

Catalyst Fund Report

September 2019

**Video and Online Instructional Modules to Empower Libraries
to Lead Participatory Archiving Events**

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1. Goal

The goal of this project was to develop an informational video and set of instructional materials, based on the proven Mass. Memories Road Show model, that will empower libraries of all kinds to partner effectively with community groups to organize day-long digitizing events to collect photographs, stories, memories and other community-based cultural heritage materials documenting collective memory in the United States. With these materials, we sought to both strengthen the existing Mass. Memories Road Show program, and to make the program's methods explicit to other libraries, archives, museums, and cultural institutions so that they can organize similar events and partner with local communities to build collections on their own.

There is a growing interest in "participatory archiving" initiatives throughout the United States. Events where community members can contribute photographs and stories to document a town, historical event, or theme became so popular that in 2015 the National Endowment for the Humanities (NEH) initiated a Common Heritage grant category to support them. While excitement about bringing community members together to share memories has generated a flurry of collecting activity, many organizations lack the experience or the tools to plan effective events and to collect, process, preserve, and make accessible the digital materials gathered. These unique cultural heritage materials, which ordinary people contribute from family and personal collections, are at risk of being neglected and lost in a manner similar to the many oral histories gathered in the 1960s and 1970s, most of which currently languish on fragile cassette tapes, untranscribed and unavailable to researchers or to communities themselves. Smaller cultural institutions, particularly those that are located in underserved communities or are primarily volunteer-run, are uniquely vulnerable, as they frequently do not have the resources to organize these types of events and manage the resulting collections.

Many U.S. institutions use Healey Library's Mass. Memories Road Show (MMRS) as a model, seeking to learn from our proven track record, techniques, and methodologies, honed since MMRS's launch in 2004. Indeed, through working with more than three dozen diverse communities across Massachusetts, including many minority and underserved populations, we have demonstrated the potential of participatory archiving to document immigrant and ethnic groups that are underrepresented in existing repositories. Our team is eager to help libraries and other cultural institutions to build on this potential. As a public research university committed to open access, we make the MMRS Project Handbook and other publications freely available. While these resources are helpful for many colleagues, they are written for partners with whom we work closely and would be more useful if generalized for broader audiences who could use these resources and subsequently implement these community events independently. A 2016 survey of communities with which we have worked revealed that partner organizations desired clearer, more engaging information describing what to expect at an MMRS event and how to effectively digitize and capture community heritage materials for preservation and access.

2. Model and Process

a. We formed a team of three full-time staff members in the Joseph P. Healey Library at UMass Boston who direct the Mass. Memories Road Show program: Public History and Community Programs Manager, Carolyn Goldstein, who coordinates the program; Interim University Archivist and Curator of Special Collections, Andrew Elder, who contributes to program strategic planning, event-day logistics, and post-event collections preservation and processing; and Interim Dean of University Libraries, Joanne Riley, who originated and was the founding director of the Mass. Memories Road Show program and continues to support its strategic initiatives.

b. In addition, we hired three individuals on contract to accomplish the work. In July 2018, we hired Caroline Littlewood to serve as Project Coordinator. Caroline is a recent graduate of UMass Boston's History M.A. program, with a specialization in Public History and Archives. In July 2018, we hired Jack Clancy, from Best Dog Ever Productions, on contract to produce the video. Lastly, in October 2018, we hired independent contractor Alex Marmor to design instructional modules.

c. Our team of four, including Caroline, met weekly throughout the length of the project, from July 2018 through August 2019, and we corresponded via email, phone, and Zoom with the two contractors.

Video: We held two meetings with Jack Clancy, one in July and the other in October, to establish overall goals and messaging and to develop a working script. Next, we reviewed existing footage and worked with Jack to develop a "shot list" of new footage to be recorded with our staff on campus and with volunteers and contributors at two Mass. Memories Road Show events in October and November respectively. He provided a "rough cut" of the video in February 2019 and refined that over the course of the spring. The team reviewed several versions of the rough cut and gave feedback on aspects regarding narrative structure, music, and inclusion of all aspects of the Mass. Memories Road Show program. Jack Clancy completed a "fine cut" in July 2019, the team provided feedback, and then a final cut was completed in August 2019.

Instructional modules: We provided instructional designer Alex Marmor with an initial set of materials related to each of the Mass. Memories Road Show "stations." He developed each of the 8 modules one at a time. He sent us an iteration of a module each week, and we provided feedback each week as well. The first drafts of the modules were developed in Google docs and then transferred to a Wordpress platform toward the later stages. Alex had a great deal of experience working on this type of a schedule and with Google docs, and our project benefited from following his lead in guiding work schedule and process.

Community review: To obtain feedback on the rough cut of the video and the draft instructional modules, we sent emails to invite participation to a list of 84 individuals who had worked with our team as community partners or volunteers as well as a number of colleagues in archives/libraries/museums who had expressed interest in our program and had either used it or were considering using it as a model for their own similar events and initiatives. A total of 44 individuals offered to review the materials. We designed separate Google forms for the video and for each instructional module and we obtained feedback in two phases. In the first phase, we asked for feedback about the first 3 modules and the video rough cut. In the second phase, we asked for feedback about the remaining 5 instructional modules. We shared that feedback with Alex Marmor, the Instructional Designer, in two phases and he revised the modules accordingly. Feedback on the video rough cut was shared with videographer Jack Clancy and used to produce the final version of the video. As an expression of gratitude to participants outside of our immediate professional circle, we provided Amazon gift cards.

d. It worked well to hire two individuals who were already familiar with the Mass. Memories Road Show program. Caroline Littlewood had worked with our team as a graduate assistant for two years before receiving her M.A. degree in History, and she

was very familiar with the program's community partners, internal files, and the digital collection. She was able to efficiently gather and organize digital photographs and video footage from past Mass. Memories Road Show events for both the videographer and the instructional designer to use. Similarly, in hiring Jack Clancy, who has recorded video interviews at Road Show events for more than 10 years, we were able to get right down to work in outlining content for the video--developing a script and main talking points—and starting to film.

At the same time, our project benefited considerably from hiring an instructional designer who was completely *unfamiliar* with our program. Alex Marmor's position as "outsider" to our program enabled him to approach our existing training materials with a fresh eye, to question assumptions, and ask for clarity about every aspect of each of the Road Show "stations." He was able to flesh out material provided by our team of insiders on staff at UMass Boston as well as by a small group of regular volunteer "Roadies" who have been leading these stations for several years.

Wordpress was flexible and easy to work with and thus adequate for the job, although with more time and resources we might have wanted to use a platform that was more graphically appealing and engaging as well as interactive.

3. Accomplishments

We produced a video, aimed at a very broad audience, that describes what to expect from Mass. Memories Road Show events, and that we hope will inspire contributors to participate and help continue to build the collection for years to come. In addition, we created 8 online instructional modules that we can use to orient and train community volunteers as well as share with archivists and librarians interested in planning participatory archiving events.

4. Lessons learned

We learned many things about our program through the process of creating these products, lessons which have strengthened our program overall and allowed us to more clearly understand the significance of the Mass. Memories Road Show program, not only for our community partners but also for the larger cohort of colleagues in libraries, archives, and museums as well as for individual community members.

Creating the video forced us to consider carefully the "big picture" and set priorities for what is most important to communicate about it. There is an ongoing tension between the public program and the archival collecting aspects of the program, and writing the script and reviewing and revising the various versions did much to crystalize our understanding of the balance between the two.

Developing the instructional modules with an outside contractor who was unfamiliar with our program required us to conduct an in-depth examination of how we operate our program. In addition to describing what happens at each "station" and who does what, instructional designer Alex Marmor also pushed us to explain why we choose to assign tasks to volunteers in the ways that we do. Considering "rationale" involved questioning many of our assumptions, and in some cases rethinking specific aspects of the stations. For example, we learned that the paperwork for photograph metadata, which had evolved considerably over the years, benefitted from the addition of information about image format.

Building a community review phase into the process allowed us to gather the perspectives of partners in libraries and other cultural institutions, volunteers, and other colleagues on all aspects of event logistics. This formal opportunity to document our processes in great detail were particularly helpful in determining the scope of the modules and defining MMRS the goals, roles, and standard language for each station.

Ultimately, all of this rethinking—and the priority to make both the video and the instructional modules available online—pushed and inspired our team to develop a dedicated website for the Mass. Memories Road Show. We are confident that the new website will raise the visibility of our program and the collection we are building.

5. Next steps

Our first step will be to begin using the materials in the operation of the Mass. Memories Road Show program. Both the video and the instructional modules are available on the new website, and we will direct our current community partners and volunteers as well as potential applicants to them as key windows on the goals and methods of our program and how to participate either as a volunteer or a contributor or both.

At the same time, we will incorporate the video into all of the public presentations that we conduct about our program, and we will revise our in-person training sessions for volunteers to complement the training modules, shifting toward a hands-on, experiential format rather than a classroom lecture. In addition, we have begun to develop short videos to include as an introduction and overview for each of the instructional modules. Over time, we expect that having these materials will not only transform the ways that we and our partners communicate to potential contributors about the Mass. Memories Road Show program but possibly also streamline our workflow to allow us to increase the number of events we hold each year. In addition, we plan to seek opportunities to spread the word about these materials so that we may lead by example in encouraging more libraries and archives to embrace participatory archiving and equip them with the necessary tools.

Finally, we have obtained a National Leadership Grant from the Institute of Museum and Library Services (IMLS) to continue the work begun with LYRASIS's support and take it to the next level. The IMLS grant supports a two-year project entitled "Destination Preservation" which will allow us to develop a broad "roadmap" to guide libraries of all kinds through the entire process of hosting a participatory archiving event with the communities they serve--from conception through event execution, as well as through the process of preserving the resulting digital collections and making them accessible. Recognizing that the Mass. Memories Road Show is not a one-size-fits-all participatory archiving project, we've partnered with archival and digital preservation experts and a nationwide network of partners to create a resource that will help libraries navigate the complexities of community partnerships, digitization event planning, and long-term digital preservation and access, all in support of the vital work of documenting their communities' cultural heritage. The roadmap will incorporate the materials about how to organize events that were developed with Catalyst Fund support, and it will present this information alongside other resources designed to guide libraries and communities in other domains, including: local community, cultural heritage, cultural competence, logistics, outreach, archival description, repositories, access, and preservation.

Healey Library's partners in the roadmap development include representatives from the Maine Historical Society, the Digital Public Library of America, the Metropolitan New York Library

Council, the Massachusetts Archives, Newark Public Library, San Jose State University, and the Boston Public Library.

The project began in spring 2019 and is scheduled to be completed by spring 2021. For a complete description of the project goals, scope, and team members, please consult the full [grant proposal](#) narrative.

LYRASIS's support for the video and the instructional modules truly served as a catalyst, and together with the IMLS project, it will allow Healey Library to leverage its standing as a national leader in participatory archiving toward the goal of expanding and enhancing the capabilities of all libraries, regardless of size or available resources, to engage in and lead these vital community archiving initiatives themselves.

6. For more information

All of the materials can be found on the Mass. Memories Road Show website: blogs.umb.edu/massmemories/.

The training modules are available under the Volunteer Training tab, and the MMRS video is available under the About tab.

Any questions can be directed to Carolyn Goldstein, Public History and Community Archives Program Manager, University Archives and Special Collections, Healey Library, UMass Boston, carolyn.goldstein@umb.edu, or library.archives@umb.edu.