptions (in some cases incomplete) for existing and some new courses in the Arrangement and Description curriculum to provide an idea of what kind of information prospective students will see.

Fundamentals of Arrangement and Description

This course focuses on the day-to-day decisions made in arranging and describing collections, both manuscript and organizational records. That includes developing processing work plans, identifying common arrangement schemes for particular types of collections, and physically organizing materials during processing. Essential elements of a finding aid, applying descriptive standards, and the creative construction of container lists are highlighted as well.

Upon completion of this course you'll be able to:

- Describe the concepts and principles of arrangement;
- Start arranging various types of collections and formats;
- Identify the essential elements of a finding aid;
- Discuss the application of archival descriptive standards; and
- Demonstrate an understanding of best practice.

Who Should Attend? Novices and seasoned archivists who want to learn more about processing archival and manuscript collections effectively and efficiently.

Knowledge Assumed: This workshop is the basic introduction to arrangement and description of archival collections that requires an understanding of archival fundamentals.

Competencies Addressed in this Course:

#1 Arrangement: Understand the process of organizing materials with respect to their provenance and original order to protect their context and facilitate access.

#2 Description: Analyze and describe details about the attributes of a record or collection of records to facilitate the work's identification, management, and understanding.

#3 Descriptive Standards: Apply rules and practices that codify the content of information used to represent archival materials in discovery tools according to published structural guidelines.

Describing Archives: A Content Standard (DACs)

Get an in-depth introduction to the key principles, concepts, and elements of [Describing Archives: A Content Standard](#), the most recent revision of the U.S. standard for describing archival materials and their creators. Learn how to implement and incorporate DACS into workflows for accessioning, arrangement, and description through discussions and hands-on work with a variety of exercises designed to help you identify required elements and create a variety of descriptions. This workshop focuses on application of DACS rules and concepts, which participants can integrate into local repository processes and descriptive outputs.

Upon completion of this course you'll be able to:

- Articulate what DACS is (and isn't), and how its basic principles relate to archival theory and practice;
- Distinguish between minimal and value-added descriptions for archival materials and creators
- Apply DACS rules to identify and formulate required elements of archival description; and
- Learn how DACS can be applied to the various activities of the archival enterprise.

Who Should Attend? Anyone whose work includes accessioning, arranging, and describing, or who supervises employees who do that work.

You must bring a print copy of the DACS 2nd Edition OR a laptop and/or tablet to access the publication in the [Standards Portal](#) since your instructor will ask you to follow along or look at parts of this text.

A print version is also available for purchase in the [SAA Bookstore](#), and you'll have the option to purchase the print version during the online registration process.

Knowledge Assumed: Fundamentals of Arrangement and Description of Archival Records.

Competencies Addressed in This Course:

#1 Arrangement: Understand the process of organizing materials with respect to their provenance and original order to protect their context and facilitate access.

#2 Description: Analyze describe details about the attributes of a record or collection of records to facilitate the work's identification, management, and understanding.

#3 Descriptive Standards: Apply rules and practices that codify the content of information used to represent archival materials in discovery tools according to published structural guidelines.

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

#5 Discovery: Create tools to facilitate access and disseminate descriptive records of archival materials.

#6 Ethics: Convey transparency of actions taken during arrangement and description and respect privacy, confidentiality and cultural sensitivity of archival materials.

#7 Risk Management: Analyze threats and implement measures to minimize ethical and institutional risks.

Pre-Readings: Roe, Kathleen. Arranging & Describing Archives & Manuscripts (Chicago: Society of American Archivists, 2005), chapters 2 and appendix B.

Keywords: Arrangement; Description

Standards Included: Describing Archives: A Content Standard; MARC; Encoded Archival Description

MARC for Archival Description

This course covers the details involved in expressing archival description in the MARC bibliographic format. Learn about the various aspects of the MARC bibliographic format and the application of the DACS content standard in the MARC format.

Your instructor will address all aspects of the MARC format, including fixed fields, main and added entries, subject added entries, and descriptive fields; and, this includes hands-on exercises and the construction of a MARC record, discussion of the utility of MARC in the descriptive framework, and identification of resources available for assisting in the construction of MARC records.

Upon completion of this course you'll be able to:

- Identify the MARC Bibliographic Format Specific MARC fields and subfields relevant to archival description; and,
- Apply DACS content and authorized forms of names to form a MARC record that represents archival Collections.

Who Should Attend? Archivist Practitioners who want to create records in another format (MARC) that allows archival description to be expressed in an environment where other formats are also described.

Knowledge Assumed: To get the maximum benefit from this class, you should take Describing Archives: A Content Standard (DACs) and/or Forming Names According to RDA first.

Arrangement and Description Competencies Addressed in this Course: TBD

Encoded Archival Description (EAD 3)

Here's your chance to receive the instruction and hands-on practice you need to deliver your finding aids on the web in a standardized format. Get acquainted with the Extensible Markup Language (XML) and practice with authoring software to create an XML version of a finding aid. **This 2-day workshop covers the most up-to-date EAD version!**

Upon completion of this workshop you'll be able to:

- Learn the fundamentals of Extensible Markup Language (XML);
- Recognize the structure of EAD (the SAA-endorsed standard for archival finding aids);
- Mark up a complete finding aid;
- Explore implementation strategies; and
- Practice encoding your own finding aid using EAD.

Who Should Attend? Archivists and others who are charged with exploring and/or implementing EAD at their institution or who want to enhance their résumé.

Knowledge Assumed: Arrangement and Description Practice and familiarity with finding aids.

Arrangement and Description Competencies Addressed in this Course:

#3 Descriptive Standards: Apply rules and practices that codify the content of information used to represent archival materials in discovery tools according to published structural guidelines.

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

#5 Discovery: Create tools to facilitate access and disseminate descriptive records of archival materials.

Overview of Metadata (under revision)

Ethics for Archivists (to be developed)

Forming Names According to RDA (Web Seminar)

Get an overview of the rules outlined in the Resource Description and Access (RDA) standard for forming personal, corporate body and family names, chapters 8-11. The [2nd edition of DACS](#) indicates the use of companion standards such as RDA for the formation of appropriate name headings. You'll begin with a discussion of the benefits of authority work and authority structures, including available resources such as the Library of Congress Authorities and the Union List of Artists Names. Following that introduction, we'll cover the construction of names for persons, corporate bodies, and families in detail; and reference the specific rules as found in RDA.

Upon completion of this class you'll be able to:

- Identify the value of authorities;
- Recognize existing authority files;
- Reference additional resources on authority work; and,
- Form names according to a set of rules (RDA) for persons, corporate bodies and families;

Who Should Attend? Archivist practitioners, librarians, and archivists needing a refresher on cataloging principles.

Knowledge Assumed: You should be versed in DACS and understand basic archival descriptive practices.

Arrangement and Description Competencies Addressed in this Course:

#3 Descriptive Standards: Apply rules and practices that codify the content of information used to represent archival materials in discovery tools according to published structural guidelines.

#5 Discovery: Create tools to facilitate access and disseminate descriptive records of archival materials.

Confidentiality and Privacy Issues in Digital Archives [DAS]

This course covers privacy and confidentiality legal issues specific to archives of digital material. You'll examine the intersection of (and the tension between) privacy/confidentiality, free speech and freedom to research/write, and focus on how electronic records and the digital realm have altered the scene. You'll look at privacy and confidentiality issues in the context of third party rights, donors, special situations such as medical and education records, national security legislation, and the overriding impact of the digital world. Through case studies, you will examine specific situations pertinent to the work of archivists. While participants should be familiar with basic concepts of privacy and confidentiality, a brief review of the development of these concepts will be provided to ground the discussion. The focus of the day will be on how to think through and identify options for resolving the most commonly-encountered privacy and confidentiality legal issues around electronic records.

Upon completion of this course you'll be able to:

- Recognize and discuss common legal issues relating to privacy and confidentiality issues in general and for digital archives in particular;
- Interpret these issues from an archivist's perspective;
- Realize when ingested records pose possible privacy and confidentiality legal issues;
- Identify, employ, analyze and compare the ramifications of a variety of legal steps that you might take to prevent or address one of the legal issues; and,
- Communicate and work more effectively with your legal counsel and administration.

Who Should Attend? Archivists and others who need to address privacy and confidentiality legal issues relating to the digital archives of their institutions.

Knowledge Assumed: You should have intermediate to advanced knowledge of archival practices and basic knowledge of general privacy and confidentiality concerns and their effect on archives, including an understanding of how archivists typically address such concerns.

Arrangement and Description Competencies Addressed in this Course:

#2 Communicate and define requirements, roles, and responsibilities related to digital archives to a variety of partners and audiences.

#6 Ethics: Convey transparency of actions taken during arrangement and description and respect privacy, confidentiality and cultural sensitivity of archival materials.

#7 Risk Management: Analyze threats and implement measures to minimize ethical and institutional risks.

Arrangement and Description of Electronic Records – Part 1 [DAS]

This course introduces you to processing strategies that are applicable to born-digital records, with an emphasis on basic concepts that archivists use to establish descriptive control over digital content. You'll learn about standards and tools that can be used to implement an integrated processing strategy. You'll also participate in a set of instructor-led exercises that arrange and describe some electronic records in ways that maintain the integrity and authenticity of the digital records. A laptop is required to participate in this course, and you must have the ability to install and use open-source software on that laptop.

In the morning, you'll review the unique processing challenges posed by electronic records before undertaking a detailed discussion on how standards, protocols, and best practices can help you address those challenges. In the afternoon session, you will explore to applicability of Describing Archives: A Content Standard to digital records and manuscripts. The instructor will demonstrate the use of basic tools that implement descriptive standards and best practices, leading you in a processing exercise that results in the generation of an archival information packet for some relatively homogeneous records. The day will conclude with a discussion of lessons learned and next steps to be taken – considering individual repository needs.

Upon completion of this course you'll be able to:

- List the major processing challenges posed by electronic records;

- Suggest strategies to mitigate them;
- Identify the elements of an integrated arrangement and descriptive program for electronic materials;
- Describe the major standards supporting descriptive systems for electronic materials;
- Identify basic tools that will help you to arrange and describe born–digital records.

Who Should Attend? Repository managers, archivists, practitioners, and anyone responsible for the arrangement and description of electronic records.

Knowledge Assumed:

Arrangement and Description Competencies Addressed in this Course:

#1 Arrangement: Understand the process of organizing materials with respect to their provenance and original order to protect their context and facilitate access.

#2 Description: Analyze describe details about the attributes of a record or collection of records to facilitate the work's identification, management, and understanding.

#3 Descriptive Standards: Apply rules and practices that codify the content of information used to represent archival materials in discovery tools according to published structural guidelines.

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

#5 Discovery: Create tools to facilitate access and disseminate descriptive records of archival materials.

#6 Ethics: Convey transparency of actions taken during arrangement and description and respect privacy, confidentiality and cultural sensitivity of archival materials.

#7 Risk Management: Analyze threats and implement measures to minimize ethical and institutional risks.

The DAS Core Competencies Addressed in this Course:

#1: Understand the nature of records in electronic form, including the functions of various storage media, the nature of system dependence, and the effect on integrity of records over time.

#3: Formulate strategies and tactics for appraising, describing, managing, organizing, and preserving digital archives.

#4: Integrate technologies, tools, software, and media within existing functions for appraising, capturing, preserving, and providing access to digital collections.

Arrangement and Description of Electronic Records – Part 2 [DAS]

This one-day course introduces advanced processing strategies that are applicable to born-digital and hybrid (i.e. mixed analog and digital) records, with an emphasis on hands-on work. We'll use a variety of software tools to establish descriptive control over digital archives, focusing on arrangement and description at the collection and series levels. The instructor will demonstrate specific techniques, and you'll practice them on a sample a set of sample records and/or materials supplied by your repository. A laptop is required to participate in this course, and you must have the ability to install, configure, and use open-source software on that laptop.

In the morning, we'll review the functional requirements that must be met by a program to arrange and describe heterogeneous digital materials, focusing on the implications that the OAIS Reference Model and DACS have regarding archival processing workflows. Then we'll use open-source tools to process digital records at the collection level. In the afternoon session, we'll undertake additional processing exercises, focusing on control at the series and file levels, resulting in the production of descriptive, structural, and preservation metadata that is stored in an archival information packet. We'll conclude the workshop by discussing factors to be considered when selecting tools and developing processing services - considering repository needs, resources, and capabilities.

Upon completion of this course you'll be able to:

- Use standards and tools that support an integrated processing workflow for digital materials;
- Evaluate and use software to process electronic records in a way that preserves their identity, significant characteristics, evidential value, and utility; and
- Make implementation decisions in order to develop a processing workflow that is suitable for your repository.

Who Should Attend? Repository managers, archivists, practitioners, and anyone responsible for the arrangement and description of electronic records.

Knowledge Assumed: Students should have taken and/or passed the exam for Arrangement and Description, Part I.

Arrangement and Description Competencies Addressed in this Course:

#1 Arrangement: Understand the process of organizing materials with respect to their provenance and original order to protect their context and facilitate access.

#2 Description: Analyze describe details about the attributes of a record or collection of records to facilitate the work's identification, management, and understanding.

#3 Descriptive Standards: Apply rules and practices that codify the content of information used to represent archival materials in discovery tools according to published structural guidelines.

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

#5 Discovery: Create tools to facilitate access and disseminate descriptive records of archival materials.

#6 Ethics: Convey transparency of actions taken during arrangement and description and respect privacy, confidentiality and cultural sensitivity of archival materials.

#7 Risk Management: Analyze threats and implement measures to minimize ethical and institutional risks.

The DAS Core Competencies Addressed in this Course:

#4: Integrate technologies, tools, software, and media within existing functions for appraising, capturing, preserving, and providing access to digital collections.

#5: Plan for the integration of new tools or successive generations of emerging technologies, software, and media.

#6: Curate, store, and retrieve original masters and access copies of digital archives.

Architectural Records: Managing Design and Construction Records

Architectural design and construction records are valuable sources for understanding and preserving the built and designed environment. Because they document a complicated work process that includes numerous creators and result in voluminous mixed, oversized, often fragile materials and fugitive media, implementing the basic archival functions of appraisal, arrangement, description, preservation and reference can present a formidable task. In this two-day workshop, participants will learn how to appraise, preserve and provide access to design and construction records. The first day will cover the process of design, legal issues, appraisal, types of records, arrangement, and description including MPLP approaches; the second day will focus on media and support identification, preservation, reformatting, electronic records, reference, and patron use. Taking into consideration the diverse requirements of different types of repositories, as well as the reality of limited space and budgets, this workshop will present best practices as well as practical solutions.

Upon completion of this workshop you'll be able to:

- Describe the process of design and the records created and how this knowledge affects the appraisal, arrangement and description of this material;
- Recognize the special legal issues created by design and construction records;
- Identify content and intent of design and construction drawings;
- Develop methodologies for appraisal, arrangement, and description appropriate for a range of repositories;
- Find specific media and supports used for design and construction drawings;
- Assess common types of deterioration, various options for holdings maintenance, and when to refer problem to professional conservators;
- Become familiar with options for housing design and construction drawings and identifying those appropriate for their institution and budget;
- Make informed decisions for reformatting design and construction records for access and preservation;
- Become familiar with the issues with appraising and preserving computer aided design and BIM records; and,
- Address the specialized handling, reproduction, and use needs when providing reference and access for this material.

Who Should Attend? Archivist practitioners, special collections librarians, and museum curators.

Knowledge Assumed: Archival practice and professional standards.

Arrangement and Description Competencies Addressed in this Course:

#1 Arrangement: Understand the process of organizing materials with respect to their provenance and original order to protect their context and facilitate access.

#2 Description: Analyze describe details about the attributes of a record or collection of records to facilitate the work's identification, management, and understanding.

#3 Descriptive Standards: Apply rules and practices that codify the content of information used to represent archival materials in discovery tools according to published structural guidelines.

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

Project Management for Archivists

You're involved in a variety of projects every day, from such small projects as developing a new procedures manual to such large projects as digitizing a collection. But because project management methodologies aren't automatically included in formal education or many archival education programs, you'll want to take advantage of this workshop to acquire the basic knowledge and tools necessary for managing successful projects.

Upon completion of this course you'll be able to:

- Describe the project life cycle from initiation to completion;
- Utilize effective project management tools and techniques;
- Evaluate project outcomes and disseminate project information; and,
- Demonstrate how positive personnel management adds to a successful project.

Who Should Attend? This is an introductory workshop that can also be taken as a refresher course on project management. Project team members who want to become more active in – and achieve a better understanding of the workings of – their own projects are also welcome.

Knowledge Assumed: A basic understanding of archives.

Arrangement and Description Competencies Addressed in this Course:

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

#7 Risk Management: Analyze threats and implement measures to minimize ethical and institutional risks.

Photographs: Archival Principles & Practices (to be revised)

Photographs are heavily-used resources in an archives, yet many professionals lack any specialized training to deal with them effectively. This introductory workshop teaches the basics of managing and caring for photographs. Discover how to apply standard archival techniques to photographs in eight modules: reading and researching; identification and handling; preservation, storage, and housing; appraising and acquiring; accessioning and arrangement; description and cataloging; copying and digitization; and public service and outreach.

Upon completion of this workshop you'll be able to:

- Apply basic archival concepts to specific work with photographs;
- Identify resources and techniques for understanding photographs, such as researching unidentified photographs or identifying common photo processes;
- Learn about photograph preservation risks and concerns, such as environmental requirements and the inherent vice of nitrate- and acetate-based films;
- Become aware of archival housing and storage options for photographic materials;
- Learn about photograph copy services and digitization planning;

- Discover tools, practices, and standards for processing and describing photographs;
- Set priorities and make informed choices in appraisal and strategic planning, including consideration of legal and ethical concerns; and
- Understand special considerations for using photographs in reference and opportunities to incorporate them **in outreach**.

Who Should Attend? Archivists, curators, librarians, records managers, and other professionals working with photograph collections. Participants should be familiar with basic archival practice. This workshop presents the fundamental principles of administering photograph collections; and, although subjects like cataloging and digitization are discussed, participants will need additional coursework to gain a thorough understanding of specific topics.

Knowledge Assumed:

Arrangement and Description Competencies Addressed in this Course:

#1 Arrangement: Understand the process of organizing materials with respect to their provenance and original order to protect their context and facilitate access.

#2 Description: Analyze describe details about the attributes of a record or collection of records to facilitate the work's identification, management, and understanding.

#3 Descriptive Standards: Apply rules and practices that codify the content of information used to represent archival materials in discovery tools according to published structural guidelines.

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

Copyright Issues in Digital Archives [DAS]

This course covers copyright legal issues specific to archives of digital material. You'll examine the impact of electronic technologies on the long-held law and tenets of copyright, including digital rights management, and acquiring and advising on the use of rights in records. You'll look at the basic text of relevant federal statutes and significant case law, as well as examining case studies. While participants should be familiar with basic copyright law, a very brief review of copyright essentials will be provided to ground the discussion. The focus of the day will be on how to think through and identify options for resolving the most commonly-encountered

Upon completion of this course you'll be able to:

- Recognize and discuss common legal issues relating to copyright issues in general and for digital archives in particular;
- Interpret these issues from an archivist's perspective;
- Realize when ingested records pose possible copyright legal issues;
- Identify, employ, analyze and compare the ramifications of a variety of legal steps that you might take to prevent or address one of the legal issues; and,
- Communicate and work more effectively with your legal counsel and administration.

Who Should Attend: Archivists and others who need to address copyright legal issues relating to the digital archives of their institutions.

What Should You Know: You should have intermediate to advanced knowledge of archival practices and basic knowledge of copyright law and application in archives, including an understanding of the basic copyright terms typically found in donor or deed of gift agreements.

Arrangement and Description Competencies Addressed in this Course:

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

#7 Risk Management: Analyze threats and implement measures to minimize ethical and institutional risks.

Style Sheets for EAD: Delivering Your Finding Aids on the Web

Here's your chance to receive the instruction and hands-on practice you need to deliver your finding aids on the Web in a standardized format. Get acquainted with Extensible Markup Language (XML) and practice with authoring software to create an XML version of a finding aid. This 2-day workshop covers the most up-to-date version of EAD!

Upon completion of this workshop you'll be able to:

- Identify the fundamentals of Extensible Markup Language (XML);
- Recognize the structure of EAD (the SAA-endorsed standard for archival finding aids);
- Mark up a complete finding aid;
- Explore implementation strategies; and
- Practice encoding your own finding aid using EAD.

Who Should Attend? Archivists and others who are charged with exploring and/or implementing EAD at their institutions or who want to enhance their résumés.

Knowledge Assumed: Arrangement and description practice and familiarity with finding aids.

Arrangement and Description Competencies Addressed in this Course:

#2 Description: Analyze and describe details about the attributes of a record or collection of records to facilitate the work's identification, management, and understanding.

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

#5 Discovery: Create tools to facilitate access and disseminate descriptive records of archival materials

Determining Options for and Selecting Tools (working title) (Web Seminar) (New)

Cross-Walking Metadata (Web Seminar) (New)

How DACS Fits with TEI, METS, MODS, and MARC (Web Seminar) (New)

Implementing DACS in ArchivesSpace (combo of AT and Archon) (Proposed)

Financial Management for Archivists (to be revised)

Successful archives don't just happen – they are made! A vital part of that success is managing the archives' financial environment. Most archivists receive little formal training in financial management. This workshop provides basic knowledge and skills needed for an archivist to become a better financial manager by introducing financial management concepts and problem-solving skills.

Upon successful completion of this workshop you'll be able to:

- Understand the language of financial management;
- Develop and understand budgets and basic financial statements;
- Evaluate services and performance; and
- Make sound financial decisions.

Who Should Attend: New and experienced archivists will appreciate this introductory skills workshop. Although the accounting segments will be geared toward nonprofit organizations, archivists from other organizations will also benefit from this workshop. Provides an archivist who is planning to jump into a management position with evidence of training to show prospective employers.

Knowledge Assumed: Basic knowledge of Excel spreadsheets is recommended. Workshop exercises are developed for Excel 2003.

Arrangement and Description Competencies Addressed in this Course:

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

#7 Risk Management: Analyze threats and implement measures to minimize ethical and institutional risks.

Implementing More Product, Less Process (to be revised)

Backlogs don't have to weigh as heavily as they do! Focus on implementing concrete strategies for increasing processing rates and reducing backlogs, as outlined in the Greene-Meissner article, "More Product, Less Process: Revamping Traditional Archival Processing," and learn as you share information and experiences with fellow workshop participants. Topics include appraisal, arrangement, description, digitization, and preservation, as well as development of processing plans, policies, and benchmarks. This array of topics is addressed through lecture, case studies, and group discussion.

Upon Completion of this workshop you'll be able to:

- Understand the concepts and arguments outlined in "More Product, Less Process;"
- Implement strategies for increasing processing rates in a variety of institutions;

- Apply techniques for managing efficient processing programs, including developing processing plans, policies, and benchmarks;
- Understand how descriptive standards such as DACS can assist in the creation of descriptive records that adhere to "minimum" requirements and assist in the reuse of data in a variety of outputs; and
- Develop strategies for integrating processing with other archival functions, particularly accessioning.

Who Should Attend? Archivists who process archival collections or manage archival processing programs and administrators interested in processing procedures within their repositories.

Knowledge Assumed:

Arrangement and Description Competencies Addressed in this Course:

#1 Arrangement: Understand the process of organizing materials with respect to their provenance and original order to protect their context and facilitate access.

#2 Description: Analyze describe details about the attributes of a record or collection of records to facilitate the work's identification, management, and understanding.

#3 Descriptive Standards: Apply rules and practices that codify the content of information used to represent archival materials in discovery tools according to published structural guidelines.

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

#5 Discovery: Create tools to facilitate access and disseminate descriptive records of archival materials.

#6 Ethics: Convey transparency of actions taken during arrangement and description and respect privacy, confidentiality and cultural sensitivity of archival materials.

Encoded Archival Context - Corporate Bodies, Persons, and Families (EAC-CPF) (to be revised)

How can EAC-CPF enhance your institution's records—and how can you get started using it? In this workshop you'll learn how to create EAC-CPF records, with hands-on application of the elements to existing data; discuss balancing existing data with additional data components as part of an implementation strategy; and examine existing projects to consider how EAC-CPF may be implemented locally, regionally, or nationally.

Upon completion of this workshop you'll be able to:

- Convey the structure and content of the EAC-CPF standard and the companion content standard ISAAR (CPF);
- Use the metadata scheme design, including elements and attributes defined to reflect that design: XML techniques used to incorporate data from allied standards and current XML techniques leveraged in the standard;
- Create EAC-CPF record content from existing data structures, such as the Library of Congress Name Authority File, United List of Artists Names, biographical resources, and other related sources; and,
- Mention EAC-CPF projects underway in the United States and internationally.

Who Should Attend? Practicing archivists who are interested in the development and design of the EAC–CPF standard, who want to learn more about this standard, and who want to consider how it could be implemented in their repositories or consortia.

Workshop attendees must bring a laptop with them to participate successfully in this workshop.

Knowledge Assumed:

Arrangement and Description Competencies Addressed in this Course:

#2 Description: Analyze describe details about the attributes of a record or collection of records to facilitate the work's identification, management, and understanding.

#3 Descriptive Standards: Apply rules and practices that codify the content of information used to represent archival materials in discovery tools according to published structural guidelines.

#4 Management: Demonstrate ability to manage physical and intellectual control over archival materials.

#5 Discovery: Create tools to facilitate access and disseminate descriptive records of archival materials.

Authorities and RDF Part 2 (Web Seminar) (New)

Big Data Set Management (New)

Linked Archival Open Data (New)

Arrangement and Description for Outreach: Processing for the Camera (Proposed)

Visualizing Description (colored maps/timelines) (Proposed)

Course Description Data Elements for Any CE Course/Workshop

This template serves as the Course Proposal Form that potential developers or instructors are asked to complete and submit to suggest the creation of new courses.

Title:

Description:

Upon completion of this course you'll be able to: *(use actions verbs from Bloom's taxonomy)*

Who Should Attend?

Knowledge Assumed:

Competencies Addressed in This Course:

Pre-Readings:

Instructor/Developer:

Keywords:

Relationship to Other Workshops:

Standards Included:

Syllabus

Supporting Materials

Activities and Exercises

Dictionary Terms:

Contributors:

Copyright:

Equipment Required of Participants:

Classroom Set Up and Equipment Required:

Version Date:

Guidance for SAA Instructors

CoE believes that the most essential element in the Arrangement and Description curriculum will be the instructors who create and present the courses. However, not all instructors will be naturally adept at all aspects of course and exam development and presentation, so we recommend that prospective instructors be provided with this simple set of advice.

The Society of American Archivists recommends that course developers and instructors follow these guidelines when preparing and giving courses on behalf of SAA:

When Developing a Course

- Take SAA's Train the Trainer webinar.
- Communicate and coordinate course development with CoE liaisons and other instructors who have developed or are developing related courses for SAA. The SAA Education Office will enable this communication process.
- Gain familiarity with best practices for teaching online whenever preparing a webinar. For example, see the WISE Introduction to Online Pedagogy Workshop at <http://www.wisepedagogy.org/workshop.shtml>. This resource is actually useful for all instructors.
- Identify three concrete learning outcomes or tools of assessment for your course before creating the course.
- Tailor course content, especially the vocabulary used to describe issues, and the delivery method to the expectations, knowledge, and needs of the user groups specified for this course (for instance, IT or legal professionals). In addition, refer to the SAA dictionary to ensure that terms are interpreted and used consistently across SAA.
 - If a term isn't found in the SAA Dictionary, instructors and developers should submit their term to the Dictionary Group for inclusion.
- Use visual aids when they are effective. If images are part of the instructional material (in particular, screen shots), make sure that they are effective (sufficiently large, viewable) not only when displayed on the computer screen or otherwise projected, but also as part of the packet the participants receive. (Print out larger screen shots in an appendix, and point participants to those pages when needed.)
- Include hands-on exercises that elicit participation of all members. One way to do this is to ask attendees in advance to bring a project or problem from their day jobs to the session.
- Do not use "Introduction" in the title of courses identified as Tactical and Strategic or higher.

When Preparing to Present a Course

- Review carefully the questionnaires you receive from SAA ahead of the workshop since these indicate what people would like to learn during the workshops. Use this information and responses from the audience at the beginning of a course session to help customize the training to the audience's particular needs.
- Develop a quiz to measure student's grasp of the core competencies taught in your course. This quiz should consist of ten multiple-choice questions. The quiz will be presented online, and the content of the quiz will be reviewed by SAA's Education Committee before it is given.

Glossary of Terms

The Committee on Education and staff referred to the SAA Dictionary for the definitions of a few terms as used in this report so as to ensure the readers' understanding of the terms in this context.

Administrator: an archivist in a large archives who oversees managing archivists, who is responsible for organizational planning, and who does not manage electronic records personally but who must ensure an organization's capacity to manage those records

IT professional: a professional in charge of various levels of the information technology management in an organization and who is responsible for providing information technology support to an archives

Legal professional: a professional who is responsible for providing legal advice and support to an archives

Librarian: a library professional whose primary responsibility is dealing with publications and their use, including digital publications and possibly also dealing with digital archival records

Manager: an archivist who has oversight of the work of other professional archivists, and who may or may not manage electronic records personally

Museum professional: a professional who has responsibility for the management and use of cultural and scientific artifacts and who may also have similar responsibility for digital archival records

Practitioner: a hands-on frontline archivist who manages or will manage electronic records personally

Records manager: a professional responsible for the management of the records of an organization across their life cycle and who also may have sole responsibility for the management of an organization's archives, including those in digital form