

ADVISORY COMMITTEE ON THE RECORDS OF CONGRESS  
MEETING #45  
DECEMBER 9, 2013  
NATIONAL ARCHIVES  
ROOM 105

Members of the Committee in attendance: Karen Haas, Chair (Clerk of the House); Nancy Erickson, Co-Chair (Secretary of the Senate); David Ferriero (Archivist of the United States); Don Ritchie (Historian, U.S. Senate); Matthew Wasniewski (Historian, U.S. House of Representatives); Sharon Leon (Director of Public Projects, Center for History and New Media, George Mason University); Jeff Thomas (Archivist, Ohio Congressional Archives, The Ohio State University); Sheryl Vogt (Director, Richard B. Russell Library for Political Research and Studies).

Members present by teleconference: Thomas Mackey, (McConnell Center, University of Louisville); Steven Zink (Vice Chancellor, Information Technology, Nevada System of Higher Education).

Also Present: Karen Paul, (Archivist, Senate Historical Office, U.S. Senate); Robin Reeder, (Archivist, Office of Art and Archives, U.S. House of Representatives); and Richard Hunt, (Director, Center for Legislative Archives, National Archives and Records Administration).

HAAS: The meeting of the Advisory Committee on the Records of Congress will now come to order. Let me first take a minute to welcome Sheryl, Jeff and Sharon back. We're so happy to have you here in person. We're happy that money has been made available for your travel. So again, welcome. We're happy to have you here.

At today's meeting Thomas Mackey is not here in person but participating via telephone. John Lawrence is not available for our meeting so we will look forward to having him at our next meeting.

I'd like to welcome both the Secretary of the Senate Nancy Erickson -- I appreciate all the work that we do together not only here at the Advisory Committee but on several other projects -- as well as the Archivist, David Ferriero. I want to thank David for hosting us in this beautiful room with all the Christmas decorations.

I'll be very brief when talking about some of the things that have been going on in the Office of the Clerk since we met last. We are in the process of preparing for the renovation of the Cannon House Office Building. This will be a major renovation project that will take multiple years, and it will cause some issues for many of our Clerk operations. We've been spending a great deal of time in planning for that renovation. The building will not ever be completely closed. They will do it in segments. So we will be able to continue to operate during the renovation.

But one of the important things to know is that several of our operations will be moved down to another office building, the O'Neill Building, which is located next to the Ford House Office Building.

The other thing that we've been busy doing since we met last is working with departing Members. Since the last meeting, we have had four Members depart the House, three resignations, and one, Congressman Young of Florida, pass away. Robin and her team have worked very hard with these groups in making sure that their papers are taken care of and assisting them with any concerns they've had along the way. At this point I'd like to recognize the Secretary of the Senate for any remarks that she may have.

ERICKSON: Thanks, Karen. I too want to thank David for hosting our meeting today. We're all sensitive to the budget pressures that we're all facing, but I think it's great that we can all be together. I think it's important for our members to develop personal relationships with one another, which I think facilitates a good meeting discussion. Since our Advisory Committee's founding in 1990, our members have been instrumental in our efforts to shape, preserve and make accessible the records of Congress. I think not only because we've had the good fortune of having very dedicated members of this board, but also due to the fact that we're able to meet regularly and the members are able to listen to our problems and help us come up with solutions. So David, thanks for making this in-person meeting available to our members.

I also want to commend Brandon Hirsch, our former Senate employee. Brandon, as well as Shannon Niou of the Center, should be commended for their recent work in retrieving

some of the Senate's earliest Web sites. It was a project that was initiated by a request from Senator Kennedy's institute requesting some of his earliest Web sites. Brandon and Shannon were able to document the Senate's earliest homepages as they were called then from the 104<sup>th</sup>, 105<sup>th</sup>, 106<sup>th</sup> and 107<sup>th</sup> Congresses. These predate the Center's crawl of Congress's Web sites, and it's fascinating to look at the numbers. They demonstrate the Senate's growing reliance and use of the Web. The first archive transfer held 83,782 files. The second transfer 184,927 files, and the third 290,094 files. So you can see the dramatic growth in the Senate's use of the Web.

And then finally I want to thank Richard Hunt and his staff who have an incredibly busy day today. Not only are they hosting our meeting this morning, but this afternoon they're going to be hosting a "treasures" open house for Members of Congress and their families. This was an idea that germinated from an ACSC meeting and will be hosted by that organization along with the U.S. Association of Former Members of Congress. It's an open house that not only involves Members but their spouses and their children. They'll all see our Senate and House treasures and learn about ways that they can preserve their own treasures, and I think this is a very effective way to show young people, and demonstrate, how they too can have a role in preserving their mother or father's congressional records. So thank you for doing that today.

HUNT: Our pleasure.

HAAS: Thank you. At this time I'd like to recognize David Ferriero.

FERRIERO: Good morning. It's nice to have you here in my house.

ERICKSON: In your beautifully decorated house.

FERRIERO: Beautifully decorated. Just a quick update on some things that have happened since we last met. First addressing Nancy's comments. We love to have Members of Congress here in the Archives. We love the opportunity to show them around with their

staffs, with their families, however they want to come, because for us we hope it puts what they do in perspective. Every time they have a chance to see the Charters of Freedom for instance, they're reminded of their responsibilities. And they always comment on that. So anything you can do to encourage those kinds of visits we certainly applaud.

Since we met last, we have survived a shutdown. And I want to commend Matt Fulgham, who was the designated representative for congressional records. And I believe we had actually one request during the shutdown and it turned out that the records weren't even here, right, Matt? They were at JFK. We did unfortunately furlough about 3,100 staff of which 81 staff were essential and were carrying on the business of the Archives including the publishing of the *Federal Register* and verifying service records for burials at our national cemeteries. Essential services that we're responsible for.

In this room just last week the Public Declassification Information Board met and reviewed the recommendations of the report to the President; 14 recommendations to transform classification in this government. One recommendation is to reduce the number of different classification guides. There are now 2,500 in operation in our government. There were also some conversations around involving the public in helping us prioritize the next tranche of classification that we're going to be dealing with. So there is some exciting work ahead on the declassification front.

We have hired, stealing her from the Center for Legislative Archives, the agency's very first historian. Some of you are smiling because I was embarrassed in public with the peer group to discover that we didn't have a historian, and how on earth could the National Archives not have a historian? So Jessie Kratz has hit the ground running and I'm really pleased that we've found someone in-house and it's nice that she's coming from the Center for Legislative Archives. So look forward to good things from her.

You're going to hear from Pam Wright about innovation but I want to share with you some market penetration information that she shared with me recently. I'm always

pushing to get our stuff out there into the eyeballs of the general public. We have been focused on getting our content to where the people are, not expecting them to come and find us. So we have some data on the past fiscal year. We have an online public catalog and Pam is going to talk to you more about that. For the first 11 months of 2013 we had 540,000 visits to that site. We have a big YouTube presence, and 872,000 visitors came to see our YouTube content. We have lots of photographs on Flickr and 11 million visits to our content on Flickr. Facebook pages, we have 39 million visitors and friends on Facebook. There are 4,000 articles on Wikipedia that have National Archives content. And for last year 11 months we had 1.3 billion visits. So that gives you a sense of how we are using social media and how we're increasing the education and access to the records of the government by exploiting those social media vehicles.

The last thing I'll report on is that we are recruiting for the directors of two presidential libraries. If you know people who may be interested in the positions, and have interest in President Carter or President Nixon, there are job descriptions posted. Let me know if there is anyone that you want to recommend.

HAAS: Wonderful. Thank you very much. Next I'd like to recognize Matt Wasniewski, the House Historian. As you all know, our offices work very closely together, and I thought Matt could provide us with an update of what's been going on.

WASNIEWSKI: Sure, thank you. Our offices do work and collaborate on a number of projects, and I would like to update you on a couple of them. First I'm happy to announce that *Hispanic Americans in Congress*, which is the third in a series of books on women and minorities in Congress, is going to press at GPO and will be available sometime in the first quarter of 2014. This new volume profiles 91 Hispanic Members who served in Congress from the very first Delegate from Florida named Joseph Marion Hernandez through the freshman Members of the 112<sup>th</sup> Congress. And like the other books, the profiles are introduced chronologically with contextual essays. There's appendices with a lot of historical data, lists, and a companion exhibition page which replicates the whole book which will go up on our Web site when the book is debuted.

I'm particularly excited about this book because it tells stories about individuals whose stories largely have not been told. The field of Latino studies isn't as well developed as that of women and African Americans. So there aren't a lot of existing political biographies out there. Nearly two thirds of the people who served before 1945, the Hispanic Members, were what we would call statutory representatives, so Delegates or Resident Commissioners whose offices the Constitution really hadn't contemplated. That's an interesting story in and of itself, the history of how these individuals and their constituencies were incorporated into the body politic and incorporated into Congress.

Another publication we're working on is a House Page history, which is a shorter publication. Again we're working on this with the Office of Art and Archives and the Clerk's Office of Communications. This will be available in early 2014 as well. It's a booklet length history of the House Page program going back to the early 1800s. The study was commissioned by House leadership when the Page program closed in 2011. It's lavishly illustrated with historic photographs, images from the House collection. And the narrative is also supplemented by a number of oral histories that our office has done with Pages who served as far back as the 1930s. This will have an online component as well. It'll be available as a PDF which folks can download, and there'll be an HTML version of it along with clips from a number of the oral histories that we've done.

One of the exciting things we turned up in creating this was the first African American Page who served in the House who we had previously believed was a man named Frank Mitchell, who on the 100<sup>th</sup> anniversary of Lincoln's assassination came into the House. Representative Paul Findley sponsored him. This is in 1965, and has been widely reported. But what we discovered was the first African American Page was actually in 1871, and he had been sponsored by a carpetbagger Union officer who represented a district encompassing Richmond. And he appointed a young boy, 14 years old, by the name of Alfred Q. Powell. So we turned up some interesting material there.

The final thing is an update on our Web site, which I can't believe has now been almost a year since we launched it. This is again another collaborative project between the Historian's Office, the Office of Art and Archives, and the Clerk's Communications and Legislative Computer Services Office. We're very pleased with the steady progress we've made with the site. Our monthly visitors this fall, September through November, have tripled since the spring time period. And we're closing in on a pace for page site visits that should bring us to about 3 million page clicks in our first year of existence. We're really pleased with that.

A lot of the increased traffic in the fall can be attributed to implementing more social media. We launched a YouTube page in September. We recently added an RSS feed for the blog, which is updated weekly. And not to be outdone by our friends on the Senate side, we added a Twitter feed in early November, and we're closing in on about 1,000 users. So competition is a good thing.

HAAS:           Excellent, thanks, Matt.

ERICKSON: I also want to note that last week, a week ago today actually, Matt came over to the Senate side and joined Don in a joint talk on commemorating the 150<sup>th</sup> anniversary of the Statue of Freedom. It was for the Monday after Thanksgiving. I was wowed by the size of our audience. We love it when Matt comes over to the Senate side and joins us. It was a great session.

WASNIEWSKI:    Thanks for inviting me.

HAAS:           It's a great team. Before we proceed, let's check to see who we have joining us. Do we have Steven? Steven, are you with us online?

ZINK:            I am here from Atlanta.

HAAS:           OK, we're sorry you couldn't meet with us in person.

ZINK: Me too.

HAAS: Do we have Thomas with us?

MACKEY: Yes indeed.

HAAS: Wonderful. OK. The next order of business is to approve the minutes from our last meeting. Do I hear objection in dispensing with the reading of the minutes? You have some comments, Karen?

PAUL: It's on page eight. The fifth paragraph down. It should be Senator Cowan, not Collins, C-O-W-A-N, Cowan.

HAAS: OK. Anything else? OK. With that correction do I hear a motion?

\_\_: So moved.

HAAS: Second?

\_\_: Second.

HAAS: All those in favor?

MEMBERS: Aye.

HAAS: Opposed? None. OK. With the amendment the minutes are approved.

At the last Advisory Committee meeting, Sheryl raised the issue of the long term preservation and the use of data stored in correspondence management systems (CMS) used by Members of Congress for their congressional offices. We've all been aware of this problem and additionally the costs that are involved for repositories when they come



into possession of these files. So since we met last, Deputy Clerk Bob Reeves and myself have been speaking with the House Committee on Administration regarding what we could do to address this issue. The House Administration Committee is responsible for the vendors and the contracting for all of the CMS products.

What we've come up with is the establishment of a task force in the House that would include the House Administration Committee, participation from the CAO in the House, as well as the Clerk's Office to see if we can come up with some solutions for this problem. Our goal is to work through the next year in preparation for the new Congress, when those new contracts will be let. So we're making progress. We hope to report at our next meeting on how we are progressing. But at this point, we have the approval for the task force and we're going to begin that in the House. Sheryl, I don't know if you have any comments that you'd like to make regarding this.

VOGT: I'll say that this is coming more to the forefront of attention for people involved with congressional papers repositories. I believe Marc Levitt, who is at the Byrd Center, has tried to do a survey to see what other people are doing. He's talked with the electronic records person on our staff. So we're getting more collaboration among members of that group, which I think will lead to some good things in how we're handling them out in the repositories. Our greatest fear has been that many institutions, especially smaller institutions, do not have IT people who can work with others who don't have the knowledge and skills to work with these materials. And we'll lose a lot of information if we don't do something.

HAAS: Obviously we'll be looking to your expertise as we try to move forward in this area. I don't know if anybody else has any thoughts. Karen?

PAUL: Yes. The Congressional Papers Roundtable (CPR) is sponsoring a session at their upcoming meeting in August which will be here in DC this year. They are setting up a panel. Katie Delacenserie, Anu Kasarabada and Brandon Hirsch will be participating on that panel. Katie, am I correct? They will be inviting a representative from at least one of

the systems to come and do a demo for the archivists so that you can get a better sense of what those systems do and what's in them and so on. So that would be wonderful to fold into your task force. I think the goal of the CPR is to educate themselves about the systems and then to be able to better define what it is they would like too, because this will be a two-way process. And the thought was that the archivists receiving these need to know more about them, so that they can help determine what it is that they can handle.

HAAS: Well, I think this will be an item that we'll keep on our agenda for the next meeting. We can have additional discussion then on any progress that we've made. Karen, you're up.

PAUL: All right. I want to begin by thanking my colleague Robin Reeder who has done such a wonderful job at outreach to the departing Representatives that those who came over to the Senate have been so thoroughly briefed that it's made my job easy. So thank you, Robin.

I also wanted to report about committee records. Deputy Archivist Elisabeth Butler heads up our effort to capture, describe and transfer the electronic records for six Senate committees now, really helping those that do not have an archivist. We believe that it's important to have trained people doing this kind of archiving of electronic records in order to guarantee the authenticity of them and to make sure that we get enough descriptive information as part of the transfer. So we've actually been discouraging committees from undertaking this unless they have professional help or well trained staff to do this.

The records that we're working with are a lot of shared drives, staff files, and e-mails. And they are extensive and growing. During the furlough some of the IT staff who weren't furloughed took advantage of the downtime to do electronic records archiving. So we were pleased upon coming back to find even more waiting for us. That's a good sign of progress. In addition to these six, we have two other committees that do have archivists who because of the size of their backlogs are only able to keep up with the

contemporary files. These two additional backlog accounts have fallen to our office. So currently with eight committees depending on us, we certainly are anticipating continuing to play a major role in this area.

I would like to mention that one committee that we have been helping has since hired an archivist. And that is Matthew Stahl who is here today. Matthew, raise your hand, is the new Commerce Committee archivist. We're really pleased to have Matt join our group.

Over the summer we transferred the 109<sup>th</sup> Congress Senate committee hearing videos, which are notable because they are open records, and again our thanks to Brandon Hirsch and Shannon Niou because these resided on 849 DVDs and these DVDs were the only copy of the hearings. This was something that we worked on quickly. And thanks to Shannon and Brandon for getting those safely ingested.

We have seven Senators retiring at the end of this Congress. All have either selected repositories or are in the process of selecting one. Senator Lautenberg passed away and his collection is currently in storage pending resolution of his estate. Senator Kerry's records are also now in storage at the Archives until such time as he is ready to donate them. And we expect both collections to go to repositories. We had two placeholder Senators come and leave during this time. Both retained their records in private custody, and because they were here for such a short time there really wasn't a lot of records anyway.

For social media archiving, we've had an ongoing interest and we were especially encouraged by Julian Zelizer, who presented the ACSC keynote address at the May conference. He in fact singled out social media and e-mail as the two contemporary sources that historians hope will be collected.

A year ago, this Committee took a look at social media collected by Budget Committee archivist Anu Kasarabada and Homeland Security archivist Katie Delacenserie. At that same time, we knew there were 10 committees that didn't have archivists. So Deputy

Archivist Alison White actually archived the social media of these 10 committees. At that time, most of them were using a one-time two-week free trial of Cloud Preservation. Since that time, we have confronted the fact that it's really a challenge to get systems administrators to take on the extra task of archiving social media.

So we are working with the Technology Assessment Group to identify requirements and focus on a set of viable solutions that would meet the majority of office needs. Our hope is that a short list of preferred tools or maybe even a Senate contract will make it easier for systems administrators to do this archiving on a regular basis. The process is a little complicated working with the technology group. I'd like to thank Alison White and Elisabeth Butler, our two deputies, for doing a presentation to that group in November when I was unavailable. That presentation was followed by voting. They managed to come in with the highest vote of any project currently before the group. They got 36 votes.

ERICKSON: May want to let everybody know what TAG is in the Senate.

PAUL: The Technology Assessment Group.

ERICKSON: It's organized and hosted by the Senate Sergeant at Arms, which provides technology infrastructure for Senate offices, and is widely attended by the respective system administrators for Senate offices.

PAUL: So anyway I'm very proud of them. And then we had a get out the vote campaign because we knew it was going to be a difficult sell. We came in with 36 votes, so it's now on their to-do list of active projects. I'm not sure if the group is interested in the kind of evaluation criteria that we think we're going to use. If anyone is interested I can run down that quickly. Sharon, are you interested?

LEON: In a personal way.

PAUL: OK. I'll skip that but maybe we can talk about that after, but I will mention that Alison has spent a couple of weeks looking at various tools. And we think that we're going to again look at Cloud Preservation, ArchiveSocial, ThinkUp, Hootsuite, Archive-It, Hanzo and X1 Social Discovery. Did we hit the right group?

LEON: You did, you hit the majority, and yes, you hit the good ones.

PAUL: OK, very good. We have an ongoing issue or project with legislative commissions and drafting and improving the language that creates legislative commissions. Over the summer the Senate Legislative Counsel proposed a draft template that was circulated. Of interest to this Committee is the proposed inclusion of language aimed at strengthening commission management and archiving of their records according to current standards and procedures. Also included in the draft is language authorizing the appropriation of funds for the commission, including costs incurred in archiving the records of the commission. That draft is still being commented upon. We're very happy with the first draft, and that was the first step in the right direction.

Another project that we did over the summer was to upgrade the third edition of our Senators' Office Archives Toolkit. And we added three new tools, one being records management for shared drives, another for sensitive and classified information management, and another for preserving electronic records over time. And particularly that last tool, the preserving electronic records over time, in meeting with the Members' offices, we find that systems people are not thinking like archivists. So that particular tool is to encourage them to do what an archivist would do in that situation. I mean if you have an office that's going on for 20 years there's certain things that need to be done on a periodic basis to save those records.

I want to give an update on our accessioning project phase two. Alison White heads this project in our office. At our June meeting she announced completion of phase one, which consisted of the launch of a new accession form that maps directly to the Archivists' Toolkit and upgrades the degree of granularity of our description. So the

Archivists' Toolkit is now implemented for us in a production environment. And it's ingesting accession metadata from the new XML transfer form.

Phase two of the project was launched this summer. One of the primary goals of this phase is to maximize use of the descriptive metadata captured in the form. A revised form about to be introduced incorporates the addition of controlled vocabulary access points by using information currently contained within the scope and content notes. Jacqie Ferry of the Center staff and Alison devised a way for the name and subject records to be automatically generated at the point where the form is ingested into Archivists' Toolkit. The vocabulary relies on the Archives, the Library of Congress, and CRS legislative terms.

And finally about this project -- and to me this is the most exciting part -- Jacqie and Alison developed an XML schema specifically for Senate accessions. They analyzed and performed the preliminary mapping with standards and systems including EAD3, EAC-CPF, the National Archives Lifecycle Data Requirements, the National Archives Holdings Management System, and the National Archives Description and Authority Services. So what this means, the bottom line is that this independent schema should facilitate future migrations to other platforms over time. So as the platforms change the information itself will be able to move along with it because of this tagging that's in the form.

I think that they both deserve high praise. This has been a two-year project and to me this is really the ultimate goal. I mean to me it makes the data not immortal, but we know it's going to live longer that way.

I was going to report on the CSS system but have already done so. We're really looking forward this summer to getting some of the vendors and the archivists together to try to hash out what it is they would like in those systems. And finally to celebrate Archives Month in October at the end of the great furlough of 2013, we decided to celebrate the end of that. And the way we did is we had a toast a day to the archivists of the Senate.

And I have to tell you there were some really good toasts that came out of this, notably from Alan Haeberle, Senator Hatch's archivist, and Heather Moore, the Senate Photo Historian. But the toast with the most was by poet archivist Will Arthur, the HELP Committee archivist, whose toast was so great, we actually brought a copy along for you to see and it's on the sideboard. I challenge you to read this toast and identify all of the references. That ends my report.

HAAS: Karen, thank you for your report.

RITCHIE: Karen, could I add a coda to that report? Which is that we are always concerned in the Senate about preserving records, but we never quite know how people are going to use the records. This last week we got one of our most unusual requests, which was to use the video of the committee hearings that Karen was talking about. The video is going to be used apparently by a communications scholar who is looking at body language and how Senators make positive pronouncements, and how they lean forward during the hearings, and what they do. He's not interested in what they say. But for the record I'd like to point with pride at what a great job we have done in preserving these records.

LEON: If I may speak for just a second I want to commend Alison and Jacqie for the success with that XML mapping. It is not glamorous work, but it is essential for the data to move on through the constantly shifting and changing systems. So that's really a tremendous accomplishment.

FERRIERO: I would just like to second that Sharon, because when the list of vendors was rattled off and you responded yes that was a good list, that's what my first thought was, and then and how long will they be around? So this needs to be able to ensure that the records are going to migrate to other systems is really important. So good work.

HAAS: OK. Robin Reeder.

REEDER: Thank you, Karen. Since the June meeting Archives staff have been focused on long term and ongoing projects, as well as planning for upcoming projects. The Clerk spoke about the Cannon renewal project, but in anticipation of this we've been preparing our storage space in the Library of Congress to be a better work environment for the archival and curatorial staff since we'll be spending longer periods of time there working with processing records and tending to the House collection and photographs. So thus far the space has been painted and better computer capacity and access have been installed. We're awaiting the new carpeting this week which will replace the lovely existing orange carpeting from the 1980s.

We have updated our Committee Records Manual and quick cards, and you all have copies at your seats. The manual was originally published in December 2011, but this new manual includes updated classified records guidelines to reflect recently approved changes in procedure, has been made more user-friendly for committee staff at all levels by tightening up the wording and shortening the length of the manual, and increasing the clarity of the instructions. We had updated electronic records guidance with the most current recommendations in consultation with the electronic records specialists at the National Archives. We have emphasized the importance of unpublished records as part of what committees should consider archiving, and that published committee material be kept in the committee's office or disposed of when no longer needed. Additional appendices demonstrate how the forms should be used.

The Members' Records Management Manual that we have is next on the schedule for revising and is long overdue for an overhaul. It will match the look of the Committee Records Management Manual that you have to create an identifiable Clerk-branded suite of records management publications. This manual should be done in the next month or so and hopefully we'll have copies for you all at the next Advisory Committee meeting in June.

The Office of Art and Archives also spent the summer months formulating internal policies and procedures for the archives into a comprehensive manual that captures the



mission of the office and serves as a roadmap of how to accomplish varied tasks we all carry out on a daily basis. We've also been using the House Learning Center to teach classes on records management to House staff. Heather Bourk has taught two classes on committee records management. And Alison Trulock has taught three classes on records management for Members' offices. Both classes are being offered every other month.

We've been updating our records retention and disposition schedules for the Office of the Clerk and have met with all nine offices to discuss the types of records generated by the office and how they are used. Each office and the Clerk approved the schedules and then they are used by each office to implement an individualized records management policy. And we plan to follow up with the offices at regular intervals to make sure that their schedules are up to date.

Electronic records archivist Heather Bourk focused particularly on processing electronic records the Office has received, many of them intermingled with textual records. She entered them into Archivists' Toolkit with detailed description and sent electronic accession information to the Center for Legislative Archives, when the physical records were transferred. Although we are seeing an upswing in the number of electronic records we are receiving, e-mail remains a challenge.

The Office of Art and Archives continues to work in consultation with the Historian's Office to maintain the records and research portion of the History, Art and Archives Web site. In particular new finding aids are being created using Archivists' Toolkit. And keep your eyes on the Historian's Twitter feed for notifications when new finding aids are posted.

Here are some statistics from the last Advisory Committee meeting that cover from July to December. We've only had four consultations with Member offices, which is much lower than this time last Congress, but we had 27 consultations in the first six months of 2013 as opposed to 13 in 2011, so this might be why. We have the same two consultations with committees, the same as it was this time last Congress. The records

transferred to us is a total of 69,000 pages, which is much lower than it was this time in 2011, when it was 290,250. But we have an upswing in the number of empty boxes we've been sending out to the committees. So I think we'll be getting them, it's just taking a little bit of time. And the loans, 70,500 pages is about the same as it was this time last Congress as well. We've also gotten 17 information requests from Members' offices, 21 information requests from committees, 25 requests from the general public, and six requests for internal House offices. And that's it. Thank you.

HAAS: Well, thank you for your report, Robin. I'd like to join Karen in her nice comments about the work that Robin, Alison and Heather have been doing. I mentioned the departing Members, but what I didn't mention is about the incoming Members. We've had one special election so far. We have another one tomorrow. And Robin and her team are the quickest with getting letters up there, the quickest with knocking on the doors to let folks know that they are available to assist. So I really appreciate all the hard work they've been doing.

Our next order of business, before we turn to Richard Hunt's annual report on the Center for Legislative Archives, is to hear from two speakers from the Archives. First is Jay Bosanko, the chief operating officer for the National Archives. He'll be talking to us about the agency's issues regarding space. Thank you, Jay.

BOSANKO: Good morning. Thanks for inviting me today and giving me the opportunity to meet with you again. I get to be the bearer of the bad news. Pam is going to talk about the exciting fun stuff. This morning my youngest daughter asked me about my day and what I was going to be talking about and I described what I was going to convey to you today. And she responded with a very serious oh. I thought it can't be that bad. So I asked her where her reaction came from, and she looked at me. She goes, "Think about how the innkeeper felt when he said that there was no room at the inn." It's not quite like that. But OK.

You're all well aware of the limited space available that we have in this building. This is not necessarily a new issue for you. But it is something that's challenging NARA quite significantly, and I wanted to put some of the information we shared with you at the June meeting in context. This building was essentially full back in 1970. We started diverting archival holdings from this building to the Washington National Records Center in Suitland, Maryland. It took us until 1993, 1994 to truly open Archives II in College Park, Maryland. During that period from roughly 1970 until that facility opened, we diverted over 700,000 cubic feet of records that we should have been storing in a building like this to Suitland. When Archives II opened its doors it had roughly 1.7 million cubic feet as available space, but we'd already diverted 700,000, almost 800,000 cubic feet, to Suitland. In other words the building was nearly half full when it opened.

But let me put our challenges in true context. In 1985 when we gained our independence, our staff was roughly 3,096. And our archival holdings were roughly 1.4 million cubic feet. Since then our staff has increased by 73. We're now at roughly 3,169. But during that same period we staffed four new presidential libraries, took on the responsibility for the Information Security Oversight Office and the Office of Government Information Services, so ISOO and OGIS. We also expanded our responsibilities with respect to electronic records and a host of other responsibilities. But during the same period where our staff grew by 73, our archival holdings grew by 3.1 million cubic feet.

Today the National Archives is responsible for over 4,619,000 cubic feet of archival holdings. When Archives II opened in College Park at the dedication ceremony which we'll be marking the 20<sup>th</sup> anniversary of this spring, it was noted that we thought that building would meet our space needs through 2007. There's no more room at the inn. We have been working incredibly hard to try and find a little bit here, a little bit there. We've added 4,000 cubic feet worth of storage to the Center's capacity. We've added -- literally trying to find alcoves and nooks and crannies that we can -- a little bit of shelving. But we are in a really challenging position as far as space.

And I wanted to share this with you so you understood it wasn't a business decision of well, we can't move these records to make room for the records of Congress. We are truly out of space. And when we look at growth, a lot of people think or assume that the paperless office is upon us or will soon be upon us. With our growth over the next 20 to 30 years, we need another probably 150,000 cubic feet for the records of Congress, just the textual materials that we know already exist. And with respect to the projections for what we need for the records elsewhere in the government, we're still working on numbers. But we're probably looking at needing several million cubic feet before we start to realize the decrease that everybody expects is coming. Band-Aids won't work any further. We've found every last little nook and cranny. We've added shelving where we can. We're now trying really inefficient means to try and carve out tiny little bits of additional space.

Moving things from location to location doesn't make sense. We've been able to acquire some additional space elsewhere in the country. But we need to figure out how we're going to use that space in an efficient manner which makes sense both to the researchers and to the agencies and other customers, such as the Congress. We could find plenty of space for the records of Congress, but I doubt you want us to move everything someplace else in the country and have it serviced from another location like that.

We need to find a longer term solution, and that probably means additional capacity here in the National Capital Region. It took us from 1970 until the early 1990s to acquire what is Archives II. I don't think what we need going forward is something as complex or as robust as the facility in College Park, but we do need some means to store records and then leverage the existing capacity and existing staff resources that we have in the National Capital Region. It's not that we need to duplicate our conservation capabilities and duplicate our research rooms at yet another location. But we need to find ways that we can use the capability that's already been built and just be able to service the records out of those areas.

In order to start figuring out a real solution -- I mean even when we start talking about this amongst ourselves, the staff -- the mindset has been such to just try and figure out how we can get just a little bit further, over that next hill, around the next corner. And in the discussions with Center staff -- and we brought together staff from a couple of other offices at the Archives -- we really had to push to come up with a true long term solution.

They gave me a report on 18 November that lays out a dozen options that they looked at. There's a lot more work to be done. It's not something I can share with you at this point. Essentially we have to look at each one of these options, figure out what the cost implications are, what the implications are with respect to service delivery, and the likelihood of success. There's no point in pursuing options that aren't going to be realistic. No matter which option we look at, there's clearly going to be a need for significant investment. But as I said before, the Band-Aid approach that we've taken so far isn't acceptable. Not to us, and probably not to you.

But in the meantime we continue to set the bar high with respect to the storage and service for the records we hold now. We know right now we have enough room to get us through 2014. And the real challenge for us is any true long term option or even some of the immediate short term options will take some time to actually implement and make real. It's truly a challenge that we're going to need to work with you to figure out what options there are. And we probably won't be able to simply work on it every time there's one of these meetings. We're probably going to have to do some work in between. Be glad to take any questions.

FERRIERO: Can I just add to that that Jay has painted a picture focused appropriately on the records of Congress. But we are out of space in 44 facilities around the country. So it's a huge problem for the records of government in general. And it's going to take -- and the reason that we're being so deliberate about this -- is this problem is going to take a long term solution rather than the short term. And it's going to take the support of Congress to make it happen, both Congress and the White House, in order to pull this off. So we're going to need help.

HAAS: Jay, thank you for your report. The alarm was sounded at the last meeting I think, and it made all of us think pretty seriously about the situation that we're facing. We are obviously going to need to be partners in this. So let us know as you're going forward how we can assist. It is a real troubling issue and something we need to come together on to try to find a solution. Thank you.

Next I'd like to welcome Pamela Wright to the table, who is the chief innovation officer at the National Archives. She'll be talking to us about ways to improve the online catalog with respect to better access to descriptions for congressional records.

WRIGHT: Good morning. I have old-school paper handouts for anybody who would like them. It looks like we have the monitors going that you can look at as well. I'm really pleased to be with you today and glad to talk about the Online Public Access Catalog. I just wanted to give a little bit of a quick historical context, and provide a current status of where we are with the Online Public Access Catalog. And then we'll talk about some of the exciting new ideas that we have going forward in the near future.

So we started really working on a catalog at the National Archives back in 1999 with the National Archives Information Locator (NAIL). It was focused on motion pictures mostly and was the first attempt at pulling together things into a centralized database. We knew that it would be easier to update and keep updated, be easier for users to do searches across various record groups and series and collections. NAIL was our first attempt at centralizing the catalog.

One of the lessons that we learned from NAIL going into the Archival Research Catalog (ARC) was the importance of standardized data and standardized metadata. And although we had authority controls and had talked about the Lifecycle Data Requirements Guide that was mentioned before in some of the work that we'd done, there wasn't that process to ensure that there was review and QC on the back end. So we pulled data in that needed to be cleaned up. When we got the Archival Research Catalog, which I think

you guys are probably pretty familiar with -- we've had it over the last decade -- we really established the processes for standardizing the metadata to do review and QC and to move the agency forward with pulling everything into a centralized database.

In 2009 I worked on a committee that started to look at ARC and say, "How can we improve the user experience with the Archival Research Catalog?" And we came up with the Online Public Access pilot in 2010 . The big difference with that pilot is that we understood from user studies that we had conducted that users are really interested in the documents themselves and really want to see those first, if at all possible, then see the contextual information, our descriptive information as well. But if we have the documents, that could be the first response to their requests.

So we talked about organizing OPA in such a way that it was best for novice users immediately. And then the more sophisticated you got, you could drill down and find more information. And so descriptions with digital copies came up first in brief hits. And then descriptions where you would have to come into any of our offices would come up next. Anything in Archives.gov, for example a *Prologue* article or something relating to your search that's responsive, would come up. Presidential library Web sites would then come up. And then our authority files that have creating organization and people names in them as well.

And so that was some of the concept that we got from Online Public Access, the pilot project. The digital copies are prominently featured. The results can be exported in HTML, XML or text. Users could tag in this catalog for the first time. It's the very first time that NARA had a social component to our catalog. And I'll talk a little bit more about that later. Also at the time it was cutting-edge, but now you just expect it, users could bookmark and share results on any kind of platform. And so we had the 'add this' button added to that. At the time when we conceived of that, you could see it on Web pages, but not many catalogs had it. Now it's just an expectation. I have a feeling that some of the things I'm going to talk to you about today in not very long will just be user expectations. So things that are exciting to us immediately become expected.

Just to show you a little bit of the history of the growth of the catalog. We started with a few thousand descriptions from NAIL that went into ARC in 2003. And ARC started with -- it had about 500,000 or so descriptions and moved on up to 5 million descriptions by 2011. That's reaching the scalability level that ARC can handle. And so we took it to the top. I remember in 2005 when I worked on ARC we had a big discussion on whether or not we would ever make 1 million descriptions. It was just beyond our comprehension. The OPA pilot now has almost 7 million descriptions in it. About 200,000 at the series level, 5 million file units, a little over 1 million item-level descriptions, and there are 2 million digital objects now in the catalog.

I just wanted to talk a little bit about the legislative archives series that are in NARA's online catalog. Currently Legislative Archives has about 82% of the records described at the series level, almost 900 series have gone in, 180,000 cubic feet described out of a total of 219,000. And this just shows the incredible growth over the last couple of years. In the last two years alone, since they've launched their description initiative to get records into OPA, they have described over 94,000 cubic feet of records in just two years, an amazing accomplishment. Matt, your team, and Jacqie, -- I just really appreciate the work that your staff have done. They've worked hand-in-hand with us and it's just been incredible. So we're at 82% today. Not that far to get all the way through. I also want to add that you have well over 5,000 digital objects in there as well. So it's a good story.

So here's some information about what we're trying to do this year. We have had the OPA pilot going now for the past couple years. It is not scalable beyond what we have in it right now. And what I'm very interested in doing is for OPA production, the next level, immediately to get scalability into it. Here's some reasons why. We've been in digitization partnerships for the last five years with Ancestry.com, Fold3, FamilySearch.org and they have created millions of digital objects that we are able to put into the catalog. The agreement was that they would create the digital objects and the metadata to our standards. They gave us both of those back. We could put the metadata up immediately, but the digital objects were suppressed for five years so they could



recoup costs. Well, the five years came and went much faster than I realized it was going to, and in 2013, the first year, we were able to put 250,000 of their digital objects up in the catalog. What's the 2014 target? Ten million. 2015, 12 million. And it just keeps going from there. So we have to have scalability like we've never had it before, and that's one of the number one things we want to have with the new OPA production that we're working on this year.

Secondly, scale is great, but if you can't find anything in a haystack that big, how useful is it? So our search needs to be updated and improved. We're working on a lot of enhancements with search. Our contractor is an expert in search who's doing a number of things. He's approaching it from a number of points of view, from giving digital objects preference so that those bubble up to the top in brief results, in OPA production with hundreds of millions as it's doing right now in OPA pilot. We want better field scoring. This is probably getting a little in the weeds. And better proximity ranking. And he wants to do some group ID so that things come up and are what you expect when you do a search. It's responsive and easy to use for the user.

Right now OPA pilot has 10,000 tags in it as of December 1<sup>st</sup>. That's pretty good but I expected a whole lot more tagging going on. In Flickr we have hundreds of thousands of tags. So the question is the implementation of tagging in OPA. I want to make it easier for the user to do, and we want to start some tagging projects to really get tagging going in OPA. The purpose of tagging, then, is to feed that index to make it more searchable, again to keep that cycle going of good access. And then I'm also really excited about transcription. We've had a really successful transcription project on our Citizen Archivist Dashboard. We had an open source Drupal technology we called Transcribr. And we put 300 records, 1,000 pages, up that were transcribed in a two-week period from the public. It was with very little effort. We didn't say very much about it at all. Just on social media channels. And just the response that we got back was so overwhelming that we definitely want to pull that into the catalog.

FERRIERO: Why is transcription so important?

WRIGHT: First of all, to make it easier to find the record. So when people transcribe it, that information gets pulled back into the search. So words that are used in handwritten documents that right now we only see at a certain level you'll be able to actually dive into the text of those documents. There's more that I'll talk about at the end.

FERRIERO: For me it's because cursive isn't being taught in school anymore and kids can't read these documents.

WRIGHT: You're stealing all my thunder, but that's good. So we're excited about that, and I'll talk about that with the Innovation Hub and some of the ideas we have about getting kids working with volunteers to read primary documents and handwritten materials. Oh, and there was one other one on here. APIs. This I think is vital. So we are not the only creators of user interfaces and user experiences. And in fact a lot of times we're the last place people come to. They'll go to Wikipedia. They'll go to other places that do excellent jobs at user interfaces. I still want to do an excellent user interface. But I really want to be able to give other people an opportunity to download our records and make something I didn't even think of, none of us even thought of. The way that users are using the materials in ways that we have never thought of before. You mentioned looking at the body language of Senators, and there's all kinds of fantastic things that are happening out there. I want to give people an opportunity to download the records easily or access them easily in an automated fashion where they don't have to call me and ask for a CD or something that they can use. So we're very interested in getting APIs worked on this year so that we can do more of this kind of working with other people and having great things come out of it that we haven't even thought of yet.

We talked about this a little bit before, but all this is is about liquid data. By having standardized intellectual and technical metadata -- and we had it in a centralized database. By pulling it all together as opposed to having it in a lot of silos, we're able then to pour that into places we've never done before. And folks that started the databases and the

digital standards in the past I don't even think realized the opportunities that will be coming and are coming rapidly to us. And we'll talk a little bit about those.

So it's not just about users being able to access our records. They're no longer just consumers but they're also producers. We want to make access, but we also want to make engagement easy, interesting, fun. I even want it to be addictive. I'm interested in gamification for our records. I'd love to build a community on top of this catalog in which people not only just access the catalog but contribute to the catalog through transcription, through uploads and scans.

I have a friend who loves online poker, and when you look at the screen of the online poker, there's the table, and there's all the different people playing the game. They can talk to each other, they can see how they're working with the cards. And he spends hours, wastes hours at that. And he pays for the privilege to do it. If we could get something that's that good that people would actually want to do and actually do it from anywhere in the world, I think it would be a great success.

I'll talk a little bit about the Archivist introducing the concept of citizen archivist in 2010. He drew parallels to citizen science projects and such and reimagined the agency's relationship with the public. That's where we got these ideas of engagement from. The Citizen Archivist Initiative that we have online right now engages the public in crowdsourcing activities such as tagging and transcribing and scanning to help make the records more accessible. And that's what I want to pull into the catalog. I think we pilot a lot of these things in the dashboard and then we want to get them into the catalog. And the catalog can then be part of the dashboard as well.

I want to return to the idea of liquid data. We've done all this work that's built on the last 30 years of creating finding aids. We've pulled those into centralized databases. Now we're taking the centralized database data and pouring it into third party platforms. So DPLA, the Digital Public Library of America, we've provided them with 2 million of our descriptions with digital objects. Every month they get 200,000 visits just on our records

in their catalog. That took no effort on our part except to give that to them. That reuse of data is what we're really excited about.

We're also working with Wikipedia. In 2011 we hired our first Wikipedian in residence. It was a student position. We loaned him out over the summer to the Smithsonian where he did some great work, and now he's back, and he is a full-time permanent position at the National Archives. Our Wikipedian in residence. I think that's the first one in the federal government, and one of the first ones in archives around the world. And his focus on working with the public, on fidelity to the records, and on the love of the content is really where description is going in the future. I think he's really one of the future describers for the National Archives.

This slide is our Innovation Hub that we just started this last month. This is in what used to be the A1 Library downstairs. And it's a place for public engagement. What we're trying to do in the hub is have in-person meetings about online projects. So we want to meet with traditional users such as genealogists, historians, and educators. We're very interested also in meeting with new users like Wikipedians, coders, interested communities that are associated with us like FADGI, the Federal Agencies Digitization Guidelines Initiative group, or Presidential Innovation Fellows. This is a place where people can work together and talk about online issues.

Here's the vision that I think David was talking about earlier. The idea of bringing in students that come and visit on spring break. Maybe they could come down to the Innovation Hub for an hour. We'd have senior volunteers that are available that could look at handwritten documents, primary documents that might be of interest to them. They could spend a little time doing some transcription. We could provide them with information so that they could go back home and continue doing volunteer work. I'm very interested in researching the ability for them to get student service learning hours that are required both in high school and college now and rewarding them for that. I mean I think we have an opportunity to get lifelong volunteers hooked at a very early age

and working with us on our projects. So that's the vision of the hub. And this is what David talked about earlier.

Why is it that we're interested in third party platforms? You just get so much bang for the buck. And it's access like we've never seen before. And OPA is vital to that and it's important, but it's the reuse of that data on platforms that's just phenomenal with the kind of bounce you get off of that. So thank you very much. That's all I have to say. Are there any questions or comments?

RITCHIE: I'll ask a question. One group that I'm concerned about are the scholarly community, the historians and political scientists, some of whom aren't as up on using electronic records as some of the younger groups are. What kind of outreach have you got? What kind of tutorials or what kind of announcements do you make to the professional organizations of people who come to the Archives who do research to learn the new system?

WRIGHT: So at the major conventions we've had booths where we talk to people. A great deal of it comes in through e-mail. There'll be questions. And we just say, "Contact us." And we have a lot of one-on-one with folks that proactively ask us questions. So there's those two ways.

FERRIERO: So we have AHA coming up at the end of the year. How about if we do an open house in the Innovation Hub for the participants?

WRIGHT: That sounds great.

LEON: You luckily have someone here who's on the local arrangements committee for AHA. They can probably swing that. I have a couple of questions for Pam. But the primary one is what's the time horizon on the OPA production.

WRIGHT: So we just did our high level requirements and we're working through, we're drilling those down right now. And I think probably by the third quarter of FY 2014. So late summer early fall we'll have the first launch. Then my understanding is we're doing this in sprints, regular sprints, so that it can continually be updated, because as you know working on these systems, it's never done, and there's always updates to it. I'm mostly concerned about the scalability because we want to get that first 10 million from the digitization partners up this fiscal year in 2014. And then after that the other big five that we talked about.

LEON: So the reason I ask about the timeline for implementation is that as you mentioned there's been this tremendous gain in the description from the folks at CLA. And those records are effectively hidden right now. I mean they're really tremendously difficult to find. The CLA Web site, if you click on the link that says, "Search records of Congress," it goes to a simple search for the entire National Archives that is not restricted to the records of Congress. You can't search by record group. You can't search by committee. You can't facet by any of those things. And so the folks at the House who obviously have remarkable stacks of things to do are producing PDF finding aids because you can't get to the stuff. And I'm not somebody who is a scholar of Congress. But if I search for the Pure Food and Drug Act, I get stuff from exhibits. And I can't find my way to the actual records. And so what I'm concerned about is remediating some of the existing issues in the time between now and the implementation. If you go to Archives.gov there's not a link on the footer to the records of Congress. I mean it's a major -- you can get to presidential libraries, I'm almost positive, but you can't get to this stuff. And since it's not the same as other kinds of records, it's not the same as the rest of your holdings, and so I'm worried about stuff getting buried.

WRIGHT: I would be glad to meet and talk with you about what we can do from here to there. I know that we had talked a couple years ago about a Web page that provided links and that made it easier to use. I haven't heard back on that but we can talk about that more. And perhaps update that. But yeah we definitely don't want burial.

LEON: Because the description is there. Finally it's there. And I think that the work on the APIs is spectacular. And I think one of the primary users of the API is going to be the House when you get the chance because people go there looking for the stuff. But for now the repository is here. And so if we have the description we should be able to find it.

WRIGHT: And there's easy ways to work on that where we can link out to a Web page that helps drill down, because it is a massive haystack. It is huge. And I think ultimately those APIs allow you to pull out of that and create your own little world that's easier to navigate.

LEON: And so I think I assume that we're going to see the faceting by the name authority files eventually and those kinds of things that we've been hearing about for a really long time. And I think that's going to have a tremendous effect on findability. But in the meantime if we can think about what we can do to surface all the work that's been done in the last couple of years to make that description visible so that scholars can find the records but also people like me who are not experts in the field can find the stuff that I need to teach with on a regular basis. The OPA pilot, where is that residing at this point?

WRIGHT: [Archives.gov/research](https://archives.gov/research). And it says OPA.

LEON: So it's not the primary search that's running right now.

WRIGHT: It is right now, just in this interim. ARC has been it. And as we move this year from ARC to OPA production, the pilot is the bridge this year. So yeah it is right now. But it's just for the few months until we get into production. I mean I think what you want, and I think what everyone wants, the bigger this catalog gets, the more important it is to have offshoots from it. Like a big bowl of cake batter. And you want a specific kind of cupcake coming out of that. That offshoot is what we need to focus on for you so that you're not swimming through exhibits and other things that are tangential. I still want you to be able to do that within the catalog. But having special pages, special portals I think are valuable.

LEON: And I assume that it's true for the presidential libraries too that you want to be able to focus on the particular and then go out to the wider universe of context. And that's what you get by having them all in one big catalog. But you got to have the starting place, got to have the front door.

THOMAS: I think it's also important, you're talking about cakes and cupcakes, to make the cupcakes readily available up front so people aren't going through a bunch of cake to find the cupcake. Or if someone is looking for the records of Congress, they should be able to do that right up front rather than going through things.

WRIGHT: And when you say up front, you mean up front on Archives.gov or where's up front?

THOMAS: Up front in the catalog, the page that people go to when they first bring that page up. It should be there. Otherwise people see the search engine and they'll start searching. And they won't get to these subunits. Subunits, you need to be able to see them right up front. And certainly I mean we're using the records of Congress as one example but certainly there are numerous other examples.

HUNT: There's certainly a structured schema for the records of Congress just given the way the institutions organize themselves. So it's teasing out those attributes in a way that is made available to communities that are interested in those institutions and their records. I wanted to ask you this question. With the possibilities of API development by someone in this community, is there a necessary financial incentive to get people to develop APIs? Or do they do it out of the goodness of their heart and for all?

LEON: Well, it's not developing the API. It's using the API. It's including the API in other things. And there's a remarkable community here, at least in DC, of open access hackers who want to do fun and cool things with your data. And so I think that that's just the local community that I know. Lots of them work at the Library of Congress and do



this on the side and those kinds of things. Also in the local universities. And so just having access to the data. To have access to a good data set is often the first task in doing something interesting. There's not enough data out there. And so every few weeks I spend a lot of my time pounding on the doors of museums and historical societies urging them to make their metadata and their thumbnails available so that people can use their stuff. And they're much more proprietary than the folks in the library world are about data. But the more that the stuff gets out there, the more interesting kinds of applications will be built around it.

FERRIERO: So it's a great opportunity for a meetup in the Innovation Hub of this community.

LEON: Oh absolutely. Have a hackathon with the API and let them go to town.

HAAS: Comments for Pam? Thank you very much. Next on the agenda is a report by the Center for Legislative Archives. Richard Hunt, the director.

HUNT: Thank you so much. I think if you've looked at our annual report, I think data is the word of the year and of the day. In addition to all the data that has been added to our description, you see that we're now collecting data on research usage for the first time, and it allows us to have a better understanding of trends that you might not see and where we need to focus our description and where we can get as much payoff with the resources that we have. You'll notice in the electronic records section there's a processing data section that always disturbs me. You'll see we get electronic records in and we get electronic records doubly preserved and transferred into the CRI ERA at Rocket Center but there's also data in limbo. And you see that given the resources we have, we focus on the processing of House and Senate committee data first.

But there are other categories that just by the nature of what we have available in staff resources and in processing equipment, there's always going to be a significant amount of data that is staying in limbo. And that's one of the challenges we face in today's world of budget constraints, to make sure that we have proper investments in the Congressional

Records Instance and our electronic records service staff. So you'll hear me comment on that frequently.

You'll notice for the first time in an annual report we had a celebrity sighting thanks to Kate Mollan and her good work on the 13<sup>th</sup> Amendment as part of the story of the Lincoln movie. And David and the Foundation making that wonderful award to Mr. Spielberg.

Before I point out a few upcoming highlights that are not in the report – I want to see if you have any questions about the annual report that you would like me to address. No? That's good, that's encouraging. Well, let me tell you what we're working on next. The reference staff is producing its first digital video to be featured on our Web site providing novice information on how to do research in the records of Congress. And we envision this as a series of short two-minute or less videos that take you into the various subspecialties of doing congressional research for the novice and then for the experts, so that people have a little better understanding about how to tackle this mass of data.

We are working with the Facilities Office in this building preparing a new Archives I home for both instances of the Congressional Records Instance of ERA. And that means the unclassified and classified versions should have a SCIF home by March 1<sup>st</sup> of 2014. So we can then get the system certified and we can put classified records into it. It will make our efficiencies and effectiveness that much higher, that Brandon and Shannon do not have to run to Archives II to start records processing then they have to come back the next day. They can do this on site. So that's a material improvement for us.

We're also working with the Exhibits Office to showcase records from the 1<sup>st</sup> Congress as featured documents next year to commemorate the 225<sup>th</sup> anniversary of Congress's meeting in New York City in 1789. So we're very excited about that.

In our researcher talk series, which has been a really tremendous success this year, we're kicking off 2014 with David Kyvig, who is the distinguished research professor emeritus

from Northern Illinois University, who will be speaking on February 13<sup>th</sup> on “The Offspring of Our Own Choice, Amendments in Constitutional Thought and Practice.” He is one of the preeminent scholars of amending the Constitution, and we look forward to his remarks.

Our Charlie Flanagan will be conducting two series of workshops early in 2014. In January he’s spending a week in the Florida Panhandle to train teachers from a variety of districts on how to use the records of Congress to teach civics. And in February he’s doing two days of teacher training on civics instruction in partnership with Humanities Texas and the George W. Bush Presidential Library in Texas, to continue our outreach on that front.

I’d also like to mention that after the meeting today the Committee is invited for a special guided tour of the Rubenstein Gallery which is opening tomorrow. So for those of you who can stay, we’d love to show it off to you. Any questions?

LEON: I have one brief one. Do you want to say anything about the reorganization of the Web page, the redesign that you have under way?

HUNT: Natalie Rocchio is working on that, and that should come out relatively soon. And we’ve basically taken a look at a Web site that has grown organically over the last decade or so and have focused it and made it much more simple and accessible to our users.

LEON: Just plug those things in, and you’d be all set.

RITCHIE: I had a question, you had an interesting chart here that shows the time periods that people are doing research. And are you noticing that as we approach the lifting of the deadlines for the 20-year and 30-year rule there’s considerable correlation between the statistics and the records that are open?

HUNT: That and the 50-year rule on investigative records really attracts a lot of scholarly interest. They're very excited to be the pioneers and the first ones into those records. So it reinforces our decision to focus on modern records which have been minimally described. Now we're seeing that the research traffic is there, which we suspected. And then it gets us back to how do we provide easy, understandable, granular access to these records and communicate to the scholarly community that these are open. So this is like our last frontier. We're getting the description done. We're happy with the way it's done. We're getting description from the records creators before they arrive. And now the last step is getting a really significant, elegant way to get it into our users' hands.

LEON: User experience is not easy. It's never going to be easy.

HUNT: So we need your help.

VOGT: I think the way that you have presented the information about your research in the Center is really interesting. And I think that as time goes on it'd be interesting to look at what centers outside of DC, the kind of research use they're having. And it might just open new opportunities for collaboration in some way. So I think it's very interesting to have this. Very good.

HUNT: On that point we have the rich institutional records of the Congress, the House and the Senate. We have the processes. We have what was accomplished. But you're missing the people, and it's a human institution. And so that's why scholars need to go into Members' papers to get the rich stories of the people that served.

VOGT: I have one more question. I want to go back to the question of space. Having gone through a period in which we greatly needed space at my institution, I had materials not only on site but at three offsite institutions. We actually were reaching the point that we were considering: do we continue collecting not knowing where we're going to put it, or what are we going to do to resolve this? It was really a difficult two to three years where we went through the transition and then started raising money for our new

building. So I'd like to know what can we do to help with this? Is there anything we can do?

FERRIERO: I think you need to stay tuned until we have finished this analysis and come up with some options. But as I promised, you need to be engaged in this, because we're going to need help.

PAUL: Do you have like a timeline for the analysis and when?

BOSANKO: So I got the initial report a couple weeks ago. Ultimately we need to identify a short term fix that doesn't just get us a little bit -- we need like a three-year temporary measure and then a long term piece. The long term piece probably will dovetail with the Archives' overall larger space needs. It's just a matter of economies of scale. It comes down to square foot cost. It gets easier if we tackle the bigger problem. So we're probably looking at another 30, 60 days to look at what we came up with, look at whether or not we need to do any more research. That will help us be in a position to lay out some of the options we have.

The team that looked at this didn't just sit down and think what might we possibly do. They looked at facilities that exist in the federal inventory at this moment. One of the facilities they considered is one that's known to likely become available but isn't yet in the disposal process. So there's a lot of variables there. But I would say very early in 2014. And we've also got challenges that are associated with this, whether it's our own funding constraints that have been facing us, and then overall governmentwide limits on increasing our footprint. So we're probably looking at an ongoing discussion, but we can probably provide some more information in the next 30 or 60 days.

PAUL: You did mention, I think I understood you to say that by the end of 2014 you're going to be full. That really has serious ramifications for us. Unlike most of the executive agencies, we transfer things that are very recent. And we have to be able to do that because we have no alternative storage at this point anyway. And I know in terms of

the Senate we're already looking at five committee chairs retiring, which is really going to be like a domino effect throughout the committees. And so at the end of 2014 right now we would be anticipating pretty heavy transfer need for the Senate anyway.

BOSANKO: So the good news is that you have a group of people on our end that are deeply committed to doing right by the records. So we're not going to tell you you can't send anything to us. Richard is very concerned, the Archivist and I are very concerned about impacts on service delivery we're looking at. If we have to move things to another location, what would that impact be? Clearly there are some records that are used more frequently than others. There's a host of sensitivities as to what goes where. But we're not going to tell you we're not going to accept the records. But I can't stress what a hardship this is going to be for us. In any other situation I would imagine somebody would simply say, "You've got to find another solution on your own." This is one that we're going to tackle this problem in partnership and we will do right by the records. We will find a way and a space.

HAAS: Jay, maybe we can look at having an update the first quarter of year, as early into next year as possible. See how you're progressing. Thank you. The next item actually dovetails on the budgetary constraints that we're all under. And I wanted to just open it up for discussion. Our last meeting, we weren't able to bring our participants to town. Luckily we've been able to do that for this meeting. And I just wanted to get some input from our Committee members about their thoughts on going forward and also from David on what our options may be going forward.

FERRIERO: Well, I think a lot depends on what happens in the next month in terms of what kind of decisions are made around budget, whether sequestration is rolled back, whether a new level of sequestration is imposed on us. There's a lot of stuff up in the air at the moment which affects all of our -- the entire budget. And that's all in the context of I am all in favor of in-person meetings. Technology has wonderful applications but it doesn't take the place of face-to-face conversation. So it's not as if I'm trying to replace those

opportunities as much as I am a fan of social media and all kinds of technology. It does not solve that issue for me.

HAAS: Any other thoughts? I would just say I agree with you. I feel very strongly that we need to continue to have the participation in person. It gives us the opportunity for give-and-take. Steven, I feel badly that you're not here today with us, and Thomas, we haven't had the opportunity to meet you yet. So I really hope we can going forward continue to have these in-person meetings and work together to see if there's any way we can assist you in that. I don't know if there's processes that can help too. But I think that the technology is still challenging to really get the give-and-take that we need in these particular meetings. So thank you. I guess now we're on to new business. And I believe, Jeff, at the last meeting you raised the issue about e-mail. I didn't know if you wanted to have a follow-up discussion on the question of e-mail and archiving e-mail.

THOMAS: Yes. I'm a bit concerned about that. Both Robin and Karen touched upon, they are preserving e-mail from committees. I'm not sure how big of a priority that is for committees when they send records over. But if it could be bumped up a notch, I think down the road everyone will be grateful for that. It's the way people communicate now. And if you do not capture it you're losing a vast amount, be it even an e-mail saying, "Please see the attached." If you don't capture the attached then it's lost. And it's also something that the creators of the records themselves can unfortunately easily delete. It's very simple to hit that delete button and I think some education with committee staff members would be in order. And also perhaps ways to better organize their e-mail. I mean how many people here -- everything's in the sent and the in-box, whereas if you have education on the use of folders and organization it makes things easier all the way down the line.

PAUL: I think with the committee level we're comfortable at this point. I mean it's a constant challenge. Certainly education is important, but also the other key is to really work with the systems people to get that e-mail before something happens to it. And so we're trying to anticipate, for example, five committee chairs changing coming up and we're trying to

anticipate that and explore ways to make sure that the delete buttons don't delete the material. I think the greater challenge is with Members' offices and it's partially generational. I think the more senior Members tend to think of e-mail as a private conversation whereas the younger Members don't quite view it the same way. So I think that things are improving but it's still with Members' offices that is a great challenge. And we do preach preservation as much as we can. And sometimes we are convincing and sometimes we're not. So anything that you having relationships with Members' offices, if you can reinforce the message as well. I think it needs to really be made plain that if they're not saving it they're not going to have a whole lot of legacy because people really aren't going to be interested in using their records if the records aren't there. And the other part of that is to stress that the e-mails can be kept closed for a long period of time. A lot of staff think that the minute it goes to an archive it's open. And so there's a lot of education that needs to be reinforced on that point. Whatever you do, save it. You can hold on to it for a while if you want to. You can donate it, keep it closed. That message needs to really be reinforced with the Members. And it needs to be constant, because you can say it, they'll agree, and they'll forget about it and get concerned again. So it is a constant educational effort there, and sometimes it just doesn't matter, they've already made up their mind.

THOMAS: I certainly agree with you on the Member's office. One of the reasons I bring the issue up is the problems I have had going into Members' offices and talking about e-mail and this is why I'm trying to emphasize education, Members and staff, that yes you can donate this to us. It's material that we want. And yes, we can close it for as long as you want also.

PAUL: One of the points that I'd like to make is that the presidential e-mail exists from the Reagan time. And so a lot of their e-mails are already being saved. So why not save the rest of them, so that your whole story can be told? I think they don't realize that. They don't realize that their communications with the executive agencies are being saved. So really what are they going to lose if they don't save their own? That's a good argument I think to use.



THOMAS: Yes that's a good point.

FERRIERO: It might help if you could identify a couple of champions who get this and understand it. And I would suggest on the House side Darrell Issa, who has been incredibly supportive of all of our efforts around electronic records. He gets this. So a conversation with him and his staff about reminding Members of the House about this would be good. And Tom Carper on the Senate side also. A real champion of electronic records. Because if they hear it from each other they are more likely to get it.

PAUL: Senator Lieberman was really a champion of that for us. And he actually put out a press release about it that we use to show what he did. So he sent his to LC.

REEDER: I was just going to add that it is a very sensitive topic with the committees. What we try to do in our education when we have our yearly program, our committee records management course, is emphasize e-mail as well as all electronic records and try to get them to think in that manner. It's an education process. We just have to keep reinforcing it over and over again.

HAAS: I think one thing, Jeff, you just triggered for me in your comments, was the organizational part of it. I hadn't really thought of it that way, and I think to Robin's point all of this, we're in this high partisan sensitivity time right now in the Congress. And so that's something that people just really don't want to touch, they don't want to talk about. So if there's a way to try to lower -- I don't know what the right word is. But really look at it as an organizational legislative tool. And talk to our folks about the best way to organize their e-mail. Maybe we could make some additional progress in that area. But it is something over the last couple years that we have been working with both the committees and as Robin pointed out when they talk to Member offices about their papers. But we still have a lot of work to do.

THOMAS: Yes and I think when you talk to people, it's the way they use e-mail. The personal goes in with the professional. It's all mixed up. And it's the personal that they are worried about. So it takes education on how to use the system where you can try to keep those two separate. If we can get to that point where we're saying, "we're not interested in personal email, it's the professional emails that we're going for," it might make it a little easier to make that argument.

PAUL: I just wanted to say along the lines of what you were saying, Karen, that with committees I think to point out that it's really an administrative function that they need to be doing in order to be following the rules and statutes, and to stress the administrative side of that is one way that I think that we've been able to make a little progress on that is to treat it as not the format so much but the function that they need to be doing this. And so if you can get that message across to the systems people that that's where you can make the headway.

HAAS: Thank you. One other item that John Lawrence brought up at our last meeting was a discussion about leadership papers and how to handle those going forward. So I'd like to have that on the agenda for next meeting so we can have a further discussion about leadership papers and hopefully John will be here to participate in that discussion. Steven, how are things?

ZINK: Atlanta is not washed away. Rain here.

HAAS: Sheryl is happy to hear that. Is there anything you'd like to add for new business?

ZINK: No, but I was thinking there was an article, getting to the IT folks, about e-mail. It's very interesting. And there was a very good brief article in *Federal Computer Week* in August by someone from the Archives talking about agency emails and they mentioned congressional e-mail and the need for education. I was quite impressed.

HAAS: Thank you. Thomas, is there anything you have for the group?

MACKEY: Just wanted to hear what the updates were in particular with OPA and then the space issues as well. And with everybody else, it seems very troubling, and it'll be interesting to see how the budget shakes out here the next few weeks and see what can be worked out. So it's been very useful for me.

HAAS: Well, thank you both for your participation. Again we're sorry that you couldn't be here. But we do look forward to having you at our next meeting. Are there any other comments? Karen?

PAUL: I just wanted to ask Richard something. Did I understand you to say that there is movement on the capability to receive classified electronic records? Did I understand that?

HUNT: Yes you did understand correctly.

PAUL: You said it so quickly, I wasn't quite sure what you said.

HUNT: The classified system is still at Archives II where it has basically been duplicated and its attributes shared with the CIA so that they've gotten what they need from the technical paper standpoint. But they won't certify the system until it's in the physical space in which it will reside, because they have to certify that the space is secure as well as the system itself.

PAUL: The system is certified.

HUNT: The system can't be certified until it's in the SCIF space. But they've done everything that they could short of certification. So the onus was on us to find a space for both the unclassified and the classified CRI. We've located that space and Facilities has priced out what it's going to cost to bring that space up to the level that we need. And they're saying we can have this ready by March.

PAUL: Oh that's wonderful.

HUNT: Once it's in the space then we can go back to the CIA and say, "Certify the SCIF and certify the system that's in it." The unclassified one will be operational as soon as the lights are on and the wiring is in. It's an adjoining space. But given the space shortage it wasn't easy to find space that would accommodate our needs. But we have it now.

PAUL: Appreciate that.

HAAS: Any other comments or questions? OK, I'll entertain a motion to adjourn.

\_\_\_: So moved.

HAAS: Second?

\_\_\_: Second.

HAAS: Adjourned. Thank you.

The meeting concluded at 11:58.