



Your Roadmap to Building a Social Archive

Are you thinking of setting up an archive for your school, university, or organisation but don't know where to start? This white paper has been compiled to provide some guidance on the elements you should consider to ensure a successful project, both in delivery and for the future.

Introduction

There is a large amount of technical guidance available around the archiving and management of historical material, including multiple international standards. It is important to bear in mind throughout the process of creating an archive that most of that material is written by, and for, organisations running large formal archives, usually with multiple dedicated members of staff.

It is only guidance so if it seems onerous or is beyond your current budget or resources, then tailor your archive to what you feel is realistic for your institution. It is better to adjust the expectations for your archive than to try to take on unrealistic deliverables which will ultimately result in the failure of the project, or worse, prevent it from ever getting started.

This guide is intended to provide some structure to the questions which should be answered and the decisions you may want to make within your institution to facilitate the successful setup and ongoing management of an archive.

THE KEY THING TO REMEMBER IS THAT SETTING UP AND RUNNING AN ARCHIVE DOES NOT NEED TO BE A HUGE COMMITMENT OF TIME AND RESOURCES, TAILOR WHAT YOU ARE DOING TO SUIT YOUR BUDGET AND ALIGN IT TO YOUR EXISTING GOALS FOR ENGAGEMENT, DEVELOPMENT, AND MARKETING AND ROLL IT OUT OVER TIME.

Likely Problems

Many of the institutions we speak with want to do something with their history but are suffering from the same challenges when it comes to starting a project:

- Boxes full of old materials.
- Little or no organisation, cataloguing, or indexing of said material.
- Items are physically dispersed around multiple rooms, buildings, or even locations.
- A mix of administrative, medical, estate, meeting, emails, history, photos, physical objects.
- Lack of information relating to materials "Who are the people in this photo, when was it taken?"
- Limited budget.
- Little or no time.
- Perceived size of the task.

Framing the challenge

- Archiving largely falls into 3 threads:
 - Mandatory/legal archiving – records which your institution is required to keep for 'x' years.
 - Historical archiving – largely focussed on preservation or research.
 - Archiving to publish material – social archiving.

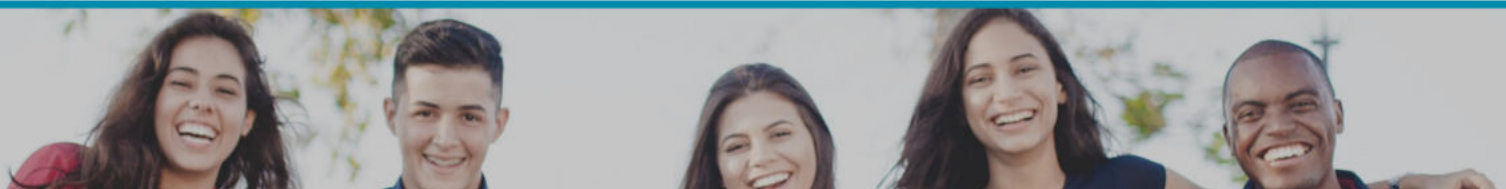
Many organisations never progress beyond point 2, and therefore miss the opportunities offered by point 3. By building point three into your archive planning several of the challenges referenced above can be reduced or mitigated completely.

Whilst it is a major improvement for most organisations to organise and catalogue their history, what benefit does this deliver? By taking a social approach to archiving, your project can not only save your history for posterity but can deliver a source of engagement to alumni and your wider community.

Step 1: Building an archive plan

Factors to consider:

- Legal requirements to preserve documents:
 - How long to be preserved?
 - Mandated requirements for storage?
- Legal requirements around publication of material (see section below):
 - Ownership of copyright/IPR requirements.
 - GDPR requirements.
- Inventory
 - Do you want to carry out an inventory/cataloguing process prior to starting the archive?
 - Process is time consuming but can help confirm materials to be archived and avoid wasted or duplicated effort further in the process.
 - This can be carried out in a phased approach (see section below).
- Appraisal and acquisition of new materials
 - What material should be added to the archive?
 - Who should be responsible for feeding in material?
 - Identify internal and external sources.
 - What level of curation will take place and who will be responsible for it?
 - A written policy is helpful in this area to avoid confusion and ensure continuity.
- Is the organisation in possession of all the material which should be added to the archive?
 - How can additional material be sourced, managed and/or returned to its owners?
- Backup and redundancy requirements.
- How will access requirement be served, especially if there are multiple stakeholders?
- Funding of the archiving project (see section below).
- Who will be responsible for the ongoing management of the archive once live?



Step 1: Building an archive plan (cont.)

- Cataloguing
 - Recording of provenance and original order.
 - Creation and storing of meta data for materials
 - e.g.: Reference number, title, level, date, physical location (if relevant), copyright holder (if known).
 - Who will generate this information, where will it be stored and how?
- Storage
 - Local
 - How will data be organised?
 - Simple file structure or using local archive management software.
 - Is there a requirement for disposal of some material?
 - Cloud hosted
 - What platform will be used?
 - How will data be organised?
- Accessibility requirements
 - Open access, restricted access, or a hybrid of the above
 - If storage is local, how will access be provided?
- Wider responsibilities within your institution for future provision of archive material.

Step 2 – Physical preservation

You may decide to make your archive entirely digital, or to have a physical archive as well.

- Material may be in poor physical shape due to age or poor storage
 - Handling to digitise might damage or destroy certain material.
- Storage requirements:
 - Need to procure specific wallets, folders, cabinets, racking, shelving, climate control, etc.
 - Is there space to store archived material?
 - Will a specific space be dedicated to the archive?
 - How will access be controlled?
 - How can visitors be accommodated?
 - Total estimated cost.
 - Is budget allocated to this?
- Maybe digitisation is to allow old physical material to be disposed of.
 - Is digitisation required in order to allow disposal of physical materials to create space?
 - Who will make the decision(s) as to what materials are disposed of?
 - If original material is to be disposed of then does this impact backup/redundancy requirements as digital copies are more valuable at that point?



Step 3 – Digital preservation

- Requirements for format and resolution?
 - Legal requirements.
 - Preferential requirements – it may be fantastic to digitise items at high resolution, but this requires increased storage which therefore increases costs.
- Size of documents and photos
 - Most desktop scanners only support up to A4, but foolscap was very popular for old documents.
 - Panoramic photos (whole school), larger photos or paintings and any physical objects will all require specialist scanning.
 - Time required to un-frame and re-frame material for scanning.
- Digital storage requirements
 - Where is the disk space?
 - Where is the disk storage backed up?
 - Is a multi-copy storage plan required?
 - How will you manage file integrity and format evolution?
- Is the content only for access within the organisation – are the raw files, PDFs etc sufficient?
- Ability/requirement to search for file content?
- Ability/requirement to search inside documents for content?
 - Requirement for optical character recognition (OCR) software

Step 4 – Publishing archive material

- Who is the archive for?
- If material is only physically archived or digital copies are only stored locally then how will access requests be served?
- Relevance of content to be published. Material of historical value and for research purposes is often not the same material which drives community engagement.
- How will people find it?
- Who will read material?
- How will people know that material has been added?
- Who will understand what that material is?
- Who will fund publishing (see more below)?

Funding the archive process

- Legal
 - Given the requirement for mandatory archiving projects this will likely already be covered within operating expenditure.
 - Can this be merged with social archiving to offer a cost saving versus running two separate projects?



Funding the archive process (cont.)

- Historical archiving
 - Many institutions utilise members of their community, e.g., historians within school, ex-teachers, and community members can do a lot of work on a volunteer basis, but this still requires internal ownership, resources to organise and systems which can support multiple stakeholders.
 - Historical archiving projects are largely driven purely by a desire for preservation, and whilst that is unquestionably valuable in and of itself, it means the project will only ever be a cost to the institution.
- Social archiving
 - Social archiving takes historical material and aligns it to the goals and objectives of the alumni, development, and marketing functions of the institution.
 - This provides a much clearer return on investment for archiving. When alumni see direct benefit (e.g. pictures of themselves from yesteryear) they engage = better engagement = more likely to provide donations/legacies, careers help etc, i.e. it supports organisation's strategic goals.
 - Funding is much easier where there is a clear return on investment.
 - Volunteers, such as those referenced above, can still help, and support the process.
 - Funding can be found from alumni for these projects. Capital and time often just need some initial funding and then follow on is easy due to visible results.

Archive Creation

The scale of a project of this nature can result in it seeming overwhelming, attempting to take what may be several hundred years of history. Social archiving supports a phased approach, so rather than viewing the creation of an archive as a single 'one off' project, it becomes part of day-to-day operations.

- You do not need to present the entire history of your institution in a single 'launch'.
- It's been proven to be more engaging for audiences when material is released in a phased approach.
 - This could be grouped in any way you feel works, e.g., time-period, subject, event, person or people.
 - It's important to ensure you have a method by which to notify existing audience members, and those who may be interested, when new elements are available for viewing.



Data Protection

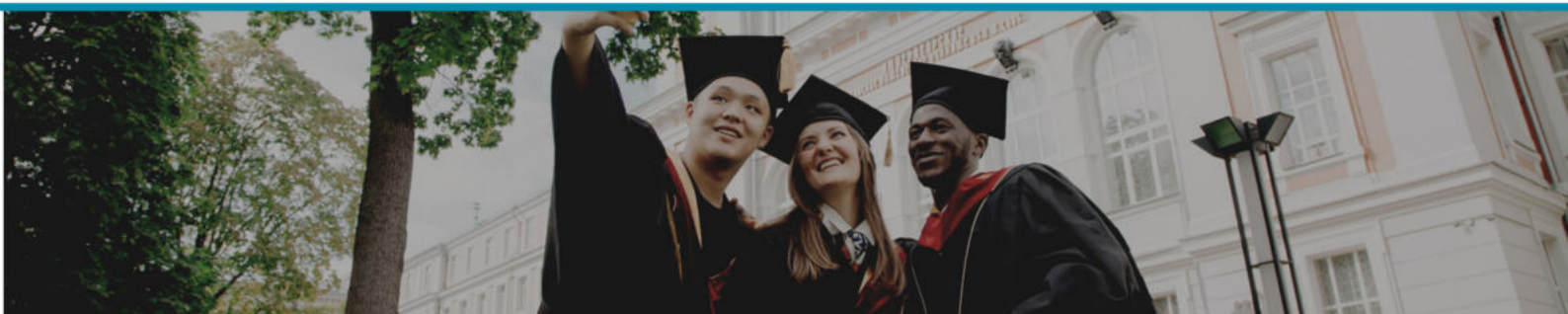
Queries around data protection are very common when it comes to archiving, key points to consider, both for setting up your archive and ongoing management:

- Have a clear policy relating to data protection:
 - GDPR provides a basis under which to permanently preserve personal information for 'archiving in the public interest'.
 - GDPR applies only to living individuals so impersonal items or materials need not be covered by this policy, in addition to those which could not reasonably be thought to apply to living individuals (for example anything over one hundred years old).
- How will you control access to archive material?
 - It's vital to strike a balance here, whilst it may be safer to only provide physical access to material this doesn't easily support the 'public interest' as it makes access difficult and excludes potential audience members who aren't able to visit the location.
 - Providing a digital platform solves the above issue but it's key to have control and visibility of who can access what material, what has been viewed.
 - How will you support different access levels, e.g., open visibility of material for true heritage items but restricted/controlled access for materials which could contain personal information.
 - Whether physical, digital, or both, consider and plan for the resources required to manage access.
- How will you handle queries or objections from data subjects?
 - Whilst data subjects do not have a right to require erasure or correction of records held about them which have been formally designated as of archival value (if fulfilment of such rights would prevent or seriously impair the archiving purpose), you may wish to implement a policy or systems to allow for this to avoid any potential conflict.

Ongoing Management

As referenced above it's important to have a clear archive policy which lays out how the archive will be managed in future, not just for its set up.

- Who will take overall ownership of material?
 - This is especially key where archiving is being carried out by volunteers
- How often will there be a review of policies and procedures around the archive?
 - Transition from pre-digital age will see a shift in challenges, from "can we find a photo of X" to "which of these 250 photos of X do we want to archive"
- How will you monitor and ensure the integrity of digital assets?



Summary

Digitising your institutions whole history and publishing en masse is high work and low value:

- This approach can lead to a 'one off' mentality, who will manage today's content for the archive of tomorrow?
- It misses the opportunity to use historical material to showcase your history, highlight the work that has gone into building the archive and, critically, to create genuine community engagement.
- It's vital that archive material is easy for users to 'consume'.
- If viewers must know what is in the archive in order to find it, this will significantly impact engagement.
- Key is "pushing" access to potentially interesting/relevant material out, where they can interact, and personalisation is key.
- Remember that, much like successful alumni programs, a great archive will not be built in a day.
- Consider what material is of interest to whom, assumption that all old material is of interest to alumni is incorrect, most will overwhelmingly be interested in material relating to their time with you.
- If you are looking to publish archival materials:
 - Use specialist tools.
 - Seed interest with small projects to start.
 - Look for more substantive funding for larger projects from alumni and associated organisations.
 - Personalisation is key if alumni interest and engagement are the goals.
 - Photos of houses and sports teams are proven to generate interest and response.
 - Private social archives can drive sign-ups to your main community database, adding a larger user audience for other marketing comms about events etc.

The concept of a social archive

A social archive is a living breathing store of material, constantly being added to, driving significant alumni engagement, giving value back to alumni and providing valuable content whilst building affinity and providing insight in the process. It showcases the history of your institution, the hard work that has gone into creating an archive, and by allowing users to interact around materials and submit their own pieces of history it builds a more complete and detailed history than would be possible otherwise.

As referenced earlier, a social archive should be there to support the goals and objectives of the alumni, development and marketing functions of the institution, not solely to preserve it's history.



The concept of a social archive (cont.)

But community engagement software is very poor at archiving, so use of specialist tools like the social archive is best approach:

- Cloud based so reachable via any device worldwide.
- Content can be made public or private.
- Fast single portal access built totally separate from original digital content.
- Social media features like commenting built in with replies to add info to archive.
- Personal galleries, "that's me" of content built for repeated access that result in high alumni interest.
- The ability for users to submit more content, so builds engagement loop.
- Statistics on who is reading what given back to the publisher, far more granular than raw social media stats about posts and email opens. Providing data to support targeting for future fundraising campaigns.

WHAT HAS MY OLD SCHOOL EVER DONE FOR ME?

ANSWER THIS QUESTION BY CONSTRUCTING AN ARCHIVE STRATEGY THAT NOT ONLY PRESERVES YOUR HISTORY, BUT ENGAGES AND GIVES VALUE TO THE COMMUNITY.

Useful additional resources:

The following organisations provide resources and guidance around archiving which may be helpful at a technical, legal or operational level:

- The National Archives – <https://www.nationalarchives.gov.uk/information-management/>
- The School Archives & Records Association – <https://schoolarchivesandrecordsassociation.org>
- Archives & Records Association UK & Ireland – <https://www.archives.org.uk/resources>
- Community Archives & Heritage Group – <https://www.communityarchives.org.uk/>
- The British Library – <https://www.bl.uk/conservation/guides>

If you would like to talk through your planned project, or to find out more about how the social archive can help you make the most of your institution's history call us on +44 2081 454 466 or email info@socialarchive.com.

