

Bearing the Standards: Reinventing the SAA Descriptive Standards Curriculum

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Society of American Archivists Annual Meeting
Washington DC
August, 1995

On a moist and bleary-eyed New Orleans Wednesday morning I found myself standing at the glass doors to a room called "Rhythm". I wondered at the rich red carpet, hanging mirror ball, empty stage and dusty glittering decor, realizing that I had not dressed my polyester flare slacks and wide-collared nylon shirt. As my travel fog lifted I realized that a small group of the nation's experts in archival description would soon be shaking their intellectual booties in that annual descriptive disco marathon known as the Society of American Archivists Committee on Archival Information Exchange (CAIE).

The CAIE agenda was scheduled tight for a full day of hustling, twisting and stomping, complete with the usual lineup of archival stars, guest artists and acronyms. But the item on the dance card that would engender the most footwork was entitled "Descriptive Standards Curriculum", and it was strategically scheduled right before lunch.

This call was not a surprise to CAIE members since Lisa Weber had distributed a draft discussion document before the meeting that had been commissioned at the previous CAIE meeting in Philadelphia. In her document Weber described the development of the first MARC AMC format workshops that emanated from the "Automated Archival Information Program" funded by the National Endowment for the Humanities in 1985. She indicated that she and other MARC AMC instructors including Steve Hensen, Maggie Kimball, Kathleen Roe and Lofton Wilson felt that the design of the early workshops incorrectly assumed that archivists understood description and that they just needed to be introduced to MARC AMC. Based on their workshop experiences the instructors felt archivists really needed to learn how to follow standards for data contents and data values, rather than to memorize data structure standards like MARC AMC.

According to Weber the group addressed these issues by writing a second NEH grant proposal to support development of the Library Descriptive Standards workshop and the second revision of Archives, Personal Papers and Manuscripts (APPM2), now the SAA standard for archival description. Following the publication of APPM2 in 1991 Hensen strutted his APPM stuff in workshops given at the University of Texas Graduate School of Library and Information Science and at other events sponsored by SAA. The Library Descriptive Standards workshop and APPM2 enabled archivists to create round pieces of descriptive information that would fit into the round holes of the MARC AMC format.

<WEBER OVERHEAD>

Weber concluded from her history of SAA-sponsored descriptive education that SAA was emphasizing MARC AMC format rather than the larger context of the descriptive information puzzle which includes local finding aids, online catalog systems and bibliographic utilities. She went on to offer a number of recommended changes to the current SAA workshop offerings in archival description. Her recommendation consisted of four workshops entitled Archival Cataloging, Access Points, Tagging, and Implementing Archival Information Systems. The workshops were designed to be taken in a specified order. She also offered two workshop "possibilities": "Introduction to MARC AMC and Automation" and "Introduction to Archival Cataloging for Librarians".

The document concluded with a series of issues for group discussion. Weber was concerned about our ability to properly train instructors and their ability to establish an agreed upon interpretation of a number of controversial and evolving issues including appropriate level of archival description, level of indexing detail and consistent use of indexing terms. Another important issue was the need to establish standardized curriculum so that courses would not have to be reinvented each time a new lecturer was appointed. Weber was also concerned about workshop follow up and ongoing consulting, since many of the instructors were becoming overburdened in their role as continuing mentors for their students. Finally, she recognized the importance of the work being completed by the Committee on Automated Records and Techniques in their curriculum project, and indicated that her proposed descriptive standards curriculum fit within CART's learning objectives in the foundations cluster and the automated applications cluster.

Back on the dance floor in New Orleans Weber began the CAIE discussion with two additional issues. She suggested that perhaps the document should address archival descriptive practices in general as opposed to cataloging. She also proposed that perhaps this should not be considered a workshop curriculum but rather a portion of a formal graduate education curriculum.

A rousing discussion ensued that addressed little of the specific content of the curriculum as proposed, but rather focused on issues relating to effective delivery mechanisms and relationships with other educational offerings including the CART curriculum project, workshops sponsored by regional archival associations and formal degree programs. The committee largely agreed with Weber's opinions on what needed to be taught, but was concerned with how to support development of the curriculum and how to select the appropriate vehicle for offering that information.

CAIE members recognized that one of the principle problems with our curriculum was segmentation of parts of the descriptive process into discrete workshops taught in separate locations at different times. Clearly archivists needed a holistic understanding of descriptive cataloging, access points and tagging and the relationships between them - learning one part of the process was not really useful without an equally complete knowledge of the others. There was also an perceived need for more general orientations directed towards librarians and resource allocators.

In addition it was recognized that students in the SAA workshops expected and needed to come out of those workshops with an understanding sufficient to allow them to begin cataloging in their home shops. It was suggested that the nature of SAA's offerings was being misinterpreted by our students. Instructors generally understood that the workshops were more of a general orientation rather than a complete preparation, whereas students (particularly lone arrangers or those from smaller institutions) generally wanted complete training, but often could not afford the expense or the time necessary for formal education.

As a result of this discussion Weber was charged to redraft her recommendations to incorporate the archival cataloging, access points and tagging workshops into a multi-day intensive institute. In order to address concerns that the institute may not produce the revenue for SAA that the previous workshops had, it was also suggested that the curriculum proposal include three other stand alone workshops: A half-day introduction to MARC AMC designed for administrators and resource allocators, an overview of existing hardware and software applications and a MARC AMC for librarians course that could be offered at professional library meetings. The committee also expressed interest in distance learning opportunities and establishment of a mentoring program for course graduates. CAIE was unsure what the result of all this would be, but suggested that Weber's revised report be should submitted to the SAA Education Office, the Education Office Advisory Board, and the Committee on Professional Education and Development.

<REVISED WEBER OVERHEAD>

On November 1st Weber electronically distributed her revised report, which incorporated the Archival Cataloging, Access Points and Tagging segments with the proposed Implementing Archival Information Systems segment into a seven day institute. The Introduction to MARC AMC and Automation workshop and the MARC AMC for Librarians workshops were included as separate stand-alone workshops.

A number of significant issues were raised by CAIE members in November and December, particularly in relation to format integration, the role of instructors as ongoing mentors and the potential for another workshop in use of commercial database management software for archival applications. At this time a third separate workshop was added entitled Advanced Concepts in Authority Control. In the end CAIE members enthusiastically endorsed the report via e-mail and forwarded it to the appropriate SAA bodies for their consideration.

In March Jane Kenamore contacted CAIE on behalf of the SAA Education Office Advisory Board

with a number of questions that were addressed in writing by CAIE chair Peter Hirtle. In response to the question of how the institute would shorten the APPM portion of the workshop as compared to the current course, CAIE indicated that portions devoted to AACR2 rules for name headings and detailed discussions of authority control, agency history records and MARC cataloging would be reserved for other portions of the institute.

Responding to the question of how the current APPM and USMARC workshops would be different from the first three segments of the institute Hirtle indicated that unnecessary duplication of content could be avoided, and that course elements would be better integrated by for example using the same case studies for addressing Archival Cataloging and again in Tagging. More time could be devoted to the subject matter rather than introducing totally new case studies and repeating basic concepts. The addition of the second unit on Access Points represented a significant expansion of the curriculum since only name access was addressed in the existing APPM workshop. Subject, form, genre, occupation and other access points were briefly covered in the AMC workshop, but deserved the considerably more detailed instruction that would occur in the Access Points segment of the institute.

The Education Office Advisory Board also asked why CAIE proposed a two-day segment for Implementing Archival Information Systems. CAIE responded that we needed to address both network and stand-alone applications in this segment so that archivists could see the advantages and disadvantages of both, since many archives use both network and microcomputer based systems for different parts of their descriptive work.

In May the EOAB expressed concerns over the costs of a seven day institute and proposed that CAIE shorten the institute to five days by limiting the Archival Cataloging portion to 1.5 days, the Access Points segment to 1.5 days, Tagging to one day and Implementation to one day. [How did we respond?] [required sequence?, stand-alone offerings with prerequisites?]

In June Hirtle wrote CAIE members that the National Historical Publications and Records Commission and the Council on Library Resources had expressed interest in reviewing proposals to fund development of the curriculum. Hirtle sought and received approval from the SAA Executive Board to seek external funding for curriculum development.

<FINAL CURRICULUM OVERHEAD>

[who drafted the proposal?] In August Jane Kenamore sent to CAIE a draft of the grant proposal to fund development of the curriculum for consideration at the SAA Annual Meeting at Indianapolis. The proposal outlined an eighteen-month project to develop a five day institute plus four specialized workshops. The proposal was funded by the National Historical Publications and Records Commission [did we accept NHPRC money or NEH money?] with funding scheduled to commence in July.

<PROJECT OUTLINE>

The project actually started with a direct mail solicitation from Kenamore to potential curriculum developers and reviewers that was mailed to [?] and was also published in the May, 1995 edition of the Archival Outlook. Potential developers and reviewers were asked to submit curriculum vitae and an application form that included a statement of interest. Applicants were asked to apply to develop or review specific segments of the institute or specific stand-alone courses. The applications were reviewed by Hirtle, Kenamore and Kathy Marquis of the SAA Education Office Advisory Board[?], and selected developers and reviewers were asked to attend a three day workshop in Chicago at the end of July. At the workshop participants would spend one day discussing descriptive cataloging issues and two days completing training in interactive learning methodology in a workshop taught by Jack Prostko. [same as training the trainers?]

From August to November course developers are expected to work independently in creating draft course materials. Each complete curriculum packet would include: Goals and Objectives, Intended Audience, General Description of the course, a course outline in the form of a daily schedule, a detailed lecture outline, list of advance readings, on-site handouts, case studies and/or exercises, bibliography, teaching notes and participant evaluation forms. In October course developers are scheduled to meet with Kenamore and exchange drafts in order to ensure topical coverage but avoid duplication. First drafts would be submitted to the SAA Education Office for distribution to Jack Prostko and CAIE members for review and comment. [how was jack prostko selected?]

From December 15th through February 15th the designated reviewers will examine the drafts for technical accuracy, organization and style. Prostko would review for integration of interactive learning methods. Comments would be forwarded back to developers and by April 16th second drafts would be returned to CAIE, the Education Office Advisory Board, CEPD and the SAA Council for final review. Developers would have until June 15th to finish revisions and submit final copy to the SAA Education Office.

From July to December, 1996 the curriculum will be copy-edited and sent for publication, while designated instructors for the new curriculum will attend a Training the Trainers workshop in November, 1996 which will include a day to practice interactive learning techniques with the newly produced curriculum materials.

OVERHEADS/HANDOUTS

WEBER DISCUSSION DOCUMENT OUTLINE

REVISED WEBER DRAFT OUTLINE

FINAL PROPOSED SAA DESCRIPTIVE STANDARDS CURRICULUM

SAA CURRICULUM DEVELOPMENT PROJECT OUTLINE