October 30, 2017

Dear Friends and Colleagues,

On behalf of the Massachusetts Archives and our co-sponsors the John F. Kennedy Presidential Library and Museum, the Edward M. Kennedy Institute for the United States Senate, and the State Library of Massachusetts, welcome to Boston! Together we are all very excited to host this year’s Best Practices Exchange (BPE) in a city renowned for its history as well as its well-deserved reputation for technical innovation and excellence.

The BPE, with its focus on the management, preservation, and accessibility of digital information, provides an excellent opportunity for archivists, librarians, records managers, and other information specialists to meet, to learn, and to share ideas and experiences. To that end, our Program Committee has created an informative selection of sessions that will both address common interests, topics, and concerns, and, we are confident, be of immediate and lasting use and benefit to attendees.

We hope that you enjoy this year’s “unconference.” We look forward to meeting you and urge you to take full advantage of all that our beautiful city has to offer.

Very Truly Yours,

Michael Comeau
Executive Director
Massachusetts Archives

220 Morrissey Boulevard, Boston, Massachusetts 02125 · (617) 727-2816
www.sec.state.ma.us/arc
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Thanks to:

**Host institutions**

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**Tour institutions**

[Images of tour institutions]

**Program Committee**

Alix Quan, State Library of Massachusetts, co-chair
Veronica Martzahl, Massachusetts Archives, co-chair
Beth Shields, Kentucky Department for Libraries and Archives
Bonnie Weddle, New York State Archives
Christian Skipper, Maryland State Archives
Dorothy A. Davis, Alabama Division of Archives and History
Jim Kammerer, Montana State Library
Kelly Eubank, State Library of North Carolina
Linda Avetta, Pennsylvania State Archives
Rae Gifford, Utah State Archives

**Local Arrangements Committee**

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<td>Alexandra Benson</td>
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<td>Judith Carlstrom</td>
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**Un-Steering Committee**

Marisa V. Bruhns; Digital Preservation Archivist, MIT Lincoln Laboratory
Lucy Jones; State Documents Librarian, Enoch Pratt Free Library
Kris Kasianovitz; State, Local, and International Government Information Librarian, Stanford Libraries
Carol Kussmann; Digital Preservation Analyst, University of Minnesota Libraries
Veronica Martzahl; Digital Records Archivist, Massachusetts Archives
Camille Tyndall Watson; Digital Services Section Manager, State Archives of North Carolina
Keynote speakers

Nancy Y. McGovern is the Director for Digital Preservation at MIT Libraries. She leads the Digital Preservation Management (DPM) workshops, an award-winning program offered more than fifty times in a dozen countries since 2003. She has thirty years of experience with preserving digital content, including senior positions at ICPSR; Cornell University Library; the Open Society Archives; and the Center for Electronic Records of the U.S. National Archives. She chairs the Research Forum of the Society of American Archives (SAA) that she co-founded in 2007. She is a Fellow of SAA and a past president. She completed her PhD on digital preservation at University College London in 2009.

David S. Ferriero was confirmed as 10th Archivist of the United States on November 6, 2009. Created in 1934, the National Archives and Records Administration (NARA) is responsible for preserving and providing access to the records of the U.S. Government. NARA has 43 facilities across the country, including 14 Presidential Libraries, containing approximately 13 billion pages of textual records; 42 million photographs; miles and miles of film and video, and an ever increasing number of electronic records. Previously, Mr. Ferriero served as the Andrew W. Mellon Director of the New York Public Libraries and held top library positions at the Massachusetts Institute of Technology and Duke University.

Mr. Ferriero earned bachelor’s and master’s degrees in English literature from Northeastern University and a master’s degree from the Simmons College of Library and Information Science. Mr. Ferriero served as a Navy hospital corpsman in Vietnam.

Special Thanks to:

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*Thank you to the Boston Beer Company for their donation to the reception.*
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<td>Breakfast - <em>Sponsored by the Legal Information Preservation Alliance</em></td>
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Wednesday, November 8, 2017

7:00 am  Breakfast - *Sponsored by MINISIS*  
MA Archives Patriot

9:00 am  Mass. Memories Road Show/If I Could Talk to the Animals  
MA Archives Patriot

A National Risk: The State of State Electronic Records  
MA Archives Classroom

Collaborative Approaches to Exposing Biodiversity Heritage Library Collections as Open Data  
MA Archives Lincoln

10:15 am  Break - *Sponsored by LYRASIS*

10:30 am  Planning for the Future of BPE  
MA Archives Lincoln

Lightning Presentations  
MA Archives Patriot

It Never Hurts to Ask: Archival Surveys as Tools to Enhance Electronic Records / OSSArcFlow: Researching Archival Workflows for Born-Digital Content  
MA Archives Classroom

11:30 am  Closing Plenary and Lunch

1:00 pm  Leave for optional tours of the State Library of Massachusetts and the State House or the Digital Commonwealth at the Boston Public Library
Session 1  **Survey Results from Recent National Digital Stewardship Alliance Projects**  
EMK Studio A-1  

2017 has been a busy year for the National Digital Stewardship Alliance working groups. This session will discuss the process and results of the Digital Preservation Staffing Survey and the Fixity Processes Survey. The 2017 Staffing Survey compares results from a 2012 Staffing Survey and the Fixity Processes Survey addresses processes outlined in the 2014 NDSA Fixity Report. Work was completed by interested NDSA members from various institutions. The NDSA membership consists of over 200 organizations across multiple institution types who are committed to long-term preservation of digital information. Come hear what we have been up to and join us!

*Carol Kussmann*, Digital Preservation Analyst, University of Minnesota

Session 2  **Metadata mysteries: Unraveling the magic and myths behind the data that drives Digital Commonwealth**  
EMK Studio A-2  

In this open format, Q&A session with the Boston Public Library digitization team and “Metadata Mob” leaders, participants will have the opportunity to understand some of the general principles, and more specific data creation and transformation procedures that have comprised their work over the past few years. After some brief introductory remarks, attendees will be encouraged to discuss their own projects and Boston Public Library staff will offer advice about how to best execute metadata creation.

*Danny Pucci*, Lead Digital Projects Librarian, Boston Public Library  
*Tom Blake*, Manager of Content Discovery, Boston Public Library  
*Jake Sadow*, Statewide Digitization Project Archivist, Boston Public Library  
*Nichole Shea*, Digital Projects Librarian, Boston Public Library

Session 3  **IQ Birds of a Feather**  
EMK Studio B-1  

IQ: Are these the most dreaded two letters in the archival community today? Join this Birds of Feather session to discuss experiences, concerns, and solutions to the topic of IQ and its implications for archival preservation.

Session 4  **The Commonwealth Historical Collaborative: the Catablog Model for access**  
EMK Studio B-2  

The Commonwealth Historical Collaborative (CHC) provides a single, comprehensive interface for the public to locate information about cultural and historical materials in Massachusetts. Built by and for a group of peers who work in historical societies, archives, libraries, and museums, the CHCH is an opportunity to share information about collections, programming, initiatives, and opportunities for growth and professional development. This session will discuss the challenges unique to a large scale collaboration with historical societies of diverse resources and technical skills and the project’s approaches to bridge gaps in representation and collection access.

*Aaron Rubinstein*, University and Digital Archivist, University of Massachusetts, Amherst; Special Collections and Archives  
*Rob Cox*, Head of Special Collections and University Archives, University of Massachusetts, Amherst
Session 5  **Theory and Practice: Collaborative Records Management in Vermont**  EMK Studio A-1

The Vermont State Archives and Records Administration (VSARA) has developed a thorough process for collaborating with public agencies to analyze requirements for public records, build sustainable records management programs, transfer records of permanent value, and preserve, protect, and provide access to those records into the future. We will describe our experiences in collaborative records management with records creators through specific projects and examples of what went right, and what lessons were learned.

  *Nick Connizzo*, Digital Records Analyst and Archivist, VSARA
  *Zachery Whitaker*, Records Analyst, VSARA


The digital holdings of the National Archives are diverse - datasets transferred by Federal agencies, classified electronic records and, increasingly, digital images and emails that number in the millions. Archivists working with these records are challenged by the dual responsibility of protecting very sensitive information while providing researchers with prompt access to the records that can be released. The archivists in this panel will describe their efforts to contend with strict legal authorities governing access; technical issues with searching, retrieving, and making these records available; and the need to respond to large numbers of access requests, including time-sensitive, high-profile requests.

  *Sarah Barca*, Archivist, National Archives and Records Administration
  *Lynn Goodsell*, Archivist, National Archives and Records Administration
  *Rob Seibert*, Archivist, National Archives and Records Administration
  *Rachel Friend*, Archivist, National Archives and Records Administration

Session 7  **Update on Email Preservation and Access**  EMK Studio B-1

A conversation about the current state of processing and providing access to email records. Nancy Melley, the session facilitator, will discuss findings of a joint NHPRC CoSA symposium on email policy, preservation, and access, and lead a discussion on how the audience’s experience with email collections reflects and differs from that of the symposium attendees.

  *Nancy Melley*, Director for Technology Initiatives, NHPRC

Session 8  **Connecticut Digital Archive: a collaborative model for digital preservation and access**  EMK Studio B-2

The University of Connecticut Library manages the infrastructure and governance of the Connecticut Digital Archive (CTDA), which has over 500,000 objects from about 40 institutions across the state. It is not a membership organization, and has a unique approach to supporting digital preservation on a “pay as you can” basis - which means most participants pay nothing. The CTDA provides preservation services and some access services, while serving as a source of data for others to consume. The Connecticut State Library is a collaborative partner and participant in the CTDA. This session will discuss the services and collaborative model of the CTDA and how the State Library is implementing these services.

  *Greg Colati*, Assistant University Librarian for University Archives, Special Collections and Digital Curation, University of Connecticut - Storrs
  *Allen Ramsey*, Assistant State Archivist, Connecticut State Library and Archives
Session 9  Email Archiving and Year Two of the Transforming Online Mail with Embedded Semantics (TOMES) Grant

The Transforming Online Mail with Embedded Semantics (TOMES) grant is working to help state archives preserve, process, and provide access to archival email. We have implemented the Capstone approach to identifying email accounts, and developed processes for transferring email accounts from hosted email platforms, e.g. Microsoft 365, Gmail, and converting them into a sustainable open source language. In year two, we’re working to automate tagging accounts and building an appraisal tool using NLP and state government specific dictionaries to aid archivists in processing accounts. This session will include the work to date—outreach, technical possibilities, tool development, and mediate access.

Camille Tyndall Watson, Digital Services Section Head, State Archives of North Carolina

Session 10  Practicing Digital Archiving: Journey from Proof-of-Concept to Enterprise

Join this session for a jam-packed presentation on the MIT Lincoln Laboratory Archives’ ongoing journey to implement practical solutions to preserve and provide access to digital records. Experience the 4-year evolution from salvaged systems with a motley crew of open-source tools to the burgeoning implementation of our new MINISIS M2A collection management system and Trusted Digital Repository! Discussion will deep-dive into the trenches of digital archiving lessons learned; real policies, procedures, workflows, and tools implemented; and IT and Security challenges faced along the way.

Marisa Bruhns, Digital Preservation Archivist, MIT Lincoln Laboratory

Session 11  The Digitization Dash: The Push to Digitize Government Records and How You Can Help Now

Government agencies are increasingly being asked to create efficiencies in many areas such as consolidating work spaces and reducing physical storage space for agency records. In both Connecticut and Wisconsin, several large state agency moves have resulted in diminishing space to store analog records and a push to rapidly digitize records prior to their moves with little or no planning which puts state records at risk. This session will discuss the approaches Connecticut and Wisconsin took to assist agencies with digitization projects and project management and the new Council of State Archivists (CoSA) Digitization Project Management best practices document.

Allen Ramsey, Assistant State Archivist, Connecticut State Library and Archives
Sarah Grimm, Electronic Records Archivist, Wisconsin Historical Society

Session 12  Mass Docs: A Possible Model for Collaboration Among State Agencies

Over the past year, MassIT, the Massachusetts Office of Information Technology, has been overseeing a redesign of the state’s web portal, Mass.gov. As part of this, non-html materials are being migrated into a new documents portal, dubbed MassDocs. Because many of these materials have little descriptive metadata, project staff reached out to staff from the State Library and the Archives to participate in a Metadata Working Group. Participants in the working group will describe the project, progress made, and the potential benefits (and pitfalls) of this sort of collaboration.

Alix Quan, Assistant Director and Head of Reference, State Library of Massachusetts
Connor McKay, Mass IT
Sienna Svob, Mass IT
Session 13  Serving your community, one size fits all?  JFK Powers

Your digital records and collections are valuable assets, but keeping them safe whilst ensuring the content remains accessible can prove challenging. This session will examine how Archivists, Librarians and Records Managers tasked with preserving and creating internal and public access to their Digital Archives have adopted a flexible and dynamic approach to managing and sharing digital content, engaging the community and reaching new audiences.

Mike Thuman, Associate VP, Digital Archiving, Preservica
Tim Hodge, Solutions Architect, Preservica

Session 14  American Archive of Public Broadcasting: Preservation Through Collaboration  JFK Learning

The American Archive of Public Broadcasting (AAPB) is a collaboration between the Library of Congress and WGBH to preserve at-risk public media and provide a central web portal for access to the unique programming created by public television and radio. To date, over 50,000 hours of historic programming contributed by more than 100 public media organizations and archives have been digitized for preservation and access. Casey Davis Kaufman and Charles Hosale will present on the AAPB's background, structure, collection development, collaboration, access policies, outreach, and workflows for digitization, acquisitions, and making large audiovisual collections available online.

Casey Davis Kaufman, Associate Director, WGBH Media Library and Archives, and Project Manager, American Archive of Public Broadcasting
Charles Hosale, AAPB Special Projects Assistant and Digitization Coordinator, WGBH Media Library and Archives

Session 15  Pop-Up Sessions  JFK Theater

Session 16  Affinity Group Meetings  JFK Theater/Atlantic
Session 17  
**Guidance and GUIs: Developing an E-Records Transfer Process/Now What? The Electronic Records Task Force was dissolved...**

The Wisconsin Historical Society (WHS) is in the midst of a 3-year NHPRC grant to implement a sustainable electronic records workflow from state agencies to WHS. This presentation will provide a brief overview of the project, and discuss our recent work on planning and piloting a transfer management process to collect electronic records from state agencies. The presentation will focus specifically on the creation of guidance documentation and templates, and the implementation of the Exactly tool from AVPreserve for the transfer of electronic records and user-supplied metadata.

**Hannah Wang**, Electronic Records Project Archivist, Wisconsin Historical Society

The Electronic Records Task Force (ERTF) worked for two years developing workflows for ingesting and processing electronic records at the University of Minnesota Libraries. This past year it was decided to dissolve the Task Force and try to move forward without it. This session will provide a brief overview of the work of the ERTF and an update on activities after dissolution. How did we move forward? What support did we get? What are we able to do now? What are our main issues and successes?

**Carol Kussmann**, Digital Preservation Analyst, University of Minnesota

Session 18  
**To the end of the Republic and Beyond: Accessioning and Preserving Electronic Federal Records**

The mission of the National Archives and Records Administration (NARA) is to provide public access to Federal Government records. Each year, the volume and technical complexity of the electronic records being transferred increases; challenging the standard accessioning policies and procedures to authenticate transfers, ensure trustworthy and reliable data, safeguard security, and provide access to Federal records for years to come. This has led NARA to envision and seek out new workflows and partnerships not only inside the agency, but outside of it as well.

**Rachel Sutcliffe**, Archivist, National Archives and Records Administration

Session 19  
**The File Frontier: Managing Records in Microsoft Office 365**

This session describes how The MITRE Corporation, a not-for-profit company that operates federally-funded research and development centers, is applying a recordkeeping framework for managing records in its Microsoft Office 365 environment. We describe our development of a process for managing email in Exchange Online; our development of a lifecycle management framework for MS SharePoint and other collaborative environments; and using O365 tools, especially the Security & Compliance Center, to bring our recordkeeping framework to bear at scale. The session will emphasize the transferable lessons learned we have gained from these ongoing efforts.

**Eliot Wilczek**, Corporate Records and Archives Manager, MITRE Corporation  
**Krista Ferrante**, Corporate Archivist, MITRE Corporation  
**Bob Toth**, Electronic Records Management Lead, MITRE Corporation
The Colorado Supreme Court and the California Legislative Counsel's Office have multi-dimensional approaches to preservation that function well within Uniform Electronic Legal Material Act (UELMA) compliance, or as a guide to preserving legal information without a mandate. The model focuses on preservation as local in origin, cooperative in practice, and interdisciplinary in nature. It advocates for visionary planning and appropriate allocation and management of funds, personnel, space, and time. The program will contribute success stories and lessons learned as they relate to these and other component parts of a legal information preservation plan:

- Collaboration
- Compilation
- Consensus
- Certification
- Curation

Margaret Maes, Executive Director, Legal Information Preservation Alliance (moderator)
Daniel Cordova, Supreme Court Law Librarian, Colorado Supreme Court
Mendora Servin, LIS Coordinator, California Office of Legislative Counsel
Wednesday, November 8, 2017 – 9:00 am

Session 21  Mass. Memories Road Show

The Mass. Memories Road Show (MMRS) is a statewide digital history project that documents people, places, and events in Massachusetts history through family photographs and stories. In partnership with teams of local volunteers, the project organized public events to scan family and community photographs and videotape “the stories behind the photographs.” The images are indexed and incorporated into an online educational collection at openarchives.umb.edu. To date, MMRS has organized nearly 50 events throughout Massachusetts, and has nearly 10,000 photographs, stories, and videos available in the online collection. In this 30-minute presentation, MMRS coordinator Carolyn Goldstein and archivist Andrew Elder will outline the program’s methods of collaborating with communities, organizing events to copy images and gather metadata as well as preserving the digital assets and making them accessible through an online platform.

Carolyn Goldstein, Public History and Community Archives Program Manager, Joseph P. Healey Library, University of Massachusetts, Boston
Andrew Elder, Interim University Archivist and Curator of Special Collections, Joseph P. Healey Library, University of Massachusetts, Boston

If I Could Talk to the Animals

Small nonprofit institutions provide an example of technicians, historians, and donors struggling unsuccessfully with different meanings for terms, goals, preserving records, and even who has records to preserve. Archivists and IT/IS professionals in other organizations often have no idea of the gap between the intended meaning and what is understood. Vendors’ jobs are to sell, yet they are often considered unbiased “experts”. Security? Networks and storage are continually hacked. Shared personal experience of a professional working with both sides of the issues will hopefully stir thoughts and discussion about communication between professionals who seem to speak different languages.

Jim Havron, Archivist of Various Religious Collections, Nashville, TN

Session 22  A National Risk: The State of State Electronic Records

The Council of State Archivists started the State Electronic Records Initiative (SERI) in 2011 to help improve electronic records management and digital preservation in all 56 state and territorial government archives. The author of the CoSA’s recently released report, “A National Risk: The State of State Electronic Records, 2017,” one of the SERI Steering Committee Co-Chairs, and two members of the SERI Steering Committee will discuss SERI successes and lessons learned, outline some future plans for SERI, including CoSA’s new Institute of Museum and Library Services grant, and solicit feedback and advice from attendees.

Barbara Teague, Program Consultant, Council of State Archivists
Sarah Grimm, Electronic Records Archivist, Wisconsin Historical Society
Veronica Martzahl, Digital Records Archivist, Massachusetts Archives
Bonita Weddle, Coordinator, Electronic Records, New York State Archives
Session 23  **Collaborative Approaches to Exposing Biodiversity Heritage Library Collections as Open Data**  
MA Archives Lincoln  

The Biodiversity Heritage Library (BHL) National Digital Stewardship Residency (NDSR) program is currently hosting five geographically distributed Residents that are collaborating to deliver a set of best practices recommendations for the next version of the BHL digital library portal. This presentation will give an overview of the BHL NDSR Residents’ projects and progress in crowdsourcing manuscript transcriptions, optimizing transcription workflow and tasks for named entity recognition and machine learning algorithms designed to extract structured datasets from archival content for computational analysis, and collaborating with Wikidata and WikiCite communities to better expose BHL’s datasets to the Semantic Web.

**Katie Mika**, National Digital Stewardship Resident, Ernst Mayr Library, Harvard University Museum of Comparative Zoology

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**Wednesday, November 8, 2017 – 10:30 am  Concurrent Sessions**

Session 24  **Planning for the Future of BPE**  
MA Archives Lincoln  

The BPE “Un-Steering” Committee leads a discussion about the future of the Best Practices Exchange Conference and how to sustain the conference long into the future.

Session 25  **Lightning Presentations**  
MA Archives Patriot  

**Navigating divergent workflows for digital records at a university archives**  

The University of Minnesota’s institutional repository serves as a “digital arm” of the University Archives. The IR works in tandem with our archives program to preserve and provide access to the University’s history. Despite this shared goal, electronic records are treated differently from an appraisal and processing standpoint depending on whether the files are intended for the repository, or are transferred as an archival collection. This talk will discuss the ways in which the context of acquisition raises practical questions about our treatment and workflows for electronic records, and can change the standard of access and preservation for that record.

**Valerie Collins**, Digital Repositories and Records Archivist, University of Minnesota

**Rethinking Digital File Management and Workflows for Preservation**  

Brief introduction to the State Library of NC’s Government & Heritage Library’s initiative to rethink how we approach our digital file management and processing. Collaborating with librarians across sections of the library, we implemented new file naming conventions in August 2017 and formed a working group to evaluate and update various workflows and tools used (e.g. foldering procedures, preservation metadata creation, and tracking approaches). We aim to build workflows that best meet current standards and functional requirements and to maximize accuracy and efficiency. I will discuss the working group’s overall goals and what we’ve discovered and developed thus far.

**Andrea Green**, Digital Collections Manager, State Library of North Carolina

**Just Drop the Keys to the Server On Your Way Out the Door**  

Over the past four years the American Heritage Center at the University of Wyoming has built a successful strategy for preserving, describing, and providing access to digital records. Tools and
workflows are used by multiple archivists across all departments in the archives, but when the Digital Archivist left in the summer of 2017, the transition was not an easy one. Issues surrounding chain of custody for the dark archive, digital literacy, and institutional support became evident. This lightning talk will discuss the lessons learned from the transition.

**Tyler Cline**, Digital Archivist, University of North Carolina Charlotte

**Digital Preservation of Architectural Plans for Roads and Bridges**

In calendar year 2017, the Massachusetts Department of Transportation - Highway Division has an active project to replace a bridge originally constructed in 1912. Access to the original plans from 1912 and any maintenance plans that changed the bridge design during the last 105 years is critical for designing a safe plan for removing the bridge at this time. Looking forward, what tools exist in 2017 that could help to preserve a new digitally created architectural drawing for the next 105 years?

**Paul Tykodi**, IT Solution Engineer, Document Management, Massachusetts Department of Transportation

**Zoltan Soos**, President, ELAN GMK

**Session 26**

**It Never Hurts to Ask: Archival Surveys as Tools to Enhance Electronic Records**

Recently, the NHPRC awarded the Alabama Department of Archives and History funds to launch an electronic records management and preservation initiative to establish pragmatic guidelines and best practices for state agencies. Focusing on the governor’s office, we created and analyzed archival surveys to develop solutions to help their staff improve the effectiveness of their records management practices and enhance our capacity to preserve permanent electronic records. Our efforts will create a model that similarly staffed state archives can implement to find new ways to manage the flow of archival records from agency to archives.

**Amanda Shelton**, Governor’s Office Liaison Archivist, Alabama Department of Archives and History

**Rachel Smith**, Collections Archivist, Alabama Department of Archives and History

**OSSArcFlow: Researching Archival Workflows for Born-Digital Content**

OSSArcFlow: Researching Archival Workflows for Born-Digital Content project is a two-year effort funded by the Institute of Museum and Library Services (IMLS) to investigate, model, and test workflows for born-digital content curation in libraries and archives. Specifically, the project focuses on integration and interoperability of three open source digital library tools (BitCurator, Archivematica, and ArchivesSpace) and to support partner institutions in integrating these tools into their workflows. In this presentation we will provide a project overview and status update, including the preliminary results from initial interviews with partner institutions on current digital curation workflows.

**Andrew Rabkin**, Research Assistant, OSSArcFlow Project

**Jessica Meyerson**, Research Program Officer

**Katherine Skinner**, Executive Director, Educopia Institute
Map of Edward M. Kennedy Institute
Map of John F. Kennedy Library and Museum
Map of Massachusetts Archives

1\textsuperscript{st} Floor (Lower)

- Classroom
- Lincoln Room

Fire Exit located at the top of the stairs.

Key:
- Green: Archives
- Purple: Museum
- Blue: MHC
- Gray: Records Center
- Light Blue: Facilities

- Emergency Exit
- Fire Extinguisher
- Fire Alarm Pull

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