Web 2.0 Tools and Strategies for Archives and Local History Collections

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Preface

Many archives and other cultural heritage institutions are stuck in a “Web 1.0” mind-set. This needs to change.

To remain relevant, archives and local history organizations need to shift their thinking about how they make their collections accessible to researchers. In these days of decreasing budgets and increasing competition for resources, archives and local history organizations must take advantage of the range of low-cost Web 2.0 tools to open up (at least virtually) our closed stacks and let users discover and interact with our collections in the ways they want to.

*Web 2.0 Tools and Strategies for Archives and Local History Collections* focuses directly and exclusively on how organizations with archival and historic manuscript collections can use social media to share their activities and collections on the Web. My goal is to offer practical, commonsense advice in non-technical language that shows both what Web 2.0 tools can do for your organization and what it takes to use these tools. Archivists from 21 institutions, ranging from the national archives of Australia and the United Kingdom to local historical societies in the United States share their experiences implementing specific Web 2.0 tools in sidebar interviews.

The book provides descriptions of all the major Web 2.0 services—blogs, podcasts, image-sharing sites, video-sharing sites, microblogging, wikis, and social networking. For each tool, there is an overview of its functionalities, analysis of the implementation requirements, and thoughtful discussion of how it’s being used by a range of archives, historical societies, and special collections. Recognizing how quickly technical specifics change on the Web, I took the approach of organizing my discussion of the different ways each tool can be used into broad categories, emphasizing the underlying purpose, in addition to specifics. The discussion focuses on what the tools are being used for—the goals that they are achieving—rather than the specifics of how they function, so
that the analysis I’m providing will continue to be relevant even as Web 2.0
tools inevitably evolve.

Implementing Web 2.0 doesn’t take place in a vacuum. *Web 2.0 Tools and
Strategies for Archives and Local History Collections* recognizes that to be suc-
cessful you need to consider your available resources, management require-
ment, and policy issues. The need to “set the stage” for using Web 2.0 is
discussed, including a walk-through of reviewing your existing Web presence,
technical resources, and available hardware and software. Other planning top-
ics addressed are the need to ground any new Web 2.0 efforts in your strategic
plan and to consider what audiences you want to attract. Starting something
like a Twitter, Flickr, or Facebook account may take only a few minutes, and
starting a blog may seem like a fun thing to do one afternoon, but a successful
Web 2.0 implementation needs to be part of an organization’s workflow. I ad-
dress important areas such as establishing systems to measure your results, get-
ing institutional buy-in, considering legal issues, defining tasks and assigning
workload, creating policies, preserving work products, and publicizing your ef-
forts. An informative essay at the end of the book also provides an overview of
recommended resources on Web 2.0 and its implementation in archives and
historical organizations.

In assembling the content of this book, I wanted to make it as useful as possi-
ble for my friends and colleagues in the field—archivists at institutions of all
sizes who want to learn about Web 2.0 tools but don’t have a lot of time to spend
“playing around.” *Web 2.0 Tools and Strategies for Archives and Local History
Collections* will be useful to anyone working in archives, special collections
departments, historical societies or organizations, local history collections in
public libraries, or museums that want to explore new ways to interact with the
public. Although it’s targeted to people working in smaller or mid-sized organi-
zations, the information and concepts are applicable to larger organizations,
too.

You can use this book to learn about Web 2.0 basics and tools and get ideas
for how you might implement them in your organization. In addition, I hope the
information provided here allows you to see new ways of using Web 2.0 tools
beyond what others are already doing. Structuring the discussions around the
purpose for which archives are using Web tools should help you assess the po-
tential of new tools as they appear on the market. You can also use this as a
guide for working through the steps needed to get ready for an implementa-
tion—putting Web 2.0 in the context of the unique world of archival materials
and raising important questions about what you need to do to make it work.
Web 2.0 Tools and Strategies for Archives and Local History Collections is organized with framing chapters that provide context, background, and additional information around the central chapters that describe the major Web 2.0 tools and how archives are using them. The Introduction reviews the changes and opportunities the Web (both 1.0 and 2.0) has brought for archives and historical organizations. Chapter 1 introduces “Web 2.0” and the key concepts behind it and reviews some of the common myths and misperceptions about social media. Chapter 2 provides an overview about what makes a good “Web 1.0” site for your organization, to ensure that the new users you attract with Web 2.0 will find a usable and professional Web site representing you. This chapter also reviews other issues you should take into account in your planning: both technical—like building on your existing digital assets and inventoring your hardware, software, and IT support—and administrative—such as working with your strategic goals and identifying your intended audiences.

Chapters 3 through 9 each focus on one Web 2.0 tool or service: blogs (Chapter 3), podcasts (Chapter 4), Flickr (Chapter 5), YouTube (Chapter 6), Twitter (Chapter 7), wikis (Chapter 8), and Facebook (Chapter 9). These chapters all follow a common structure—a brief definition of the tool and an overview of its functionalities, followed by a substantial discussion of how archives and historical organizations are using the tool, and then concluding with a review of steps needed for implementation. Each chapter contains interviews with people from archives and related historical organizations who have successfully implemented the Web 2.0 tool in question. These interviews cover topics such as the steps the archivists took to prepare, the major benefits and challenges they have experienced, and the lessons they learned. Chapter 10 contains similar briefer discussions of four Web 2.0 tools that are not being commonly used by archives and historical organizations but that are important to be aware of: mashups, widgets, online chat, and Second Life.

Chapter 11 raises a critical issue, and one that is all too often ignored—how to measure the success of what you’ve done. It introduces the concepts of measuring outputs and outcomes, places the methods in the context of a Web 2.0 implementation, and provides some suggestions for how to approach the thorny issue of measuring social media success. Chapter 12 reviews the range of management and policy concerns that are necessary to plan for in any successful Web project: getting institutional buy-in, dealing with copyright issues, defining tasks and assigning workloads, creating policies, planning for preservation, learning what your users want, and publicizing your efforts.
The Conclusion returns to the broad issues raised in the Introduction about the impact of the Web, discussing the major challenges it holds for archives. It presents an argument that the key to success—and the greatest challenge—lies in each organization finding the right balance between the archival principles and traditions embedded in the old way of doing things and the opportunities of the new Web. The essay presented in the Appendix provides a critical overview of what I think are some of the most useful resources available on Web 2.0 in general, as well as recommendations on where to look for the best thinking on use of these tools by archives and historical organizations.

*Web 2.0 Tools and Strategies for Archives and Local History Collections* isn’t just about Web 2.0—it was written using Web 2.0 research. In gathering information for the book, I raised questions and had discussions on my blog, ArchivesNext, and on my Twitter and Facebook accounts. I developed my understanding of how Web 2.0 tools work through my own firsthand experience creating my own blog and wiki and using tools like Facebook and Flickr. When there was a tool I had not used, I asked my blog readers and friends on Twitter and Facebook for help (in addition to using traditional Web tools for research). I also used the feedback I’ve gotten from the many people I’ve talked to about Web 2.0 in workshops I’ve taught and from conversations with my colleagues. These archivists shared their own success stories, as well as their concerns, questions, and fears. I’ve incorporated the stories I heard from people about the planning they wished they had done to suggest topics to be included in the chapters on planning and management.

One of the aspects of *Web 2.0 Tools and Strategies for Archives and Local History Collections* that I’m most pleased to share are the many examples of organizations using Web 2.0 tools right now to reach new audiences and advance their missions. They provide real-world demonstrations that Web 2.0 tools can have real results. For example, the National Archives of the United Kingdom is located in London, but through its podcasts and wiki, as well as the images it shares on Flickr and the videos it shares on YouTube, it provides information to people around the world. And using Web 2.0 tools doesn’t just get your message out; it also gives your audience a vehicle for giving information back to you. Using Twitter, the Nova Scotia Archives not only shares news about what they are doing but they also participate in conversations with others about Nova Scotia and its history. The experiences of the many archives using Flickr show that people want to engage with historical content, whether by sharing their opinions or providing new identifying information.
I hope my efforts to share these examples and my own practical experience provide you with the background you need to feel confident approaching Web 2.0 and its many tools and services. You should have a clear understanding of why these tools are useful for archives, be able to knowledgeably decide which ones would work best for your organization, and have a basic understanding of what it will take to implement them. If you are skeptical about the hype surrounding Web 2.0, this book should demonstrate through examples of real-world implementations why Web 2.0 is worth exploring. If you’re nervous that Web 2.0 will require more technical skills or resources than they have, I think you’ll see how simple most tools are to use. But I also want to caution and inform people who want to rush into Web 2.0 implementation to ground your efforts in your strategic goals and do the preparation and planning necessary to ensure your project succeeds. Ultimately, I hope Web 2.0 Tools and Strategies for Archives and Local History Collections can demystify Web 2.0, supply a framework for how to evaluate the usefulness of both existing and new Web tools, and spark new ideas about how to be part of the new interactive Web.
The latest glossary published by the Society of American Archivists (SAA) provides many definitions for the word “archives.” The SAA glossary allows for the use of the term to describe records (“materials created or received by a person, family, or organization, public or private, in the conduct of their affairs and preserved because of the enduring value . . .”), organizations (“the division within an organization responsible for maintaining the organization’s records of enduring value” and “an organization that collects the records of individuals, families, or other organizations”), a profession (“the professional discipline of administering such collections and organizations”), and even buildings (“the building [or portion thereof] housing archival collections”) (Pearce-Moses, 2005: 30). Interestingly, all of these definitions focus primarily on the need to preserve, maintain, administer, and house archival materials, but none makes explicit that archives are preserved, maintained, administered, and housed so that they may be used.

The professional discipline of archives has both an inward and an outward focus. Archivists are responsible for acquiring, processing, and preserving their collections, but they are also responsible for ensuring that those collections are used by as many people as possible. Archives are defined as being materials that are preserved because of the “enduring value contained in the information they contain or as evidence of the functions and responsibilities of their creator” (Pearce-Moses, 2005: 30). Archival materials are not usually preserved because of their intrinsic value (their value as objects); they are preserved because of the use to which they can be put. Archives are for use.

Because archives and historical collections exist to be found and used, for most archivists, the rise of the Internet and the World Wide Web has been a wel-

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come means of expanding the audience for their collections. The Web is a powerful platform for promoting repositories, sharing information about collections, and reaching out to potential new users. It did not change the archival principles that underlie the traditional tasks archivists perform. What the Web has changed, for almost every archives, special collection, local history collection, or historical society, is the way it interacts with the public.

How has the Web changed how we interact with our users? I think we have seen the greatest changes in terms of:

- how users locate material that interests them,
- volume and type of reference requests,
- user expectations about how they want to conduct their research,
- user expectations about the speed of the reference process,
- shift in workload from researchers to archivists, and
- increase in workload on archivists.

For most people who work in archives and historical organizations today, these changes are taken for granted as an accepted part of how we do business. However, before considering the range of possibilities Web 2.0 brings to archives, it’s worth going back and reviewing how broadly Web 1.0 affected our jobs and institutions—in some cases in ways we have yet to fully adjust to.

Before the Web, almost all researchers who wanted access to material in an archives would have to begin by corresponding with the archivist to identify how much material was of potential interest. Then the researcher would either have to travel to the archives to review the materials (or pay a local researcher to do so) or else pay for photocopies to be made of all possibly relevant materials (and pay for their postage). The Web has transformed several aspects of this process. First, the Web made it easy for archives to share information about collections—like finding aids and collection catalogs—online. This allowed users to discover for themselves with relative ease what information an archives might have. Then, with the digitization of holdings, users could get direct access not only to information about the records but also to some of the actual records themselves. For many users, interaction with the archivist and travel were no longer necessary.

Thanks to Google, if you put information on the Web today, people who are interested in it will find it, and you. For most archives, sharing descriptions of collections on the Web has brought an overall increase in the number of reference requests. In addition to finding they have more users, most repositories
also find they are attracting a new kind of user, one who often has no previous experience working with special materials. Their requests often begin, “I found you by doing a Google search for . . .” Responding to requests from these kinds of users often requires the archivist to explain some basic facts about archives, such as the level of intellectual control of the materials and the fact that not everything is digitized and searchable. Working with these inexperienced users is generally a different kind of reference interaction than working with professional researchers.

Increasingly, users of all types expect the Web sites for archives, special collections, and historical organizations to function like the other Web sites they use. They want everything to be easy to discover, access, and share. Many first-time users expect an archives to function like a library, with item-level control of all its holdings. When they ask an archives if it has something, they expect the archivist to be able to give them an answer, not a lengthy explanation about how they will have to come and look for it themselves. Users also expect materials to be digitized and online. In the twenty-first century, telling a user he or she will have to travel to you to get an answer to questions is becoming less and less acceptable.

Furthermore, as e-mail replaces “snail mail” as the preferred method of communication for most researchers, it means that users are placing their requests with greater ease and speed, and they are placing them 24 hours a day. The Web brought archives not only more users, but users who are communicating more quickly, and often expecting responses just as quickly.

Identifying what information an archival collection holds on a specific subject requires research. In the past, it was the archivist’s job to describe the content of collections in general terms; it was the researcher’s job to locate the particular material desired. Serving new, inexperienced users and attempting to meet the increased expectations of today’s audience has meant that the burden of doing the work of locating relevant materials often shifts from user to archivist. While most archivists may not be doing actual research for users (although that does happen), archives are targeting their resources to providing more and better online description and more digitization of collections. The traditional model, in which the archivist processed collections, produced hard-copy finding aids, and then waited for users to come to them has transformed into archivists proactively producing and pushing out information and digitized content, trying to pull people in rather than waiting for them to show up. Finding and telling the stories contained in collections used to be the province of researchers; now, to make the archives a compelling and relevant online destination,
archivists are finding it’s also part of their job to promote the value of their holdings.

These changing conditions have meant new kinds of work for archivists, in addition to what was traditionally required. Today’s archives must produce content for the Web—online exhibits, digitized collections, EAD (Encoded Archival Description)—encoded finding aids, and possibly also the blogs, Flickr photostreams, and YouTube videos inspired by Web 2.0. Archivists must respond not only to letters and phone calls but also to reference requests received via e-mail and online chat. The products of the Web and the other virtual mountains of electronic records being created must also be managed, appraised, acquired, processed, preserved, and made accessible—no small task for any archives. The need to share data among archives led to increased standardization in how collections are described—leading to the need for training in the standards and increased scrutiny of descriptive products to ensure they meet the standards. Archivists have had to learn how to use new software to create Web sites and to format finding aids in EAD. Meanwhile, the wonders of technology have done little to change the fundamental responsibilities that have always faced archivists—to acquire, process, preserve, and make available the materials they are charged to collect.

All of these changes may make it seem like the Web has brought nothing but trouble for archives and historical organizations, but this is hardly the case. What it has done is put them on the same playing field with other information providers such as libraries and museums—as well as sites like Wikipedia. In the past, archives and special collections generally appeared hard to access, with limited hours and restrictive policies. All too often they had a reputation for being places that were not very welcoming to people who were not serious scholars. They were “special” places, and those coming to visit were expected to abide by special rules that didn’t apply in other places. On the Internet, a Web site for an archives, special collections department, or historical organization can be found and accessed just like any other site. This accessibility brings opportunities. Although most archivists and history professionals are familiar with the possibilities inherent in the Web, it’s worth reviewing them before embarking on a discussion of the new tools that Web 2.0 gives us, which build on and expand these opportunities.

The Web allows archives to be discovered by more people—and by more diverse people—than would ever have been possible in the past. If you agree that archives exist so that their collections can be used, then the Web is the best thing that ever happened to them. Digitization of collections and online exhibi-
tions mean that people around the world can see and learn from archival materials. Partnerships with companies like Ancestry and Footnote, who digitize and provide access to millions of archival records, mean greater visibility for our holdings and greater use by an interested public. Web 2.0 tools provide a wealth of further options for connecting people with our documents, photos, sound, and moving image collections.

The Web has brought about a sea change in how people find out about what’s in our holdings. Before the Web, many archivists created descriptions of collections targeted to meet the needs of historians—our primary users. Those descriptions, or summaries of those descriptions, were shared primarily through published scholarly channels. If you were interested in something outside the mainstream of scholarship or if you were not familiar with how to do scholarly research, you had little chance of locating relevant archival material. Today, millions of people can discover what collections you have by simply typing search terms into their favorite search engine. The channel for discovering collections is open to everyone, and if an archives describes its collections well, people will find them.

The Web has also transformed what is required to “publish” information—creating new opportunities for other people to publicize your collections. In the past, sharing information about archival materials took place largely through formal publication, which was primarily done by professional scholars and dedicated hobbyists. With the Web, anyone with an interest in a topic, however narrow or specialized, can publish a blog, contribute to Wikipedia, or start their own Web page, and if the topic is right, share information about relevant material in your collections. The support the Web provides for people to network means that those with common interests can easily share knowledge about where to find good resources.

There is a user out there for everything in an archives’ collections; it’s just a question of connecting the right user with that material. In 2004, Chris Anderson introduced the concept of applying the “long tail” to online commerce. In short, he argued that although the largest volume of consumers will be interested in only a relatively small number of products, and for each of the less popular products there will be a much smaller number of interested consumers, if you add up the total number of consumers for all of the “less popular products” the potential revenue for all the products along this “long tail” of demand will be significant. A requirement for the “long tail” to work is that you need to make sure the people looking for the less popular items can find them—a requirement more easily met with the advent of the Web (Anderson, 2004).
The concept of the “long tail” can also be applied to archives (Lasewicz, 2007). In most archival repositories, the bulk of the reference requests will probably be for a relatively small percentage of the collections, usually those that have material on popular topics or that are the best publicized; the rest of the holdings receive little use. This is not because those collections have material that is of no interest. It is because the people who might be interested in using them don’t know about them. One potential the Web has for archives is the capability to match the most users with the most materials.

Archivists frequently complain that when their profession appears in the popular media—movies, television, or books—the archivist is all too often a stereotype: old and pale, living in the past, obsessed with his documents, unable to deal with technology, catering only to researchers he finds worthy. Archives are invariably referred to as “dusty” or “musty” (or both). They are hidden-away places, seldom visited, quiet and dark. By embracing technology and the opportunities that the Web provides, archivists can begin to break down these stereotypes, showing that we are not, in fact, out-of-touch guardians of crumbling paper, but rather open, engaged, and tech savvy. Unlike the hard to find and restrictive places in the real world, on the Web archives are always open, and people can browse through the collections as much as they want. While campaigning against a stereotype may seem like a minor concern, the public perception of archives has serious implications for funding and public support. In these times of shrinking financial resources, an archives cannot afford to have the public and its funders think that archives are for only a few scholars and that archivists are out of step with the times.

Breaking down stereotypes and connecting more people with more materials are just some of the opportunities that resulted from “Web 1.0.” As you will read about in the upcoming chapters of this book, Web 2.0 has only enhanced these possibilities for greater visibility, providing increased opportunities for the discovery of materials and for promoting the archivist and the archives as valuable and relevant contributors to the culture of the Web.

The Web, in both its 1.0 and 2.0 incarnations, has brought many challenges along with these opportunities. Archives and historical organizations face issues such as increased user expectations, maintaining archival principles in the digital world, copyright concerns, bridging the digital divide, and finding a balance between serving the needs of the physical and digital worlds. These complex challenges will be discussed in the conclusion.

It is worth remembering, as you think about the challenges presented by the Web, that we have no choice but to address them. The Web becomes more
closely integrated with our lives every day, and those who seek to turn back the clock to a time when archives were places that were governed by different rules are fighting a losing battle. The question for archives and other historical organizations is how they can best adapt and take advantage of the Web as it continues to evolve, through Web 1.0, Web 2.0, Web 3.0, and beyond.

REFERENCES

