



RAO Newsletter

SOCIETY OF AMERICAN ARCHIVISTS' REFERENCE, ACCESS & OUTREACH SECTION

Summer 2013 | Issue 22

Anything and Everything; Anyone and Everyone: The Opportunities and Responsibilities of Freedom and Inclusion

In the past, SAA's conferences have had a theme—like last year's "Beyond Borders." This year, the Program Committee decided to make the annual meeting "theme-free" to encourage participants to be "free ranging" (<http://www2.archivists.org/conference/2013/new-orleans/about-the-program>). Additionally, SAA leaders have just convened a task-force to study "what sorts of affinity group structures might be most effective in encouraging flexible, inclusive, and participatory opportunities for members" (<http://www2.archivists.org/news/2013/call-for-volunteers-task-force-on-member-affinity-groups?>). These themes have also been animating my gray matter of late and provide some inspiration for this column. In theory, this ethos of openness and inclusion should govern the vision and path forward for a member-driven organization like SAA and RAO. To remain dynamic and relevant, any organization must be willing to embrace risk and experimentation and welcome and engage the diverse talents, perspectives, and experiences of its constituents. In practice, to sustain these aims, the organization must also embrace accountability and intension as well as tolerance and compassion.



Jill Severn | RAO Chair
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As leaders and members of RAO we want to be open to experimentation—to new ideas, new approaches, and new blood. This means making elections transparent and widely advertised and robustly contested. This means charging members to investigate new ideas formally in taskforces and working groups and informally in discussions on the listserv and Twitter. This means providing a variety of platforms or crossroads to share these new ideas and information with members wherever they are—at the annual section meeting, on the RAO Microsite, on Facebook, on the RAO blog, in the Twitterverse, on the phone, and even at the water cooler.

To achieve this openness we must also balance the appeal of technology and professional zeitgeist with a commitment to the enduring value of personal connections. Do we know our RAO neighbors? Do we use RAO as a springboard to local action and connection? What avenues exist at the annual section meeting for informal person-to-person connection? What avenues exist throughout the year? This year, the RAO steering committee has worked to make space at the section meeting marketplace program for this kind of informal self-directed interaction by members. There will be opportunities to talk over issues of common concern, face-to face in the market stalls and at the "graffiti wall," and with a much wider audience via Twitter and Facebook. In the year ahead, we will also be thinking and listening for ideas about how to keep this hive of interaction buzzing and cross-pollinating. There will be calls for volunteers to serve on committees and taskforces, opportunities to intern, and chances to run for office. Please answer these calls!

In addition to embracing an openness to how we approach meetings, knowledge sharing, and each other, RAO should continue to demonstrate a willingness to consider new and provocative ideas and deliberate their merits and tradeoffs with gusto. The recent review of the ALA-RBMS Lending and Borrowing Guidelines (see article in this issue) for possible recommendation for standards endorsement is a recent great example of this commitment to take on tough and complex issues.

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Notes from the Chair, continued

Last year's section meeting allowed us to thresh out the idea of lending and poll members on the standard's suitability. RAO leaders reviewed the document carefully and crafted language in support of the guidelines that simultaneously acknowledged the legitimate reasons for choosing *not* to lend as much as to choosing to lend. The ALA-RBMS Lending and Borrowing Guidelines are therefore considered guidelines rather than standards. SAA Standards Committee accepted these recommendations and caveats, and in doing so has embraced a more inclusive and flexible standard. This example plots a course for our section to embrace tough issues in the future and demonstrates the power of deliberation and dialogue by RAO membership.

And yet, inevitably, a good idea may fail. A person may not be able to fulfill a responsibility. A consensus among the section members and/or leaders may dissolve into impasse. These are all common pitfalls for volunteer-based organizations like RAO. How do we as a section get past these rough patches with our mission, goals, momentum, and relationships intact? The answer is that it varies, but there are a few approaches that seem helpful:

- Both RAO leaders and members should revisit founding documents (bylaws) regularly and propose updates when warranted.
- RAO leaders should consult other section and roundtable leaders for fresh ideas and solutions to problems as well as the usual network of support provided by SAA Council.
- RAO leaders need to ask members for feedback and direction on a regular basis. In turn, RAO members need to share expectations, offer constructive criticism, and seek opportunities to be active in a way that contribute to the vibrancy of the section, but which also is realistic about their respective time and resources.

Above all, we need to be compassionate and tolerant of each other on an individual level. We are more than a once-yearly meeting, an election, and a few endorsements. We are small but mighty community of archivists held together by common interests and common commitments and together we are much greater than the sum of our parts. Onward, upward, outward!

Wanted: Instruction Resources

Have you read a helpful article or resource about teaching with primary sources? The RAO Teaching with Primary Sources Working Group is seeking suggestions of resources to add to its bibliography.

Use this link to submit your resource: <https://docs.google.com/spreadsheet/embeddedform?formkey=dGNtMmtybVZEeTNIM3AxWmoyQXFwNWc6MQ>

Thank you for your contributions!

Have ideas, content, or suggestions for the RAO Section newsletter?

Send them to Lisa Sjoberg, Communications Liaison, at sjoberg@cord.edu.

RAO Marketplace of Ideas II: Bigger, Better, Hotter, Cooler!

**What puzzles you? What amazes you? What provokes you?
What's now? What's next? What's over?**

RAO Marketplace of Ideas II program aims to keep all of these questions on the tip of your tongue and front and center in your mind as you browse and haggle over the ideas and issues on offer by vendors this year. Building on the best parts of last year's RAO Marketplace, the program team for Marketplace II has brought together an amazing array of hot topics vendors who promise to engage, inspire, and even incite the savviest RAO shoppers to browse, haggle, and buy the latest and greatest in RAO idea merchandise.

Some Background on the Marketplace of Ideas Concept

Imagine a colorful vibrant marketplace filled with exotic and amazing things, thronging with people haggling, dealing, debating, laughing, and shouting. Now, imagine that this marketplace sells ideas and approaches to all the things that you do or hope to do as an RAO archivist and everything is free! Shoppers will be able to move through the marketplace in several rounds stopping in to a stall to deliberate hot topics in reference, access, and outreach.



RAO Marketplace I, San Diego, California, 2012

This year, there will be six market stalls, exploring a variety of topics, anchoring the market:

- 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

What's new for the 2013 Marketplace?

An innovation for the 2013 will be the **Idea Snack Bar (ISB)**. Equal parts graffiti wall and Twitter nest, the **ISB** is a place where shoppers can post questions, share ideas, make suggestions, draw diagrams using sticky notes, or tweet using the **hashtag #SAARAO13**

For those who can't get enough of the marketplace magic this year there will also be an **Idea Seed Swap (ISS)**. For each of the six hot topic/cool demo booths there will be a box where shoppers can leave business cards or contact information. Marketplace staff will compile the names and emails submitted for each booth and share the list with those who submitted their information into the **ISS** booth box. From this shared interest in a topic or concept many interesting things may sprout and grow.

By popular demand, this year's marketplace will feature time at the end of the program for all shoppers to compare notes, share experiences, and show-off purchases. Finally, this year the marketplace managers have taken a solemn oath to do all that is humanely possible to keep noise levels reasonable, instructions clear, pathways open, and schedules on track.

Need more information? Please contact Jill Severn at jsevern@uga.edu

Marketplace II is brought to you by the 2013 RAO Program Planning Committee: (Greg Kocken, Mary Manning, Aimee Morgan, Jill Severn, and Lisa Sjoberg) and the stellar group of Marketplace Vendors for 2013 (Alison Stankrauff, Christine Anne George, Elizabeth Wilkinson, Rebecca Petersen, Heather Briston, and Amy Roberson).

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Meet the Candidates: It's Time to Vote!

Vice Chair / Chair-Elect: Greg Kocken

It is election time for the RAO Section. The ballot will be sent to the RAO membership electronically in July. You will be voting for 1 vice chair/chair-elect candidate and 2 steering committee members. Please be sure to exercise your right to vote.

Bio: Greg Kocken is an assistant professor and Head of the Special Collections & Archives Department at W.D. McIntyre Library, [University of Wisconsin-Eau Claire](#). Prior to joining the University of Wisconsin-Eau Claire, Greg served as a reference archivist at the American Heritage Center in Laramie, Wyoming and at the Wisconsin Historical Society before that. He holds a B.A. degree in History, with an emphasis in Public History, and earned an M.A. degree in Library and Information Studies from the University of Wisconsin-Madison. Greg has served as a member of the RAO steering committee since 2011 and is actively engaged in issues related to reference, access and outreach.



Statement: Reference, Access and Outreach is constantly evolving, and as a community we must address challenges and embrace opportunities. If elected, I will provide the leadership necessary to strengthen existing RAO initiatives, and engage our community through new initiatives. Previously, I have been involved with RAO's [National History Day Committee](#) and the [Navigating Minimal Processing and Public Services working group](#). My experiences with these groups helps provide me with the foundation needed to lead RAO. An issue which I hope to address is how RAO can serve as a leader in helping our profession to address the challenges of providing access to born digital materials. RAO's members have great ideas, and if elected I will channel those ideas to help us all better understand this and other important issues.

Vice Chair / Chair-Elect: Lisa Sjoberg

Bio: My current position is the College Archivist and Digital Collections Librarian at [Concordia College](#) in Moorhead, Minnesota. Since I joined SAA in 2005 as a graduate student, I have been a member of the Reference, Access and Outreach Section. I have been fortunate to serve on RAO task forces ([National History Day](#) and currently as co-chair of the [Teaching with Primary Sources working group](#)). I have also served as the RAO Communications Liaison for two years, and am the editor of the [RAO Newsletter](#).

Statement: My involvement in the RAO section has allowed me to work with amazing people and also to learn how the Section operates. This knowledge and experience is one of the skills that I will bring to the Section as the Vice Chair/Chair-Elect. Another skill I have to offer is passion. My archival bailiwick is promoting the use of collections. I am deeply invested in generating new methods and ideas for reference, access, and outreach not only at my place of employ, but in the profession more broadly. I love learning and pursuing new ideas, and I really enjoy looking at the big picture to innovate new practices and advance archives. Finally, as a lone arranger in my day job, I rely on collaboration to make progress on initiatives. Therefore, one of the best words to describe me is "connector" because I thrive on being in conversation with others and linking people to resources they are seeking whether that is information sources, people, or ideas to lead them on their path of discovery. Because of all of these interests, I have strong listening and interpersonal skills, and I enjoy serving others. I am grateful for the opportunity to continue my involvement in the RAO Section, and I thank the RAO leadership for the nomination to serve as the next Vice Chair/Chair-Elect.



Election Slate, Continued

Steering Committee: Jodi Alison-Burnell

Bio: Jodi Allison-Burnell is the Program Manager for [Northwest Digital Archives](#) at the Orbis Cascade Alliance, where she has worked with archives and special collections repositories in Washington, Idaho, Oregon, Montana, and Alaska since 2007. Her prior positions were at Oregon State University, the University of Montana, and the University of Maryland. She holds an MA in American History and an MLS from the University of Maryland at College Park and a BA in English summa cum laude from Whitman College. She is active in the Society of American Archivists and Northwest Archivists. She is most likely the only archivist in the US with a cat and a vat of sauerkraut in her office.



Statement: I have observed the very dynamic activities of the RAO Section over the last four years with interest. With a broad charge and a rapidly changing landscape that brings many new opportunities, RAO is clearly in for more dynamism! I'd love to be a part of guiding and coordinating the activities of this section in these very interesting times, bringing my experience in coordinating many people across vast geographic distances and making things happen.

Steering Committee: Rebecca Bizonet

Bio: My job for the past five years as part of the Ford Historical Resources Collaborative at [The Henry Ford](#) has been to provide research and reference services to my colleagues at the Ford Motor Company Archives, drawing on the significant collection of historical records and photographs that the company donated to us in 1964. I've also facilitated public access to our collections during regular reference shifts in our reading room. It's been extremely helpful as a processor and cataloger (which I was in a former life, and still try to do when I can) to see how the collections I've described are actually being used. In addition, for over a year now I've been the social media liaison for Historical Resources (which includes archivists, librarians, and curatorial, conservation, and registrar staff). This involves coordinating [blog posts](#) — from recruiting writers, to educating, encouraging, and editing — along with serving as a resource on collections information for our institution's social media manager.



Outside of work, I'm the co-editor of Michigan Archival Association's biannual newsletter, [Open Entry](#), and am also a member of the MAA board. In both roles, it's been my mission to ensure that our members are well informed and have a voice in the organization. As part of SAA's [Annual Meeting Task Force](#) over the last two years, I've helped analyze current practices and formulate recommendations for updating and improving SAA's annual meeting. Specifically, on the Online Access Subgroup of the task force (first as a member and later as its chair), my group and I researched and recommended ways to increase and modernize online access to the annual meeting. Through it all, communicating our charge to SAA members and gathering and listening to their input was crucial. The task force's work continues this summer with the hosting of a forum for member discussion of our final report. I'm also a member of MAC (Midwest Archives Conference), and I served on its 2011-2012 Nominating Committee.

Statement: Some running threads through my work in archives and in other professional activities, especially in MAA and SAA, have been a commitment to service, fostering constituent inclusion and participation, working as part of a team for the common good, and being on the lookout for creative ways to make things better. As a research and reference archivist, I provide as good of an answer as I can on a sometimes tight deadline. As an editor of both a blog and a newsletter, I relish providing a forum for many voices and shepherding my contributors' work to completion. I love getting the word out to a larger audience about things archival, whether it's sharing stories about our collections with the public or promoting the work of my colleagues within the profession. I look forward to being able to contribute my skills, interests, and enthusiasm to the RAO Section Steering Committee, and in turn to learning from my RAO colleagues.

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Election Slate, continued

Steering Committee: Matt Herbison

Bio: Matt Herbison is the Reference & Outreach Archivist at the [LegacyCenter](#) of Drexel University College of Medicine in Philadelphia. Matt writes, "I enjoy advocating for the rights of archives users—and for the obligation and right of archivists to actively cultivate and meaningfully engage as many new archives users as possible. I have a particular interest in working with K-12 and undergraduate students and teachers to bring primary sources into the classroom in both face-to-face and online settings, with the goal of building 'simple' document analysis skills all the way through to the complex task of intelligently incorporating archives into students' research processes."



Statement: For the last two-plus years, I've been working with the RAO [Teaching with Primary Sources \(TPS\) Working Group](#), as a member of the TPS Survey group and as a leader of the group creating the TPS Bibliography. I have also done stints as Web-person for MARAC and the SAA Museum Archives Section. I am active in local groups, including leading the [THATCamp Philly](#) organizing group, am a founding member of the Greater Philadelphia Digital Humanities Group ([PhillyDH](#)), and am currently Immediate Past Chair of the [Delaware Valley Archivists Group](#). I'm also a member of the 2013 cohort of the Archives Leadership Institute.

Steering Committee: Nora Murphy

Bio: Nora Murphy is the Archivist for Reference, Outreach and Instruction at the [Massachusetts Institute of Technology Institute Archives and Special Collections](#). Since arriving in 2000, Nora has overseen public service. She runs the reference services and reading room, and has worked with many different types of researchers, from National History Day high school students to established historians. She works with faculty in different disciplines to introduce undergraduate and graduate students to primary sources. Nora routinely gives talks and presentations to alumni, staff and donors at MIT, and coordinates presentations by other staff. She collaborates on and curates exhibits (physical and virtual) is always eager to promote the use of the archives and special collections. Prior to arriving at MIT, Nora worked with archives at the Episcopal Diocese of Massachusetts, the Massachusetts Supreme Judicial Court Archives and Records Preservation, the John F. Kennedy Presidential Library, the Massachusetts State Archives, and on a number of grant-funded archives projects.



Statement: I bring a breadth and depth of experience in reference having worked with researchers in a variety of different archival repositories. I have initiated and collaborated on many outreach efforts, from newsletters, to presentations, to exhibits, and enjoy working with faculty in difference disciplines (including architecture, music, history and writing) to tailor instruction sessions to the needs of a class. Whether working in a one-person archives or in a larger repository, I have worked with professional colleagues and interns to make collections available for use as quickly as possible, and to find ways to share information about our holdings. I enjoy working in archives and learning from my colleagues. I hope for the opportunity to work more closely with my RAO colleagues to share ideas about how to inform and engage researchers and others about the amazing materials we curate.

Some Substance and a Little Style: RAO Steers Propose Bylaws Revisions to Members

Regular review of an organization's bylaws is a great way to ensure that the organization remains nimble, responsive, and current. (It is also a great way to make sure that the organization's image isn't marred by the presence of typos.) Last year the RAO steering committee included this review as one of its tasks for the year. After careful scrutiny, the group determined that a few revisions would clarify and reflect current practice and a broad slathering of spell check would enhance the luster of the section. Specifically, the chief substantive revisions establish the position of Web Liaison as a voting officer of the section, and detail the broader range of duties performed by the Communications Liaison. We have also corrected the spelling of "nominating" and "about." When SAA voting season rolls around in July, this ballot referendum on the bylaws will appear along with the slate of candidates. To get ready to weigh in on these proposed bylaws changes, please take a few minutes and review the revisions below. Changes are denoted in **red**.

Proposed Revisions to Reference Access and Outreach Section Bylaws, 2013:

I. Membership

Membership in the Reference, Access and Outreach Section of the Society of American Archivists is open to any member of SAA who has an interest in reference, access and outreach issues.

II. Officers

The officers of the Reference, Access and Outreach Section shall be the chair, **the vice chair, and the communications liaison, and the web liaison**. Only members of SAA and the Reference, Access and Outreach Section may serve as officers of the Section.

A new vice chair shall be elected at each annual meeting of the Section and shall serve for one year as vice chair, succeeding automatically to the office of chair for the subsequent year. If for any reason the vice chair is unable to succeed to the office of chair, a new chair shall be elected following the same procedures as for election of the vice chair. The communications liaison shall be appointed by the chair, with the advice of the Steering Committee, for a term of two years, which may be renewed indefinitely. Both a chair and a vice chair shall be elected in the first election following the approval of these bylaws. The chair shall preside at all meetings of the Section and the Steering Committee; represent the Section in its relations with SAA in general and with the Council and other groups within SAA; serve on SAA committees, task forces, etc. as an ex-officio member when required or appoint a representative to do so; appoint Section committees as needed; and submit an annual report of Section activities to the SAA executive office. The vice chair shall serve as acting chair in the absence of the chair. The communications liaison is responsible for issuing at least one newsletter annually to the Section membership.

The communications liaison shall be appointed by the chair, with the advice of the Steering Committee, for a term of two years, which may be renewed indefinitely. The communications liaison is responsible for issuing at least one newsletter annually to the Section membership. The Communications Liaison is also responsible for using various communication modes, such as the Section listserv, Facebook, and Society of American Archivist publications to communicate with the Section membership about news and events.

The Web Liaison shall be appointed by the chair, with the advice of the Steering Committee, for a term of two years, which may be renewed indefinitely. The Web Liaison is responsible for maintaining and updating the Reference, Access and Outreach Section microsite as well as creating new content as needed. The Web Liaison collaborates with the Communications Liaison to distribute information to the Section.

For questions about the RAO Bylaws revision, contact Jill Severn at jsevern@uga.edu.

Bylaws Revision, continued

III. Steering Committee

The Steering Committee shall consist of the officers and four members. The members shall serve two year terms, two members being elected at each annual meeting with additional members elected if for any reason unexpired terms need to be filled. The Steering Committee shall serve in an advisory capacity to the chair and its members may be assigned specific responsibilities by the chair. The Steering Committee shall plan each annual meeting of the Section.

IV. Election of Officers and Steering Committee

There shall be a **Nominating** and Elections Committee consisting of the immediate past chair of the Section (serving as chair of the Committee) and the two Steering Committee members whose terms are not expiring at the conclusion of the next annual meeting. Utilizing an announcement issued by the Section chair, this Committee shall solicit from Section members the names of volunteers or persons recommended for the positions to be filled in the next election. All persons whose names are submitted to the Committee or proposed by the Committee itself shall be considered nominees if they agree to have their names placed in nomination and are members of SAA and the Section. The Committee shall be responsible for ensuring that there is at least one nominee for the position of vice chair and that the number of nominees for membership on the Steering Committee is not less than the number of positions to be filled. The **Nominating** and Elections Committee shall distribute information **about** the nominees to the membership of the Section at least 45 days before the Annual Meeting. The election shall be conducted in the manner specified by SAA Council. A simple majority of the votes cast shall be required for election to vice chair. Members of the Section may vote for as many nominees for member of the Steering Committee as there are positions to be filled and the nominees receiving the highest number of votes shall be elected. Elected officers and Steering Committee members shall assume office at the conclusion of the Annual Meeting of the Section.

V. Meetings

The Reference, Access and Outreach Section shall meet once a year at the annual SAA meeting at the time and place scheduled by the SAA program committee and executive office. Additional meetings of the entire membership or the Steering Committee may be scheduled by the chair if needed to carry out the business of the Section.

VI. Amendments

Any member of the Reference, Access and Outreach Section may propose amendments to these bylaws. Proposed amendments must be submitted in writing to the chair at least 60 days prior to the Annual Meeting. The chair shall publish proposed amendments at least 45 days prior to the Annual Meeting and voting on the proposed amendments shall be in the same manner as the election of officers. A two thirds majority of votes cast shall be required to amend these bylaws.

VII. Enactment

These bylaws shall be distributed to the membership of the Section with a mail ballot for their approval or rejection. They shall become effective immediately if approved by a majority of the votes cast by the deadline set for the return of the ballots.

Adopted 1996 Revised 2009, Revised 2010.

RAO Recommends Endorsement of Interlibrary & Exhibition Loan Guidelines

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](http://www.acrl.org)), a division of the American Library Association ([ALA](http://www.ala.org)) 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.

RAO Steering Committee

Jill Severn, Chair (*University of Georgia*)

Mary Manning, Vice Chair/Chair-Elect (*University of Houston*)

Kathryn Otto, Immediate Past Chair (*University of Wisconsin-River Falls*)

Gregory Kocken, Member (*University of Wisconsin-Eau Claire*)

Alison Stankrauff, Member (*Indiana University South Bend*)

Rachael Dreyer, Member (*American Heritage Center, University of Wyoming*)

Jean Green, Member (*SUNY at Binghamton*)

Aimee Morgan, Web Liaison (*Stanford University*)

Lisa Sjoberg, Communications Liaison (*Concordia College*)

Terry Baxter, Council Liaison (*Multnomah County Records Program*)