

THE ADVISORY COMMITTEE ON THE
RECORDS OF CONGRESS
SUMMARY OF MEETING

December 3, 2021

The Advisory Committee on the Records of Congress convened for its sixty-first meeting at 1:00 P.M. on December 3, 2021. The meeting was held virtually.

In accordance with the provisions stated in Public Law 92-463, the meeting was open to the public. The meeting was scheduled from 1:00 P.M. to 2:30 P.M.

Members of the Committee present:

Cheryl L. Johnson, Clerk of the U.S. House of Representatives and Chair of the Committee

Ann Berry, Secretary of the U.S. Senate and Co-Chair of the Committee

David S. Ferriero, Archivist of the United States

Betty K. Koed, Historian of the U.S. Senate

Matthew Wasniewski, Historian of the U.S. House of Representatives

Danna Bell, Educational Resource Specialist, Library of Congress

Denise Hibay, Director for Collections and Research, New York Public Library

Tanya Marshall, Vermont State Archivist and Chief Records Officer

Norman Ornstein, Senior Fellow Emeritus at the American Enterprise Institute

Deborah Skaggs, Former Archivist, McConnell-Chao Archives, University of Louisville

Guenter Waibel, Associate Vice Provost and Executive Director, California Digital Library

Others present for all or a portion of the meeting were:

Karen Paul, Archivist of the U.S. Senate

Heather Bourk, Archivist of the U.S. House of Representatives

Richard Hunt, Director of the Center for Legislative Archives (NARA)

Hugh Halpern, Director of Government Publishing Office (GPO)

Danielle Emerling, Associate Curator and Congressional and Political Papers Archivist at West Virginia University

CLERK'S REPORT

Cheryl L. Johnson welcomed members of the committee and introduced new member Norman Ornstein, Senior Fellow Emeritus at the American Enterprise Institute. Ornstein was nominated to serve on the committee by the Speaker of the House, Nancy Pelosi, as a replacement for John Lawrence. The Clerk thanked Lawrence for his service on the committee. She also welcomed the co-chair of the Advisory Committee, Secretary of the Senate, Ann Berry, as well as David Ferriero, Archivist of the United States. She thanked Ferriero and the Center for Legislative Archives for hosting the virtual meeting. She also thanked Danna Bell, her appointee to the committee for her continued service.

Johnson reported on highlights of the Office of Art and Archives Department. Those highlights included work over the past several months on updates to the instructional manual provided to committee offices that offers guidance on records management and archiving. While the core records management and archiving practices remain the same, staff worked to shorten and simplify the text with a focus on removing jargon, providing more straightforward guidance and making outdated information current. The Archives Department also drafted new text and reworked existing content for guides designed as abbreviated versions of the information found in the complete manual.

Notable achievements:

The House Curatorial staff spent the second half of the year conserving and stabilizing works of art affected by the events of January 6th.

A memorandum of understanding (MOU) has been signed by the National Archives and the Government Publishing Office (GPO) to formally proceed with phase two of the archival storage construction project at GPO.

SECRETARY'S REPORT

Secretary Ann Berry thanked the Clerk for presiding over the meeting and greeted the committee members and presenters. She reported while staff remains in a hybrid system of on-site and

telework status, the historians and archivists have continued to fulfill all of their core duties and more.

Notable achievements:

Massive reorganization of historical material on the Senate website.

New publication is on schedule, entitled: *Scenes: People, Places and Events That Shape the United States Senate*.

Historians are conducting an oral history project to document the events of January 6, 2021 to record the experiences and insights of the Senate officers and staff on duty that day.

ARCHIVIST’S REPORT

David Ferriero thanked the Clerk and Secretary for their ongoing support. He reported that hardest hit by the pandemic has been the National Personnel Records Center in St. Louis. The National Archives for the past 20 months has been monitoring 40 facilities in 17 different states, monitoring infection rates in more than 20 counties, opening and closing and re-opening and re-closing research rooms and record centers and presidential libraries. As of the morning of December 3, 2021, he reported that 24 of those 40 centers are in high transmission areas, meaning 200 or more new cases, and 10% high positivity rate, 10 are in substantial transmission areas or 100 to 199 new cases with 9% positivity rate.

Six centers are in moderate transmission areas, 20 to 99 new cases and 5 to 8% positivity. None of our facilities are in a low transmission area. That translates into 10 facilities re-opened to limited numbers of staff and the public, and 30 facilities with limited staff. The museum and most of the presidential libraries are open on a time-ticketed basis and the research rooms are testing virtual consultations and visits by appointment.

The Archivist recognized Hugh Halpern, Director of GPO, and noted the signing of the MOU for the second GPO space and NARA’s willingness to support the project.

Notable achievements:

On the implementation of the Archivist’s Task Force on Racism, 40 staff volunteers worked to look at the employee experience focusing on recruitment, advancement, and opportunities in diversity and inclusion.

The reparative description project began meeting in July with 18 staff members from around the country. The working group launched a reparative description webpage on archives.gov and drafted a set of guiding principles for reparative description.

APPROVAL OF MINUTES

The Clerk called for a motion to approve the minutes. Motion was made and seconded and minutes were approved.

GPO REPORT

The Clerk introduced Hugh Halpern, GPO Director. Halpern reported on the status of the GPO buildout. He related how the fourth-floor space became available due to the ability to retire older printing equipment to be replaced with digital ink presses. The benefit of this space is that it is directly over the existing third-floor archival storage space that was previously built in the building. He reported that the design work will take a year to complete with a likely delivery in early 2023. He expected to solicit bids from firms to do the build-out and construction in the summer of 2023.

ARCHIVIST OF THE HOUSE REPORT

House Archivist Heather Bourk reported that the Archives Department continues the core work of supporting committees and members by managing new accessions of records and loans of previously archived records, providing records management guidance and responding to records related questions. She also noted many other projects that are in progress.

Notable achievements:

New streamlined committee manual was completed and published in August. Currently working with the Clerk's Office of Communications to revise four existing quick guides.

24 new House record descriptions added to the Record Search Database.

Continued research and drafted House record-focused content for the History, Art, and Archives blog and Twitter.

Participated in National History Day as judges and collaborated with the Historian's Office to compile web resources in support of next year's National History Day theme of *Debate and Diplomacy*.

ARCHIVIST OF THE SENATE REPORT

Archivist Karen Paul reported that Senate archivists continued to telework and tele-meet much of the time since the June meeting. The office scaled back a planned September increase of staff onsite in response to CDC guidance and increased COVID levels. In late summer, the Center for Legislative Archives' return to level-one operating status and cessation of archival transfers from the Senate to NARA resulted in over 550 boxes of new transfers accumulating in working offices. The Center resumed transfers when the extent of the backup became known to them, and committees were thankful.

As called for by the fiscal year 2020 Further Consolidated Appropriations Act, the Senate Committee on Rules and Administration and Senate Committee on Appropriations Subcommittee on the Legislative Branch directed the Secretary of the Senate to enter into a partnership with a public university in order to acquire information on best practices in archiving congressional papers. This information is derived from experience and insights gained as a result of processing, preserving and making available a Senator's large collection and will be used to assist current and future Senators with preserving their collections.

Notable achievements:

December 2020, the Committee on Rules and Administration and the Subcommittee on the Legislative Branch approved a memorandum of agreement establishing a partnership between the Secretary and Arizona State University, the repository of Senator John McCain's Papers.

During fiscal year 2021, the Senate transferred 228 new textual accessions totaling 989 cubic feet from 17 committees and offices and requested 47 loans totaling 120 cubic feet.

A transfer of electronic records on October 1st yielded 1.12 terabytes from 58 accessions and five committees. In addition, there were two electronic records loaned back to the Senate totaling 227 gigabytes.

Work continued with committees to archive social media accounts with the download of 49 accounts for 11 committees totaling 1.4 terabytes of data.

DIRECTOR OF THE CENTER FOR LEGISLATIVE ARCHIVES REPORT

Director Richard Hunt reported the Center was able to maintain uninterrupted Congressional loan services to support the current business of Congress, providing over half-a-million pages of records to committees.

He stated that expected reference demand would increase exponentially in the coming year. Researchers requiring on-site access to records had to defer plans for most of 2020 and 2021,

creating a backlog of researchers who want to schedule visits in the new year, and undoubtedly, new researchers will surface and place new demands for records assistance.

On the electronic records front, the Center will begin the preparatory work with the Internet Archive for the harvest of the 117th Congress web presence, which will begin in the fall of 2022.

The Center continued to focus on supporting teachers with existing lessons, eBooks and apps, and on additional opportunities to introduce teachers to these resources and to provide training on the use of primary source material in the classroom. The focus remained on cultivating active and informed citizens and on greater civic understanding of the constitutional framework for our governing institutions.

Notable achievements:

Restored accessioning of congressional records, transferring more than 2.5 million pages of textual records and 3 terabytes of committee data into the Center's holdings.

Increased outreach to teachers across the country providing 68 instructional webinars to over 1,100 teachers in 13 states.

Answered over 800 researcher inquiries.

Continued to work with the CVC Exhibit Renovation Project.

REPORTS

Tanya Marshall, Vermont State Archivist and Chief Records Officer, gave an overview of the work being done in the Vermont State Archives & Records Administration on a pilot project using Microsoft 365 to automate the transfer and ingest of state agency records into a digital preservation system.

Danielle Emerling, Associate Curator and Congressional and Political Papers Archivist at West Virginia University, gave a report on the recently established American Congress Digital Archives Portal Project, a pilot project to aggregate the personal papers of Members of Congress into a single online portal.

NEW BUSINESS

There was no new business reported.

ADJOURNMENT

Hearing there was no new business, Clerk Johnson asked for a motion to adjourn. A motion to adjourn was made and seconded and the committee was adjourned at 2:30 p.m.

I hereby certify that, to the best of my knowledge, the foregoing minutes are accurate and complete.

Richard H. Hunt
DFO Director, Center for Legislative
Archives

Cheryl L. Johnson
CHAIR Clerk, U.S. House of
Representatives

These minutes will be formally considered by the committee at its next meeting, and any corrections or notations will be incorporated into the minutes of that meeting.

Cheryl Johnson: Hello, everyone. I am Cheryl Johnson, Clerk of the House. This meeting of the Advisory Committee on the Records of Congress will now come to order. I welcome you all to the 61st meeting of the Advisory Committee on the Records of Congress. I'd like to take this opportunity to welcome appointees and members, and thank you for your continued service and interest in helping to document the work of Congress.

The Speaker's appointee to the Advisory Committee, John Lawrence, has decided not to continue his Advisory Committee service. His insight into the workings of the House and the history of Congress, as well as his thoughtful questions and contributions will be missed. John, thank you for eight years of dedicated service. The Speaker's Office has appointed Norman Ornstein, Senior Fellow Emeritus at the American Enterprise Institute. Welcome, Norm, and thank you for agreeing to serve on the Advisory Committee. I look forward to working with you.

I am also pleased to report that my appointee, Danna Bell, has agreed to continue her service. Thank you for your continued commitment to the work of the Advisory Committee, Danna.

Welcome to the co-chair of the Advisory Committee, Secretary of the Senate, Ann Berry, my good friend. I look forward to working with you as we lead this committee on other shared projects.

I'd also like to take a moment to welcome David Ferriero, the Archivist of the United States. Thanks to you and your staff for the work you do to preserve and promote the records of Congress, and an added thank you to David and the staff at the Center for Legislative Archives for hosting today's virtual meeting. I'm pleased that even though we've had a couple of little hiccups, technology has enabled us to continue the meetings of the Advisory Committee during the pandemic. I am hopeful that when we meet in 2022, that it will be in person.

At this time, I'd like to take a moment to share highlights of some of the work the Office of Art and Archives has accomplished over the past six months.

The Archives Department has spent the past several months working on updates to the instructional manual provided to committee offices that offers guidance on records management and archiving. While the core records management and archiving practices remain the same, staff worked to shorten and simplify the text with a focus on removing jargon, providing more straightforward guidance and making outdated information current. The Archives Department also drafted new text and reworked existing content for guides designed as abbreviated versions of the information found in the complete manual.

The updated version of the manual for committees was completed in August, and the companion Committee Quick Guides are expected to be completed in the new year.

Archives staff continue to support the record keeping needs of committees and offices by providing consultations on records management and archiving best practices, managing the transfer of new records for archiving, and providing in-person and digital access to previously archived records. Outreach to the House's newest select committee yielded several requests for meetings to discuss best practices for managing and preserving both print and electronic records.

The House Curatorial staff spent the second half of the year conserving and stabilizing works of art affected by the events of January 6th. Curatorial staff also recently launched a popular virtual program called Lunch and Learn designed for House staff to log into at midday and access a short episode that highlights parts of the House collection that are of special interest to Congressional staff. Topics have included the House Mace, complete with a 3D model that can be manipulated on screen and virtual tours of real life exhibitions, such as the one marking Joseph Rainey's election as the first African-American representative.

We continue to move forward with work on the Archival Storage construction project at the Government Publishing Office. I'm pleased to report that a memorandum of agreement has been signed by the National Archives and GPO to formally proceed with phase two of the project. A portion of the meeting will be dedicated to representatives from GPO and the National Archives updating us on next steps and a project timeline.

I look forward to hearing from the Advisory Committee's newest appointee, Tanya Marshall, about her work at the Vermont State Archives and a presentation on the American Congress Digital Archives Portal Project from Danielle Emerling. I would now like to yield to the distinguished Secretary of the Senate and co-chair of the Advisory Committee, Ann Berry.

Ann Berry:

Thank you, Cheryl. Greetings to our committee members, those giving reports, and attendees. Today's agenda is very full, so I'll keep my remarks brief. The past six months have gone by quickly, and we are glad to have this opportunity to take a few minutes to give the committee a status report on our mini projects and the achievement of our goals despite the continuing challenges posed by the pandemic. While our staff remains in a hybrid system of on-site and telework status, the historians and archivists have continued to fulfill all of their core duties and more. All three historians, Betty Koed, Kate Scott, and Dan Holt continue to give virtual and in-person presentations to the Senate community and beyond. They

have attended professional conferences and participated on scholarly panels in a virtual setting.

The number of questions coming in from researchers and the public has not let up, and the request for images from our photo historian Heather Moore continues to pour in. Large projects, such as a massive reorganization of historical material on the Senate website and a new publication to be titled *Scenes: People, Places and Events That Shape the United States Senate* are moving along on schedule. The historians are also deep into an oral history project to document the events of January 6, 2021, and record the experiences and insights of the Senate officers and staff on duty that day.

Senate Archivists, Karen Paul, Allison White, and Elizabeth Selinger have continued to take full advantage of virtual technology for briefings and meetings with Senate staff and for attending archival training seminars.

In many ways, an unexpected benefit of the pandemic is the new era of virtual course offerings that has opened up possibilities previously unavailable when attendance had to be required.

Karen Paul's report today will share details of Senator's papers and committee records preservation, while special presentations by Tanya Marshall and Danielle Emerling will focus on two current archival topics of interest and concern.

Finally, I look forward to learning more about the archival storage from Archivist David Ferriero, and GPO Director, Hugh Halpern. Having toured the designated GPO space last spring, I'm excited to learn about progress towards fulfilling the long-sought goal of providing needed storage for the growing collection of congressional records. Thank you very much.

Cheryl Johnson: Thank you, Ann. I'm excited for our collaboration and look forward to lots more collaborations as we work to preserve the records of Congress. Now, I would like to recognize David Ferriero, the Archivist of the United States, for an overview of his agency's current work. He will also provide an update on reopening plans at the National Archives and an update on the Archival Storage Project at GPO.

David Ferriero: Thank you, Ann and Cheryl, for your ongoing support. I look forward to the day when we are all in the same room and can share our greetings in person. A special welcome to Norm. You have big shoes to fill. I'm a long time fan of yours. So it's really exciting to have you with us, and Danna, thank you for agreeing to extend. You represent an important partner in our work.

Let me start with the COVID situation. The National Archives for the past 20 months has been monitoring 40 facilities in 17 different states, monitoring infection rates in more than 20 counties, opening and closing and re-opening and reclosing research rooms and record centers and presidential libraries. As of this morning, I can report that 24 of those 40 centers are in high transmission areas meaning 200 or more new cases, and 10% have a higher positivity rate, 10 are in substantial transmission areas or 100 to 199 new cases with about 9% positivity rate.

Six centers are in moderate transmission areas, 20 to 99 new cases and 5 to 8% positivity. None of our facilities are in a low transmission area. That translates into 10 facilities reopened to limited numbers of staff and the public, and 30 facilities with limited staff. The museum and most of the presidential libraries are open on time-ticketed basis and the research rooms are testing virtual consultations and visits by appointment, so this is a constantly changing landscape. One of the few upsides of the pandemic has been the impressive work accomplished remotely to improve access to our records. In the past year alone, 27 million new digital pages have been added, 800,000 new transcriptions have been added, and almost 3 million tags have been added. It's important to note that a high percentage of those transcriptions and tags came from the American public as part of our Citizen Archivist Initiative.

Hugh will be reporting on the GPO space during our meeting. I just wanted to say that we continue to support his work, have helped develop and signed the MOU that Cheryl mentioned regarding roles and responsibilities during the design portion of the effort. We stand ready most importantly, to provide the funding as outlined in the MOU when the architectural and engineering contract has been negotiated. We deeply appreciate the close coordination and cooperation with our GPO partners.

I promised at our last meeting to keep you up-to-date on progress on implementation of the Archivist's Task Force on Racism. I've been reporting on this for the past several meetings. This was an effort launched during the summer of 2019 to analyze internal and external procedures and processes in agency culture. Forty staff volunteers worked in three working groups, looking at the employee experience focusing on things like recruitment and advancement, and opportunities in diversity and inclusion.

Another group is looking at archival descriptions questioning how we address an asynchronistic or an offensive terminology in our catalog. In the last group, looking at museum and public programs, how do we ensure diverse representation in our exhibits, education, and public programs? The report was delivered to me in January, and one of the

recommendations was the creation of an agency-wide approach to reparative description.

Reparative description is shorthand for intellectual frameworks that place the stories of stakeholder communities at the center of core archival description. An essential aspect of this approach is the creation of meaningful consultation, and engagement and collaboration with community partners. Reparative description rejects the proposition that archival neutrality is possible and it aims to correct harmful language and omissions over description created by the biases or assumed neutrality of the past. The reparative description and digitization working group began meeting in July, and they have been meeting regularly since.

The group is composed of 18 staff from various offices with different skill sets and grade levels from around the country. So far, the group has developed a potentially harmful content post on archives.gov and put a potentially harmful content alert on the catalog. We've launched the reparative description webpage on archives.gov, which I urge you to take a look at. We drafted a set of guiding principles for our reparative description based on reviews and discussion of other institutions.

Principles identified an initial universe of communities to consult. They consulted with experts within NARA, as well as points of contact in the African-American and Puerto Rican communities, and identified an initial set of harmful terms in our catalog descriptions. We're currently identifying the scope and location of those terms in the catalog. So this is an ongoing process. We're pleased to see that this notion of reparative description analysis is being picked up at many of our peer institutions around the country, so we'll keep you posted and that's my report.

Cheryl Johnson: David, you've been quite busy. Thanks so, so very much. Like Ann mentioned, during the pandemic with all of its absolutely terrible, horrible problems the one light is it has given us a chance to accomplish a lot more during this time. It's amazing to me. So next on the agenda is approval of the minutes of the June 7th meeting. Is there an objection to dispensing with the reading of the minutes? Noting none. Are there any corrections to the minutes of the June 7th meeting? If there are no corrections, is there a motion and a second for their approval?

Ann Berry: I motion.

Betty Koed: Second.

Cheryl Johnson: The minutes are approved. So next, we will hear from GPO Director, Hugh Halpern. He will now provide an update on progress of phase two of the Archival Storage Project at his agency. Hugh?

Hugh Halpern:

Thank you, Madam Clerk. Thank you for the opportunity to speak with you today. It is always great to join my colleagues, the Clerk, the Secretary, and the Archivist. I particularly want to thank David and his team for their support on this project. When we last met, we discussed the opportunity to locate the phase two space of the Center for Legislative Archives expansion in Building A of GPO's headquarters. If you recall, we believe this solution has many benefits for the National Archives and for Congress, notably the ability to rely on our prior experience building phase one in a similar space and the fact that the two spaces are literally on top of each other.

This space became available as a result of our move to digital inkjet press technology and our ability to retire older, larger equipment. Today, I'd like to give you an update on our progress and show you our near-term path forward. If you look at the slide, this will give you a sense of how we're doing. Over the summer, we hosted many of the stakeholders, including some of you to tour the proposed space.

The response was positive from all corners, so we began to move forward with the Archives to develop a Memorandum of Agreement for the design of the phase two project. We executed that MOA in October and around the same time, the GPO received approvals from the Joint Committee on Printing to move forward with the work associated with this project. Currently, the GPO and the Archives are drafting the statement of work for the design and should be able to finalize it within the next month or two. Then, as a benefit of our blanket architectural and engineering contract, we should be able to solicit proposals and select a firm to complete the design by the end of winter or early spring.

The actual design work will likely take about a year to complete, so we expect it to be finished in early 2023. Then, in the summer of 2023, we'll solicit bids from firms to do the build-out and construction. That will also be around the same time we estimate that our legacy equipment will be removed and we can start our internal moves to fully accommodate this project.

While I know that everybody would like a firm date for completion, I'm afraid I can't provide that to you today. There are just too many variables at this point, including what the design work reveals, how many firms bid on the work, the availability of supplies and skilled labor and other potential obstacles. But this is a firm path for our near-term progress on phase two.

Working closely with our partners at NARA and in Congress, we've made substantial progress since our last meeting. The good news is that we've turned the phase one space over to NARA and they're fully able to use that

facility. Now that we have a site selected, we're eager to keep moving on our design work and eventual construction so that we can have both phases of this project completed in the next several years. Madam Clerk and everyone else, thank you so much for the opportunity to update you on our progress. If anyone has questions, I'll be happy to try and answer them.

Cheryl Johnson: Thank you, Hugh. Are there any questions for either David or Hugh?

Matt Wasniewski: Yes, I have a question for Hugh, and maybe David would chime in too. First of all Hugh, thanks for that report. It's reassuring. It sounds like we're off to a good start on phase two. Phase one was a necessary and welcome addition, but it had some bumps along the way to fruition, and I'm just wondering if you can generally address lessons learned or changes that have been made that are going to allow phase two to proceed a little bit more efficiently?

Hugh Halpern: Well, that's a great question. I think one of the key things that came out of the phase one process is figuring out roles and responsibilities and who does what, and the best way to integrate the narrowest role as the customer here and GPO's ability to deliver. I think both the experience of working out the kinks of that relationship, along with learning how to deliver a finished product for NARA in that space are both things that we can use to our advantage as we move forward in phase two. I think the Memorandum of Agreement that we just signed really reflects a lot of those lessons learned, and we now have in place our blanket architecture and engineering contract so that we limit the number of firms to folks that we know can do this work and can be responsive. So we're really looking forward to taking those lessons and moving forward.

Cheryl Johnson: Any more questions of David or Hugh?

Hugh Halpern: Matt, I would just add to that that we took those lessons learned to heart. I can guarantee you that we are not going to have those same situations develop over long periods of time. The oversight of this phase of the project is much more rigorous, I can guarantee you. Are you hearing an echo because I am.

Matt Wasniewski: Yes, but I got the gist of your answer. Thank you. It seems like we're off to a great start.

Cheryl Johnson: Okay. Next, we will hear from Heather Bourk. Heather will give us the House Archivist's Report.

Heather Bourk: Thank you, Cheryl, and hello everyone. Thanks to the Advisory Committee for providing me with this opportunity to update you on what's

been happening in the House Archives Department since our last meeting in June. While we continue our core work of supporting committees and members by managing new accessions of records and loans of previously archived records, providing records management guidance and responding to records related questions; in this report I will highlight projects outside of these responsibilities.

Our outreach efforts to committees and members include providing manuals and guides, detailing records management guidance, and archiving procedures. As the Clerk mentioned, the committee manual was completed and published in August. We're pleased with the streamlined look and simplified guidance. We shared the new manual with committee clerks in one of the monthly archiving email tips we send to that group.

We're currently working with the Clerk's Office of Communications to revise four existing quick guides, and to create one new guide to highlight topics we are frequently asked about by committees. The topics covered include archiving electronic records and social media, preparing records for transfer, the differences between published and unpublished records, and End of Congress archiving. We're also drafting a quick guide focused on archiving email for both committee and member offices for publication next year. The revised quick guides will match the updated design of the new committee manual and reflect the refreshed content. Our goal is to create a seamless suite of products that we can offer to committees to educate them on archiving requirements and facilitate the archiving process, from understanding which records to retain, to preparation and transfer of records.

Staff are also working to update the Records Management Manual for members. Like the approach taken with the committee manual, the text has been pared down to make the guidance more user-friendly, and the design will incorporate images and infographics to highlight key concepts in an easy-to-understand presentation. The new text emphasizes the role of Archive staff as a resource for questions about records management and archiving, and encourages members to document their career in the House by donating their papers to a research repository. We're also working on quick guides designed to provide easily accessible instructions for archiving electronic records and social media in member offices. The member manual and committee and member quick guides are slated for completion early next year.

Staff continue to research and draft content for the History, Art & Archives website. Last month, we added 24 new House record descriptions to the Records Search database. Topics covered include the United States Postal Service, Presidential Addresses, and The Role of Women in War and Statehood. Some of my personal favorite new

additions are a report advocating that Yosemite Valley and the Mariposa Grove be set aside as public lands, documentation of a pioneering woman's quest to own land in Louisiana in the early 1800's, and a booklet on stamp collecting. We'll add a link to Records Search in the chat so you can take a look. We plan to add transcriptions for handwritten documents to Record Search next year.

The department also continues to research and draft House record-focused content for the blog. Recent posts include one aimed at how teachers can use House records found in the Record Search database as instructional materials in the classroom, as well as posts featuring maps and graphics found in our records.

We also continue to support the House history Twitter feed through tweets highlighting House records and contributing along with the Curatorial Department to the National Archives Hashtag Party. We've also recently started to contribute records-focused tweets geared toward educators.

Archives staff also continue our commitment to connecting teachers and students to primary sources through content created for the education portion of the website. Upcoming projects slated to launch next year include a primary source set and video featuring House records documenting prohibition. Stay tuned.

Also, on the education front, staff participated in judging for National History Day at the national competition level earlier this year. Staff members have also collaborated with the Historian's Office to compile web resources in support of next year's National History Day theme of *Debate and Diplomacy*. The webpages pull together a variety of existing content, House records and objects, oral histories, and historical highlights, under suggested topics students might consider for their projects. We were pleased that the National History Day team retweeted our promotional tweet of these pages, calling them, "a fantastic resource."

Archives spent a day in October reviewing our current web content, considering questions about mission, audience and goals, and drafted a web strategy plan to frame the content we create moving forward. The plan includes adjustments to current projects and proposed new projects. We're eager to share details once projects are in the works.

Our office continues to support the work of the Historian's Office through research into primary sources for use in their projects. Staff worked closely with the Center for Legislative Archives on a request for scans of election credentials of African-American House members. We also continue to update research collection information on the member profiles

found on the online Biographical Directory of Congress with a current focus on African-American members.

I'd like to take a moment to acknowledge the Center for Legislative Archives' work in support of projects for both our office and the Historian's Office. In addition to the credential scans already mentioned, they support our annual work to update Records Search by providing scans of many new documents that are added. Kudos to the Center staff for helping make our projects successful.

Archives staff attended the virtual Society of American Archivists Annual Meeting in August and reported on the department's work to the Congressional Papers Section.

I'm happy to answer any questions the Advisory Committee has or to provide additional information on the work we've been doing. Thank you.

Cheryl Johnson: Thanks very much, Heather. I would like to say in addition to all of that, Heather has prepared me so well for this meeting, and I just want to say thank you publicly for all that you do. Next we will hear from Karen Paul, the Senate Archivist's Report.

Karen Paul: Thank you so much, and I'm very pleased to be able to present the following report. The Senate archivists continued to telework and telemeet much of the time since the June meeting. We scaled back a planned September increase of staff onsite in response to CDC guidance and increased COVID levels. In late summer, the Center's return to level one operating status and cessation of archival transfers from the Senate resulted in over 550 boxes of new transfers accumulating in working offices. The Center resumed transfers when the extent of the backup became known to them, and we and our committees thank you all very much for that. Six Senators have announced retirement. They have received copies of *Preserving Senate History, Closing a Senate Office* and have been briefed on best practices, and will continue to receive guidance as questions arise.

As called for by the fiscal year 2020 Further Consolidated Appropriations Act, the Senate Committee on Rules and Administration and Senate Committee on Appropriations Subcommittee on the Legislative Branch directed the Secretary of the Senate to enter into a partnership with a public university in order to acquire information on best practices in archiving Congressional Papers. This information is derived from experience and insights gained as a result of processing, preserving and making available a Senator's large collection and will be used to assist current and future Senators with preserving their collections. Senate Report 116-124 advised that in order to gain insight into significant

challenges, emphasis should be placed on a collection, that due to special circumstances or lack of available guidance from the Senator, rapid closing, transfer, and processing was required.

In December 2020, the Committee on Rules and Administration and the subcommittee on the Legislative Branch approved a memorandum of agreement establishing a partnership between the Secretary and Arizona State University, the Repository of Senator John McCain's Papers. As per the agreement, the university is filing quarterly reports on the processing of The McCain Senate Papers, providing information in the following categories: preliminary and final budget; processing plans for analog and digital records; IT capability to support digital preservation activities; assessment of incoming digital records; procedures to identify and protect sensitive information in digital and analog records; plan and budget for format migration and content preservation; and metadata management and/or other digital preservation needs. It also called for a plan for cataloging and making the collection available; division of labor between contractors and the university; and the role of the university in direction, oversight, and approval of tasks performed by contractors; a plan for identifying and returning Senate committee records inadvertently transferred with the Senator's personal collection; and other topics or issues as discovered during the course of the project, such as unexpected gaps in the Collection and preservation conservation issues posed by the Collection.

The university will submit a final report to the Senate at the conclusion of the project in 2024. The Legislative Branch Appropriations Act of 2021 Explanatory Statement assigned to the Secretary of the Senate the task of preparing a report for the Subcommittee on the Legislative Branch on ways to enhance records management, and archiving services to Senators to promote proper organization and preservation of their records so that their official papers will be ready for historical preservation when the Senator leaves office. To improve our report, we surveyed administrative directors and systems administrators. Over half of the Senator's offices responded and results showed the following: more than 66% of respondents want short-term, in-person assistance at the end of a Senator's term to help office staff implement the steps outlined in *Preserving Senate History* and *Closing a Senator's Office*. More than 60% want help with creating a custom office records management policy. More than 55% want increased training in records management and archiving, both at the opening of an office and periodically thereafter.

Nearly 50% want provision of short-term, in-person assistance and periodic reviews of electronic records management. About 48% want help preparing electronic records, systems and data for extraction from Senate systems and deposit in a Senator's designated archive, and about the same

amount want periodic reviews of office management of electronic records and recommendations for processes and tools to assist with these tasks. To meet these needs, the Historical Office has made recommendations to the committee, including expansion of our archival team. These recommendations are pending as the appropriations process continues.

During fiscal 2021, the Senate transferred 228 new textual accessions totaling 989 cubic feet from 17 committees and offices and requested 47 loans totaling 120 cubic feet. A transfer of electronic records on October 1st yielded 1.12 terabytes from 58 accessions and five committees. In addition, there were two electronic records loaned back to the Senate totaling 227 gigabytes.

In August and September, there was a pause in new transfers to the Center. As I mentioned, due to the National Archives moving back to level one operations, with the help of the Center, the Secretary's Office and the United States Archivist, that period turned out to be brief, and we have resumed sending our new accessions. The Center staff has always been committed to serving loans and they have always responded promptly and with understanding to the needs of Senate offices and committees, and for that, we thank them immensely. Archiving the 116th Congress, electronic records of committees that do not have staff archivists keeps Deputy Archivist, Elizabeth Selinger, very busy. So far, out of 12 such committees we have received a complete set of records from seven of the committees, partial amounts from two committees, and three committees are in progress. The bulk of the paper and electronic records of both Presidential Impeachment Trials have been processed and accessioned.

After a long hiatus, we resumed sending archival transfer accession paperwork to the Center using the Center's secure large file transfer, possible because the system was recently upgraded and improved. This allows us to easily provide transfer materials at any time without having to schedule in-person pickups on a separate drive. This is a positive development, and we are looking at this as one non-media independent way to give staff access to electronic records loaned back to the Senate.

Closing a Senator's office is a mammoth task, further complicated by the number of terms a Senator has served and the amount of time that the office has to plan for a closure. Archivists in the Historical Office have encouraged member offices to develop a digital preservation plan and to do so early in the Senator's tenure. I think as you heard from the survey, we did that and there's a growing knowledge for the need to do this. This year, we updated our guidance to offer practical steps to discover, maintain, and preserve digital records created in Senate offices. The starting point of this guidance encourages offices to survey all electronic records they are currently managing. We include information about older

formats that offices may encounter and provide ways to make sure these materials remain accessible.

Digital preservation planning is equally important for Senate committees and, of course, we meet with them at least once a Congress to assess their progress. In support of our digital initiatives, Deputy Archivist, Alison White, has met with eight member's offices and with one receiving institution to discuss the digital aspect of Senate Collections and encourage assessment and communication between parties. To stay informed of best practices, she has attended numerous Senate seminars on email archiving, preservation planning, and digital preservation policies.

Deputy Archivist White has also participated in meetings with the Sergeant-at-Arms staff addressing best practices for exporting and archiving records created in Microsoft Teams and One Drive environments, and email archiving of Microsoft accounts. The Senate Sergeant-at-Arms continues to work on an archived solution for Microsoft 365 and is in the midst of a proof of concept solution. There is hope to add to that a records management capability. We are also looking at a recently developed addition to Senate technology offerings called Quill, a digital letter sharing, signing, and searching solution that automates the signing of letters intended for leadership, committees, or outside agencies.

We are creating and updating our guidance accordingly. We continue to work with Senate committees to archive social media accounts. Deputy Archivist White has recently completed the download of 49 such accounts for 11 committees comprising approximately 1.4 terabyte of data, and we'll be accessioning these materials to the Center.

Digitization of Senate Republican Caucus videos and creation of log sheets continues. Managing an ongoing project such as this has equipped us to better provide guidance to other Senate offices, and we have advised several member and committee offices on similar digitization projects.

I wanted to say just a few words about the Congressional Papers Section Annual Meeting. This group, founded in 1974, has been a long term partner of our historical office efforts in preserving the records of members. This section met virtually on July 13th from 11:00 to 12:30, and we packed a lot into that hour-and-a-half. We had good attendance with over 50 archivists.

Carly Dearborn of Ohio State University and Mary Goldsby of Baylor University provided information on Electronic Records Committee projects to update the 2009 publication *Managing Congressional Collections* by Cynthia Pease Miller by incorporating guidance on electronic records. Deputy Archivist White is a member of this working

group. A panel of four seasoned political collection archivists shared insights based on recent experiences with archiving Congressional Collections. For example, Hope Bibens of Drake University, Lori Schwartz of the University of Nebraska Omaha, Jim Astrow, archival consultant, and Robert Lay of the University of Georgia discussed the role of heightened partisanship and the choices that members make in preserving their papers and in selecting a repository. They also noted that the requests for access to Congressional Papers have evolved to include not only researchers pursuing scholarly studies, but also those searching collections for political purposes.

Finally, Blynn Oliveri of West Georgia University and Robert Lay of the University of Georgia led a discussion about the potential need to provide historical context for harmful language usage when found in Congressional Collections. This parallels the effort that David outlined.

So in conclusion, finally, while we again were not able to meet in person today as hoped, we will repeat our hope that we may do so in June. I have been at the Senate now for almost 40 years. This February 2nd will mark that date, and other than the anthrax attack of 2001, the ricin attack of 2003, the combined effects of COVID, January 6th, Impeachment Trials, and having to conduct most business virtually has made this past year-and-a-half unimaginable and unforgettable, which I am sure has been the case for all of us. But I believe we are meeting our goals and we are looking forward to enhancing the services we are able to provide to Senators, especially in the year ahead. Thank you.

Cheryl Johnson: Karen. Thank you for decades of faithful service. That is just absolutely wonderful. So next, we will hear from Richard who will give us a report on the activities of the Center for Legislative Archives.

Richard Hunt: Thank you, Madam Clerk, and it's good to see all of you once again. Looking back over the past year, I'd like to point out the Center was able to maintain uninterrupted Congressional loan services to support the current business of Congress, providing over half-a-million pages of records to committees. We were able to restore our accessioning of Congressional records, transferring more than 2.5 million pages of records and three terabytes of committee data into our holdings. We also increased our quantity and quality of records description, improved our website and added helpful information and blog posts to assist researchers, and answered over 800 researcher inquiries. Briefly this summer and starting again in November, we began to provide on-site assistance to researchers in the Archives Research Room.

We also increased our outreach to teachers across the country providing 68 instructional webinars to over 1,100 teachers in 13 states. We have been asked to develop week-long webinars to train teachers on how to use primary source material in the classroom with our educational partners in Texas and Oklahoma. We also continued to provide guidance and support to the CVC Exhibit Renovation Project ahead of its anticipated reopening in 2022.

I'd like to take a few minutes to look ahead to the coming year and what our expectations are. We anticipate a high volume of accessions from the Senate and the House in 2022. We began to accept accessions in November 2020 and Senate records transfers remained at a steady rate throughout the past year. We anticipate the resumption of accessions from the House in the coming year if conditions permit, and we also plan to resume the transfer of House and Senate records placed in temporary storage at the Washington National Record Center to our record storage area in the GPO building.

We expect reference demand to increase exponentially in the coming year. Researchers requiring on-site access to records had to defer plans for most of 2020 and 2021, so there is a backlog of researchers who want to schedule visits in the new year and undoubtedly, new researchers will surface and place new demands for records assistance.

We will continue to work on the Authority Description Project, focusing on the creation of name authority records for committee chairman. Our staff will convert legacy finding aids of select committees for upload to the National Archives Catalog and create item-level description of exhibit items and documents on our website. We will also continue to prepare for Archivist Toolkit migration, developing requirements and doing data cleanup. We will tackle description of the 3,000 cubic feet of records from the 99th Senate for our LEAD project, adding to the already completed description of the 99th House records in the past year.

On the electronic records front, we will again post the position for an additional Electronic Records Specialist and continue our efforts to process and preserve Congressional records in the local CRI system and in the deep preservation system offsite. We will also begin the preparatory work with Internet Archive for the web harvest of the 117th Congress web presence, which will begin in the fall of 2022.

On the education front, we will continue to focus on supporting teachers with existing lessons, eBooks and apps, and on additional opportunities to introduce teachers to these resources and to provide training on the use of primary source material in the classroom. Our focus is on cultivating active and informed citizens and on greater civic understanding of the

constitutional framework for our governing institutions. One lesson we have in development to support our objectives focuses on 19th-century petitions, which students will review and analyze to learn the issues that motivated everyday people to petition their government and exert popular influence on the legislative agenda.

This effort will complement our work on NARA's National Education Initiative, *We Rule: Civics for All of US*, which debuted on Constitution Day this year with online programs that reached over 4,000 elementary students across the nation. Charlie Flanagan has been participating in a NARA team effort to prepare online programs and materials for middle school students on the Bill of Rights, which will debut on Bill of Rights Day on December 15th of this year. Agency educators will develop additional programs and materials to support NARA's educational initiatives throughout the year.

I would like to conclude with a comment from a Texas teacher after one of our recent workshops. "I especially like the activity on how to teach the role of Congress," this teacher observed. "This is a very important idea for students to know in terms of their civic duty to vote for the representatives of Congress. This activity will help students understand the role of Congress and how that plays out within the constitutional principle of separation of powers. This activity is very hands-on and engaging for my students."

This teacher's comments reflect the value of this Advisory Committee. In the committee's first report issued in 1991, it called for the Center to establish an educational outreach program to use the records of Congress to promote students' active and informed engagement in civic life. The report noted that "The records that document the history of Congress, the People's Branch should be used to foster a better understanding of Congress and the legislative process."

For 30 years now, the Center has been striving to fulfill that important charge and under the able leadership of Charlie Flanagan, we have a demonstrated record of success in bringing Congress into the classroom. With the launch of the new National Archives Civics Education Initiative, the Center will join forces with agency educators to broaden and extend our impact on civics education nationwide. That concludes my remarks, and I am happy to entertain any questions.

Cheryl Johnson: Questions for Richard? Richard, thanks so much. It just seems to me that any gatherings I've been in for the last several years invariably come around to a discussion of the lack of civics being taught in schools, so what a noteworthy project that you all have undertaken. Thanks very much.

Richard: Thank you.

Cheryl Johnson: Next, we get to hear from another of the committee's newest members and the Secretary of the Senate's appointee, Tanya Marshall. Tanya will give us an overview of her work at Vermont State Archives. Welcome, Tanya.

Tanya Marshall: Thank you very much Madam Clerk. I'm going to apologize in advance for my voice today, and I thank Secretary Berry and the committee for having me. Just a little bit background for this particular automation pilot project is that I wear a lot of hats in the state of Vermont, so I'm at the beginning of the records creation process all the way down to the end. We have a very small staff. We're a very small state, but someone's delivering eight terabytes of legislative records to me this afternoon and our goal is to try to turn them over and get them processed by the end of next week, which will show why we're going in this direction.

Marco, if you can change the slide, that would be great. So in terms of digital preservation goals, just for background for what we have here, is that we are focusing heavily on automation transfer and ingest into our digital preservation system.

These would be records that are sitting either in the Legislative Branch or the Judicial Branch. We only have state courts, so we work for the Judicial Branch as well as the Executive Branch. Vermont State Archives & Records Administration was not created until 2008, so although we have records that were originally assigned to the Secretary of State, which is the office I'm in, we did not become responsible for all three branches of state government until 2008 and we also provide services for local government. We don't have counties, but we have a municipal government in Vermont. So there's a lot of legacy digital records to work through and we want to automate how we bring them in. We also have been working on preservation in place. These are active records as they're being born. They may not be ready for custodial transfer to the Vermont State Archives & Records Administration where we take legal custody.

We're working on onsite digital preservation systems which is our second goal, especially if the timeline is going to be very long between the ownership within the different branches and eventual transfer into Vermont State Archives & Records Administration. Then, our third goal is actually what I phrase as pre-processing, meaning that we want the records to come in already described. We have a record keeping metadata standard that starts with the beginning, and that's where the nice hat that I have as the chief records officer for the state allows that to move forward, so the records are actually described already when they come into our systems, which is why we're trying to do this turnover fairly quickly.

Marco, can you change to the next slide? We completed two pilots in 2021. The first one was an information governance pilot. I don't oversee the technology for our state. That is underneath our Governor's office.

Part of it was a cooperative framework in terms of how we can all work together with the different systems that we use, the different technologies, and different people. Our information governance pilot was looking at the legacy records and the work that we can do if they are ready for destruction, then destroy them through this pilot. Permanent records would be transferred to the Vermont State Archives & Records Administration.

The second pilot we did was a technical pilot, which looked at two specific systems in particular. This stems from the June 2021 committee meeting when Karen Paul reported about Microsoft 365 and some of the work that's happening within the Senate.

We're very comparable. We are a Microsoft state, so that particular preservation pilot is focused on Microsoft 365 in terms of a system.

Marco, can you change the slide for me, please? Thank you. For the information governance pilot that we've done, it is a cooperative framework, so it did involve multiple agencies and also different agency executives, which I think is not unique at all to the government sector. What we did was we worked with a commercial information governance application that is just one portal that can go into multiple different locations where digital records are stored. It can be a file server or it can be any of the Microsoft 365 applications. It can be a content management system.

We are an OnBase state. We also use Alfresco. It is basically one portal for an information professional, whether you're on the records end or archives end, and you can do that collaboratively with the business side, so those are the creators of the records. What we did was we piloted those workflows and we also piloted the rules functionality there. We did this with our largest agency, which is in the Executive Branch for the Agency of Human Services. We were able to look across several of their digital repositories. Again, these are legacy records that had not yet been really managed. They did well with their paper filing, but it's that period where the electronic records aren't necessarily managed as well. They're unstructured, so in the sense they would be PDFs or Word documents. Also going back in time with different legacy formats, we were able to use those rules and workflows to essentially take our record schedules and identify these records using the different types of tools within this information governance.

We did this pilot from December to May of 2021, and had representation on the legal side, representation on the business side, archives and records, and then also, for information technology. It was eye-opening. It was the first time that we had actually been able to see the volume of records. We did it based on a smaller volume, about seven terabytes and we were able to go across this platform through a very simple portal that would allow us to do that. What we're able to do also is automate some of the records appraisal. By using different rules that we would write based on our knowledge of the records and our knowledge of how to use those tools as part of this pilot, we were able to classify the records and work on migration.

The nice part about this particular pilot is it allows us to migrate the records from their original storage location into another repository, including our digital repository, through one mechanism, and it contains all the audit trails that we'd want from a record keeping perspective. The last part, our third goal, is that we were able to retrospectively apply the record keeping metadata that we not only use in the records function of the records management in the state of Vermont, but we'll also use it for the archives function and that's how records get described into the digital archives for people to be able to filter and sort, in addition to free text search and so forth.

So that was our information governance pilot, and then, Marco, if you don't mind changing to the next slide. We also did a preservation pilot, and we just finished this a few weeks ago. This is a technical framework, so it was very much in the weeds about the actual technologies that we use.

We did it in two commercial applications. One of them was Microsoft 365, the other was our digital preservation system. We use Preservica, so as part of that pilot, we were able to connect between the two environments, so we are in a Microsoft state. We did it starting with SharePoint, which gave us the ability to use the features inside the Microsoft 365 platform to classify the records, to identify which sets of records would be curated, that, for example, were archival and as part of that, use the records management policy features and functions in Microsoft 365 to put an umbrella around if it was a subsite or if it was a document library. As records were brought in, we could also then execute the actual transfer.

There's two processes that we were able to automate as part of that pilot and it worked very well. One was a move, so this would be an actual transfer. What was nice about the aspect of a pilot is that the originating agency, if they were using Microsoft 365, could actually see that it was moved to the archives, so it was transferred and accessioned, but they could also access it right through the SharePoint platform and continue to

have that long-term access. The other part was a preservation copy, Both the functions worked very well. We were very pleased with it. It was a different kind of license than what we used for the Microsoft 365 in the state of Vermont, but we're working through the different technical aspects of how those licenses translate to some of the pilot.

Then, the nice part is that we do record keeping metadata. We do have that standard that is in our enterprise systems including Microsoft 365, because it is a statewide platform that is used as a single tenant in the state of Vermont, which means multiple branches are actually in the same tenant, which has its own challenges in itself. But we were able to migrate that SharePoint record keeping metadata into the digital preservation system and actually turn it around to start working on it, to have it for the access and description that we use. So that pilot just finished in October, and was very successful. So for both of these pilots, we are anticipating that we are launching in 2022 for live use. The information governance platform, we're working through that right now to bring on board in January on a small scale.

In the state of Vermont, we do start small, so we'll start with and work through the business workloads and work through the processes that have to occur and then scale it up. Then we'll do the same with the preservation pilot, because right now we are receiving records from all these multiple repositories. But like I said earlier, they come on a hard drive or they come through some other process. This is really making that more proactive status that we want to see in terms of preservation. I like that those who are creating records can do their day-to-day operations and what they need to do for work, and the records management piece is running behind the scene and allowing them to continue working as they would without adding more to their workload. It's not adding more to our workload, so it is a collaborative process.

Marco, if you just have the last slide. Thank you. So it's just more of a reminder that we're small.

I have a team of 18 and for the archives pieces we only have three FTE's total. For that part, we have a large, more records management continuum. We also operate a record sensor. We do a lot of stuff for the secretary of state as well so that automation is really key for us, and that legacy clean up for the inactive records is really a core part of the information governance pilot and what we're bringing on board. The second is that preservation in place that we're working through. We do have a couple of business applications for some of our agencies that are actually looking at using our digital preservation system up front. We won't transfer custody, but we'll begin the preservation processes early and the last is that integration of record keeping metadata, so information about the records

that are going to help people find and access them in addition to some of the benefits that happen with digital records and free text search, for example. Thank you very much. I know I packed a lot into a small timeframe, but I'm happy to answer any questions for anyone.

Cheryl Johnson: Tanya. Thank you, and welcome again. We are so delighted to have you.

Tanya Marshall: Thank you very much. I'm happy to be here.

Cheryl Johnson: Any questions for Tanya? Okay. Our final speaker is Danielle Emerling and Danielle is associate curator and Political and Congressional Papers Archivist at West Virginia University. She'll give us an update on the recently established American Congress Digital Archives Portal Project.

Danielle Emerling: Thank you, Madam Clerk. Good afternoon, everyone. I appreciate the opportunity to be with the committee today, and I'm very excited to tell you about the American Congress Digital Archives Portal Initiative. But first, I wanted to talk a little bit about where we are right now on the repository side with members' personal papers. Members of Congress, of course, choose a repository for their archives and so personal Congressional Archives are geographically dispersed across the country and institutions with varying levels of resources for managing what are often very large and very complex collections. But what does that look like for our users and for our researchers? Next slide, please. So imagine that you are researching a policy. So in this hypothetical scenario, we're going to use the Children's Health Insurance Program, or CHIP, which was a measure passed by Congress in 1997. If you wanted to better understand things like lawmakers' decision-making, process or their bipartisan coalition building, you would want to find primary sources in the archives of the lawmakers who are responsible for CHIP. You can see here that I've mapped out your research trip for you.

So your research would almost certainly take you to my home institution to view the archives of former Senator Jay Rockefeller, but you would also need to research in the archives of two of his closest collaborators, Senator John Chafee and Congressman John Dingle, which would bring you to the University of Rhode Island and the University of Michigan. But you might also be interested in the complimentary proposal that was put forward at the same time by Senators Orrin Hatch and Ted Kennedy, which would then take you to the University of Utah and the John F. Kennedy Presidential Library in Boston. Now, with your small research stipend, you determine this trip is completely unrealistic. You may decide to visit just one of the archives, or you may decide to forego congressional archives entirely and make a single trip to the Clinton Presidential Library to study CHIP from the president's perspective. Now, those of us in archives and libraries know that the pandemic has only exacerbated

challenges for archival research because of travel restrictions, reading room closures and shrinking travel budgets or budgets that don't exist at all. Next slide, please.

The American Congress Digital Archives Portal will significantly improve these challenges by aggregating the personal papers of members of Congress into a single online platform. We know that member's personal papers are invaluable for understanding legislative decision making, constituent voices and opinions on policy topics, political processes, and America's political development over time. Through this nonpartisan project, we will make research in Congressional Archives easier, and we will illuminate the value of these collections for new audiences of researchers, educators and the general public. We are in a foundational phase of the project made possible by a grant from the National Endowment for the Humanities. We have also received support from the Association of Centers for the Study of Congress. In this phase, West Virginia University Libraries has partnered with the Robert J Dole Institute of Politics at the University of Kansas and the Robert C. Byrd Center for Congressional History and Education. We're also working with an advisory board composed of leading individuals in areas of Congressional Archives, scholarship and digital archives. Next slide, please.

Our portal prototype currently hosts more than 400 archival materials from the three partner institutions I mentioned. More materials will be added before the site is made available to the public in May of next year. Now to guide this work, we've articulated metadata standards and controlled vocabularies as well as guidance around issues like privacy and copyright. The site is developed using open source applications and will provide open access to both the content and the metadata. You can see here, an image in the portal of a document with its accompanying metadata. Users of the portal can open this PDF to view a larger version and use a find or search option to search the OCR text. In the metadata, anything highlighted in blue is a link that will open other relevant materials. So for example, if the user clicks the link in the coverage Congress field, they will be able to view all the materials from the 89th Congress available in this portal. An exception to this is a link to the collection finding aid, which will take the user to the institution's finding aid for the collection from which the material was digitized.

Currently, we are conducting usability experience interviews, and that data will inform future development over the coming months, as well as in future phases. Next slide, please. Now, because of the size and number of Congressional Collections, we know that we can't put everything online. So in this early phase, we gather data from potential users that will help us prioritize our efforts. Throughout October and November, we conducted a

research priority survey receiving 126 responses. The vast majority of participants identified in the disciplines of history and political science, which was not a surprise to us. We are still analyzing the data, but there are a couple of responses that I think are particularly valuable for creating those priorities. So, first is this top 10 list of document types. We asked respondents to indicate the importance of each document type out of a list of 24. The reason for asking a question like this is because in Congressional Collections, these document types often correspond to our archival arrangement schemes.

So for example, three of these types, speeches, press releases and newsletters are typically found in a press series. These are often relatively easy document types for archivists to locate, thus allowing us to get important content online more efficiently. Next slide, please. Second, we asked respondents to rank their research topic priorities related to Congress. These topic areas will take a little bit more creativity on our end to align our collection materials, but they provide important guidance. For example, leaders and parties, a topic that encompasses elected leaders, leadership activities and party organizations means that one focus of our efforts will be including the collections of individuals who have held leadership positions in Congress. Next slide, please. This foundational phase will conclude in May 2022. With additional funding. We plan to expand the portal and to complete development for the nation's Semiquincentennial in 2026.

We will continue to develop with open source applications using an external development team to help us scale up the project. Additionally, we will transition from hosting to harvesting content. We plan to expand the number of partner institutions with a goal of including at least one institution from each state. With our partners, we will create a governance model to ensure the project is sustained and staffed beyond soft funding and beyond 2026. With more partners, we'll also be adding more content. To do so we will use the data from our research priority survey to guide content selection. Additionally, we want to focus on the contributions underrepresented people and communities have made in Congress by including archives of women, Hispanic Americans, Black Americans, Asian and Pacific Islander Americans and others who have served in Congress.

Finally, as we add content we plan to curate materials for the purposes of civics and history education. Next slide, please. Earlier you imagined you were a researcher, potentially traveling to many different archives to investigate just a single policy, but now imagine you are people who do that work from home. Imagine if congressional archives from all 50 states were represented online and a broader audience of researchers, educators, and the public could develop a better understanding of what Congress

does, how it does it and why it's important. One of our grant proposal reviewers put it well. In part, they wrote, "Researching Presidents or courts is vastly easier than researching Congress, a fact that has led to a fairly lopsided historical literature." This project's goals would help remedy this imbalance. We believe this project will do exactly that and make the first branch of government, the People's Branch, more discoverable and accessible for everyone. I'm happy to answer any questions the committee may have, and thank you.

Cheryl Johnson: Thank you, Danielle. That is fascinating. I would like to ask a question. What age group are you targeting – only college age or could a high school person access your files, and would they be user-friendly to someone in high school?

Danielle Emerling: I do believe that students in high school and, perhaps, even middle school could use the portal even in its current iteration. But what we hope to do is to make it more user-friendly for younger groups, and we'll do that by creating things like thematic document collections and lesson plans for educators. Thank you.

Cheryl Johnson: Any other questions of Danielle? If not, is there any new business that the committee would like to discuss? Boy, looks like we're going to end right on time as scheduled. If there are no additional current issues or new business, I will now entertain a motion to adjourn.

Karen Paul: I motion.

Cheryl Johnson: Is there a second?

Ann Berry: Second.

Cheryl Johnson: Okay. The meeting is adjourned and I certainly wish everyone the best and happy holidays and six months will go by again very, very quickly. Thank you all so very much, and thank you, Marco. Everything worked out well. Thank you everyone. Bye-bye.

Ann Berry: Thanks. Bye.

Event Producer: That concludes our conference. Thank you for using Event Services. You may now disconnect.