



Reference Access and Outreach Section Annual Report 2012/2013

November 15, 2013

Officers: Jill Severn, Chair; Mary Manning, Vice-Chair; Kathryn Otto, Past Chair

Steering Committee: Greg Kocken, Alison Stankrauff, Rachael Dreyer, Jean Green

Appointed: Lisa Sjoberg, Communications Liaison; Aimee Morgan & Shaun Hayes, Web Liaisons

Report from annual meeting:

- Number of attendees: **72**
- Election results:
 - Lisa Sjoberg elected Vice Chair-Chair elect; Jodi Alison Bunnell, Matt Herbison elected to steering committee
 - Bylaws Revision Referendum: (see revised language, [Appendix A](#))
 - Passed by RAO membership
 - Now before SAA Council for consideration (see Report to Council, [Appendix B](#))
- Summary of meeting activities:
 - **Brief business meeting**—welcome and introduction from the chair, nominations and elections report, verbal reports from RAO working groups and introduction to RAO SAA Council representative Terry Baxter. (see 2013 RAO Meeting Agenda, [Appendix C](#))
 - **Marketplace of Ideas II Program:** billed as “bigger, better, hotter, cooler,” the 2013 version of the Marketplace of Ideas continued the core focus from 2012 of giving attendees a chance to connect with each other over key RAO issues in a small informal setting, in a self-directed manner, to encourage creative synergies and robust communion. (see Marketplace II Description, [Appendix D](#))
 - There were six idea vendors drawn from RAO membership who applied to participate. They facilitated conversations on the following issues/topics:
 - Successful strategies for engaging undergraduates with primary sources.
 - Why we need archival privilege? Protecting donors and preserving the historical record.
 - Results from RAO’s Teaching with Primary Sources Survey group, a discussion of findings and directions for future action
 - Outreach strategies and documenting underrepresented groups
 - Copy requests and fair use

- Assessing student learning
- **New for the 2013 Marketplace:**
 - The **Idea Snack Bar (ISB)**: Equal parts graffiti wall and Twitter nest, the **ISB** was conceived as a place where section meeting attendees could post questions, share ideas, make suggestions, draw diagrams using sticky notes, or tweet using the **hashtag #SAARAO13**
 - **Idea Seed Swap (ISS)**: To provide a springboard for RAO section meeting attendees and RAO members in general to connect with people with similar interests or expertise we created the RAO Idea Seed Swap. We created a “seed packet” (a manila envelope) for each of the six hot topic/cool demo booths we created a “seed packet” as well as several other topics mentioned by members. We encouraged attendees at the marketplace to deposit their business cards in any or all of the seed packets and directed RAO members in general to contact us with their seed packet interests. We created a spreadsheet with contact information for all the people in each seed packet, shared this form, and welcomed them to do great or small things together. We look forward to monitoring if and how these “seeds” sprout and grow.
- **Special thanks and appreciation:** the Marketplace format works best with a large space with a fairly specific set-up of chairs. **Rene Mueller** at SAA was a delight to work with on arranging this specific set-up for us and really the cornucopia of positive reviews of the event—particularly in comparison to the previous year’s inaugural effort—are a tribute to her fine work and assistance. This is a wonderful example of SAA supporting a section’s efforts to be creative and try new things.

Completed projects/activities:

- **RAO Recommends Endorsement of Guidelines for Interlibrary and Exhibition Loan of Archives and Special Collections Materials to SAA Standards Committee:**
 - After careful consideration and input from membership at the August 2012 RAO Section meeting and the RAO steering committee, Jill Severn as Chair of RAO submitted a recommendation to the SAA Standards Committee to endorse a new set of external guidelines for Interlibrary and Exhibition Loan Of Archives and Special Collections Materials. RAO joined the Archives Management Roundtable in this recommendation. The Rare Books and Manuscripts Section of the Association of College and Research Libraries ([ACRL](#)), a division of the American Library Association ([ALA](#)) developed these guidelines and the Board of Directors of ACRL adopted them in January 2012. The full text of the guidelines is available at www.ala.org/acrl/standards/specialcollections. Jennifer Schaffner and Christian Du Pont brought the guidelines to the attention of the RAO steering committee and assisted with the preparation of the recommendation document.

The purpose of the guidelines is to help special collections and archives formulate appropriate policies and responsible practices for managing requests from other institutions to borrow materials from their holdings for research and exhibition loans. They offer a set of principles and general guidelines for institutions to consider in formulating their own local policies and practices, whether those include lending physical materials under certain conditions or providing digital or other surrogates in lieu of physical lending. They also outline the responsibilities of borrowing institutions in ensuring the security and preservation of loaned materials.

The RAO steering committee determined to recommend the guidelines to the SAA standards committee for endorsement because the guidelines will give borrowing or lending archives a vetted guide for policies that follow best practices established by archives, libraries, and museums with longstanding experience. The committee also believes that endorsing the guidelines will encourage further consideration in the archival community of what types of lending and borrowing policies and practices are best suited specifically for archival materials. Finally, the RAO steering committee asserted that it balances its support for these guidelines with its continuing affirmation of archivists' authority to choose to not engage in borrowing or lending materials for their respective institutions.

In February 2014, the SAA Standards Committee reviewed and approved the RAO/AMR recommendation to endorse the guidelines. Following this approval, the Standards Committee submitted its recommendation to endorse the guidelines to SAA Council for consideration. At its May 2014 meeting the SAA Council affirmed the recommendations from RAO, AMR, and the Standards Committee and endorsed the guidelines.

- **Creation of new RAO standing committee, Teaching with Primary Sources:**
 - The leaders of the RAO Teaching with Primary Sources Working Group made a formal proposal to the RAO Chair proposing that the expanding scope and enduring nature of the Working Group's activities warranted a transformation to a more permanent status as a standing committee. The Chair reviewed this request in July 2013 and appointed the Teaching with Primary Sources Standing Committee on August 12, 2013. The RAO Chair directed the leaders of the RAO standards committee to prepare governance documents and submit them to the RAO steering committee for review and approval.

Ongoing projects/activities:

- **Migrating National History Day site to RAO microsite:**
 - Shaun Hayes, RAO's new Web Liaison and current chair of the National History Day Committee has been working with Matt Black of SAA to migrate the national history Day Toolkit links to the RAO microsite. This process will ensure sustainable access and maintenance of these resources to SAA members and their constituencies.

- **Teaching with Primary Sources Working Group (now TPS Standing Committee) Survey of Primary Source Teaching Practices**
 - TPS survey team surveyed RAO members about their teaching practices January 14–25, 2013 and circulated a report of its findings in August 2013. TPS will now move forward to address the four key recommendations from the report:
 - **Developing and/or identifying techniques for creating interactive instruction experiences.** Concrete examples, case studies, and resources will help archivists create high-value instructional sessions without “reinventing the wheel.” Resources supporting instruction should cover a range of topics in the whole spectrum of archival research, including navigating archives spaces and policies, identifying and finding materials, and analyzing primary sources.
 - **Developing and/or identifying strategies for connecting with faculty/instructors** and engaging them in the instruction planning process. Although every relationship—and every institution—is unique, some approaches may cut across different contexts.
 - **Advocating for instruction as a core component of archival work,** given that the underlying barrier to successful instruction is lack of time, resources, and/or institutional support. While SAA cannot “wave a magic wand” and create more archivists, it can help archivists promote and demonstrate the value of instructional services to both internal and external constituents.
 - **Developing best practices for assessment.** A shared understanding of what makes instruction successful will help archivists improve their practices (and cut down on time needed to develop assessment methodologies). It will also help them make the case for more resources.
- **New Leadership for 23 Things Initiative:**
 - In August 2013, 23 Things Initiative leader Kathryn Otto stepped down from leading the initiative. Before she stepped down, Kathryn and Helen Kim and intern Karla Irwin transferred the project to a more permanent Wiki format and continued to add new content to the project. The RAO Chair appointed Rebecca Bizonet to serve as new leader for 23 Things. Several people joined the seed packet (affinity group) for 23 Things at the RAO Section meeting and via the call to respond mounted on the listserv to tap for assistance on the project
- **Marketplace of Ideas as a Concept or System:**
 - (See specific description of 2013 program above). This effort to push the boundaries of what constitutes a section program has taken strong root at RAO and will likely continue to evolve and grow over the next several years. With the 2013 implementation of the Ideas Seed Swap which encourages and facilitates RAO members to connect with each other throughout the year, and the continued opportunities the Marketplace offers for members to propose and lead substantive deliberations of issues of relevance, RAO leaders are poised to transform the older approaches and notion the section meeting program into a more encompassing enduring system of interaction and innovation. Year-round shopping and browsing!

New projects/activities:

- Inspired by the excellent work of the Manuscript Repositories Section on its Jump-In initiative and responding to a growing interest and concern of members. RAO is considering a new working group to bring focus and attention to providing reference for e-records and the 2014 RAO program committee is considering ways to bring the challenges and opportunities presented by e-records reference into the Marketplace of Ideas Program for 2014.

2010-2013 Strategic Priority – Technology Initiatives:

- *Rapidly changing information technologies challenge archival principles, practices, and communication protocols, demanding effective leadership from the archives community to access, capture, and preserve records in all formats.*
 - *Desired Outcome #3: SAA will make increasingly effective use of current and emerging technology in order to enhance communication with internal and external audiences and stimulate collaboration among its constituents.[Internal Radar Screen]*
 - RAO's chief contribution to the technology strategic priority relates to Outcome # 3.
 - During the year the Web Liaison revamped the RAO Drupal microsite to make discovery more intuitive and to generally improve the aesthetics of the pages. Anecdotal evidence suggests that this has led to more frequent use of the page making it more effective as a tool for information and knowledge sharing
 - A sustained effort to keep the RAO Facebook dynamic with posts from leaders and from members has been effective. The number of page likes has increased steadily over time and is currently 253 as of 11/06/2013. Posts from non-page managers are also growing. At the 2013 steering committee meeting, a decision was to expand the number of Facebook page managers to four to encourage sustained fresh content. Facebook appears to be a place for less formal interaction among members. Developing such a space enriches RAO members' connections with each other by helping them to know each other and their interests better.
 - Although not driven by emerging technology, the **Idea Seed Swap** initiative implemented by the 2013 RAO program committee has the potential to make a contribution to the #3 collaboration outcome and may adopt social media tools to facilitate its activities in the future.
 - *Desired Outcome #4: SAA will harness and cultivate the technology expertise of its members to inform strategic planning, educational programming, and internal and external communication*
 - RAO is making a contribution to outcome #4 in its efforts to advocate for and implement plans to move valuable external Web content into the Drupal microsite environment. The most notable example of this is the

collaboration between SAA and RAO representatives to bring the National History Day Toolkit content into the RAO site.

- At its August 2013 steering committee meeting, RAO leaders discussed the need to provide leadership, guidance, and resources for providing reference for e-records. Plans are evolving as to how best to meet these needs, but will likely include the creation of an RAO working group focused on the issue.

2010-2013 Strategic Priority – Diversity Initiatives:

- *The relevance of archives to society and the completeness of the documentary record hinge on the profession’s success in ensuring that its members, the holdings that they collect and manage, and the users that they serve reflect the diversity of society as a whole.*
 - *Desired Outcome #2: Identify and promote existing models and develop new methods for assisting archives and archivists to diversify the documentary record within their repositories and to promote archives to diverse communities*
 - In 2013, RAO’s activities were not focused on the Diversity Strategic Priority specifically. It is an area that the section leaders could and should pay more direct attention in its future activities—particularly in the arena of promoting archives to diverse communities. However, one of the vendor topics selected by the program committee for the 2013 Marketplace was “**Outreach strategies and documenting underrepresented groups**” and as a corollary, there is now a seed packet group organized around this topic.

2010-2013 Strategic Priority – Advocacy/Public Awareness Initiatives:

- *Archivists must take an active role in promoting the importance of archives and archivists in order to increase public support, shape public policy, and obtain the resources necessary to protect the accessibility of archival records that serve cultural functions as well as ensure the protection of citizens’ rights, the accountability of organizations and governments, and the accessibility of historical records*
 - *Desired Outcome #3: Using American Archives Month as one communication vehicle, plan and implement a public relations campaign, directed to users of archives, whose goals are to 1) increase users’ appreciation of archives; 2) continue to “brand” American Archives Month as a profession wide opportunity to build public awareness; and 3) increase archivists’ involvement in public awareness activities. (FY 2011–FY 2014*
 - The main thrust of RAO’s endeavors related to advocacy and awareness center on refining and developing tools and approaches to leverage the contact that archivists have in an instructional context with students of all ages. This is expressed in two key arenas:
 - National History Day Committee and its initiatives

- Further development of the NHD Toolkit and its migration to its permanent home on the RAO microsite
 - Teaching with Primary Sources Committee and its initiatives
 - Survey of teaching with primary source practices completed. Findings have been translated into future steps for enhancing this key connection with the public.

Initiatives associated with the new 2013-2018 Strategic Plan:

- **GOAL 1: ADVOCATING FOR ARCHIVES AND ARCHIVISTS**
Society values the vital role of archives and archivists
 - *1.4. Strengthen the ability of those who manage and use archival material to articulate the value of archives.*
 - The RAO Teaching with Primary Sources Standing Committee will focus on addressing 4 key findings from its survey on teaching practices with primary sources:
 - Developing and/or identifying techniques for creating interactive instruction experiences.
 - Developing and/or identifying strategies for connecting with faculty/instructors and engaging them in the instruction planning process.
 - Advocating for instruction as a core component of archival work, given that the underlying barrier to successful instruction is lack of time, resources, and/or institutional support. While SAA cannot “wave a magic wand” and create more archivists, it can help archivists promote and demonstrate the value of instructional services to both internal and external constituents.
 - Developing best practices for assessment.
- **GOAL 2: ENHANCING PROFESSIONAL GROWTH**
Archivists have access to the professional resources they need to be successful and effective in their careers
 - *2.1. Provide content, via education and publications that reflects the latest thinking and best practices in the field.*
 - RAO TPS work on four directives outlined above
 - Further expansion of the Marketplace for Ideas program format and the Idea Seed Swap as contexts for providing inclusive, effective venues for deliberation on the most relevant RAO-related issues of the day.
 - 23 Things Initiative supports this standard by adding new descriptions of new Web 2.0 tools.
 - *2.2. Deliver information and education via methods that are accessible, affordable, and keep pace with technological change.*
 - Migrating content from external sources to RAO microsite to ensure longer-term sustainability and accessibility

- 2.3. *Support the career development of members to assist them in achieving their goals.*
 - RAO has offered an internship program since ca. 2010 that pairs applicants with committees, working groups, and individuals. This brings new ideas and enthusiasms to bear on RAO projects and provides the interns with resume building experience and learning opportunities. Finally, it also fosters informal mentoring relationships that provide support for new archivists as they begin their careers.
- **GOAL 3: ADVANCING THE FIELD**
Professional knowledge expands to keep pace with an increasingly diverse archival record
 - 3.1. *Identify the need for new standards, guidelines, and best practices and lead or participate in their development.*
 - RAO contributions to the collaborative recommendation to the SAA Standards Committee to endorse the new guidelines for Interlibrary and Exhibition Loan of Archives and Special Collections Materials
 - 3.2. *Foster and disseminate research in and about the field*
 - RAO Marketplace of Ideas Program provides a venue for presenting and threshing new ideas and approaches in the field related to RAO work.
- **GOAL 4: MEETING MEMBERS' NEEDS**
SAA is an agile association that delivers outstanding service and fosters a culture of participation
 - 4.2. *Create opportunities for members to participate fully in the association.*
 - RAO has implemented several opportunities for members to shape and engage with direction and activities of the Section. They include:
 - Marketplace of Ideas format for the program at the Section meeting depends on RAO member volunteers to propose and lead dialogue and deliberation or demonstration “booths,” encourages small group deliberation and dialogue, and assesses participant feedback through an evaluation survey
 - Use of the RAO listserv and Facebook for formal and informal input on professional and organizational matters as they arise.

Questions/concerns for Council attention:

- To facilitate a cohesive approach to SAA’s strategic goals, RAO leaders propose that SAA Council consider developing language in its strategic planning documents that outline possible actions or initiatives specifically suitable for component groups to undertake.
- To keep current strategic priorities on the radar for SAA leaders, RAO proposes allotting time at the leadership orientation program for moderated small group discussion and brainstorming of one or more strategic priorities with SAA leaders. The question before each table could be, “What could your component group do to advance this priority or goal?”

- As more and more SAA members connect with the Society solely through electronic means (Web site and listserv; not in person), there will be more and more demand for component groups to develop tools and resources on their microsites that meet their members' changing needs. This will place greater demand for technical expertise and resources on SAA and strain budgets and personnel resources. To address the challenges and opportunities posed by the demand for more Web based resources, RAO proposes that SAA leadership consider development of an annual competitive grant program for component groups to propose projects that would enhance the resources and experience for the members who engage with SAA chiefly through the Web interfaces provided on the SAA microsites.

**Respectfully Submitted,
Jill Severn
RAO Chair 2012/13**