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| **A&D Track Considerations** | | | | | |  |
|  | Financial Mgmt  Basics | A&D of  Manuscript | MARC accdg. to DACS | Copyright: Archivists & Law | DACS | MPLP |
| 1.Does this content bridge, enhance, and/or build on other workshops (If so, please name) | No | Builds on DACS; prepares for EAD; MPLP, & AT | Builds on A&D of Manuscript Coll., EAD & DACS; solid basis for Applying DACS to Single item Man. Cataloging. | Enhances workshops in all categories. See course specific eval. | Presents more focused examination of archival description practices than found in Principles and Practices | Yes, [F] Arrangement and Description of Manuscript Collections;  [F] Describing Archives: A Content Standard (DACS);  [TST] Change Management;  [TST] MARC According to DACS;  [T&S] Archivists' Toolkit: Shortening the Path from Accession to Researcher |
| 2. Does this build on other workshops not on the list? | No | Seems foundational  Level; | Great for review of cataloging and how it corresponds with DACS | No | No | Yes – itemized on the specific form. |
| 3 Should this be part of the A&D Track? | TBD | Yes – this or equivalent exp. | Yes | Yes | Yes | Yes, with some caveats. |
| 4. Where would this workshop fall in the sequence of an A&D track? | TBD | Should start the track | Place after fundamental crs. | Should be grouped with foundationals. Take after principles, appraisal, and A&D. | Since it’s assumed that s/he is familiar with A7D process, it should follow A&D. | This would be somewhere between Foundational and Transformational because it represents a significant change that has occurred in the archival profession's mindset since the groundbreaking article, “More Product, Less Process” was published in 2005. |
| Why? |  | Because it’s imperative to understand the physical collections principles… | Beyond basics but not as advanced as single item cataloging. Helpful examples. | After taking the above, s/he would need this workshop to take others in DAS |  |  |
| 5. What tier does this workshop fall in? (See attached tiers) | The tiers aren’t attached. | Foundational | TST | Foundational | Foundational | Transformational or Foundational tiers. |
| 6. Target Audience | Attached list of tracks can be used to indicate appropriate level of experience and job function | Novice | Refer to list of tracks | Administrative-level personnel . Refer to course specific eval. | Anyone whose work includes accessioning, arranging, and describing, or who supervises employees engaged in those functions. | Archival managers, processing archivists, archival administrators |
| 7. Is the suggested prior “experience/knowledge” appropriate? | Yes | Taking DACS or equivalent | Best to take DACS, EAD, and have some processing exp. Prior to taking this course. | No | Perhaps A&D of Manuscript Collections should be the pre-requisite | Yes, mostly appropriate.  More specifics on original. |
| 8. Learning Outcomes:  Are they appropriate and/or relevant? | Yes | Yes | Yes | Yes | Yes | Yes, appropriate: Understand concepts and arguments outlined in MPLP; |
| 9. What should they be?  Please list learning outcomes. |  | Should be stated that this is an overview | Yes | Should stay; but maybe emphasize last outcome | N/a | Learning outcomes should also address the risks and tradeoffs of speed versus more extensive descriptions. |
| 10. Can you make suggestions for competencies this workshop would fulfill? |  | Foundation for A&D  Base for other archival activities;  Overview of processing workflows and strategies for mgmt.. | Reinforces archivist’s understanding of A&D practices, interpretation of DACS, and relation-ship between EAD, MARC, and DACS. | Understand the delibertaions involved in A&D of records, incl. different media formats, metadata schema, etc. | Don’t know | #3, #4, and #7. |
| 11. Would parts of the content lend themselves to a different format? | |  |  | | --- | --- | | Check one: Webinar:   * 30 minute * 90minute | In person:   * 1/2 day * 1 day * 2 day | | Face-to-face 1-day | Face-to-face 1-day | Face-to-face 1-day | Face-to-face 1-day | 1-day or   |  | | --- | | 2-day - one day, split into two parts: one for backlogs of paper and manuscripts collections and the second part focusing on describing born-digital, digitized, audiovisual & electronic records. | |
| 12. Which parts? | ALL |  |  |  |  | if other articles and opinions about MPLP were appended, it would give students a fuller understanding of how MPLP pertains to non-manuscripts collections. |
| 13. Does it lend itself to repurposing as an audio CD? | NO -- Too many visuals | Best in person | No | Possibly | No | Several options listed |
| Which parts? |  |  |  | Develop a follow-up with case studies |  |  |

*Financial Management:*

Other comments: Some comments for consideration:

1. The content needs to be updated: currently the course is geared for Excel 2003.
2. The vocabulary sections are excellent.
3. The workbook is well thought out.
4. This course seems to be a mixture of tactical – generating reports – and strategic – analyzing data. I suggest that a decision should be made – is this a course where students are taught how to generate the reports or to analyze them.
   1. If the students generate reports using Excel on a regular basis, I suggest that the parts of this course relevant to archival practice (mostly narrative) should be added to a basic Accounting course. Microsoft probably offers a course using the current version of Excel or perhaps they can be contracted to offer it for SAA.
   2. If the students are to understand the relevancy of the data generated by their institutions and how it applies to the operations, management and decision-making for their institution, then less time should be spent on how to generate reports, which are probably going to be generated for them and more time on analysis. As a result, a scientific calculator is not a requirement.
5. Suggest that content be added related to grants and the typical contributions to grants, i.e., in-kind, match, indirect/direct cost concepts/examples, etc. as well as the strategic planning that should be included as part of the financial side of pursuing grant funding. The reason is that increasingly, institutional projects require external funding in order to be addressed. That piece could connect with the course on Grant Proposal Writing.
6. If there’s time, some information about the components of project management and their impact on institutional resources should be incorporated because increasingly, archivists are on working groups, teams and are managing by project, which may be grant-funded. That piece could connect with the Project Management course.
7. Altogether, this course could become part of a 3- or 4- part business management-oriented arc (if an Excel course is included) which would meet relevant and immediate business needs of cultural institutions.
8. The financial style question: Suggest that it is more relevant to bring out the importance of the institution’s culture and mission and how that affects financial decision-making and strategic planning.
9. Overall, suggest more of an analytical approach particularly if the course expects to address positioning students to develop good decision-making skills. Suggest students could be given a short writing or role-playing assignment to show they can explain/discuss the concepts knowledgeably.

***Arrangement and Description of Manuscript Collections***

Other comments:

--With arrangement and description comprising the core of all other archival activities, this course would best be taught in person over (at least) two days as currently offered through SAA.

--The class provides an overview of descriptive activities for basic collection management, and can be helpful for novices, or as a refresher for experienced professionals. As stated above, it should be stressed as an overview course.

--I couldn’t tell from the course materials if there were any hands-on activities (small collections of correspondence, ephemera, etc.) for participants to try arrangement and description of archival collections in class. This was something that I did in class in groups in graduate school (chiefly to demonstrate the variety of arrangement schemes that can be applied to collections), and it engaged the students.

--This is a lot to cram into two full days. Would it be possible to expand it to at least three (perhaps to accommodate more hands-on examples)?

***MARC According to DACS***

--This class should remain a two-day, in person class. Having instructors in the room encourages dialogue, especially for a topic as subjective as archival cataloging, and as well as questions from the participants.

--How will RDA (Resource Description and Access) be incorporated into this course? Are there any repositories working with RDA yet?

--The class builds upon basic arrangement and description principles covered in library school archival programs, and also provides a solid foundation for archival cataloging (which is often not covered in library school).

--I would encourage students to be familiar with DACS before attending the class, or perhaps SAA could offer offer the DACS class before the two-day MARC according to DACS workshop (as has been done in the past).

***Copyright: The Archivist and the Law***

* The workshop description is somewhat outdated, since it emphasizes the Eldred case from 2003.
* The copyright timeline does not have any updates since 2005.

***MPLP***

Other comments: Mark Greene and Dennis Meissner's groundbreaking essay, “More Product, Less Process” was published in 2005,

and sought to propose solutions to the problem that “Cataloguing is a function which is not working.” They point out that in a project

at the University of Washington, “up to 80% of processing time was spent on tasks related to refoldering.” With those words, the authors systematically investigated archival backlogs (mostly paper collections in academic institutions) and proposed MPLP, a methodology

for minimal processing stating: “good processing is done with a shovel, not with tweezers.” A serious problem though, is that most

of their research was based on large backlogs of 20th century collections of personal papers and manuscripts. But one methodological

solution may not be sufficient because in the digital age of exponentially growing collections of digitized and born-digital materials,

MPLP can and should also be used to make workflows, appraisal, accessioning and processing more efficient.

In the same way that Greene and Meissner argued that “good processing is done with a shovel, not with a tweezers,” students pursuing

a certificate in Arrangement and Description should understand that MPLP can also make use of automated functions to ensure that digital

files are described accurately, consistently and efficiently (such as with geotags, MAC dates, EXIF, and etc.).

I would advise that if the Integrating MPLP class is offered by the SAA as part of a certificate in Arrangement and Description, it be updated   
to include other more contemporary articles from *The American Archivist* (including Greene's own follow-up article “MPLP: It's Not Just for Processing Anymore”), as well as discussion of tools and available options for automatically harvesting technical and descriptive metadata

from digital assets.