National Archives and Records Administration
Archivist's Committee on Presidential Library - Foundation Partnerships Meeting
National Archives Building - Washington D.C.
May 3, 2018

Minutes

Advisory Committee Members

Jerry Fleagle	Hoover Presidential Foundation
Clyde Wendel	Truman Library Institute
Stephen Hauge	Eisenhower Foundation
Steven Rothstein	John F. Kennedy Library Foundation
Larry Temple	Lyndon Baines Johnson Foundation
Joseph Calvaruso	Gerald R. Ford Presidential Foundation
Frederick J. Ryan, co-chair	Ronald Reagan Foundation and Institute
James Cicconi	George Bush Foundation
Bruce Lindsey, co-chair	William J. Clinton Foundation
Robbin Cohen	Barack Obama Foundation

Foundation Association Members in Attendance

David Dierks	Hoover Presidential Foundation
Mark Updegrove	Lyndon Baines Johnson Foundation
William Baribault	Richard Nixon Foundation
Roger Zakheim	Ronald Reagan Presidential Foundation and Institute
David Jones	George Bush Foundation
Stephanie Streett	William J. Clinton Foundation
Brian Cossiboom	George W. Bush Foundation
Anne Filipic	Barack Obama Foundation
Dana Remus	Barack Obama Foundation

NARA Staff in Attendance

The Honorable David S. Ferriero	Archivist of the United States
Debra Wall	Deputy Archivist of the United States
William Bosanko	Chief Operating Officer
Micah Cheatham	Chief of Management and Administration
Christopher Runkel	Senior Counsel
Susan Donius	Acting Executive, Legislative Archives, Presidential Libraries and Museum Services and Director, Office of Presidential Libraries
Tom Putnam	Acting Director, Education Division
Mary Knill	Acting Deputy Director, Office of Presidential Libraries
Marlon Guinn	Office of Presidential Libraries
Thomas Schwartz	Herbert Hoover Presidential Library and Museum
Elizabeth Dinschel	Herbert Hoover Presidential Library and Museum
Paul Sparrow	Franklin D. Roosevelt Presidential Library and Museum
Kurt Graham	Harry S. Truman Presidential Library and Museum
Dawn Hammatt	Dwight D. Eisenhower Presidential Library and Museum
Nancy McCoy	John F. Kennedy Presidential Library and Museum
Michael Ellzey	Richard Nixon Presidential Library and Museum
Meredith Evans	Jimmy Carter Presidential Library and Museum
Mira Cohen	Ronald Reagan Presidential Library and Museum
Warren Finch	George Bush Presidential Library and Museum
Terri Garner	William J. Clinton Presidential Library and Museum
Patrick Mordente	George W. Bush Presidential Library and Museum
Brooke Clement	Barack Obama Presidential Library and Museum
John Hamilton	Director, Congressional Affairs
John Laster	Director, Presidential Materials Division

Phone Participants

Duke Blackwood	Ronald Reagan Presidential Library and Museum
John Heubusch	Ronald Reagan Presidential Foundation and Institute
Edna Ishayik	Director of Civic Engagement Initiatives, Civic Nation
Maura Pally	William J. Clinton Foundation
Janet Tran	Ronald Reagan Presidential Foundation and Institute

Introductions

The Archivist of the United States, David Ferriero, thanked the attendees for joining the meeting and invited the participants to introduce themselves.

National Civic Education Initiative

The Archivist introduced NARA's National Civic Education Initiative. Citing recent polls from the Pew Research Center and others, the Archivist discussed how NARA has significant opportunities to increase civic literacy with the American public. He stated that today's session would be an opportunity to discuss what is currently happening at NARA and how we can build upon it.

Mr. Sparrow continued the discussion. He stated that Presidential Libraries are the greatest consortium of civic education institutions in America. He shared a document listing various education and public programs at the Presidential Libraries and noted that it would be worthwhile to consider how NARA and the Foundations can best work together. The National Archives is uniquely positioned to create opportunities.

Mr. Putnam discussed the education program summary document which was shared with meeting participants. There is no debate over who owns our nation's founding documents - the National Archives. We have to look at opportunities like iCivics, the Annenberg Foundation, and others, to explore collaborative opportunities for teaching students and citizens about our holdings. NARA wants to hear from the Foundations what they are envisioning and what they are working on, and then we can determine how to build from there.

Ms. Filipic shared that she is excited to be at the meeting and to be discussing this topic, as education is a focus of the Obama Foundation and of President and Mrs. Obama. The mission of the Foundation is to inspire people to change their world and to make a difference in their communities. To make this mission a reality, we need to inspire more and better participation. How we overcome this is the aim of the Foundation. Their focus will be on civic leaders. Robust discourse and collaborative partnerships will increase civic participation.

The Obama Foundation will pursue a few initial programs. The Academy will be a civic training program which focuses on online content. In-depth training across the country will focus on citizens aged 18-24, as well as institutions. Other programs will be the "Obama Fellows," a two-year program, and the "Obama Scholars," a master's degree scholarship program for 25 students.

Ms. Filipic emphasized that as we are thinking about civic engagement, we need to recognize the systemic barriers that many communities face and work to address them. Programs such as "My Brother's Keeper" are examples. We should focus on building a program that aims to create an inclusive society. Ms. Filipic added that she is excited to be working with the other Foundations on various projects and on meeting the goals and vision set forth.

Ms. Filipic went on to explain that the Obama Foundation is still working on determining what the relationship with NARA will look like. The focus now is on the digitization and storage of the textual records, but they anticipate that over time they will work with the Obama Library on education efforts.

Mr. Cossiboom said the George W. Bush Foundation is mostly focused on the policy center and works with the Clinton and Johnson Foundations to develop young professionals through the Presidential Leadership Scholars program. Much of the program involves civic engagement. The permanent exhibit at the George W. Bush Presidential Library has a specific section that highlights civic education. The Foundation's primary role is funding students that would not otherwise be able to come to the museum. The Decision Points Theater also allows students to engage in Presidential decision making. The Library also has Camp 43, which hosts students over the summer.

Ms. Streett shared that the Clinton Foundation has a number of existing programs for K-12 students and a number of those programs are focused on civic literacy. The Library staff and Foundation staff work together on leadership programs, a particular program on the Kosovo Crisis, and the Clinton Global Initiative, where students explore how to make their world better. Chelsea Clinton has held two meetings with various foundations and academic organizations where they examined how the groups could collectively partner. The Clinton Foundation has also talked to iCivics. Ms. Streett acknowledged that the power of the Presidential Foundations working together has proven to be successful in the past and they all feel passionate about it. It is a worthwhile conversation to explore how they can better work together.

Mr. Ryan emphasized the importance of an *informed* patriotism. The Reagan Foundation serves 40,000 students through their various programs and offers $1.5 million in scholarships. Part of this is through the Discovery Center, which invites students to take on the role of the President, press, etc. The Situation Room is another role-playing program that has been successful and effective. Community partnerships have been pursued such as the Reagan Leadership Summit where students learn about what it is like to be a changemaker. The Leadership in the American Presidency Internship program was launched in D.C. and offers college credit. Another program is the Reagan Institute Summit on Education (RISE), which looks at the state of schools today and will now be an annual program. The D.C. site will be a satellite of the program/Library with programs here in D.C.

Mr. Rothstein said that there are three types of programs at the Kennedy Library and Museum: 1) on-site programs 2) programs available to people around the country and 3) writing programs. Many children go through school without learning anything significant about civics. The Massachusetts Civic Education Initiative is a consortium of sixteen groups across the state whose goal is to affect many various aspects of education including legislation, classroom-based projects, and scholarships. The Kennedy Foundation is also talking to the Reagan Foundation about cross-marketing and marketing some possible projects together.

The Archivist discussed how the White House Historical Association (WHHA) will be coordinating the Presidential Sites and Libraries Conference, which meets every four years. NARA will be hosting an afternoon conversation around civic literacy. A representative from iCivics and from Pew Research Group, and Mr. Sparrow, representing the Presidential Libraries, will be speaking. This will be another opportunity to discuss this issue.

The Archivist added that there is so much going on as a group and it will be important to effectively share this information amongst each other and with the public. Mr. Calvaruso stated that he liked the idea because he has never heard all of what the other Libraries/Foundations are doing. He also urged the importance of quantifying the impact of civic education programs from year to year. Mr. Hauge asked if NARA's goal is to engage the few or the many, who is the primary audience, and how will we define success.

The Archivist shared that our goal is to reach the "many," including families. It is clear that a lot of learning happens at home. The metrics are to be worked out.

Mr. Hauge asked if we could collect data about how many people we are reaching including how many website visits, etc. If we had a better picture about the numbers across NARA and the Foundations, we might have a more telling picture.

Mr. Finch stated that challenges lie less as a staffing or budget issue, but rather, a technology issue. A Library could reach thousands of children in an hour but we don't have the technology.

Ms. Garner said she has the same situation at the Clinton Library, which reaches every school district in Arkansas. She stated that what they need now is advertising to drive people to the website. The Clinton Library provides a great service, but it is challenging to ensure people know about it.

Ms. Streett suggested a public service announcement to kick off the campaign.

Ms. Filipic added that there is also the question of how the research about this can be translated to an online experience. Ms. Cohen emphasized the issue of breadth vs. depth, stating that supporting leaders is not episodic and not a one-time event. It needs to be sustained over time.

Mr. Sparrow said it would be great if the Foundations could create some kind of survey or data collection method that would allow additional data to be collected, so we would have more accurate information about the true numbers of people we are reaching.

The Archivist said that impact is a harder thing to measure. Mr. Calvaruso agreed and said there are two categories - qualitative and quantitative.

Mr. Updegrove asked if anyone could speak about the impact of distance learning. Mr. Rothstein suggested that regarding online trainings and programs, posting a video is generally ineffective but when the trainer engages and there is back and forth - and when there is accountability - it is much more effective.

Mr. Blackwood shared that the next goal of the Situation Room Experience is to measure impact. Reach is one thing, and impact is another. The Reagan Library is working with a university to develop a scientifically-valid assessment tool and feel that they may have something in six months.

Ms. Filipic discussed the idea of a blended-learning journey in which basic training is conducted online, followed by doing activities within the community, then returning to the online experience for follow up.

The Archivist said that next steps would include taking an inventory of the Foundations' activities, gathering data about our audiences, and doing better marketing.

Ms. Streett asked about timeline, as this appears to be a project of interest to the various staff. She also asked if there was a budget for a collective project.

The Archivist responded that NARA and the National Archives Foundation are in the quiet stage of a capital funding campaign, and one of the buckets is civic education, with digitization and the Public Vaults comprising the other two. The Archivist will share information about the capital campaign with the Foundations.

FY 2018 Budget and Centralization of Classified Records

Mr. Cheatham gave an update on the budget. OMB issued a memo that mandated each agency develop a reform and workforce reduction plan to ensure activities are efficient, non-duplicative, etc. The second requirement was to create a new Strategic Plan for submission. We received 505 responses on a staff survey regarding ways we can improve efficiency. The most common suggestions involved restructuring. We received approval of our Strategic Plan and our 2018 budget and are now awaiting approval on our 2019 budget.

With respect to the reform and workforce reduction plans, Mr. Bosanko said that NARA management was able to engage with staff, but it was only at a high level. They are only really starting the more local conversations to determine the specific unique way forward for each Library. They need to determine how to meet workforce reductions, not just with Presidential Libraries, but with all of NARA. Mr. Bosanko shared that over the 25 years he has worked here, the mission has only expanded while resources have been reduced. This is the beginning of a process where we look at all of our policies and procedures and consider how we can do things better. We have to truly consider "what are we going to stop doing." For example, we shouldn't be doing more outreach to bring more people in our doors if we cannot meet current demands. Mr. Bosanko continued by stating that this is an agency-wide issue and each director shouldn't be left to figure out a solution on their own.

The Archivist said NARA pitched its government reform plan around the growth of electronic records and the need to create a broader IT infrastructure.

Ms. Wall added that the government is not saying "do more with less." It is saying "get out of certain businesses." That was a significant consideration in the budget.

Mr. Hamilton said that his relationship with Congress is very positive and they have champions such as the Freedom Caucus and Mark Meadows. NARA has done well compared to other agencies.

Mr. Mordente asked if we have any standards for how we measure our success that would show if we are under producing or over producing. Mr. Bosanko responded that this is an important consideration. We will absolutely be using data to assess the efficiency of our work.

The Archivist cautioned that we are responsible for shifting hundreds of agencies from paper to electronic record keeping by 2020. This is also weighing on our ability to achieve our goals.

Mr. Cossiboom asked if there is a more efficient way to process records and digitize them. Mr. Bosanko responded yes - as archivists we go through boxes many times, and we are looking at

all these types of things. We have some staffing/resource disparities between D.C. and the field for certain types of tasks including declassification. The National Declassification Center (NDC) has upwards of 60 staff with each Library having a handful of people working on declassification. It comes down to efficiency. NARA intends to take a look at many different types of processes to see where we can do things better.

Mr. Rothstein posed some questions: Based on the reality of the direction to do less with less, year after year, what does this mean for staffing levels, library hours, and civic education? With staff reductions, are there other things NARA plans to centralize in future years?

Mr. Bosanko said there have been efforts to influence and change the model for some time. We need to be planning for tight times to continue. Consolidation of classified records is our first focus. We are looking at where we can recognize each other's synergies for education and build on these to do things more broadly. We are looking at how we are going to store and manage artifacts from the Obama administration and beyond. There will be other opportunities in the future.

Mr. Cicconi stated that it's one thing to centralize staff but another to centralize records. If records are digitized then at the end of the day it doesn't matter where they are located - but where are the resources to digitize? Some facilities are still trying to figure out how to digitize the records we have. Also, review and processing are laborious and time consuming. Until materials are digitized, we undercut the goal of processing by cutting personnel.

Mr. Bosanko added that as an agency we are looking closely at how we do digitization. We are considering how we can partner with the Foundations. We are starting with the Obama Foundation, and we will see what we can learn from the process.

Mr. Cicconi stated that line-by-line review is slow and asked if Congress can change this.

Mr. Bosanko stated that there are two key ways to speed the processing: changing the requirements or improving the technology to expedite declassification review through machine learning.

Mr. Rothstein asked about the authorized staffing levels and when the Foundation might be able to learn more. The sooner they know more, the better they might be able to get involved and respond to needs as necessary. He also asked about the process for reviewing the possibility of Foundation-run museum stores. Mr. Rothstein also asked if the restrictions on use of the Trust Fund can be reviewed.

Mr. Cheatham said the restrictions on the Trust Fund are decided on a case-by- case basis and to bring forth proposals. Only about two things requested for the Trust Fund have been denied over the years. NARA does not typically involve non-Federal entities in decisions about allocation of NARA resources, but after NARA makes its decisions, directors may pass on the information. He also stated that the fourteen different Libraries each have unique needs. A confederation model instead of a hierarchical model is going to take some time.

Mr. Bosanko said that once we have an authorized staffing plan, the directors will not need special approvals for hiring unless they want to go above those levels.

Mr. Lindsey asked if vacancies on January 20 went away. Mr. Cheatham said that the background process is methodical; if a position is critical it can be backfilled, and another position would go away instead. Mr. Bosanko said that NARA is managing to a particular number.

Mr. Cheatham said they will look at actual performance and performance against targets. We must take action now, and we must have a baseline.

Mr. Baribault asked if there was an opportunity for staffing discussions between the Foundation and NARA - for example, NARA could present a staffing plan to the Foundation to begin a discussion.

Mr. Bosanko said these are the kinds of discussion we need to be having. If we focus on individual lost positions, we may lose sight of the bigger picture and how we find a larger solution - how do we fulfill our mission given the reality?

Mr. Calvaruso said it would be great to confirm that NARA and the Foundation can have staffing conversations and that it is not NARA only. The Archivist confirmed that yes, he wants the Foundations and directors to have staffing conversations. Mr. Bosanko added that he agreed, but with the understanding that final staffing decisions at NARA lie with NARA.

The Archivist stated that he is not looking for one-size-fits-all arrangements. We have unique situations, and that is what makes the Libraries special. He doesn't aim to lose that.

Mr. Temple asked for a copy of the Trust Fund statute. Mr. Temple asked if staffing on the Trust Fund is part of the policy or if these are just local decisions made in D.C. Mr. Cheatham responded that we do currently provide for NARA staff out of the Trust Fund. Most are revenue-generating, but we haven't said "directly" revenue-generating. We're flexible. NARA will consider any reasonable proposal.

Mr. Bosanko said a significant question is whether the Trust Fund can be sustainable over a longer period of time. We know the volume of records in our holdings will double. However, our staffing will not increase at the same rate, if at all.

Mr. Cheatham said the administration is preparing multiple rescission budgets that aim to rescind monies given. We don't know how that will affect the Presidential Libraries.

The Archivist said that even with all these budget issues and the requirements, his view and vision for the Libraries has not changed. It's more a matter of what can we learn from the newest Library that can inform how we do things. NARA leadership reiterated that the Presidential Libraries will continue to be an important part of the National Archives. The Archivist added that the future is digital. He has a significant digitization agenda.

Public Comment

There were no public comments.

Next Meeting

The Archivist said he would be as transparent as possible through the directors and these topics would certainly be on the agenda for next time.

Ms. Donius said the goal is to have the next meeting in the fall in Grand Rapids. This will be Mr. Putnam's last meeting and the Archivist thanked him for his service over his many years at NARA. The Advisory Committee members acknowledged Mr. Putnam with a standing ovation.

Action Items
1. **NARA will share FY 2017 data about museum visitors and participants in education and public programs, as well as data about website visits.**
   Update September 2018: See Attachment A. Information about museum visitors and education and public program participants was initially shared with the Library and Foundation Directors on May 16, 2018.

2. **NARA will share the Presidential Library Education Report with attendees.**
   Update September 2018: The report was shared with the Presidential Library and Foundation Directors on May 16, 2018. A final copy will be distributed this calendar year.

3. **The Foundations will consider ways to compile and share information about Foundation education programs.**

4. **NARA will share a copy of the Trust Fund statute that speaks to using TF for staff hires.**
   September 2018: See Attachment B, Trust Fund Statute 44 U.S.C. Chapter 23, Paragraph 2302 (2)

5. **The Archivist will share information about NARA's Capital Campaign with the foundations.**
   This topic will be on the agenda for the 2019 Advisory Committee meeting.

Education and Public Program Attendees FY 2017

Library	Public Program Attendees	Education Program Attendees	Total Program Attendees
Hoover	3,463	13,544	17,007
Roosevelt	14,643	34,932	49,575
Truman	5,783	19,609	25,392
Eisenhower	17,769	7,163	24,932
Kennedy	23,611	59,175	82,786
Johnson	14,312	5,092	19,404
Nixon	12,138	7,207	19,345
Ford	7,504	12,006	19,510
Carter	6,001	4,855	10,856
Reagan	27,229	41,511	68,740
Bush (41)	37,209	140,655	177,864
Clinton	154,829	41,266	196,095
Bush (43)	531	49,051	49,582
Obama	n/a	n/a	n/a
Total	325,022	436,066	761,088

Museum Visits FY 2017

Library	Museum Visits
Hoover	40,780
Roosevelt	194,162
Truman	78,046
Eisenhower	189,524
Kennedy	217,489
Johnson	152,583
Nixon	89,959
Ford	218,180
Carter	73,018
Reagan	417,510
Bush (41)	149,614
Clinton	100,822
Bush (43)	218,879
Obama	n/a
Total	2,140,566

Website Visits FY 2017

Library	Web Visits
Hoover	406,516
Roosevelt	609,165
Truman	1,679,002
Eisenhower	194,393
Kennedy	5,618,012
Johnson	4,854,656
Nixon	335,127
Ford	74,951
Carter	352,779
Reagan	303,729
Bush (41)	191,469
Clinton	218,619
Bush (43)	1,208,828
Obama	7,325,819
Total	23,373,065

Trust Fund Statute 44 U.S.C. Chapter 23, Paragraph 2302 (2)

Section 2302: In carrying out the purposes of this chapter, the Board— …

Paragraph (2): may utilize on a reimbursable basis the services and personnel of the National Archives and Records Administration necessary (as determined by the Archivist) to assist the Board in the administration of the trust fund, and in the preparation and publication of special works and collections of sources and preparation, duplication, editing, and release of historical photographic materials and sound recordings, and may utilize on a reimbursable basis the services and personnel of other Federal agencies for such purposes; (3) may adopt bylaws, rules, and regulations necessary for the administration of its functions under this chapter; and (4) may, subject to the laws and regulations governing appointments in the civil service, appoint and fix the compensation of such personnel as may be necessary to carry out its functions.

See the full section:

https://www.gpo.gov/fdsys/pkg/USCODE-2015-title44/pdf/USCODE-2015-title44-chap23-sec2302.pdf