



CPS Advocacy Day 2018

*A guide to advocating for the preservation
of congressional papers*

Purpose

In 2017, the CPS approved a new strategic plan that aligns the Section's goals with those articulated in the SAA 2018-2020 strategic plan. Goal 1 in both plans addresses "advocating for archives and archivists." Specifically, CPS committed to providing leadership in "promoting the value of congressional archives and archivists to members of Congress..." and to organizing an "advocacy activity during its 2018 meeting in Washington, DC, with congressional members and staff." Further, CPS members have expressed a more urgent need to advocate for funding for congressional papers preservation because of the significant resources needed to care for these collections.

To meet these objectives, CPS will host an advocacy training session at its annual SAA pre-conference program, which occurs this year on Wednesday, August 15, at the Capitol Visitor Center. The session will include former or current congressional staff members who will provide useful insights to archivists about how to make the case for preserving congressional records. The session also will include a representative from the Congressional Management Foundation, which researches and provides training on congressional advocacy.

This advocacy event will occur just three months before the 2018 midterm elections. All 435 seats in the House of Representatives and 33 Senate seats are up for election. Additionally, more than 40 members have announced early retirements. It is a crucial time for archivists to establish relationships with congressional offices or to check-in with existing connections.

This booklet will help you prepare for an advocacy visit to your delegation on Capitol Hill. It includes a basic set of talking points, tips for interacting with congressional offices, and checklists to help you gather the necessary information for your visit.

Checklists

Use these two checklists to prepare an elevator pitch for your visit to Capitol Hill. The first checklist will help you gather basic information about your repository. The second will help you address specific concerns typically expressed by donors. Should you need them, more detailed checklists are available.¹

Repository Checklist

Topic	Response
How does your collection policy relate to legislative collections?	
What type of experience does your staff have with large, legislative collections?	
How large is your repository's staff and how many collections do you manage?	
What type of physical and digital storage infrastructure do you maintain?	
What type of experience does your repository have facilitating use of congressional papers?	

Donor Checklist

Topic	Response
Is the repository conveniently located?	
Does the repository have previous experience with congressional papers?	
Does the repository have enough space for the materials?	
Does the repository have the infrastructure and expertise to preserve electronic records?	
Is the repository aware of declassification procedures (does it have experience handling sensitive materials)?	

¹ https://cprerc.files.wordpress.com/2016/07/ercm002_discussing-electronic-records_-repository-and-donor-perspectives.pdf OR https://cprerc.files.wordpress.com/2015/08/electronic-records-checklist-for-congressional-offices_0.pdf

Talking Points to Build Your Pitch

Talking Point	Your Response
Introduce yourself	
Why are you visiting the office?	
The value of preserving the member's records (legacy, living legacy, research, teaching, the importance of the collection to the member's home state)	
Mention existing connections member has with your institution	
Know your institution's existing policies for government relations and involve them as necessary	

Your Elevator Pitch

Using the talking points you established above, develop an elevator pitch to make during your visit.

Getting to Know the Staff

Building a strong relationship with a congressional office often involves interacting with the staff, not simply the member in question. Here are some helpful insights about key staff positions.²

Position	Level of Importance
Chief of Staff (CoS) and Administrative Director	Staff members in these positions are the most importance because they have the positional power to convince the member and set the staff's agenda.
Systems Admin and Executive Assistant/ Chief Scheduler	Staff members in these positions have access to either the entire infrastructure of the office in the case of the System Admin, and the scheduler/assistant is in a place of having their hands on or near every major record in the office and arguably have as close a relationship to the member as the CoS.
State/District Director	Staff in these positions are important to know because state offices perform unique constituent services functions and may provide a convenient point of initial contact with the office.
Mail Manager	Staff members in these positions provide the most help with CSS (other than the Sys Admin) because they would know the operational side of CSS, and they would have access to ALL lists of legislative responsibility areas in the office, needing this to properly assign issues through the system.

Pro Tips

For a First Visit: Plan ahead. Do your research. Vet any major proposal with your administration and see what help they can offer to you. Get an appointment. If you can't get an appointment with the member, try for his chief of staff or office manager. During your visit, drop names. If you have relationships with colleagues of the prospective donor, play on those to help establish your expertise. Remember, you are selling the idea of creating a collection, selling your individual repository, and selling yourself. In a way, it's a job interview. **Building a relationship:** This takes time, but you can help the process along. Are there already any links to your institution? Might you have friends or interests in common? Show that you are sincere in desiring to work with that particular member. Impress them with your knowledge of their life and interests. Show that you are a fan, but don't be fake. Never promise more than you can deliver. **Advocate for preservation:** Argue the importance of documenting the member's contributions to governing the state and nation and documenting their influence on world affairs. Then describe in detail

² For a more granular overview of congressional staffs, see: the Congressional Management Foundation's list of congressional office staff positions: <http://www.congressfoundation.org/component/content/article/85/136-job-descriptions-house-office-sample>

the expert services your repository provides. Emphasize that with the signing of the gift agreement, you and your staff become adjuncts to the member's staff. To showcase our real value, I share a favorite story of a donor who called one morning hoping to locate a needed file. She didn't know whether or not she had actually transferred the file to us. Thanks to our careful inventorying of new materials, I was able to call her back in a few minutes with the file in hand. I also share horror stories of South Carolinians who lost valuable records through fires, flooded storage rooms, etc. **Conclusion:** Enjoy these experiences. Successful or not, you're building memories that will remain with you the rest of your life. - *Herbert Hartsook, creator of the South Carolina Political Collections at the University of South Carolina*

"To reinforce a sense of trust, we promote the Russell Library as an extension of the member's office -- and the idea that the papers have a life beyond the function of the legislative office, although the focus and life cycle will be different in the archives. A few minutes of each office orientation visit are spent introducing the staff to the Russell Library, its mission, the archivist's work, and how the member's papers will be managed and used once transferred. We emphasize working together with the common goal of documenting the member, the office, and its representation of Georgia in Congress, but we reassure staff that the commitment to the library will not add to the workload...The importance of sustaining the office contact in D.C. and at the district/state level cannot be overstated." - *Sheryl B. Vogt, "Richard B. Russell Library for Political Research and Studies: An Evolutionary Model," in An American Political Archives Reader, p. 371*

Advice for reaching out to your delegation for the first time: Introduce yourself and identify your institution as a research repository for congressional and public policy collections. Have a list of the collections that you curate. Consider having a list of all congressional collections (post WWII) at institutions in your state to make the point that it is a strong state tradition. The list can be compiled using the Congressional Biographical Directory online at:

<http://bioguide.congress.gov/biosearch/biosearch.asp>

Explain that you are visiting the office [on behalf of the Congressional Papers Section of the SAA or your own repository as appropriate] to advocate for the preservation of the senator's collection on behalf of the congressional documentation community. Mention that the Congressional Papers Section was established in 1986 within the Society of American Archivists and is dedicated to the preservation and management of congressional papers and records, providing a forum for news, for discussion of issues and developments, and for setting standards in the preservation and use of congressional collections.

Give them a copy of H. Con. Res 307 (2008) which encourages members to manage and preserve the records of their service, to donate them to a research institution that is properly equipped to care for them, and to make them available for research use at the appropriate time.

Make a strong statement on why congressional collections are important to the nation, that they are fundamental primary sources of our national history and that historians, archivists and educators use them to study and learn about our political history, public policy, and the evolution of the democratic process. Educators rely on congressional collections to develop civics education programs K through 12 and to further civic literacy among students of all ages. Congressional primary sources are highly valued

because they contain the most authentic evidence of the facts behind the headlines of the day. They are the most reliable sources because they were created in real time.

Present a business card and offer to answer any general questions about the process of preserving a collection in a research institution and what your institution can offer should your institution be selected by the member.

How do you build good relations with members and staffs:

Pay courtesy visits to the DC office once a Congress, accompanied by your Development staff as appropriate. Consider paying courtesy visits to member state offices as well. Invite staff to visit and tour your archives during state work periods. If you celebrate Congress Week, let the office know how you have done so. Share notices of exhibits, research using congressional collections, and educational use of congressional collections- for example if you are using them for coursework, teacher institutes, and intern or scholar programs.

State the most important things that your repository has to offer:

- Your repository is dedicated to preserving the documentary record of Congress and to making the records available for research and educational use at the appropriate time
- Your staff are seasoned and knowledgeable about congressional materials and are expert in managing sensitive records
- You and your institution are representing the member's best interests with regard to preservation and use of the materials
- You and your program have the knowledge and experience to preserve and manage electronic records according to the current archival best practices
- As applicable, your university is a potential source of summer intern assistance from your library school or history program

Karen Paul, Senate Archivist

Appendix

Advocacy and Congress

This appendix features key documents related to the preservation of congressional papers and remarks made by members of Congress in support of such work. Referring to these remarks or resolutions may prove important when working with members of Congress to ensure the preservation of their papers.

Landmark Resolution on Congressional Papers Approved

This article was written for the Congressional Papers Roundtable Newsletter.

H. Con. Res. 307, 110th Congress, Passes

By Karen Paul

June 20, 2008 was a milestone in the long term efforts to improve preservation of the papers of members of Congress. What began over thirty years earlier with the establishment of a Historical Office in the Senate in 1975 culminated when the House passed H. Con. Res. on March 5, 2008 and the Senate in turn passed it by unanimous consent on June 20th. This resolution puts in place the final piece of a puzzle whose design element is the documentation of Congress, specifically the preservation of the papers of its members. With this concurrent resolution, the Congress finally has expressed in writing its “policy” regarding the preservation of these materials.

The discussion began years ago when the Public Documents Commission recommended that members’ papers become public records. [National Study Commission on Records and Documents of Federal Officials. *Final Report*, March 31, 1977 (Washington, D.C.: Government Printing Office, 1977), 19-22]. At the time, there were many objections and perceived problems, mainly centering on separation of powers and cost issues. The result was that nothing was done. Both House and Senate went on to produce records management guidance for members and gradually an acceptable modus operandi developed.

The Congressional Papers Roundtable had been exploring various issues related to congressional documentation since 1984. At a forum held in 2001, the Roundtable emphasized the value of concentrating these collections at institutions that specialize in congressional documentation. The economies of doing so were noted as well as the fact that it would be an incredible boon for researchers to have sources concentrated in several large research centers rather than scattered about the nation in numerous isolated institutions.

The Association of Centers for the Study of Congress (established 2003) also reviewed the present state of preservation and access to congressional collections. As a result, the John H. Brademas Center for the Study of Congress at New York University hosted a symposium on October 25, 2005 on the history of the 1974 Presidential Recordings and Materials Preservation Act, its role today, and current policy options and obstacles in archiving the papers of government officials. Representative John Brademas (D-IN, 1959-1981) was responsible for the legislation that resulted in the Presidential Records Act of 1978. In opening

remarks at the symposium, he commented that the time has come “to fashion a more rational, orderly public policy for dealing with the papers of senators and congressmen.”

The final panel of the day was on the topic of “Can We Create a Policy for the Papers of Public Officials?” In his report of the symposium, Bruce Craig (“Symposium Raises Concerns Over Disposition of Congressional Papers,” *American Historical Association Perspectives*, January 2006, 23) recounted that John Constance, then director of congressional affairs at the National Archives expressed his doubts that Congress would ever embrace legislation that would turn congressional records (now viewed as personal property) into public property. He stated that members would not allow a law to standardize access, the cost of preserving the collections is prohibitive, and all collections are not equally good. Craig then went on to report that Karen Paul’s “upbeat” presentation suggested that the problems relating to creating a public policy were not as overwhelming as they seemed in the past. Paul pointed out that to an extent we already have a policy for the papers of public officials in place. Both houses had devised records disposition guidelines for their members. Retiring members generally do select a repository for their papers, and access to these collections is spelled out in deeds of gift and deposit agreements that tend to parallel the access rules for the official committee records of each body. The Congressional Papers Roundtable has helped to further standardize the appraisal and processing of congressional collections. She said that the one item lacking was a written policy.

The symposium report called for a congressional discussion of the issues and recommended that the presidential library system, characterized by its ease of use and centralization of resources and funding opportunities, be used as a model for congressional papers, in terms of how to define them and how to provide access to them. The report emphasized that access to these records is just as important as access to presidential papers. (Preserving and Expanding Public Access to Public Papers, The John Brademas Center, www.nyu.edu/ofp/brademascenter/events.html, 27 March 2006).

The Brademas conference provided the inspiration for a congressional resolution regarding preservation of papers. By September 2006, a draft resolution for the Senate was created but conditions were not conducive to moving it in the 109th Congress, there simply was not enough time. With the substantial changes brought by the 110th Congress, it was not until January 2008, that it was raised again with the Secretary of the Senate in preparation for a meeting of the Advisory Committee on the Records of Congress. The resolution was thoroughly discussed at the January 28th committee meeting and unanimously endorsed.

The Clerk of the House, Lorraine Miller, “embraced” the resolution and immediately proposed it to the Committee on House Administration whose staff also liked the idea. By February 6 a discussion draft was produced. Over two days at the end of February, Farar Elliott, Chief of the House Office of History and Preservation, attended at least one three-hour meeting, and Senate Historian Richard Baker and I (via e-mail) discussed finer points of wording in the resolution with the House Legislative Counsel. Finally the language was shaped to their satisfaction. The phrase “official papers of members of Congress” was changed to “Members’ Congressional papers” having been through several iterations including at one point “historically significant congressional office papers.” Also in the preamble, the phrase “must be properly maintained” was changed to “should be properly maintained.” Representatives Robert Brady (D-PA) and Vernon Ehlers (R-MI) introduced the measure and spoke eloquently in its favor. (See below)

On March 6, *Roll Call* reported that “The House passed a concurrent resolution by voice vote on Wednesday (the 5th) reminding Members that their Congressional papers *must* be properly maintained and encouraging them to “take all necessary measures to manage and preserve these papers.” (So much for fine tuning of the wording as reported by the press.)

As Richard Baker said in his keynote address to the Association of Centers for the Study of Congress later in May, “Karen Paul and I have never danced before...” That same day, March 6th, it was received in the Senate and referred to the Committee on Homeland Security and Governmental Affairs. On March 28th it was referred to the Subcommittee on Federal Financial Management, Government Information, Federal Services, and International Security so that the subcommittee could exercise its jurisdiction. With committee archivist Elizabeth Butler’s timely assistance to the Staff Director, and “talking points prepared by Richard Baker and myself, the committee ordered it to be reported favorably on April 10th. On the twenty second, Senator Lieberman reported it and it was placed on the Legislative Calendar.

On June 19 at 14:40:22, the Republican Cloakroom “Hotlined” the resolution with the notation, “Call up and pass.” And it did on the next day, June 20th at 12:47 P.M.

H. Con. Res. 307 expresses the sense of Congress regarding the importance of preserving members’ collections. While it does not define the contents- that is left to archivists- it does state the members’ common belief in their value and in the importance of preserving them. Over time, it will grow in stature as it is used over and over again in remarks, in written guidance, and as a constant reminder. This written “policy” provides congressional archivists inside and outside the Congress with a persuasive and useful tool for demonstrating the documentary importance of the materials that result from the members’ service. Service in Congress is a high public trust and the records of that service are invaluable. It now is up to all of us to use this new found tool to the best of our abilities.

H. Con. Res. 307

Agreed to June 20, 2008³

One Hundred Tenth Congress
of the
United States of America
AT THE SECOND SESSION

Begun and held at the City of Washington on Thursday, the third day of January, two thousand and eight
Concurrent Resolution

Whereas Members' Congressional papers (including papers of Delegates and Resident Commissioners to the Congress) serve as indispensable sources for the study of American representative democracy;

Whereas these papers document vital national, regional, and local public policy issues;

Whereas these papers are crucial to the public's understanding of the role of Congress in making the Nation's laws and responding to the needs of its citizens;

Whereas because these papers serve as essential primary sources for the history of Congress, the study of these papers will illuminate the careers of individual Members;

Whereas by custom, these papers are considered the personal property of the Member who receives and creates them, and it is therefore the Member who is responsible to decide on their ultimate disposition; and

Whereas resources are available through the Office of the Clerk of the House of Representatives and the Secretary of the Senate to assist Members with the professional and cost-effective management and preservation of these papers: Now, therefore, be it

Resolved by the House of Representatives (the Senate concurring), That it is the sense of Congress that--

(1) Members' Congressional papers (including papers of Delegates and Resident Commissioners to the Congress) should be properly maintained;

(2) each Member of Congress should take all necessary measures to manage and preserve the Member's own Congressional papers; and

(3) each Member of Congress should be encouraged to arrange for the deposit or donation of the Member's own noncurrent Congressional papers with a research institution that is properly equipped to care for them, and to make these papers available for educational purposes at a time the Member considers appropriate.

³ For the official text, see: <https://www.gpo.gov/fdsys/pkg/BILLS-110hconres307enr/pdf/BILLS-110hconres307enr.pdf>

Attest:

Clerk of the House of Representatives.

Attest:

Secretary of the Senate.

Majority Leader Mitch McConnell Congress Week Remarks, 2018

April 9, 2018 (S2001)⁴

ACSC CONGRESS WEEK

Mr. MCCONNELL. Mr. President, I would call my colleagues' attention to the recent 229th anniversary of the first quorum of the U.S. Congress. The House of Representatives achieved a quorum on April 1, 1789. Five days later, on April 6, the Senate marked that milestone. Each year, the Association of Centers for the Study of Congress, ACSC, commemorates this anniversary by observing Congress Week during the first week of April. Commemorative events around the country encourage students to explore the work of the U.S. Congress and its constitutional role in our government and promote advanced scholarly research.

The ACSC was founded in 2003. It includes more than 40 organizations and institutions that help to preserve and make available the archival records of Members of Congress. Each year, the annual meeting of the ACSC brings together Members of Congress who create the records, archivists who preserve the records, teachers who incorporate them into their lesson plans, and scholars who study them in order to advance our understanding of congressional history and the evolution of the political process. This year's annual meeting will be hosted by the Robert J. Dole Institute of Politics at the University of Kansas. Thanks to the work of the ACSC and its member organizations, we have substantially improved the number and research value of congressional collections being preserved nationwide, producing an educational resource for legislative branch studies that rivals the presidential library system.

I am happy to report that the McConnell Center at the University of Louisville is one such member organization. Created in 1991, the McConnell Center nurtures "Kentucky's next generation of great leaders" with programs focused on service, leadership, and civic

education. Last spring, at the annual meeting of the ACSC, I had the pleasure of participating in a fireside chat with the McConnell Center archivist, Deborah Skaggs Speth. We discussed the importance of Members preserving their records, which shed important light on what we do on behalf of the American people, and how we do it.

In 2008, Congress unanimously passed H.Con.Res. 307. It recommended that Members' records be properly maintained, that each Member take all necessary measures to manage and preserve their records, that they arrange for the deposit or donation of their records with a research institution that is properly equipped to care for them, and that they make them available for educational purposes at an appropriate time.

⁴ For the official entry in the Congressional Record, see:

<http://www.congressweek.org/uploads/1/0/1/6/101677438/crec-2018-04-09.pdf>

Organizations like the McConnell Center and the Dole Institute, in collaboration with the ACSC, are diligently working to ensure the preservation of records for generations of students and scholars. I encourage my colleagues to preserve the records of their service in a research institution, where they can contribute to this vital, necessary, and growing component of our Nation's documentary heritage.

Senator Orrin Hatch Congress Week Remarks, 2016

April 7, 2016 (S1802)⁵

OBSERVING CONGRESS WEEK

Mr. HATCH. Mr. President, I wish to call the attention of my colleagues to the 227th anniversary of Congress' first quorum, which the House of Representatives achieved on April 1, 1789, and

which the Senate achieved 5 days later. In the first week of April, the Association of Centers for the Study of Congress remembers these milestones by observing Congress Week—an annual celebration which includes commemorative events at member institutions across the country.

The Association of Centers for the Study of Congress is composed of more than 40 universities that work to preserve the historical collections of Members of Congress. The organization's goal is to promote public understanding of the House and the Senate by focusing on the history of Congress and its role in our constitutional system of government. Having served as a member of this body for nearly four decades, I understand well the importance of keeping good records, which is why I am sincerely grateful for the Association of Centers for the Study of Congress and its efforts to help us in this endeavor.

While Presidents have Presidential libraries maintained by the National Archives, we—the Members of Congress—are responsible for preserving our own personal documents. Only by archiving these records will historians, students, and teachers be able to appreciate the vital role that Congress has played in our national history.

As President Pro Tempore, I am committed to upholding the reputation and dignity of this institution. Part and parcel to that effort is preserving the Senate's history. To this end, I strongly encourage my colleagues to keep comprehensive records of their work in Congress. Just as important as writing legislation is maintaining a thorough record of the bills we pass, so that future generations can appreciate the historical importance of our accomplishments.

Serving as a Member of the world's greatest deliberative body is no small honor; it is a tremendous privilege that none of us should take for granted. The American people have placed their confidence in our ability to effect meaningful change for the good of the country. May we honor this sacred trust by keeping detailed archives of the work we do here.

⁵ For the official entry in the Congressional Record, see: <https://www.congress.gov/crec/2016/04/07/CREC-2016-04-07-pt1-PgS1802-2.pdf>