COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
TOT Curriculum Table of Contents
April, 2022

The overall goal of the Community Archiving Workshop (CAW) Training of Trainers (TOT) is to increase the skills and knowledge of participants so that they may plan and carry out CAWs with confidence. CAWs are designed to jump-start preservation efforts for moving image and sound collections, whether found as film, videotape, audiotape or on various digital media carriers. All audiovisual collections are critically endangered and when we labor together in a CAW to collect data about the works, we give the collection caretakers information necessary for preservation planning. The more people organize CAWs, the more likely a diversity of historic collections will be saved and accessible.

This curriculum was created by Mona Jimenez and Marie Lascu in 2022. It is designed on a chronological model from the earliest stages of planning – such as the recruitment of partners and partner negotiations – through to the CAW and post-CAW follow-up. It is adapted in large part on a TOT designed and delivered for staff from the Robert F. Smith Center of the National Museum of African American History and Culture (NMAAHC) held in 2021. The authors also owe a huge debt to curricula and website resources created by the CAW Committee, in particular the CAW Handbook, core resources like AV Basics, and materials generated from TOTs carried out in California, the Southeast, and the Midwest.[1] A number of sessions were drawn directly from the California TOT curriculum.

The curriculum is one of many educational materials available in the CAW Toolkit; these resources have been made possible with support from the Institute for Museum and Library Services (IMLS), the National Endowment for the Humanities (NEH), the Association of Moving Image Archivists (AMIA), and the generosity and dedication of the CAW Committee, numerous CAW partners, and countless volunteers.

Please note: This curriculum is available for free download from the CAW TOT Toolkit as one pdf (CAW_TOT_CUR.pdf) that contains everything listed below in the Table of Contents. Each document is also available separately as a Google document or Google slides that can be adapted for local use.

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[1] The models used by these regions are also published in the TOT Toolkit. In this model, a CAW Mentor working through an anchor site selects a partner and negotiates the collection scope, workflows, and data template. The trainees experience a CAW and take on specific roles on the CAW day, and learn the planning steps through mentoring as they then plan their own local CAWs.

For the individual components, follow the associated links. (Some files, like the presentation slides, are not included in the .pdf in full form, but are referenced.)

TABLE OF CONTENTS

PRE-TRAINING DOCUMENTS

Please note: These documents are not associated with any particular session and are provided before the training series starts. See also under Webinar 1 the Sample Instructions for Participants for Webinar 1, CAW_TOT_CUR_Web_1_Particip_Instruct. It should be provided a week or 10 days prior to Webinar 1.

Sample Proposed Training Schedule
CAW_TOT_CUR_Proposed_Sched

Sample Full Training Agenda
CAW_TOT_CUR_Full_Agenda

Sample Participant Info
CAW_TOT_CUR_Particip_Info

WEBINARS

Webinar 1 - The Goals and Process of a CAW
Trainers Notes Webinar 1: The Goals & Process of a CAW
CAW_TOT_CUR_Web_1_Trainers_Notes

CAW TOT Webinar 1 Presentation: The Goals & Process of a CAW
CAW_TOT_CUR_Web 1_Presentation

CAW TOT Speaker Notes Webinar 1: The Goals & Process of a CAW
CAW_TOT_CUR_Web_1_Pres_Speaker-Notes

Sample Instructions for Participants for Webinar 1
CAW_TOT_CUR_Particip_Instruct

Homework for Webinar 2
CAW_TOT_CUR_Web_2_Homewk

Webinar 2 - Finding and Developing a CAW Partnership

CAW TOT Trainers Notes Webinar 2: Finding and Developing a CAW Partnership
CAW_TOT_CUR_Web_2_Trainers_Notes

CAW TOT Webinar 2 Presentation: Finding and Developing a CAW Partnership
CAW_TOT_CUR_Web_2_Presentation

CAW TOT Speaker Notes Webinar 2: Finding and Developing a CAW Partnership
CAW_TOT_CUR_Web_2_Pres_Speaker-Notes

Sample CAW TOT Timeline and Tasks
CAW_TOT_CUR_Sample_Timeline_Tasks

Sample CAW Memorandum of Understanding
CA_TOT_memo_partners

Sample CAW Partner-Collection Survey Form
CAW_TOT_CUR_Partner_Survey

Sample CAW Survey Responses
CAW_TOT_CUR_Survey_Responses

Sample Partner Organization Inquiry Letter
CAW_TOT_CUR_Inquiry_Letter

Sample Roles during a CAW
CAW_TOT_CUR_Roles

Sample CAW Publicity
CAW_TOT_CUR_Sample_Publicity

Webinar 3 - CAW Negotiations: Collections
CAW TOT Webinar 3 Trainers Notes: CAW Negotiations: Collections
CAW_TOT_CUR_Web_3_Trainers_Notes

CAW TOT Webinar 3 Presentation: CAW Negotiations: Collections
CAW_TOT_CUR_Web_3_Presentation

CAW TOT Speaker Notes Webinar 3: CAW Negotiations: Collections,
CAW_TOT_CUR_Web_3_Pres_Speaker-Notes

Homework for Webinar 4: CAW Negotiations: Data Templates
CAW_TOT_CUR_Web_4_Homewk

CA TOT CAW Data Template
CA_TOT_CAW_InventoryTemplate

CA TOT CAW Presentations
CA_TOT_CAW_Presentations

CA TOT CAW Cheatsheet
CA_TOT_CAW_Cheatsheet

Webinar 4 - CAW Negotiations: Data Templates
CAW TOT Webinar 4 Trainers Notes: CAW Negotiations: Data Templates
CAW_TOT_CUR_Web_4_Trainers_Notes

CAW TOT Webinar 4 Presentation: CAW Negotiations: Data Templates
CAW_TOT_CUR_Web 4_Presentation

CAW TOT Speaker Notes Webinar 4: CAW Negotiations: Data Templates
CAW_TOT_CUR_Web_4_Pres_Speaker-Notes

Sample CAW Equipment/Supplies List - Media Collections
CAW_TOT_CUR_Equip_Supplies

CAW TOT On-site Training Agenda
CAW_TOT_CUR_On-site_Agenda

ON-SITE TRAINING

DAY 1 - Final Preparations/Practice for a CAW

Evaluation of Collections & Final Workflows
CAW TOT Day 1 Trainers' Notes: Collections/Workflows Planning
CAW_TOT_CUR_Workflows_Trainers_Notes

Space Configuration & Collection Arrangement
CAW TOT Day 1 Trainers Notes: Space Configuration and Collections Arrangement
CAW_TOT_CUR_Arrangements_Trainers_Notes

Presentations & Template Practice
CAW TOT Day 1 Trainers Notes: Presentations and Data Templates
CAW_TOT_CUR_Presentations_Templates_Trainers_Notes

DAY 2 - Community Archiving Workshop Day

CAW Coordination Practice
CAW TOT Day 2 Trainers Notes: CAW Coordination Practice
CAW_TOT_CUR_CAW_Day_Trainers_Notes

Community Archiving Workshop Evaluation
CAW_TOT_CUR_CAW_Evaluation

DAY 3 - Debrief & Follow-up Tasks for a CAW

Data Merging & Analysis of Evaluations
CAW TOT Day 3 Trainers Notes: Data Merging/Analysis of Evaluations
CAW_TOT_CUR_Data_Analysis_Trainers_Notes

CAW Debrief
CAW TOT Day 3 Trainers Notes: CAW Debrief
CAW_TOT_CUR_Debrief_Trainers_Notes

Partner Follow-up & Our Work Ahead
CAW TOT Day 3 Trainers Notes: Partner Follow-up/Our Work Ahead
CAW_TOT_CUR_Follow-up_Trainers_Notes

From Community Archiving Workshop Training of Trainers Curriculum, CAW_TOT_CUR.pdf

CAW TOT Evaluation
CAW_TOT_CUR_Evaluation

Sample CAW Follow-up Meeting Agenda
CAW_TOT_CUR_Follow-up_Agenda

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Sample Proposed Training Schedule

Note: *This document is for the trainers to provide to the trainee planning team (aka TOT participants) to get everyone on the same page about the TOT schedule and basic content. Using this document, the exact time and place of every training session can be finalized. It is recommended to hold 2-3 mentoring meetings to provide further guidance as the trainee team plan the CAW.*

We recommend a minimum timeline of three months between Webinar 1 and the On-site Training. For example, if a CAW is held in mid-December, we recommend that the first Webinar is held no later than mid-September. The core planning team should be finalized at least six weeks ahead of the first Webinar; in this example by mid-July. This allows time for the participants to agree on dates for the Webinars and the On-site Training, and to complete some tasks prior to Webinar 1.

This schedule describes the core components of the Training of Trainers (TOT): four Webinars followed by three days of On-site Training, where the second day is a Community Archiving Workshop (CAW) organized by your team. Before the on-site training,

It is helpful to come to Webinar 1 with some ideas for a potential CAW partner. However, the search can start in earnest after Webinar 2, which focuses on the recruitment and selection process. We recommend that the workshop partner be finalized as soon as possible after Webinar 2 and that an agreement is reached with the partner six weeks prior to the On-site Training (in our example no later than November 1 for a mid-December CAW).

The webinars run 75-90 minutes each. After most of the webinars there will be homework that advances the planning of the CAW.

For the on-site training, typically Day 1 is four hours (or 5 with a working lunch); Day 2 (the CAW) is at least 8 hours, with the CAW being held from 11:00 am - 4:30 or 5:00 pm. Day 3 is typically 3.5 - 4 hours. For Days 1 and 3, there is flexibility for start and end times.

Use this document to finalize your agenda:
Sample Full Training Agenda - CAW_TOT_CUR_Full_Agenda

WEBINAR 1: The Goals and Process of a CAW

We recommend this webinar be held approximately 3.5 months before the CAW.
This webinar will ensure all planning team members understand the why, what, and how of a CAW.

WEBINAR 2: Finding and Developing a CAW Partnership

We recommend that this webinar be held one week after Webinar 1. After this webinar, the planning team will begin the process of finding a partner. Within 3-4 weeks, the workshop partner should be finalized, a draft agreement on the roles and responsibilities of your team and the partner should be shared, and one or more collections to use for the CAW have been identified.

WEBINAR 3: CAW Negotiations - Collections

We recommend that this webinar be held approximately six weeks before the CAW. You will come to the webinar with one or more collections in mind, an understanding of the partners existing descriptive systems, and the proposed goals and scope for the CAW. You will leave the Webinar prepared to finalize your partner agreement by Webinar 4.

WEBINAR 4: CAW Negotiations - Data Templates

We recommend that this webinar be held approximately one month before the CAW. Before the Webinar, you will obtain any existing data about the collection (inventories, spreadsheets, database outputs) and come prepared to discuss your ideas for a CAW workflow and the CAW data template. This webinar will allow you to refine and finalize the data template that balances archival standards and the needs of the partner. After the webinar, you will confirm the template with your partner, and you will finalize the CAW presentations and cheatsheet to match the template.

ON-SITE TRAINING

The three training days should be sequential and ideally all three days are held at the same site.

DAY 1: Final Preparations/Practice for a CAW

We will need to have access to the space for the CAW and to the collection(s) that will be the focus of the CAW. You will analyze the collection to make final decisions about the CAW workflow including space and collection arrangement. You will practice the presentations as needed, particularly for AV handing and the introduction of the template. You will also practice data entry to determine any final adjustments to the template and cheatsheet.

DAY 2: CAW

Your team will carry out the CAW under the mentorship of trainers. Every team member will have one or more roles to practice (greeter, presenters, table captains, etc.) The CAW is

typically held between 11:00 and 4:30 or 5:00 pm, with the remainder of the day for set-up and clean-up.

DAY 3: Debrief/Follow-up Tasks for a CAW
We will debrief about the CAW day, discussing what you found successful about the CAW and what could be changed. Your team will carry out preliminary analysis of the CAW evaluations and the spreadsheet data. We will discuss points for a post-CAW meeting with your partner that will support their next steps toward preservation and access. Also, we will plan any follow-up for ourselves and have you fill out evaluations for the TOT.

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Sample Full Training Agenda

WEBINAR 1: The Goals and Process of a CAW
[date & time, 90 min.]

WEBINAR 2: Finding and Developing a CAW Partnership
[date & time, 90 min.]

WEBINAR 3: CAW Negotiations: Collections
[date & time, 90 min.]

WEBINAR 4: CAW Negotiations: Data Templates
[date & time, 90 min.]

ON-SITE TRAINING
[partner (and host organization, if different) & location]
[link to or attach map of location and directions, if needed]
Final agenda will include breaks and lunch as needed.

DAY 1: Final Preparations/Practice for a CAW
[date, start and end time]
~ 5 hours with lunch and break

15 min. Welcome [if start at noon can include lunch for 60 min. session]
40 min. Evaluation of Collections/Workflow Proposal
35 min. Final Workflows & Roles
30 min. Space Configuration & Collection Arrangement
30 min. Review of CAW Presentations/Presentation of Data Templates
60 min. Data Templates Practice
30 min. Wrap-up

DAY 2: Community Archiving Workshop
[date, start and end time]
Full day, 8-9 hours with set up & clean-up
2 hrs. Overview of the Day & Set Up
2 hrs. CAW: Welcome/Presentations/Begin Inventory & Inspection

DAY 2: Community Archiving Workshop (con't.)

30-45 min. CAW: Lunch
3 hrs.   CAW: Continuation Inventory & Inspection
30 min. CAW: Accomplishments & Next Steps
60 min. Clean-up

DAY 3: Debrief/Follow-up Tasks for a CAW
[date, start and end time]
~ 3.5 hours with break

45 min. Data Merging/Analysis of Evaluations
45 min. CAW Debrief
45 min. Partner Follow-up
40 min. Our Work Ahead
20 min. Wrap-up/TOT Evaluations

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Sample Participant Info

Please fill out this form by [date/time]. This will help us know how to tweak the training to your needs and get to know you better. It is also intended to gather info that will help you distribute the work in your team, especially to maximize your learning. We encourage you to stretch and use the planning process and the CAW to practice new skills, rather than do what comes easy.

As we said in the Instructions to Participants, please be as specific as you can in recording the one or two top things you hope to learn by the end of training. In other words, instead of stating "how to run a CAW", you might want to learn how to choose and scope a collection for a CAW, or know more about volunteer recruitment and orientation. Or you might place as a priority how to gauge the condition of films, how to design and/or negotiate a data template, or how to balance best practices with an organization's current workflow.

Name	Your organizational affiliation and position, if any.	What are your top take-aways from the videos or your previous participation in a CAW?	Your strengths - what you bring to the planning process and the CAW, and what you feel comfortable with.	Your needs - the one or two top things you would like to learn about planning and carrying out a CAW.

From Community Archiving Workshop Training of Trainers Curriculum, CAW_TOT_CUR.pdf

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Trainers Notes Webinar 1: The Goals & Process of a CAW

TIME: 75 - 90 min. Times for sessions are approximate; timing through practice presenting is recommended, and will also depend on the number of participants.

LEARNING GOALS:

- To meet and gain comfort with the group leaders and participants
- To increase knowledge of the basic CAW and TOT models, including their histories and potential impact
- To increase clarity about the principles and core tasks of organizing a CAW, and the practical requirements for the organization, collection, and space
- To understand the roles and responsibilities necessary for a successful CAW, differentiating among the contributions of a planning group, partner(s), and volunteers
- To become familiar with documents that help with CAW organization and support good partnerships
- To increase clarity about the TOT proposed timeline and trainer/participant expectations and needs

This session does not need to be a webinar; this was just the model for this CAW TOT because the trainers and trainees were geographically separate and it was not feasible to bring them together. These trainers notes can be adapted for an in-person session that can be more interactive. Adding examples from your CAW experiences always helps a lot.

Please also note that "trainee" and "participant" are used interchangeably throughout the curriculum, and they are also referred to as being a "planning team." In other words, the TOT is based on the trainers mentoring the trainee group through the process of planning a CAW that will occur on Day 2 of the On-site Training.

The trainers notes were written for two trainers per session, so you will see a suggested breakdown, but the material can be delivered in any way that makes sense.

PRE-WEBINAR: It is recommended to send a proposed schedule for the webinars and the 3-day on-site training to the participant team at least one month before the first webinar. Ideally, Webinar 1 and Webinar 2 will be held within a two week period several months before the On-site Training. Please see the CAW TOT Sample Proposed Training Schedule (CAW_TOT_CUR_Proposed_Sched).

Trainers make any needed edits to Sample Instructions to Participants (CAW_TOT_CUR_Particip_Instruct) and Sample Participant Info (CAW_TOT_CUR_Particip_Info). They should send these docs to participants at least a week to 10 days ahead of this webinar. Also, participants can be sent a reminder about the presentation date/time 1-2 days prior.

It is also helpful to have a directory (such as a folder on Google Drive) or another vehicle (such as a web site) to post handouts for the TOT.

It is helpful to have a list of participants prior to the webinar, to help the trainers become familiar with them more quickly. They may be a self-organized team, represent small teams from several different organizations, or all come from one organization. You can decide if you need a contact person for the whole group, or if the participants come from several different organizations, it's helpful for each organization to choose a contact person. In any case, work out the best ways to communicate and share info.

If the participants are organizationally-based, ask the contact person to send the trainers the following, if it has not already been gathered when the participants were chosen. Trainers could also create a form to collect this information.
- organizational mission or purpose
- membership and/or communities they serve or represent
- if they manage audiovisual (AV) collections, the numbers of items in their AV collections and item types (video, audio, film, digital media, etc.)
- logo or image(s) of their organization and/or collections for use in the presentation

If it is a self-organized team, just find a way to learn about their affiliations and collections (if any) before the TOT begins, and figure out the best way to communicate.

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches
25 min.	Trainers may start with the opening slides of the presentation if they have multiple organizations represented and have included their logo/images in the presentation. In this case, intros can be done along with their organizational info. If the participants are all from the same organization, they can introduce themselves before the presentation is shared.	Discussion/presentation CAW_TOT_CUR_Web_1_Presentation Time is based on up to 8-9 participants, where each person

	In any case, the trainers will welcome the participants and briefly introduce themselves and the overall purpose of the TOT, and ask each person to state their name, their position or involvement with their organization, and one take-away from having attended a CAW or from watching the videos. Hopefully, they would already have put some takeaways in the Participant Info form. The trainer not presenting can record info into that form, if needed. Tell them they can feel free to correct if the trainer got anything wrong.	takes a minute or so. More time will be required if there are multiple organizations, especially if they introduce themselves and their organizations.
15 min	Trainer presents the introductory slides through CAW PRINCIPLES. The main goal of his section is have participants understand the context and purpose of the CAW, and see their part in the larger movement to save AV collections through actions by both professionals and the communities from which the work arose. Preservation and access are catalyzed through the effort of laboring together. Also, this is one of many places to acknowledge that we, in the process of training and mentoring, strive to be responsive to the needs of the group. As the TOT participants, they will do the bulk of the planning with our guidance, which will include meetings outside the formal training times. You may find that you need to adapt the training materials to account for where the group is in the process; for example, one group may not have begun the recruitment of partners, and another may be far along. One group may be very experienced AV archivists, and another may include a lot of newbies. In essence, this presentation presents the what, why and the broad strokes of the how. Emphasize that each group is different and that the presentations are intended to not only provide a baseline of information but to model communicating CAW concepts and tasks to others.	Lecture/presentation This part ends at slide 25.
max 20 min.	Begins with CAW TASKS. The overall goal of this section is to understand the chronology of CAW planning that leads to and makes possible the activities they saw carried out in the videos. Also, this baseline of information provides a structure of the group to start its planning work. Ask them to listen with an ear to where their strengths are and where	Lecture/presentation This is a good place to switch to the other trainer. Slides 26 - 47

	they would like to learn, and how they can structure their work as a committee to accomplish the tasks.	
max 10 min.	Trainer leads discussion on the strengths/training needs and again the other trainer can take notes into the Participant Info form as needed.	Group discussion Slides 48-49
max 20 min.	Take any questions at this point and move on to the status of the search for a potential partner, if any. Give the team a chance to report on whatever they think is relevant about the outreach. The documents in Homework for Webinar 2 (CAW_TOT_CUR_Web_2_Homewk) will be a help for this stage. Remind the group about the next webinar and walk them through the homework. Stress that it is important to meet as a group and develop a rough timeline, and that we encourage them to take on roles in the planning that will make them stretch and get to some of the things they want to learn.	Slides 50-end

EQUIPMENT & RESOURCES:
- Platform (Zoom, Google chat, Skype, etc.) or laptop/projector
- Presentation(s): CAW_TOT_CUR_Web_1_Presentation

OTHER CONSIDERATIONS/MATERIALS
- If the session is done in person, there may be time for an ice-breaker (for intros). Here and in the case of the other sessions, you may find ways to make the sessions more interactive if they are not webinars, scheduling them for two hours instead of 90 min.

- If you are meeting in person, a flip-chart/markers or whiteboard/markers or blackboard/chalk is helpful to track their responses during discussions, or you can take notes in a file that is projected.

**COMMUNITY ARCHIVING WORKSHOP
TRAINING OF TRAINERS**

[name of planning team (trainees)]
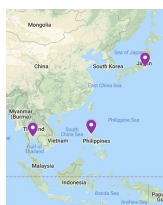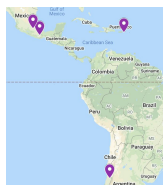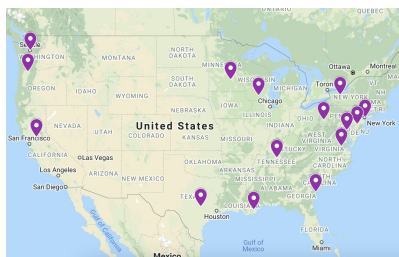
Webinar #1: The Goals and Process of a CAW

Upper left clockwise: Oaxaca, Ojo de Agua Comunicación; Savannah, GA, All Walks of Life & Georgia Historical Society; Pittsburgh, PA, Attack Theatre, City of Asylum, & David Newell; Richmond, VA, Valentine Richmond History Center; Manila, the IBON Foundation/AsiaVisions.

[this page will need updating if used]

THE GOALS & PROCESS OF A CAW

why community archiving workshops?
CAW principles
core tasks for a well-planned CAW
your team & plans thus far
next webinar & homework

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catalyst for preservation of endangered media & film
_____

owner better understands collection
content & needs

---

catalyst for preservation of endangered media & film
_____

owner better understands collection
content & needs

collects item information
and reveals risks & condition

**catalyst for preservation of
endangered media & film**
———————————————

owner better understands collection
content & needs

collects item information
and reveals risks & condition

enables prioritization to
begin preservation

**builds networks of
support & access**
———————————————

sharing of skills/knowledge

**builds networks of
support & access**
———————————————

sharing of skills/knowledge

attracts allies & volunteers

**WHY
COMMUNITY ARCHIVING
WORKSHOPS?**

**builds networks of
support & access**
———————————————

sharing of skills/knowledge

attracts allies & volunteers

builds awareness & interest about
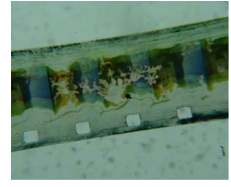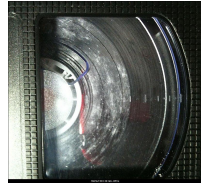collections

**WHY THE
URGENCY?**

obsolescence of equipment

few decks, parts, or experts
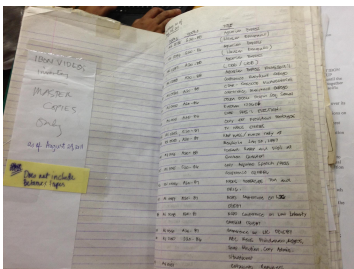
inherent deterioration

contamination

use/mechanical damage

loss of information & context

CAWs transform older records…

not searchable

…into electronic form

searchable, more data

make a preservation plan

and preserve!

Santiago, Chile, Señal Tres La Victoria

CAW
PRINCIPLES
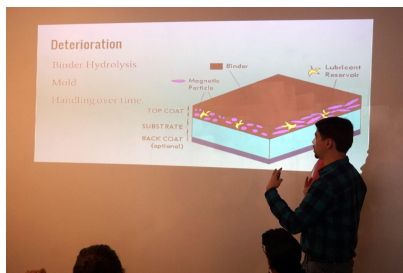
teach about audiovisual collections & their care

New York, NY, Black Public Media

'each one teach one' - experienced people work
with those new to inspection & inventory

Savannah, GA, All Walks of Life & Georgia Historical Society

collect core data about the
collection & its condition

Oaxaca, Ojo de Agua Comunicación

give all items unique identifiers & take actions
to prevent further damage/deterioration
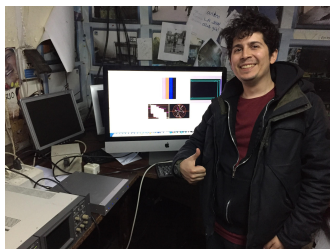
leave the organization with the data and
inspiration they need to begin preservation

Santiago, Chile, Señal Tres La Victoria

CAW CORE TASKS

PRE-CAW

find a collecting organization or individual
to partner with

Sacramento, CA area, Sacramento Public Library, Galt Area Historical Assoc. & others

PRE-CAW

agree on basic goals & roles

Savannah, GA, All Walks of Life & Georgia Historical Society and others

CAW GOALS

1. To process 100 videotapes, audiotapes, and films
   with 25 staff & volunteers

2. To label, inspect, inventory, and re-box the
   [name] collection

3. To collect the data into a Microsoft Excel
   spreadsheet

PRE-CAW

CAW organizer

- prepares presentations
- brings inspection kits,
  supplies & equipment
- proposes data template
- recruits volunteers
- provides merged
  spreadsheet

Partner

- provides and transports
  collection(s)
- provides space &
  projection equipment
- co-develops data template
- recruits volunteers
- provides refreshments

defined through a memorandum of
understanding or other agreement

PRE-CAW

agree on collection & scope

Happy Camp, CA, Karuk Tribal Libraries

PRE-CAW

COLLECTION
- Community Visions Collection
- Subset for this CAW:
  the oldest productions
  (they are most at risk for age
  and format)

SCOPE
- Select approximately 200 tapes
- Focus on edit masters, camera originals and audio originals
- Pre-sort boxes so we concentrate on the above

Manila, the IBON Foundation/AsiaVisions

PRE-CAW

decide details of workflow

Savannah, GA, All Walks of Life & Georgia Historical Society

PRE-CAW

- Welcome table (1 person): Greet and assign volunteers to tables
- Table captains (4 people): Coordinate data collection for the table
- Box table (2-3 people): Assign boxes and labels
- Presentations (3 people): Present CAW overview; magnetic media inspection and inventory; film inspection and inventory

decide roles

Manila, the IBON Foundation/AsiaVisions

PRE-CAW

Title *	Anglo California National Bank	
Date	1950	
Creator		
Description	Resting at 2863 Thirty-fifth Street in 1950 is the Anglo California Bank. The brick structure was built in 1918 for 10,000 dollars, replacing the bank's previous wood frame building. Its new sign would read Citizens' Bank of Sacramento, representing a milestone for the burgeoning business and a time when the previously unincorporated community of Oak Park was now a part of Sacramento.	
Format	7.5 x 9.5 in.; b&w	
Holding Institution	Sacramento Public Library, Sacramento Room	
Rights	This image may be protected by Copyright Law (Title 17 U.S.	
Street/Neighborhood	2863 Thirty-fifth Street; Oak Park	
City/County	Sacramento	
Subject	Banks; Signage; Business Enterprises	shared controlled vocabulary
Collection	Sacramento Room Photograph Collection	
Unique ID	AASAC1210	
Identifying Number *	1880	
Object Filename		
Permissions		edit

agree on data template

PRE-CAW

4/22/19 - 4/26/19 SPL/CEN California Revealed

West Meeting Room

13 meeting room tables
36 meeting room chairs
2 6x30 tables for food/beverages
1 lectern w/mic; 1 a/v cart
1 built-in projector & screen
1 trash can
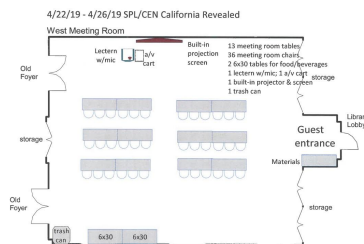
plan space/equipment/supplies

PRE-CAW

publicize & recruit volunteers

New York, NY, Black Public Media

PRE-CAW
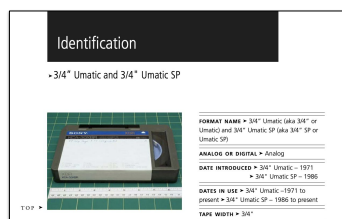
conform cheat sheet to data template
revise presentations if needed
compile resources for volunteers
& send out with reminders

CAW DAY!

set up space according to workflow

CAW DAY

welcome &
orient
volunteers

load data
template
onto available
laptops

Seattle, WA, Three Dollar Bill Cinema

CAW DAY
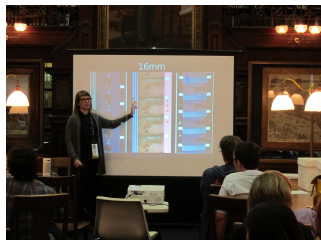
welcome by partners & presentations

Savannah, GA, All Walks of Life & Georgia Historical Society

CAW DAY

inspect & inventory

Pittsburgh, PA, Attack Theatre, City of Asylum, & David Newell; New York, NY, Downtown Community Television Center;
Savannah, GA, All Walks of Life & Georgia Historical Society

CAW DAY

summarize accomplishments &
discuss next steps for collection

CAW DAY

thanks & evaluation

Savannah, GA, All Walks of Life & Georgia Historical Society

POST-CAW

5. Was this your first time participating in a Community Archiving Workshop?
Yes: 11 participants (79%)
No: 3 participants (21%)

6. What did you learn from the workshop?
- "How to archive, be thorough. That the collection is huge!" (1)
- "The value of having a strong community to help preserve an organization's video history. Also, how critical having multiple voices and great diversity in media." (2)
- "The workshop gave me a chance to handle and learn more about physical tapes (I work with a lot of digital-born media at my job)." (3)
- "Meeting other professionals, learning about different organizations, some condition assessment of tapes" (4)
- "I learned how to manage archival processing" (5)
- "That tapes existed and are being found in various places around the country" (6)
- "I learned how important it is to be meticulous when labeling items and keeping records" (7)

summarize evaluations to guide
future CAWs

POST-CAW
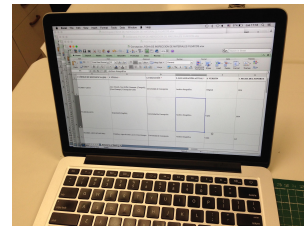
merge all files &
summarize learning from the data

POST-CAW

Formatos	TOTAL OF TAPES	TOTAL HOURS	PERCENTAGE OF TOTAL TAPES	PRIMARY STORAGE (terrabytes)
Hi8				
Betacam				
Mini-DV				
Subtotal video				
Audiocassette				
DAT				
Subtotal audio				.
Total				

use data for preservation plan
begin preservation!

NEXT STEPS

what do you feel confident about in terms of being a CAW organizer?

what are the one or two top things you hope to learn through the training?

---

what is the status of your search for a potential partner?

Questions?

Webinar #2 - Finding & Developing a CAW Partnership

_____

[date, time]

- [how we will connect]
- review sample recruitment docs & memorandum of understanding
- meet as a team & create rough timeline w/roles
- input info about partners into webform
- by [date], please finish Participant Info

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Speaker Notes Webinar 1: The Goals & Process of a CAW

Provided below is a copy of the speaker notes also contained within the associated presentation slides (CAW_TOT_CUR_Web_1_ Presentation).

Slide 1:
Wonderful to be here to bring you into the Community Archiving Workshop (CAW) movement as future organizers. The CAW model was piloted in 2009 and 2010 as part of the course Video Preservation in the Moving Image Archiving and Preservation (MIAP) program at New York University (NYU). The first public CAW was organized by MIAP with the Scribe Video Center in Philadelphia alongside the annual conference of the Association of Moving Image Archivists (AMIA). Starting in 2011, the AMIA Independent Media Committee took on the yearly organization of CAWs in conjunction with the conference, soon co-organizing with the AMIA Diversity Task Force. The organizing committee quickly realized that more people needed to be trained to run CAWs; first the website was launched and then the Training of Trainers program, to share what they had learned with others.

Slide 2:
If you've had a chance to look at the videos you'll get a sense of a community archiving workshop and the workflow, the rhythm, the collections and the camaraderie. This collage gives you a sense of the different places and environments we've done CAWs.

Slide 3:
There are collections and passionate caretakers in many corners of North America and the globe! In addition to the AMIA pre-conference CAWs, adventurous people have taken the idea and organized CAWs within their communities and as part of other events, such as Audiovisual Preservation Exchange (APEX), the National Council of Public History Conference, conferences of the Association of Tribal Archives, Libraries and Museums (ATALM), and Cine Oaxaca, to name a few.

As of summer 2021, there have been 30+ CAWs in 7 countries that we are aware of. There were 10 organizations from California, the Midwest and the Southeast trained in the TOT curriculum through a grant from the Institute for Museum and Library Services (IMLS). The CAW Committee also has held other AV Fairs and other specialized workshops.

Slide 4:
This is our agenda for today. We'll start out with understanding the concept and goals of CAWs, why we think they are so important, and the principles that are common to CAWs. We will then

go on to how a typical CAW is organized, how it unfolds, and what follow-up is needed.

You hopefully have all seen the proposed workshop schedule that we sent **[month or date]**. We would then like to hear about any plans you already have in place, and bring some clarity to how we will work together. We will finish up with a discussion of the next webinar/session and some homework that you will need to do.

Slide 5:
Why do we do community archiving workshops? We have come up with 2 primary reasons, but you may be able to think of more.

One is about the impact on the collections and the preservation process, and one is more about community-building and access.

Slide 6:
[read text on slides]
[Examples are helpful in this section if time permits.]

Slide 7:
[read text on slides]

Slide 8:
[read text on slides]

Slide 9:
[read text on slides]

Slide 10:
[read text on slides]

Slide 11:
[read text on slides]

Slide 12:
No doubt most of you already have the basics covered in these next slides, and we're sure the AV specialists repeat them often in your daily work. Although our partners also may have this info down, when we model it, we give our partners simple language for them to then pass on to their decision-makers and supporters.

Slide 13:
These fundamental areas of risk are present, regardless of the media or signal type, whether we

are dealing with tape or film or CDs, analog or digital carriers and signals. Often CAW organizers gather resources for the participants, and you will see as the training goes on that the presentations delivered at the start of a CAW get into more detail.

Slide 14:
[read text on slides or add own context]

Slide 15:
[read text on slides or add own context]

Slide 16:
Through the CAW, awareness is raised about how important the information is that is written on the labels on the carrier (the tape label or film itself) and the container, as you see here. Those masking tape labels are ready to detach. The CAW also reminds participants about machine-readable media vs. being able to hold up a film to the light.

Slide 17:
Other records may exist that also provide context. All of the info is important for content identification, context, and to understand the items' technical requirements. Participants start to appreciate how important it is to be able to incorporate that information or point to it in the spreadsheet.

Slide 18:
Labeling the tapes with a unique ID provides that link to between the item and its metadata. On a practical level, participants don't need to search through boxes again and again to assess the collection. In other words, the CAW achieves that important first step of basic intellectual and physical control that provides a deeper understanding of the collection and begins its management.

Slide 19:
The ultimate goal is access through preservation. The CAW data helps a partner set priorities, select items, and make a preservation plan.

Slide 20:
There are a few principles or themes that are present in CAWs.

Slide 21:
CAW presentations give participants guidance and a vocabulary about AV format identification, risks, condition, and types of metadata.

Slide 22:
Experiential learning through groups of 2-3 , and the demystification of AV archiving, is intentional.

Slide 23:
As mentioned already, data available on the item is collected through shared labor. Also, info from content experts - such as creators, volunteers, or long-time residents - can also be captured. The teams all use the same template. The spreadsheets are collected, corrected as needed, and merged after the CAW.

Slide 24:
Central to the work is giving the container and the carrier unique numbers. If no system exists, the CAW organizers provide guidance to establish one. In addition, simple preventive conservation actions like dusting the containers, write-protecting media, or taping down reel to reel audio tapes is often undertaken.

Slide 25:
There is an abundance of good energy at CAWs, and sometimes the digitization process can be de-mystified and demonstrated through the use of media digitization kits or tapes or films can be transferred through a partnership with a digitization expert. The CAW ends with a recognition of what was accomplished, and the excitement about next steps leading to access!

Slide 26:
A closer look at the planning process and tasks that you will undertake. We expect you see places where you feel very comfortable, and will be able to identify those areas where you want to concentrate for your learning. The tasks will also form the foundation for a first draft timeline that we will ask you to prepare for next week.

Slide 27:
Typically, a planning committee is formed. For this TOT, the participants are the planning team, and Webinar #2 will go into detail; about what makes a good partner, and what info you will need to gather to decide if the partner makes sense. Designate a contact person to represent the team.

We will want to hear from you a little later about any work you may have already done to choose partners, and Webinar #2 will cover this in detail.
We will also provide you with some sample documents that you can use for outreach.

Slide 28:
You will be working toward a memorandum of understanding (MOU) that lays out the basic

goals and the roles of the organizers and the partners. This is a fluid process, where each of the parties are getting to know each other. For example, you will need to learn about their collections (things like formats), the state of their descriptive systems, and the procedures they have in place and how they compare to standards and practices.

Slide 29:
This is an example of goals. It sets out generally the number of items, the format, and the goal for how many volunteers will be involved. In this case, the goal is 3 different formats; you may only choose one. It states not just the tasks and all steps. In this case it includes labeling and re-boxing. In addition, you have been clear about the spreadsheet software.

Slide 30:
This is an example of a role breakdown. It's good to get the MOU done early to pin down the date and have general agreements.

Slide 31:
This photo was provided by the Karuk Tribal Libraries, showing their Mini-DV collection of 500 tapes.

500 is more than can be managed in one CAW. Is there a subset that makes sense? For example, all of the masters and submasters, or a time period, or the oldest? This is more descriptive than your general goals that are in the MOU, and can be confirmed via email. This will be a negotiation - this process will be covered more in Webinar #4.

Slide 32:
This is an example of a more well-defined scope from a CAW held in Manila in 2017, organized by the University of the Philippines School of Library and Information Studies (UPSLIS) and the IBON Foundation addressing the AsiaVisions analog video collection. Community Vision was a subset of the AsiaVisions holdings.

A site visit could happen earlier, but is an especially good idea at this stage. It fills in background, gives you a good sense of the condition, and helps when deciding on workflow specifics. In this case, the Foundation lent the collection to the University, so a list was generated and the materials were boxed (with box IDs) for transport.

Slide 33:
Your workflow is the 'how' and 'who' of the day. How many tables will there be for data input? Will there be a box table? Will labels be pre-printed or hand-written? Will the labels be attached at the box table or at the participant tables? If there is film, will the CAW include inspection? Or just applying labels and noting the format? How many people do we have that can take on

essential roles and how does that affect workflow?

Slide 34:
These are likely the roles that your team will take on. You may also need people to do documentation, or to demonstrate digitization. The needed roles will match your workflow.

Slide 35:
We will cover this in detail in Webinar #4, as it is a critical part of your negotiations with your partner. You will need to analyze their existing information management system(s), that can be everything from nothing to paper lists to a database. Where are they trying to go with their systems? How does a spreadsheet fit in? Are there authority lists? Is there data that should be imported into the template before the workshop?

Slide 36:
This again is more detailed decision-making that can be defined after the MOU or may be part of it. A diagram like this is not necessary but the point is that if your partner has a map, it's helpful to see it, or to visit the room as part of your site visit. Also, it is important to get very specific about what supplies and equipment (including laptops, projectors, etc,) will be provided by each party, according to scope and proposed workflow.

Slide 37:
Community outreach is key to a successful CAW. As with any event, the sooner you can let people know what is happening and when, the better. Date for promotion and registration will be part of your timeline.

Slide 38:
We will provide standard presentations to introduce the partners, the CAW process, educate on film and media basics, and introduce the template. They may need to be revised for your workflow. In addition, each table is given a cheat sheet that will also conform to the particulars of your template and workflow. Typically a bibliography of resources is sent along with the reminder to all participants.

Slide 39:
The room is set up and often the collections are also arranged in order of priority and in groups that make the data input easier. A box table can accommodate these groupings.

Slide 40:
Typically, the participants sign in and the person at the welcome table gauges their experience and assigns them to a table, mixing more experienced and less experienced people together for peer-to-peer learning. As the participants arrive, the table captain is responsible for making sure

the template is loaded on the laptops (using a dedicated thumb drive for that table) and the files are named in a consistent manner.

Slide 41:
The partner(s) opens, giving the participants background on the collection, and if possible, showing a clip or two to build enthusiasm. Presentations follow.

Slide 42:
The bulk of the day is spent on inspection and inventory. Collection items are fed to the tables as needed. Typically, everyone stops for lunch. There may be breaks where participants share some interesting finds or questions are answered that affect the group.

Before the end of the day, the Table Captains collect the templates onto that table's dedicated thumb drive. This process often begins 15-30 min before the scheduled end time.

Slide 43:
The accomplishments of the day are celebrated. The group may reflect on the day. Returning to the risks and significance of the collection, the organizers stress that the point is not pretty labels and organized tapes, but the data as a means to preservation. The point is to set priorities, make selections, and make a plan. If someone walked through the door and offered to preserve 20 tapes, what would they be?

Slide 44:
Evaluations are distributed and collected, thanks all around and the collection is organized for return to the partner.

Slide 45:
The results of the evaluation are shared with the partner.

Slide 46:
The data is compiled and often needs some massaging before it is delivered to the partner. Having a follow-up meeting is a good idea to present the data and evaluations and to discuss next steps and any needed follow-up.

Slide 47:
For example, the partner may need some training on how to translate the data into storage requirements. In any case, the data is very helpful in preservation planning.

Slide 48:
[add own context]

Slide 49:
Facilitate a discussion, asking a few people to share their thoughts about these two questions in light of the presentation about tasks. There will not be time for everyone to share. Knowing what you need to learn helps us know how to tweak the training to your needs and get to know you better. It is also intended to gather info that will help you distribute the work in your team, especially to maximize your learning.

We encourage you to stretch and use the planning process and the CAW to practice new skills, rather than do what comes easy.

Slide 50:
[read text on slide] [Discussion]

Slide 51:
[add own context]

Slide 52:
We want to remind the group about the next webinar. We will meet for mentoring sessions and these are times that will be more informal as check-ins on your progress and any questions and guidance you might need.

Let's briefly review what is contained in the homework for Webinar 2. The recruitment documents are a sample inquiry letter that you can use as an email, and a webform to have participants fill in that will populate a spreadsheet. The spreadsheet can also be a vehicle for you to track potential partners. There is also a sample memorandum of understanding (MOU). We will need you to meet and begin to outline how you will work together as a team, and create a rough timeline, using the tasks we just discussed. The tasks should also say who will carry out that particular task; in other words, you will make some decisions about roles within your team. Someone should take on the task of presenting the timeline at Webinar 2. The timeline should also include points where mentoring meetings should happen. In addition, please individually fill in the Participant Info. [if you haven't, set a date before Webinar 2]

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Sample Instructions to Participants - Webinar 1: The Goals and Process of a CAW

Dear colleagues,

We are excited to begin the first webinar for the Community Archiving Workshop Training of Trainers (TOT) in partnership with [if any]. **Webinar 1 will be held on [date, time]**. Your trainers will be [trainer names]. Please see our bios below.

We will connect using [include platform, instructions, contacts if problems].

We are asking all participants to do three things in preparation for our meeting:

1. **Watch a minimum of two videos** from the list below. Reflect on what you see and take notes as needed. Questions to consider are below.
    - Community Archiving Workshop in Manila, Philippines with the University of the Philippines School of Library and Information Studies and the IBON Foundation.
      https://communityarchiving.org/workshops/2017-manila/
    - APEX Community Archiving Workshop in Santiago, Chile with the local community television station Señal 3 La Victoria:
      https://vimeo.com/171161573
    - Community Archiving Workshop in New York City with Black Public Media (formerly National Black Programming Consortium):
      https://communityarchiving.org/workshops/2016-new-york/
    - Community Archiving Workshop in New York City with Downtown Community Television Center:
      http://communityarchiving.org/workshops/2015-newyork

2. **Browse the Community Archiving Workshop website** at communityarchiving.org. The descriptions and pictures of "Past Workshops" are particularly fun to go through. Reflect on what you see and take notes as needed.

3. **Please fill out the Participant Information form** [link or attach; sample: CAW_TOT_CUR_Particip_Info]

As a reminder, **Webinar 2 will be held on [date and time] also using [platform].** And we look forward to seeing you for the Webinars 3 and 4 and for the On-site Training and CAW in

[location - if known] in [month - if known]. Please note that dates for Webinar 3 and 4 may change slightly from the Proposed Training Schedule we provided in [month, or date], based on information we gain from our first two webinars.

Please feel free to email if you have any questions or concerns. You can also contact [any other contact, such as a team leader], who is working closely with us.

Best regards,
[trainer names and emails]

[Include short trainer bios]

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Homework for Webinar 2 - Finding and Developing a CAW Partnership

Webinar 2 will be held [date, time].

You will connect using [platform, instructions, contacts for problems]

Before the webinar, please:

1. **Review the following documents that are useful to survey potential CAW partners:**

   ● Sample CAW Partner-Collection Survey Form: CAW_TOT_CUR_Partner_Survey
   ● Sample CAW Survey Responses: CAW_TOT_CUR_Survey_Responses

   The Sample CAW Survey Responses is a Google Sheet automatically generated from the Survey Web Form. We have provided an example of the data collected on the first row. If you are already considering a certain partner, you can fill in the Google Sheet and use the Web Form as a guide to gather more information. You can also make the Web Form available to collect information from any other partners you are considering. Remember that Webinar 2 will be all about finding a partner so no worries if you don't have much info!

   Please choose someone from your team to present the information you have recorded in the Google sheet during Webinar 2.

2. **Read the Sample CAW Memorandum of Understanding**

3. **Hold a meeting to create a rough timeline** of pre-CAW planning tasks that we can discuss during Webinar 2. Please include dates and team members for every task, and include proposed dates for mentoring sessions.

   Please consider your learning goals in the Participant Information form [link or attach; sample: CAW_TOT_CUR_Particip_Info] when assigning planning roles.

4. **If you have not already done so, please complete the Participant Information form** [link to CAW_TOT_CUR_Particip_Info]

5. **Review Sample Partner Organization Inquiry Letter** It may be useful for your initial contacts with partners.

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Trainers Notes Webinar 2: Finding and Developing a CAW Partnership

TIME: 60 - 90 min. Times for sessions are approximate; timing through practice presenting is recommended, and will also depend on the number of participants.

LEARNING GOALS:

- To understand the best criteria for a good workshop collection
- To understand the best criteria for a good workshop space
- To understand the basic steps in connecting with a partner organization for a CAW workshop
- To understand the various roles and responsibilities necessary to carry out the tasks (and if possible follow-up), differentiating among the contributions of a planning group, a partner, and volunteers
- To become familiar with documents that help with CAW organization and support good partnerships

This session does not need to be a webinar; that was just the model for this CAW TOT because the trainers and trainees were geographically separate and it was not feasible to bring them together. These trainers notes can be adapted for an in-person session that can be more interactive.

Please also note that "trainee" and "participant" are used interchangeably throughout the curriculum, and they are also referred to as being a "planning team." In other words, the TOT is based on the trainers mentoring the trainee group through the process of planning a CAW that will occur on Day 2 of the On-site Training.

The trainers notes were written for two trainers per session, so you will see a suggested breakdown, but the material can be delivered in any way that makes sense.

PRE-WEBINAR: It is recommended to send participants a reminder about the presentation date/time 1-2 days prior. If necessary, the homework document can be re-shared as a friendly reminder.

At the end of the previous session (The Goals and Process of a CAW), participants should have been given a homework document (CAW_TOT_CUR_Web_2_Homewk). Work entailed:

- Reviewing Sample CAW Partner-Collection Survey Form (CAW_TOT_CUR_Partner_Survey)
- Reviewing Sample CAW Survey Responses, (CAW_TOT_CUR_Survey_Responses)
- Reading a Sample CAW Memorandum of Understanding (CA_TOT_memo_partners)
- Meeting to create a rough timeline of tasks and responsibilities
- Completing the Participant Information form (CAW_TOT_CUR_Particip_Info)
- Reviewing Sample Partner Organization Inquiry Letter (CAW_TOT_CUR_Inquiry_Letter)

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
2 min	Trainer(s) begin with a brief introduction summarizing the first presentation. Give an overview of what to expect in this session, present the agenda.	Presentation Slides, lecture. CAW_TOT_CUR_Web_2_Presentation Slide 1-2
5-10 min	Trainer(s) guide recap of shared strengths and training needs collected in the Participant info document (CAW_TOT_CUR_Particip_Info). You can either summarize what you've gleaned from people's responses, share individual entries, ask individuals to share their responses, etc.	Presentation slides, discussion. Slide 3
2 min	Trainer(s) recap the basic CAW event structure - a simple review of the typical workshop model structure and the workshop goals. The CAW structure was covered more in depth in Presentation/Webinar 1.	Presentation slides, lecture. Slide 4
5-10 min	Trainer(s) recap a typical MOU structure - focus on the major parts of the document, such as the goals of the workshop, day of workshop tasks, planning committee tasks and supplies needed, partner tasks and supplies needed. The sample MOU document shared as part of the homework can be referenced here (CA_TOT_memo_partners). A specific discussion about this sample document could be initiated - keeping in mind that trainees are still doing the work of gathering the information that would help finalize their own MOU.	Presentation slides, lecture, review of sample document. Slide 5

5-10 min	Trainer(s) will now focus on criteria for a partner organization, a partner collection, workshop space, and additional volunteers. This presentation assumes that the partner organization will also be providing the sample collection material for the CAW. List out basic good criteria for a partner collection - examples available in associated presentation slides. Trainers could engage trainees more by first asking them to contribute criteria ideas - these could be listed on a board in person or on a blank slide in a virtual environment.	Presentation slides, lecture. Slides 6-8
5-10 min	Trainers could engage trainees more by first asking them to contribute criteria ideas - these could be listed on a board in person or on a blank slide in a virtual environment. Explain that while a partner is not obligated to provide workshop space, it is an ideal scenario if a partner organization can provide a space. Workflow depends on space - access affects workflow decisions. ● Address cost issues: [examples in slides]. ● Address access issues: [examples in slides]. ● Address desired amenities: [examples in slides].. ● Address space setup, namely for what you will typically need to be able to do: [examples in slides].	Presentation slides, lecture. Slides 9-17
3-5 min	Trainers could engage trainees more by first asking them to contribute criteria ideas - these could be listed on a board in person or on a blank slide in a virtual environment. Trainers could also begin discussion with trainees about their current volunteer networks or ideas they may have for engaging volunteers. Explain that thinking about target volunteers for the workshop is influenced by community building goals. Give an overview of volunteer recruitment logistics to begin discussing early on in order to ensure that day-of workshop intentions and goals are met.	Presentation slides, lecture. Slides 18-20
2 min	Trainer(s) will now refocus the lecture to the partner/collection search. They will break down the best way to gather the information needed to assist with	Presentation slides, lecture. Slide 21

	securing a partner and planning the workshop. It is likely that those interested in planning a CAW have a collection in mind or partner in mind already - but approach this section as if the search is beginning from scratch.	
	Review good initial outreach information to share and questions to ask. Reference the sample inquiry letter (CAW_TOT_CUR_Inquiry_Letter) shared as part of the homework. Emphasize the importance of understanding what the partner wants to get out of this work, and the importance of needing to know that the planning committee has the information and resources needed to achieve the agreed upon goals. Clear communication with the partner is key.	Presentation slides, lecture. Slide 22-26
4 min	Trainer(s) Review more specifically methods that will be helpful for gathering partner/collection information early on in the process. Explain that a form or other information gathering format can streamline information gathering to determine a partner/collection. Reference partner-collection survey form (CAW_TOT_CUR_Partner_Survey) and responses (CAW_TOT_CUR_Survey_Responses)	Presentation slides, lecture. Slide 27-29
2 min	Trainer(s) review specific questions that will be useful for learning about a potential partner's descriptive systems or anything available to reference for key collection information that will help move the process toward final selection of a partner as well as targeted collection items appropriate for the day-long workshop. Specific questions listed in presentation slides.	Presentation slides, lecture. Slide 30-32
2-5 min	Trainer(s) should first note that for the purpose of this training, collection and space information gathering is presented separately, but in practice this work will always occur in tandem. Questions regarding workshop space needs will organically arise while learning about collection needs, and it will quickly become clear whether or not a partner has the space available to host the workshop, or whether they have other options for facilitating a space. Explain the purpose of a site visit and that it is ideal for determining if a location is appropriate for the day-of workshop, but acknowledge that in many scenarios this is	Presentation slides, lecture. Slide 33-34

	not always possible. It is advised that when beginning to plan CAWs for the first time to push for site visits to gain a better understanding of needs. Once you are very comfortable planning and executing CAWs you can get away with never having been onsite with a collection or workshop space until the day-before set up.	
2 min	Trainer(s) may need to state at this point in the training that it is too early in the process to actually be recruiting day-of workshop volunteers, but it is important to think about volunteer needs early. It is assumed that in addition to any planning committee members and partner staff, additional volunteers will participate on the day of the CAW. There is good info in the online handbook on developing resources like a volunteer packet: https://communityarchiving.org/before-the-workshop/recruit-volunteers/ https://communityarchiving.org/before-the-workshop/advertise-for-trainers-archivists/	Presentation slides, lecture. Slide 35-36
5-10 min	Trainer(s) can decide if a slide is needed at all. If presenting virtually, it is recommended to step out of the presentation and screenshare the documents or ask everyone to open the documents together. Reference: Partner-Collection Survey Form (CAW_TOT_CUR_Partner_Survey) and Survey Responses (CAW_TOT_CUR_Survey_Responses). Trainer(s) could share their screen in a virtual setting and walk through the form; you could project the form in an in-person setting and walk through the form and/or you could ask participants if any had taken the time to practice using the form perhaps with a potential partner in mind. If the group is very much in the early stages of brainstorming partners, walking through the forms and simply asking participants to review questions - basically testing out the clarity of the form. Ask participants - does the form make sense to you? would you add more questions or more explanation? do you have something similar you've used for other events that would be worth sharing as an example?	Presentation slides, discussion. Slide 37

10-15 min	Trainer(s) will now ask the trainees to discuss the timeline for the CAW training they are tasked with planning. As part of the homework before this presentation, trainees are asked to meet and draft a rough timeline. At least one trainee should present on the draft - if virtual, ask the assigned trainee to share their screen, or if trainers are given a copy of the timeline beforehand you can share the document while the assigned trainee speaks. Review the timeline as a group, then ask trainees now that the second presentation has occurred, what changes/additions they would make to their current timeline. This exercise will give the trainers a sense of how the group is functioning together, and where more guidance is required. This will allow for scheduling of the next webinars and mentoring sessions as needed.	Presentation slides, discussion. Slide 38
5 min	Take any other questions at this point. Remind the group about the next webinar, mention any homework if you have decided to assign any. At this stage the group should be focusing on their partner and workshop location search. Tell them that at least one mentoring meeting between now and Webinar 3 is recommended, and they should also be choosing roles for the day-of the CAW. Reference Sample Roles during a CAW (CAW_TOT_CUR_Roles)	Presentation slides. Slide 39-40

EQUIPMENT & RESOURCES:

- Platform (Zoom, Google chat, Skype, etc.) or laptop/projector
- Presentation(s): CAW_TOT_CUR_Web_2_Presentation

OTHER CONSIDERATIONS/MATERIALS

- Here and in the case of the other sessions, you may find ways to make the sessions more interactive if they are not webinars, scheduling them for two hours instead of 90 min.

- If you are meeting in person, a flip-chart/markers or whiteboard/markers or blackboard/chalk is helpful to track their responses during discussions, or you can take notes in a file that is projected.

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS

[name of planning team (trainees)]

Webinar #2: Finding and Developing a CAW Partnership

CAW_TOT_CUR_Web_2_Presentation

FINDING & DEVELOPING A CAW PARTNERSHIP

recap of CAW event structure
recap of MOU structure

I. Partner and collection criteria
II. Workshop space criteria
III. Volunteer criteria
IV. Gathering the information

will review web form/spreadsheet homework
will ask group to present on draft timeline

RECAP: SHARED STRENGTHS & TRAINING NEEDS

[share document CAW_TOT_CUR_Particip_info
or add main bullet points/overview of what was submitted by participants]

RECAP: A BASIC CAW EVENT

typical workshop

- 6 hours
- 25-30 attendees
- 150-200 media items inspected and inventoried

workshop goals

provide basic information about the collection, & enable organization to:

- identify unique items, & items in need of immediate attention
- set priorities for preservation and access
- communicate to others – i.e. funders – the content and status of the collection
- provide a community networking environment

RECAP: MAJOR PARTS OF AN MOU

goals of the workshop are listed out

specific day-of workshop tasks are listed

specific planning committee tasks/supplies are listed

specific partner tasks/supplies are listed

I. PARTNER & COLLECTION CRITERIA

GOOD PARTNER/COLLECTION CRITERIA

not-for-profit or independent
artist/collector

small-to-medium collection of audiovisual
media (say, 200-5,000 items)

collection defined as needing attention

collection defined as unprocessed or
minimally processed

GOOD PARTNER/COLLECTION CRITERIA

Organization has an existing network of
volunteers that can be counted on to show
up for the workshop and will continue
showing up afterward (big ask)

Has the ability to provide a workspace
free-of-charge (ideal)

II. WORKSHOP SPACE CRITERIA

CAW SPACE - COST

available free of charge (ideal)

close to collection storage (ideal)

free parking &/or access to public
transportation (ideal)

space for volunteers to eat lunch, or access to
food nearby (ideal)

CAW SPACE - ACCESS

access one day prior to the workshop for
set-up (if possible)

access available at least 2 hours before and 2
hours after workshop

easy access for bringing in materials (i.e.,
ramp, elevator, etc)

adequate accessibility implemented for both
planning committee and volunteers

CAW SPACE - AMENITIES

tables and chairs can be provided

bathrooms

sufficient power outlets (ex: for 10-15
laptops, other equipment if necessary)

adequately heated or air-conditioned
adequately lit

projection equipment and screen (or white
wall) for presentations & screenings

CAW SPACE - SET-UP

typically, you will need space for:

distribution (items are managed, distributed to work tables, items return and are checked by the partner) [1-2 box tables]

for film or for tapes that are very dirty, a separate area for inspection [1-2 tables]

inventorying [minimum of 4 tables - 3' x 6' - [for 25-30 people]

digitization or any other demos [1 table]

lunch/refreshment - can't be near collection materials

EXAMPLE OF WORKSHOP SET-UP

Archiving Workshop 2011: Austin History Center
November 15, 2011
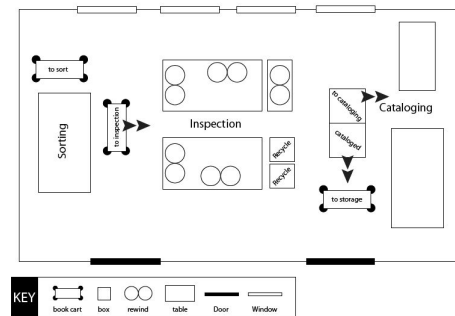
EXAMPLE OF WORKSHOP SET-UP

Archiving Workshop 2011: Austin History Center
November 15, 2011

EXAMPLE OF WORKSHOP SET-UP

Archiving Workshop 2018: Mystic Lake Casino, Prior Lake, MN
Association of Tribal Archives Libraries and Museums (ATALM) annual conference

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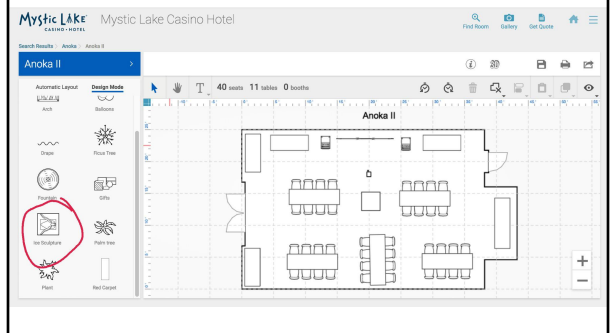
EXAMPLE OF WORKSHOP SET-UP

Archiving Workshop 2018: Mystic Lake Casino, Prior Lake, MN
Association of Tribal Archives Libraries and Museums (ATALM) annual conference

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III. VOLUNTEER CRITERIA

CAW VOLUNTEERS

important to think about this early in the process:

who is it important to recruit?

good balance of people with some knowledge (includes committee!)

good to have some expert spreadsheet users

what's good for the workshop process and good for desired outcomes

CAW VOLUNTEERS

have a discussion with the partner about:

target number of volunteers overall, and where they are coming from (ex: students, archivists, etc)

how each partner plans to conduct recruitment—role and responsibilities

a timeline for recruitment

process for registration and orientation

IV. GATHERING THE INFORMATION

IV. GATHERING THE INFORMATION

a. partner/collection

CAW PARTNER SEARCH: INITIAL OUTREACH

modify or create outreach template email & cover:

- ❏ what is a CAW; why are you doing this.
- ❏ ask: any collections that fit the workshops' scope?
- ❏ ask: willing to participate in such a workshop?
- ❏ ask: adequate facilities, or recommend a location to investigate?
- ❏ share: CAW website to further illustrate intentions

liaison(s) initiates contact

reference: CAW_TOT_CUR_Inquiry_Letter

PARTNER/COLLECTION

determine how best to be of service to the organization and collection

you are in a fluid state here

make sure the partner has a good sense of the basic workshop process

manage expectations!

understand what the partner wants to get out of the workshop

make sure you have the information and resources needed to achieve potential goals

PARTNER/COLLECTION

be open to meeting in person (safety first!)

schedule phone calls

don't be Zoom reliant (if you can help it!)

take detailed meeting notes and share with partners

provide clear roadmap for each meeting

be clear about who completes which tasks & when

PARTNER/COLLECTION

encourage partners to ask for help or clarification
at all times

remember that planning the workshop is
part of the learning process

make your partner's grasp of the content and comfort
with the process a priority

thoughtful communication is required

take into consideration comfort level with
communication tools - use what is best for them
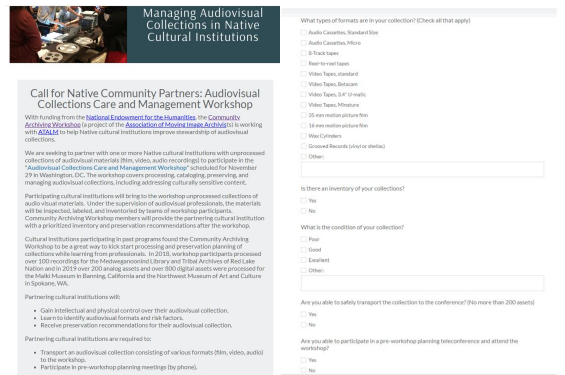
GATHERING PARTNER/COLLECTION INFO

form to gather more collection information can be used
once contact has been made with potential partner

form can also be used for initial contact

specific collection information is essential to finalizing
partner & planning workflow and logistics for workshop

GATHERING PARTNER/COLLECTION INFO

GATHERING PARTNER/COLLECTION INFO

example: Webform
example: Linked spreadsheet

KEY QUESTIONS FOR PARTNER

**questions about descriptive systems
& what's available to reference**

what kind of information about the collection is available to share
with the planning committee?
existing inventories? sample database records?
what kind(s) of software is being used?

does the collection have unique identifiers or
any other numbering system?
are items labeled with the identifier?

how are the collections arranged? cataloging standards?

are the collection items under consideration part of
a database or spreadsheet?

KEY QUESTIONS FOR PARTNER

questions about history, care, and condition

how much is known about collection content?

how much is known about the production history?

how much is known about the provenance?

how are the collections stored? shelves, boxes?
on site, off site?

any issues with retrieval?

are there any known problems with item condition?

KEY QUESTIONS FOR PARTNER

questions about available equipment/supplies

playback equipment for video to aid in identification
(depending on the format, age and condition)

film equipment to aid in identification (ex: inspection
table, loupe, paper tape, split reels, etc)

labeling supplies (archival labels or paper tape
for temporary labels)

IV. GATHERING THE INFORMATION

b. workshop space

SITE VISIT

generally, used for finalizing a collection and
finalizing space

being able to do pre-workshop site visits is more
about timing

IV. GATHERING THE INFORMATION

c. volunteer recruitment

VOLUNTEERS FOR THE CAW

volunteer recruitment targeting depends on:

- established network of partner organization
- community growth desires of partner
  organization
- workshop scope needs

volunteers need to understand
why their work will be valuable

draft recruitment materials with partner

consider using a webform to register volunteers

HOMEWORK

REVIEW:
CAW Partner-Collection Survey Form
&
CAW Survey Responses

HOMEWORK

DISCUSSION:
draft timeline

Questions?

Webinar #3 - CAW Negotiations: Collections
_____

[date, time]

- [how we will connect]
- [summarize assigned tasks/work, if any]

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Speaker Notes Webinar 2: Finding and Developing a CAW Partnership

Provided below is a copy of the speaker notes also contained within the associated presentation slides (CAW_TOT_CUR_Web_2_ Presentation).

Slide 1:
The first webinar focused on a brief introduction to the history of the workshop model, and then provided an overview of the goals and process of a CAW - including planning, day of execution, and post-workshop wrap up. This webinar will focus more on decision making around partner recruiting, how workshop location and partner collection selection is intertwined, and how this will impact the potential scope of your workshop.

Slide 2:
This is the agenda for webinar 2. There will be a brief recap of the CAW event structure and the recommended sections for a typical MOU. The bulk of the webinar will focus on partner and collection criteria, workshop space criteria, volunteer criteria (for the day of the workshop), and generally the process of gathering information to make decisions around partner, collection, space, and volunteers. We will end on the workshop planning timeline, discussing what you may have been able to draft, answer some questions, and discuss dates for webinar 3 and 4 **[if needed]**, as well as scheduling at least one or two mentoring meetings.

Slide 3:
Before we begin with the outlined agenda, we want to recap the shared strengths and training needs based on what you all filled out in the Participant Info document.

Slide 4:
Before continuing on to partner and space criteria, let's briefly recap what the basic CAW workshop model looks like, and what we intend to build toward when beginning outreach for a collection partner. Typical CAW workshops have been 6 hours with an average of 20-30 attendees, and 100-200 items inspected and inventoried. The essential workshop goal is to provide basic information about the collection that enables the collection stewards to identify unique items, and items in need of immediate attention; help set priorities for preservation and access; assist in communicating to others the content and status of the collection. The second essential workshop goal is providing a successful community networking environment. A CAW workshop can certainly be smaller, the above numbers reflect the average between 2010-2021. This is the type of event you know you want to put on, and now (if you haven't already) you want to find the right collection and collection stewards to work with.

Slide 5:

The MOU you create with your partner will be reviewed [in a future mentoring session before Webinar #3]. For now, we want to emphasize what you are gathering information for (aside from the obvious day-of workshop). These are the major information points covered in a memorandum of understanding for a typical CAW partnership - the sample MOU shared is based on this structure. Information can be ordered as you see fit, but we recommend filling in these buckets of information to ensure everyone is on the same page:

Goals of the workshop are listed out - the examples used in the sample were:
- to help [partner] gain better intellectual and physical control over the endangered media collections;
- provide training and advice to staff and community members on media archiving and preservation;
- strengthen relationships within our community toward preservation of moving image and sound heritage

Specific day-of workshop tasks are listed - the examples used were:
- Inspect and label the videotapes from the ---- Collection
- Inventory the tapes using the data template
- Re-box the tapes into new boxes

Specific planning committee tasks/supplies are listed - three examples were
- Provide the following supplies and equipment: [the CAW committee would list out things like a film inspection kit, paper tape and sharpies, a digitization kit...]
- Prepare a proposed data template for the workshop
- Merge inventory records created during workshop and send to host within two weeks after workshop

Specific partner tasks/supplies are listed - three examples were
- Provide information about the collections and the organization's current descriptive practices and work with the organizers to define the data collected
- Ensure the collections are on-site prior to the CAW
- Develop publicity about the CAW, and with the organizers, recruit volunteers for the CAW, such as staff, colleagues, interns, students and community members

Slide 6:

Everything is flexible, and you may find yourself in a scenario where perhaps you are the collection steward who would like to put on a workshop for your collection, or you already have a close relationship with a collection steward and together you decide you want to put on a workshop - this would simply put you ahead of the logistics game.

We will approach finding a collection partner for the workshop with the assumption that you are starting more or less from scratch - as the process is designed to work with 'strangers.'

Slide 7:
The next few slides will cover what we consider to be good partner organization and collection criteria - points to consider when searching for and evaluating potential partners for a workshop.

Is the potential partner a not-for-profit or independent artist/collector - we try to avoid being replacement archivists for organizations that absolutely have the resources to invest in preservation workers and can at the very least hire contract archivists. Is the collection a small-to-medium collection of audiovisual media (say, 200-5,000 items)? The workshop will have the most impact on a smaller collection, and generally much larger collections are held in institutions that (optimistically speaking) should be able to funnel more resources toward care. Collection defined as needing attention - is defined as unprocessed or minimally processed - the workshop model focuses on foundational intellectual and physical control activities and so best serves unprocessed or minimally processed collections.

Slide 8:
Does the potential partner have an existing network of volunteers that can be counted on to show up for the workshop and will continue showing up afterward - a tall order, but even if this is just 2 committed people, their efforts will go a long way. Does the potential partner have the ability to provide a workspace free-of-charge (bonus) - again, it is not mandatory for a partner to supply a space, it just often works out that way and is better for the collection to not have to travel.

Slide 9:
Finding a workshop space is, relatively speaking, the more straightforward process. The search for a partner organization and workshop space generally coincide but it's important to understand practical space requirements separately from the partner collection requirements. Workflow depends on space - access affects workflow decisions.

Slide 10:
In an ideal scenario the collection org can also provide the workshop space, or the collection org has an existing relationship with the space. The amount of space needed depends on the number of potential volunteers, which depends on the size of the collection. It always depends! The following 3 slides have split up criteria under Cost, Access, and Amenities. These are not hard categories, and many of the points listed could fit under all three.

In relation to cost, criteria includes the following: Available free of charge (ideal) - this has often been the case for the AMIA CAW planning committee. It seems to happen naturally, and we

have been very lucky. Close to collection storage (ideal) - We prefer that the collection items do not need to travel too far - that being said, if people are comfortable and feel confident that they can bring 200 items in a car or a plane, support them! Free parking &/or access to public transportation (ideal) - this impacts both the planning committee and day-of volunteers. Space for all volunteers to eat lunch, or access to food nearby (ideal) - if food cannot be served to volunteers (and this has happened plenty of times) people just need to know in advance, and it is helpful to tell them where they can go eat.

Slide 11:
Access on multiple levels is important, and you want to know as early as possible what kind of access is available. Access in regard to physically accessing the space for planning purposes; at least one person being able to go to the space prior to the workshop to take photos and confirm it meets requirements is ideal; access the day before the workshop for set up and confirming workflow; at the very very least, access 2 hours before the workshop start time. Easy access for bringing in materials and supplies (i.e., ramp, elevator, etc). And very important to establish up front, is there adequate accessibility implemented for both planning committee members and volunteers if needed. It is important to ask volunteers to share accessibility needs well before the event to make sure they can be properly accommodated.

Slide 12:
These requirements are listed under amenities, but most of them are essential for the workshop to function **[read slide]**.

Recall the CAW event videos you reviewed - there is no need to presume you must be working in a hyper sterile or traditional environment like a conference room in a hotel. It is important to ensure that people and collection items are safe, that goals can be accomplished, and always make sure to feed people.

Slide 13:
Now let us address space set up for the workshop. While not essential, creating a diagram of the workspace is useful. It is helpful when inspecting the space to envision the tasks for the workshop. Typically, you will need space for several phases of work, examples include: A distribution table where the collection items are managed, distributed as necessary to different work tables, and where collection items return and are checked by the partner; there may be a film inspection table, or depending on the condition of the collection you are working with, it may be necessary to do more involved inspecting and light cleaning before distributing the items; rehousing/inventory tables will encompass the primary workshop activity - depending on number of attendees, you want to give people enough space not only to inventory at a laptop, but also to pair up and work together on inspection and inventory tasks. Typical table sizes for each inventory station have roughly been four 3' x 6' tables. The tables should be set up so

participants can work on both sides, and the tables can accommodate "staging" of materials at each station. Let us show you some examples.

Slide 14:
This is an example from a CAW done in 2011. Notice how the setup suggests the workflow -- collection items are sorted, then move to the inspection tables, then move to the 'to cataloging' table, then off to cataloging, then returning to cataloged and then off 'to storage'.

Slide 15:
And here is the diagram in real life - you can see in this photo that this was a film-centric workshop, and the paired work teams are visible.

Slide 16:
Another example here is from a CAW partnered with ATALM in 2018 - the hotel required room setup diagrams and provided access to design software. You will notice that this setup is quite similar to the previous one. It really is about tables and chairs, and clearly designated stations.

Slide 17:
And here is the real world version of the previous space setup diagram.

Slide 18:
The model thus far calls for both the partner organization and the CAW organizers to recruit volunteers. The partner organization is usually best equipped to reach out to its existing volunteer base and/or their wider community. As members of the planning committee you may have your own relevant connections and networks to tap into.

Slide 19:
Thinking about target volunteers for the workshop is influenced by community building goals. One aspect of the community building goal in relation to a CAW is the partnership between the CAW organizers and the collection stewards. Community building also comes into play between the collection stewards and their own network of volunteers or local community members they may be trying to connect with. Unsurprisingly, we have found that when we do more than one workshop in the same location, people tend to repeat attend and keep helping each other after we are gone. Of course, ultimate outcomes depend on the organization or collection stewards. It's important to think about early on who is it important to recruit for the day-of the workshop; depending on goals, it's good to have a balance of people with some knowledge (in terms of formats being handled, and collection management practices being utilized), this of course includes the CAW organizing committee; it is important to have some folks comfortable with spreadsheets! Working with spreadsheets is part of the education process. What is good for the workshop process and good for the desired outcomes.

Slide 20:

In order to settle on target volunteer goals, discuss amongst the planning committee but also with your collection partner the following: What the target number of volunteers is overall, and the goals for the site and the planning committee (as noted above pairing an expert with a volunteer can be effective); How each partner plans to conduct recruitment—role and responsibilities; A timeline for recruitment; A process for registration and orientation -it is essential to make sure people bring laptops!! You will want to consider making sure people can open Excel or Google Sheets documents - we believe the Mac version is Numbers - or making sure there will be internet access and you can get everyone to just use Google Sheets (that of course is it's own set of logistics to iron out). We will get into more of these specifics as your planning moves forward.

Slide 21:

We want to keep reiterating that everything you are doing in this early planning stage is about moving toward finalizing the goals and scope of the workshop, having the information you need to secure a partner, and then come to a written agreement that you are both happy with, and allows for more detailed event planning work to move forward. In order to know whether you can be effective in the CAW, you need more information about the collection. Right now you are working toward gathering information that is necessary to get you to those next steps of establishing goals, roles, and workflow.

Slide 22:

This first part of the gathering information section is focused on the partner and collection.

Slide 23:

The planning group may draft an outreach template email that should cover: **[read points listed on slide]**.

Liaisons initiate contact. The sample inquiry letter shared after webinar 1 reads as if some kind of contact has already been made. It is there for reference, and is by no means the only option for initiating contact. The main point to keep in mind about a first inquiry letter is that it relays enough information to give the partner a sense of what you are proposing, and it also introduces some of the possible roles that will eventually be formalized in the MOU (assuming the partner commits to the event). Webform surveys have been used in recent years to gather more information up front, and some of the information points just mentioned have made their way into that form. We will review the form later, and it is up to you to decide if you want to share that form right away or wait until initial contact has been made. Many of the sample documents are intended simply as examples, or a menu of options. Specifically, these are examples of things that have worked for CAW planning committees over the years.

Slide 24:
You need to know what the partner wants to get out of it, and you need to know that you have the information and resources you need to achieve the agreed upon goals - you are in a fluid state here. An overall goal is always to help the organization or individual gain intellectual and physical control over a collection that is unprocessed or minimally processed. You need to determine how best to be of service to the organization and collection. They need to understand the basic workshop process and how they contribute to it. Each organization will be different and each collection will have different needs, but the tasks will be similar. The workshop will model basic collection management tasks that can be undertaken by volunteers and staff members after the workshop is finished.

Slide 25:
It is worth emphasizing that we are working to achieve their outcome, though we are connecting through an event type we have structured. We always want to respect what they do and hear what they say, while working to be practical and explaining why we do things and how we do them. You will notice things the partner needs to do, or they may be more focused on other areas. You don't want to propose or impose templates or workflows that contradict what they are doing or that will be discarded post-event. As was stated previously, meet people where they are. Sometimes this might mean that this event is not beneficial to them at this time. When interacting with partners, we recommend: be open to meeting in person, when possible, or scheduling phone calls; take detailed meeting notes and share them back with your partners; provide a clear roadmap of what needs to be determined in each meeting; highlight "follow-through" tasks that result from meetings; be clear who is required to complete these tasks and by when. This all probably sounds like basic project management tasks - and they absolutely are.

Slide 26:
Encourage partners to ask for help or clarification on the process. Remember, planning the workshop is part of their learning process and your role is to mentor them through these steps. Make your partner's grasp of the content and comfort with the process a priority. Organizing a workshop requires thoughtful communication with your partner organizations. Take into consideration their level of comfort with communication tools and use the tools that work best for them. Online tools such as Slack and Google Drive can be helpful for your purposes, but not everyone is comfortable with them.

Slide 27:
An outreach email should always explain who you are, what a CAW is, and why you are organizing it, but with some kind of form the planning committee can streamline information gathering: **[read points on slide]**.

Slide 28:

Once you have brainstormed possible partners to do initial outreach to, you can decide if you want to include an information gathering form as part of your initial outreach or wait until interest has been expressed.

A survey form is particularly handy if doing an open call for partners. This is an example of an open call form a CAW planning committee used in partnership with an organization who in turn shared the form to its own network. Form questions were agreed on between the CAW planning committee and partner organization, the partner org sent out the form, planning committee reps and partner org reps came together to assess form responses, the CAW planning committee took over contacting potential collection partners and moved forward with workshop planning. A major benefit of this strategy is that we already know the potential partner is invested in the idea of doing the event since they chose to fill out the survey.

Slide 29:

As part of the homework we shared a sample web form that can be easily modified for your purposes. The information you gather should be specific to the workshop you are planning, but can function as basic research around local collections. The form might simply be creating a contact list or could double as useful information that could influence other project work. The survey is meant to function as a vehicle between initial contact and moving information gathering toward a final decision on the partnership and funneling information into a partnership agreement. As stated earlier - these are suggestions, the point of any method is that you are gathering the information you need. Whatever process works for you, stick with it.

Slide 30:

These are questions that could also be put into a form, but these are questions better answered once you have a pretty good sense that you have found a good partner. Might be more likely asked in a phone call/or site visit. More detailed information about the collections will also be gathered in subsequent conversations, but to review possible questions, the following are geared toward descriptive systems and anything available to share or reference for the planning committee to understand the collection's state and needs.

We often lead with asking people if an inventory exists for the collection, and if so, can this inventory be shared (understanding that it will not be shared externally). Another key question, especially when getting down to the selection of 200 items for the workshop is whether or not there is a numbering system for individual items, and if the items have any kind of labeling available on them. Responses to your questions about inventories or databases will then give you a sense of the partner's comfort with a spreadsheet template moving forward.

Slide 31:
This set of questions are geared toward information about history, care, and condition of the collection.

Many of these questions are similar to what might be asked when conducting a collections assessment report - contextual information is key to understanding the state of a collection, the needs of a collection, and which of those needs could realistically be met through the workshop, and how the workshop could be used to set up the collection stewards for success in pursuing the rest of the collection needs.

Slide 32:
This set of questions are geared toward information about available supplies and equipment - this is also about determining what the planning committee could work to provide, or if it would just mean eliminating certain workshop goals. For example, if a desired goal was to inspect film elements but there is no way to provide a film inspection station, then the goal would be paired down to a visual inspection only (meaning opening a can, at most unwinding a bit of leader, recording basic condition information in the inventory template, and perhaps marking in a field that a full wind through of the film is recommended).

Slide 33:
For the purpose of this training, collection and space information gathering is presented separately, but in practice this work will always occur in tandem. The ideal space criteria listed previously is generally confirmed with a partner when also gathering more collection information - assuming they are the ones providing the space - and on the rarer occasion where finalizing space is separate from the collection it's expected that you would be gathering space information in a similar fashion, by phone meetings or initiating a site visit.

Slide 34:
The general purpose of a site visit is to get to know people, see collections, see space. It's possible one site visit is more than enough to make decisions. There are two basic scenarios: 1. you're in the same community and can do multiple visits, 2. you are working remotely or too far away, and things will be more on the fly. You do NEED to see the collection the day before if you are working remotely. In the past, collections have often been selected based solely on information gathering discussions with an interested partner.

A site visit is most essential for determining if a space is appropriate for the workshop, but even in this case past CAW planning committees have relied on partners to share space information and we have trusted their opinion on the space. Ultimately, the site visit for a workshop space should at least occur the day before the workshop and it is primarily about confirming what has already been discussed. Since most of our workshops are organized remotely, the day-before

site visit focuses on troubleshooting the planned workflow and physically inspecting collection items.

Slide 35:
It is too early in the process to actually be recruiting day-of workshop volunteers, but it is important to think about volunteer needs early.

Slide 36:
There is good info in the online handbook on developing resources like a volunteer packet and you can reference these resources if needed. Materials like the volunteer packet are sent out shortly before the event and include many established details that wouldn't have been determined yet. To quickly review: **[read slide text]**.

Slide 37:
The presentation giving a partner and space search overview has concluded - so now we want to step out of the presentation and first discuss the sample web form and spreadsheet, and then we will focus on the timeline you were asked to begin drafting.

Slide 38:
Depending on whether the workshop is part of a larger event, such as a conference, the timeline will vary widely. Some communities will have a core set of moving image archivists who are dedicated to this type of work, other communities may need the infusion of outside specialists visiting their community. Some organizations have a well-established set of volunteers they can call on, and others may need to do recruitment. Working back from the date of the workshop and setting benchmarks for each of the major tasks will help determine whether the partnership will work.

We assigned you the task of drafting a timeline to get you thinking about due dates, but with the understanding that a timeline cannot be finalized until a partner is confirmed and roles are assigned. You hopefully have a basic understanding of what needs to be done now, so let's have you present a draft timeline and give us a sense about how you will organize yourselves as a planning committee.

Slide 39:
[take questions]

Slide 40:
[reminder for Webinar 3]

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Sample CAW TOT Timeline and Tasks

Timelines for a CAW vary widely on planning team and partner availability, location, and whether or not the CAW is tied to a larger event. Be flexible but keep moving things forward. Working back from the date of the workshop and setting benchmarks for each of the major tasks helps the organizers determine needs and roles, and whether the partnership for the CAW will work.

For example, if the organizers are experienced with the process, a partner has expressed interest, and the collection scope is evident, CAW planning can take place over a short period of time. However, even in those cases, it takes time to negotiate an agreement, to find a site, and to develop the templates; a suggested minimum is two months. If a Training of Trainers team needs to be established or there is no identified CAW partner, the timeline can stretch much longer. (See the Sample Proposed Training Schedule, [CAW_TOT_CUR_Proposed_Sched](#).)

This timeline was created for a Training of Trainers and was used as a guide for the trainers for all of the tasks that go into a CAW planning process. Rather than being offered as a template for planning, the trainees were encouraged to develop their own document.

For use in a normal CAW planning process, the document can be adapted by removing the references to webinars, mentoring sessions, and on-site training. In any case, as noted below, the timeline should include not just the tasks, but which team member will carry them out and by what date.

[MONTH, year]:

[date, time]: Webinar 1 - The Goals and Process of a CAW [trainer(s) name(s)]

[date, time]: Webinar 2 - Finding and Developing a CAW Partnership [trainer(s) name(s)]

[date]: Outreach to potential partners

- Inquiry letter [assign team member]
- Partner info form [assign team member]
- Set check-in dates

[date]: Assign pre-workshop planning group roles [list team member names and roles]

- for reference: https://communityarchiving.org/getting-started/planning-committee/

From Community Archiving Workshop Training of Trainers Curriculum, CAW_TOT_CUR.pdf

[MONTH, year]:

[date]: Finalize selection of partner organization

[date]: Mentoring session

[date]: Begin MOU draft [assign team members]

[date]: Begin data template draft [assign team members]

[date]: Schedule first phone/video meeting partner

- Review interest form information
- Review CAW structure and event needs
- Overview of potential collection, gather relevant documentation (if available)
- Schedule site visit if possible

[date]: On-Site visit to selected partner [location] (if possible)

- [list team member(s) visiting]
- Determine size and scope of collection for workshop
- Share CAW MOU template or draft

[date, time]: Webinar 3 - CAW Negotiations: Collections

- Think about roles for the CAW, check-in about timeline and tasks

[MONTH, year]:

[date]: Determine equipment/supplies needs [assign team member]

- EX: (projector?, labeling supplies, thumb drives, boxes?, power strips, pencils, extension cords, laptops, USB/USB-C adaptors)

[date]: Send MOU to [partner] - [assign team members]

[date, time]: Webinar 4 - CAW Negotiations: Data Templates

- Finalize individual CAW role assignments
- Begin data template [assign lead]
- Begin cheat sheets [assign lead]
- Begin presentation(s) [assign team members]

From Community Archiving Workshop Training of Trainers Curriculum, CAW_TOT_CUR.pdf

[date]: Finalize MOU

[date]: Work on promo/recruitment call

[date]: Finalize equipment list

[date]: Finalize inventory data template (in coordination with [partner])

[date]: Finalize cheat sheets

[date]: Finalize presentations (in coordination with [partner])

[date]: Finalize venue and catering

[date]: Send out recruitment info for CAW (with RSVP)

[date]: Send out resource packet to volunteers

[MONTH, year]:

[date]: Send out reminder emails for CAW

[date, time]: DAY 1 - Final Preparations/Practice for a CAW [trainers and trainees only]

[date, time]: DAY 2 - Community Archiving Workshop [includes outside volunteers and other non-trainees]

[date, time]: DAY 3 - Debrief/Follow-up Tasks for a CAW [trainers and trainees only]

[date]: Collate Spreadsheets and organize data [assign team members]

[date]: Deliver information to [partner], schedule follow-up meeting [assign team members]

Sample CAW Memorandum of Understanding

[date]
[contact for CAW Team]

RE: Community Archiving Workshop

Dear _____.

This will serve as an agreement between [organizers] and [partner] for roles and responsibilities for the Community Archiving Workshop scheduled for [date] from [times] at the [location].

The goals of this workshop are:
- to help [partner] gain better intellectual and physical control over the endangered media collections;
- provide training and advice to staff and community members on media archiving and preservation;
- strengthen relationships within our community toward preservation of moving image and sound heritage

The tasks carried out during the CAW are as follows [specify what are agreed-upon tasks; these are examples]:
- Inspect and label the videotapes from the ---- Collection
- Inventory the tapes using the data template
- Re-box the tapes into new boxes

Organizer tasks:
- Provide the following supplies and equipment: [specify]
- Prepare a proposed data template for the workshop
- Prepare educational presentations for the volunteers and collections
- Assist with publicity about the CAW and recruitment of volunteers for the CAW [specify who will keep the list of participants]
- Merge inventory records created during workshop and send to [partner] within two weeks after workshop
- Distribute & collect CAW evaluation forms

Partner tasks:
- Provide information about the collections and the organization's current descriptive practices and work with the organizers to define the data collected

- Prepare the collections for the CAW and set the standards for the work, such as re-housing, labeling, data template, etc.
- Provide the following supplies and equipment: [specify]
- Arrange for the needed space, refreshments, and equipment necessary for projecting presentations
- Ensure the collections are on-site prior to the CAW
- Develop publicity about the CAW, and with the organizers, recruit volunteers for the CAW, such as staff, colleagues, interns, students and community members
- Lead the setup and clean-up of the site
- Participate in CAW evaluation
- Arrange for any releases needed for workshop documentation

I, _____, agree to the description and outlined objectives of the project.

Signature	Date

I, _____, agree to the description and outlined objectives of the project.

Signature	Date

Sample CAW Partner-Collection Survey Form v. 2022

Thank you for your interest in participating in the Community Archiving Workshop, proposed to take place [Month Date] in [City, State] [add any host partnership names or if this workshop is part of a larger event/conference]. Please fill out the survey below to the best of your knowledge, and we will contact you soon with further questions and details.

If you have any questions, please email [your main contact email]. Thank you.

CAW_TOT_CUR_Partner_Survey_v2022

* Required

1.   Organization Name *

2.   Organization Website

3.   Organization Address *

(street address, please)

4.   Contact Person *

(first and last name, please)

5.   Contact phone number *

6.   Contact email *

7. What is your role in the collection? *

   Check all that apply.

   ☐ Archivist
   ☐ Librarian
   ☐ Collection Manager
   ☐ Conservator
   ☐ Curator
   ☐ Administrative
   ☐ Volunteer
   Other: ☐ _____

8. Does your organization have space to host the workshop or can you arrange for a space to host the workshop? Ideally, the space would accommodate 25-30 people where participants work around 4 tables, as well as other tables for collection items.

   Mark only one oval.

   ○ Yes
   ○ No
   ○ Other: _____

9. Can the collection be easily/safely transported to a workspace if necessary?

   Check all that apply.

   ☐ Yes
   ☐ No
   Other: ☐ _____

10. Can you cover costs such as refreshments and supplies (such as labels or needed boxes) or collaborate on getting donations for these items?

   Mark only one oval.

   ○ Yes
   ○ No
   ○ Other: _____

11. Can you recruit local participants for the workshop, such as staff, colleagues from other organizations, volunteers, members, students, or film/video makers?

Mark only one oval.

◯ Yes

◯ No

◯ Other: _____

12. Roughly how many items would you say are in the collection?

_____

13. Can you provide a rough breakdown of items by format?

(i.e. 16mm film vs. VHS video cassette)

Check all that apply.

☐ Yes

☐ No

Other: ☐ _____

14. If yes, what types of formats are in your collection? (Check all that apply)

Check all that apply.

☐ Audio: Compact Cassettes, Standard Size
☐ Audio: Cassette, Micro
☐ Audio: Cassette, 8-track
☐ Audio: Open reel-to-reel (1/2 inch, 1/4 inch)
☐ Audio: Grooved Records (vinyl, shellac, other)
☐ Audio: Wax Cylinders
☐ Audio: OTHER...
☐ Video: VHS
☐ Video: Betacam, BetacamSP
☐ Video: 3/4 inch U-matic, UmaticSP
☐ Video: MiniDV
☐ Video: 8mm (Video, Hi8, Digital8)
☐ Video: OTHER...
☐ Film: 35mm
☐ Film: 16mm
☐ Film: 8mm, Super-8
☐ Film: OTHER...
☐ UNKNOWN.

15. If known, please provide a brief description of the collection(s), such as the content and the types of materials (raw footage, finished edited works, documentation of events, home movies, etc.):

_____

_____

_____

_____

16. To what degree has the collection been processed already? What documentation about the collection exists, if any, such as paper lists, spreadsheets, databases, etc.?

_____

_____

_____

_____

17. Generally, what condition do the materials appear to be in?

_____

_____

_____

_____

18. Do you have plans for the collection after the workshop? Please explain:
   (i.e. applying for preservation funds, creating public access, etc?)

_____

_____

_____

_____

19. Other comments or questions?

Please tell us anything else you think we should know about your collection

_____

_____

_____

_____

Google Forms

Timestamp	Organization Name	Organization Website	Organization Address	Contact Person
9/14/2021 12:40:43	Crowing Rooster Arts	crowingrooster.org	100 Lafayette St, Ste 602, New York, NY 10013	Marie Lascu

Contact phone number	Contact email	What is your role in the collection?	Does your organization have space to host the workshop or can you arrange for a space to host the workshop? Ideally, the space would accommodate 25-30 people where participants work around 4 tables, as well as other tables for collection items.	Can the collection be easily/safely transported to a workspace if necessary?
212-334-6260	marie@corwingrooster.org	Archivist	Yes	Yes

Can you cover costs such as refreshments and supplies (such as labels or needed boxes) or collaborate on getting donations for these items?	Can you recruit local participants for the workshop, such as staff, colleagues from other organizations, volunteers, members, students, or film/video makers?	Roughly how many items would you say are in the collection?	Can you provide a rough breakdown of items by format?	If yes, what types of formats are in your collection? (Check all that apply)
Yes	Yes	4,000 - 5,000	Yes	Audio: Compact Cassettes, Standard Size, Audio: Open reel-to-reel (1/2 inch, 1/4 inch), Audio: OTHER..., Video: VHS, Video: Betacam, BetacamSP, Video: 3/4 inch U-matic, UmaticSP, Video: MiniDV, Video: 8mm (Video, Hi8, Digital8), Video: OTHER..., Film: 16mm

If known, please provide a brief description of the collection(s), such as the content and the types of materials (raw footage, finished edited works, documentation of events, home movies, etc.):	To what degree has the collection been processed already? What documentation about the collection exists, if any, such as paper lists, spreadsheets, databases, etc.?	Generally, what condition do the materials appear to be in?	Do you have plans for the collection after the workshop? Please explain:	Other comments or questions?
The bulk of the media content is related to multiple documentary shoots in Haiti between 1990 - 2004, with raw footage shot on 16mm film and Hi8 video and transfers to 3/4 inch U-matic and Betacam SP for tape to tape editing before the implementation of digital format editing via Final Cut Pro 7. Finished edited works are on multiple broadcast formats, primarily 3/4 inch U-matic and Betacam, with the occasional 2" Quad and D2 tape. Other raw footage formats also include MiniDV, DVCam with some accompanying audio on DAT and 1/4 inch open reel.	Roughly 3000 items have been inventoried in an Excel spreadsheet, with 3/4 of those items entered into a FileMaker Pro 14 database with minimal cataloging.	Material seem in relatively good condition, with minimal dust on items stored in the main work office and no signs of mold or visible sticky shed on items stored in the main office or pulled from offsite storage. Films in offsite storage are beginning to exhibit vinegar smell, but no physical signs of decay.	Once material is fully digitized, there are plans to reuse raw materials to create new documentaries. To date, the archive remains internal due to security concerns by the primary content creator and owner.	Will there be coffee?

Sample Partner Organization Inquiry Letter - General

Dear—:

Thank you for your interest in possibly partnering with **[your organization]** to hold a Community Archiving Workshop (CAW) to address your audiovisual collections. We are in the process of selecting one or more partners for **[suggested timeframe]**.

This workshop model brings experts and those new to audiovisual archiving together to inspect and inventory these very endangered collections. The purpose of a CAW is to help jump-start your preservation projects by gathering the information necessary for you to set priorities, make selections, and develop plans for digitization and access.

Community Archiving Workshops typically take place on a single day and involve 25-30 participants. We have found that with this scenario, the participants can create a spreadsheet inventory of as many as 150-200. In addition to your staff, participants are often your members or volunteers, and local experts, allies, and enthusiasts. No prior experience is required.

We find the best partnerships involve one or more organizations that can select approximately 200 items of **[type(s), i.e. video, film, digital media]** that are significant to their communities and represent rare or unique materials.

We lead and facilitate the workshop, and compile and deliver the data to you after the CAW. We help you select the collection(s) and incorporate best practices for inspection, labeling, and data collection in keeping with your existing procedures and descriptive systems. Where needed, we bring specialized equipment, such as for film inspection.

Partners set goals for the CAW, engage in a planning process and provide access to collections and collections data. In addition, usually, the partner(s) provide or arrange for space and provide refreshments. They often take the lead in publicizing the CAW, recruiting participants, and gathering supplies. However, we can collaborate on these tasks as needed.

Thanks so much for your time, and I hope that we can work together to save our audiovisual heritage. I would be happy to meet to provide more details.

Best regards,

Sample Roles during a CAW

Below are typical roles that a planning team can divide up to ensure the smooth running of a CAW. Some people will need to take on more than one role, and people can trade roles during the CAW to gain different experience. Also, if you have a small planning team, you may have key volunteers that can be asked to take on certain roles.

CAWs are wonderfully lively and unpredictable and can seem a little chaotic as everyone gathers and finds their place. Plan ahead, choose roles and be clear about responsibilities before the CAW day. This is especially important during CAW Training of Trainers or in any case where team members are new to CAW organizing. Every CAW is different so modifications of these roles or new roles may be needed – the point is to match roles with your proposed CAW workflows.

Typical roles on the day of a CAW:

- Lead Site Organizer(s): 1-2 people are lead contacts for the partner and site, and deal with any logistical issues that arise during the CAW. They can keep track of time and make sure the group moves along on the agenda; for example prompting the group to lunch, a break, or to cleaning up for the end-of-day celebration of accomplishments. They can coordinate the answering of questions that are useful for the whole group – getting the group's attention and facilitating or answering the question(s). These workers can also lead the discussion of accomplishments and next steps at the end of the day or recruit someone to do that.

- Welcome table: Typically one person works at the welcome table, greeting participants, signing them in, and assigning each person to a table. Volunteers are assigned so that there are a mix of people at each inspection/inventory table; for example, those with a range of expertise with archiving, with media/film, and/or with spreadsheets.

- Evaluation Coordinator: This person makes sure no one leaves without filling out an evaluation form. They may also take on the job of summarizing the evaluations for the post-CAW meeting with the partner.

- Table captains: One person per inspection/inventory table, who facilitates that table's work. The table captain greets their team and helps those with computers load the data template/spreadsheet on their laptop(s). They make sure that everyone names their

template files correctly. After a few records are completed, the table captain checks them for accuracy and consistency, and consults with their colleagues as needed for any questions about how inspection or description is being done. At the end of the day, the table captain collects all of the files from the participants at that table. This is a wonderful way to become experts with the template and to practice facilitation.

- Box table: Typically we need 2-3 people in this role. The workers at the box table keep track of the totality of boxes that are being inspected and inventoried, distributing and retrieving the boxes to the tables. When a box is fully inventoried, they may need to re-box the items. These workers are responsible for tracking what item numbers ultimately end up in what boxes. This role gives you a chance to practice the tasks in the overall management of the CAW, and to experience first-hand how the archival materials are organized and tracked.

- Presentations: The presentation can be divided up into sections, so 2-4 presenters are needed. Fewer may be needed depending on whether the workflow calls for presenting the template to the entire group, or if each table is trained separately on the template. Also, the complexity of the presentation will depend on the media types represented in the collection(s).

  Typically the slides for the presentation time include: welcome and intro of the partner, the collection and CAW goals; instruction on media and film or both; presentation of the CAW workflow; and the introduction of the template. Sample presentations are available that cover all of these points. It's great practice to present the slides and with the help of colleagues (if needed) to answer questions. This is a great way to learn about deterioration factors for video and film, to become an expert in the template and workflow, and to practice presenting.

Sample Publicity for a CAW

- Please note that the CAW histories shown here are no longer current as these are older descriptions.
- Please refer to the CAW website for various descriptions of the CAW and its goals.

COPY OF PUBLICITY FOR 2015 CAW AT THE SCRIBE VIDEO CENTER
https://scribe.org/events/preservation-community-archive-workshop

- Note that in this case we were working with an organization's workshop template, requiring an "instructor," which should have been something like the "CAW Committee." However, the description is simple and engaging, emphasizing the educational aspect and targeted at non-specialists

Preservation - Community Archive Workshop

Saturday, April 29 from 11:30 AM – 5:30 PM (Bring your own brown bag lunch!)
Cost: FREE

Whether taping a local street protest or recording a block party or church event, documenting community history is only the beginning. As years go by and tape formats change, countless productions are locked away on obsolete and deteriorating tapes. The first step to access is to understand what a collection contains so that the highest quality, most important, and most at-risk tapes can be preserved. Join the workshop where experts and beginners come together to develop an archiving strategy for community collections. Learn archiving skills and hear about how actions for preservation and access can be organized for your organizational or personal collection. To learn about the process, please see https://communityarchiving.org/.

COPY OF PUBLICITY FOR A CAW AT THE DOWNTOWN COMMUNITY TELEVISION CENTER, NYC

https://www.nycarchivists.org/event-2073371

- This description was written by students in an NYU course, so has a certain bent. However, it talks about the collections, which may entice some people. The students also set up a Facebook event.
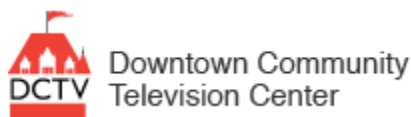
A Community Archiving Workshop on November 4th will tackle the archiving of social issues documentaries from the 1970s and early 1980s produced by the Downtown Community Television Center (DCTV), a media arts center that was founded in 1972. Organizers welcome the participation of archivists and those new to archiving and interested in learning basic archiving skills for video materials. Join us in this effort to save DCTV's collections and learn about audiovisual archiving in the process!

Interested participants must be pre-registered and space is limited to 30 participants — please RSVP to **--**.

DCTV's rich and precious resources have been locked away in older video formats, like 1/2" open reel, that were used by pioneering documentarians starting in the late 1960s. Their historic collections include street interviews of residents and businesses on 3rd Avenue from the Bronx to lower Manhattan; the living and working conditions for Asian immigrants in 1970s Chinatown; Vietnam as it was rebuilt after the Vietnam War; and Iran and Afghanistan during the time of the Iran Hostage Crisis. The tapes were used in award-winning films, and offer a unique picture of New York in the turbulent times of the 1970s and 1980s.

Audiovisual archivists and students from NYU's Department of Cinema Studies are recruiting the participants to activate the recovery of these endangered tapes. They will spend the day inspecting and inventorying 70 or more boxes, pulled down from DCTV's crawl space. The inventory will help DCTV decide what can be saved. Organizers also believe that it is essential to demystify this process of inspection and cataloging so that other important collections held by arts and cultural groups of New York will not disappear from the cultural record. Selections of finished works will be screened and refreshments will be served.

COPY OF PUBLICITY FOR AN AMIA CAW

- This description was intended to recruit professionals who are part of the network of the Association of Moving Image Archivists (AMIA), so has a much more formal tone. "About the Community Archiving Workshop" will need updating, but the description of the partners is a nice touch. This publicity was for a CAW organized in conjunction with the 2015 AMIA conference. See https://communityarchiving.org/workshops/2015-portland/.

In association with the annual AMIA Conference, the Community Archiving Workshop provides moving image archivists the opportunity to serve regional communities and work with local volunteers to help an organization gain intellectual and physical control over an endangered moving image collection. This year the workshop is partnering with the Portland Institute for Contemporary Art and filmmaker Vanessa Renwick to process both personal and organizational collections of film and video. Conference attendees will receive training and supervision as they partner with local volunteers to conduct basic processing, cataloging and inspection of moving

image assets. By doing so, participants will learn how to identify risk factors and make preservation recommendations for moving image collections, as well as gain experience in working with and training non-archivists to care for their collections. Most importantly, participants will build relationships and connections with the Portland community and learn about the local arts community.

[additional information for email blast]

About the Community Archiving Workshop:
A proptype community archiving workshop was held at the Visual Studies Workshop in Rochester (2009) and the first public event was held at Scribe Video Center in Philadelphia (2010). The Independent Media Committee began hosting the event in 2011 at the Austin History Center. In 2012, the Independent Media and Diversity Committees joined forces to host the workshop at Three Dollar Bill Cinema, a Seattle community organization. In 2013, the workshop partnered with The Valentine Richmond History Center and the Virginia Commonwealth University Libraries. In 2014 the workshop partnered with the Georgia Historical Society and A.W.O.L. (All Walks of Life) a Savannah- based youth media organization. Versions of the workshop have been held in Oaxaca City, Mexico (2014) and Nashville (2015).

Local and AMIA volunteers find the workshop enriching, valuing the hands-on aspect it adds to their conference experience. Volunteers described the experience as "a fantastic opportunity" and "one of the best things I've done at AMIA."
http://communityarchiving.org/
https://www.flickr.com/groups/communityarchiving/pool/

About the Portland Institute of Contemporary Art (PICA):
PICA's programming supports the experiments of the most vital and provocative artists of our time. Our vision is international, intergenerational, interdisciplinary, and decidedly forward thinking (even when those explorations look back in history). PICA is unique among institutions for working right alongside artists at the increasingly blurry boundaries between forms and at the edge of new ideas. Throughout the year, audiences have myriad opportunities to interact with artists, curators, critics, and cultural visionaries in a direct, in-depth way. From performances to exhibitions to lectures to the annual Time-Based Art Festival, our programs catalyze conversations about contemporary culture.
http://pica.org/

About Vanessa Renwick:
Founder and janitor of the Oregon Department of Kick Ass
Daughter of the American Revolution
Born 1961 in Chicago, Illinois. Film / Video / Installation artist. Lives in Portland, Oregon

An artist by nature, not by stress of research. She puts scholars to rout by embracing Nature's teaching problems that have fretted trained minds. Working in experimental and poetic documentary forms, her iconoclastic work embodies her interest in landscape and transformation, and relationships between bodies and landscapes, and all sorts of borders. She is a naturalist, born, not made : a true barefoot, cinematic rabblerouser, of grand physique, calm pulse and a magnetism that demands the most profound attention.
http://www.odoka.org/

ANOTHER SAMPLE OF PUBLICITY FOR AN AMIA CAW (EMAIL)

Arriving early for the AMIA Conference this year and looking to get out in the Richmond community?

Register for the Community Archiving Workshop!
Tuesday, November 5th, 11am - 5pm

Working with the Valentine Richmond History Center, Community Archiving provides moving image archivists the opportunity to serve the community of Richmond and work with local volunteers to help an organization gain intellectual and physical control over an endangered moving image collection. Conference attendees are paired with community members to conduct basic processing, cataloging and inspection of a moving image collection and, by doing so, will learn how to identify risk factors and make preservation recommendations for moving image collections.

Attendees will gain experience in working with and training non-archivists to care for their collections. In the process, they will engage in hands-on processing, inspecting, and cataloging audiovisual media. Most importantly, they will build relationships and connections with the Richmond community.

A late lunch will be provided.

Details:

Community Archiving Workshop
Day: Tuesday, November 5, 2013
Time: 11-5pm
Location: James Branch Cabell Library
Second Floor, Multipurpose Room
VCU Libraries
901 Park Ave.
Richmond, VA 23220

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Webinar 3 Trainers Notes: CAW Negotiations: Collections

TIME: 60 - 75 min. Times for sessions are approximate; timing through practice presenting is recommended, and will also depend on how much discussion (mentoring) happens at the end of the webinar.

LEARNING GOALS:

- To gain an overview of factors that go into the selection of a collection and the scope for a CAW
- To increase understanding of how the choice of a collection and scope affect the workflow and tasks of a CAW
- To increase understanding of the impact of AV type, the depth of processing, and how activities such as digitization affect a CAW workflow and preparations
- To understand the factors that go into selecting and configuring a CAW space
- To become familiar with the typical flow of a CAW and roles that can be helpful to support that flow and meet the goals of the CAW

PRE-SESSION WORK:
It is recommended to send participants a reminder about the presentation date/time 1-2 days prior. Also, a mentoring session should be scheduled before Webinar 3. The timing and rough agenda of the mentoring meeting should be confirmed as soon as possible after Webinar 2, if not at that time.

It is likely they will need some time between Webinar 2 and 3 to look for a CAW partner using the tools introduced in Webinar 2. Or if they have a partner in mind, this is a good time for a site visit and/or to otherwise get more details about partner collections and their current descriptive systems.

The next two webinars cover two major aspects of negotiations with the partner. Webinar 3 is about negotiating the focus: the specific collection and the corresponding specific goals, tasks and workflow of the CAW. Webinar 4 focuses on the design of a data template, considering the partner's current systems/practices. Both require research that ideally would be undertaken preliminarily between Webinar 2 and Webinar 3. The final agreement on roles and responsibilities should be finalized as soon as possible after Webinar 4.

From Community Archiving Workshop Training of Trainers Curriculum, CAW_TOT_CUR.pdf

If the site for the CAW is going to be different from the partner's location and the collection, this aspect of the planning will require more work, such as ensuring the safe movement and security

of collections. Also, in the case of separate locations, there are the added logistics of coordinating the three days of On-site Training. Any research on a site that can be done prior to Webinar 3 will be helpful.

During this time they should also be continuing to refer to and refine their timeline and planning tasks, based on the discussion at the end of Webinar 2. Discussion of the timeline and tasks will be a major part of the mentoring session with them to make progress on the tasks outlined in that document. The planning will unfold differently for each group of trainees, so it is important to remain flexible and to make the overall TOT timeline work for each scenario.

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
20 min.	After reviewing the agenda on slide 2, the first set of slides encourages the participants to think first about identifying one or more collections, and then about the scope or extent of the work that can be done with the collection(s). In other words, a collection might include all of the materials from a certain production, but the CAW organizers and partner may settle on focusing on finished productions, camera originals, and audio originals in their first discussion. The scope gets further narrowed down in areas like media types, quantities, and the actual impact on the items. Here they are working toward specific goals for the CAW that could go in a MOU; for example those that were in Webinar 1, slide 29: 1. To process 100 videotapes, audiotapes, and films with 25 staff & volunteers 2. To label, inspect, inventory, and re-box the [name] collection 3. To collect the data into a Microsoft Excel spreadsheet	Slides 1-11 CAW_TOT_CUR_Web_3_Presentation

	This is still pretty broad, so negotiations continue to determine actions (tasks) for each media type, which factors into workflow. This first part helps the participants see how the process of selection can go back and forth as the organizers and partners get to know each other. Eventually, everybody comes to a common understanding about what the CAW will entail. We end this section with a reminder about how different each CAW can be, and how planning can be a process of education for both sides. As with all sessions, the more examples, the better!	
20 min.	In this section you are getting down to the task level. Participants learn about the variables and possibilities that we have seen in CAWs. A series of small decisions, considering the needs of the partner and the collection, add up to workflows for the day-of and determine things like equipment lists, space needs, volunteer recruitment, the technology needed, and the depth of data gathering. There are pros and cons to any workflow and sometimes we just need to experiment.	Slides 12-21 This is a good time to switch trainers
20 min.	Talk through the HOMEWORK; this will probably morph into a discussion on what is on their minds since the mentoring meeting. The trainers can also prompt them for updates on things on the timeline. It's time for them to settle on some roles for the CAW, as this may impact their work going forward. For example, they could divide up some of the remaining prep, like making any local changes to the CAW presentations. It makes sense for the group to decide on who will present at the CAW, so the same people can be part of designing those changes. Make sure tasks are being as evenly distributed as possible.	Slide 22 Share the homework: CAW_TOT_CUR_Web_4_Ho mewk The trainers could switch off again here for this facilitation

EQUIPMENT & RESOURCES:

- Platform (Zoom, Google chat, Skype) or laptop/projector
- Presentation(s): CAW_TOT_CUR_Web_3_Presentation

OTHER CONSIDERATIONS/MATERIALS

- As noted with other sessions, this does not need to be a webinar. In fact you may find ways to make the sessions more interactive if they are not webinars, and then can be scheduled for a longer time.

- If you are meeting in person, a flip-chart/markers or whiteboard/markers or blackboard/chalk is helpful to track their responses during discussions, or you can take notes in a file that is projected.

COMMUNITY ARCHIVING WORKSHOP
TRAINING OF TRAINERS

[name of planning team (trainees)]

Webinar #3
CAW Negotiations: Collections

CAW_TOT_CUR_Web_3_ Presentation

CAW NEGOTIATIONS: COLLECTIONS

choosing collection(s) &
determining goals & scope of work

task/workflow decisions & strategies

space arrangements

wrap-up, homework & next tasks

WHAT MAKES A GOOD COLLECTION?

strong likelihood CAW will lead to preservation & access

strong benefit to organization & users

interesting & engaging content helps!

---

identified as in need of attention
age, obsolescence, condition, significance

unprocessed or
minimally processed

unique materials/
valued content

materials they own, have rights to, or
for which they play a custodial role

WHAT MAKES A GOOD CAW SCOPE?

management of tasks matches people
power (numbers & skills)

tasks provide a sense of completion

orienting participants to tasks (opening
presentations) takes no more than an hour

---

processing tape-based
media

more experts
process is similar for all tape types
metadata is accessible
little risk to collection
playback possible but may create risk
can't see content so not as exciting as film

Slide 1

processing film

fewer experts

often more about demo than reproducible skills

metadata less accessible, some risk in unspooling

will you do a visual inspection or full inspection?

if full inspection, will you record full inspection on paper & then enter into data template?

image is visible so can be more exciting

Slide 2

tot.communityarchiving.org/2021/09/04/webinar-9-using-the-film-inspection-kit/

CAW
Community Archiving Workshop

TRAINING OF TRAINERS TOOLKIT

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Webinar 9: Using the Film Inspection Kit

Sep 4, 2021 | Documentation, Presentation, Remote, Southwest, Tribal Archives SW, Webinar

Presenter: Shahed Dowlatshahi

In this session, participants will be introduced to a portable film inspection and repair kit. The main components of the kit are a set of film rewinds, splicers and leader for various gauges, a lightbox, cores, reels and split reels, and other accessories and tools necessary for film inspection and repair. The kit can be used to view, inspect, and repair 8mm, Super 8mm, 16mm, and 35mm film.

Film Inspection Kit Guide

FilmKitguide

Slide 3

processing optical media
(CDs, DVDs etc.)

expertise varies

metadata inaccessible, including about important carrier and file format distinctions

playback possible, lower risk than with magnetic media however handling can be more risky

these are recent formats, so there may be more confidence in handling

Slide 4

connectingtocollections.org/c2c-care-course-physical-media-to-digital-storage/

FAIC

Connecting to Collections Care

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C2C Care Course: Physical Media to Digital Storage

Physical Media to Digital Storage
Migrating Audiovisual Files in Museum Collections
October 13 to November 12, 2020

Do you have collections of obsolete and vulnerable removable media (optical media, hard drives, flash drives, etc.) but no backup of the files (the content) to safe and secure storage? This course, created for collections care staff at small and mid-sized institutions, takes you through the steps to identify, prioritize, describe, verify, and to safely transfer the files.

At the end of the course, participants will be equipped to plan and carry out their own migration plans of these critically endangered materials. The emphasis will be on moving image, sound and multimedia content, but the course will be applicable to the shared concerns about other materials such as photos and text. A sample Excel template will be provided listing the key information necessary for management of the

Upcoming Events (All times in Eastern Time — New York, NY)

September 30, 2021, 1:00 pm – C2C Care Course: Building Collaborations Between Museums and Indigenous Communities
November 16, 2021, 1:00 pm – Long Term Storage for Large Functional Objects: Vehicles
January 19, 2022, 1:00 pm – Introduction to Digital Collection Management

Past Webinars

Security for Collections: Preventing Loss and Planning for Any Budget
May 24, 2012

Selecting a Conservator
May 9, 2012

Slide 5

different organizations, different needs

Slide 6

TASKS & WORKFLOWS

- ❏ 9:00 - 10:30 - set-up
- ❏ 10:30 - 11:00 - volunteers arrive, template loaded on laptops, teams get to know each other
- ❏ 11:00 - 12:00 - welcome, presentations, instructions on inspection and inventory
- ❏ 12:00 - 4:00 - inventory including breaks
- ❏ 4:00 - 4:30 - teams wrap-up their work, boxes and materials organized, and participants do evaluations
- ❏ 4:30 - 5:00 - celebrate accomplishments and talk about next steps
- ❏ 5:00 - 6:00 - finish clean up

unique IDs

❏ analyze any current or old numbering systems
❏ most important to convey: that IDs must be unique
❏ assure the partner that if a new ID is devised, all old numbers can be captured
❏ account for growth if new unique IDs are needed

labeling options

❏ label items before the CAW
❏ label at a workstation (i.e. box table) and distribute labeled media to inventory tables
❏ distribute pre-printed labels to inventory tables for affix labels
❏ distribute blank labels & a set of numbers to inventory tables for writing & affixing

distribution, retrieval & re-boxing of items

❏ volunteers at one workstation (i.e., box table) distribute one box at a time to inventory tables according to priorities
❏ box table volunteers are responsible for correlating & documenting the item IDs represented in a given box
❏ if re-boxing is needed, box table volunteers track the changed box numbers

data template & software

❏ plan for one table captain assigned to each inventory table for supporting & tracking work and collecting all data
❏ choose software: inventory done through an Internet-dependent platform like Google sheets or through a program like Excel?
❏ make a plan for handling questions that impact data consistency

team configurations and teamwork

❏ teams of 2 or 3 work well
❏ often teams will organize their own ways of working together; be flexible but plan for team roles
❏ the more information is known about volunteers, the more you can direct teams
❏ volunteers love exposure to different materials and processes - decide if teams can be rotated to different stations

OTHER ACTIVITIES

sorting on-site

conducting a box level inventory

New box #	Other box # or annotations	Formats & numbers	Contents	Type of materials	Date range	Condition	Notes
Include if you need to give the box a new number	Any old number or relevant markings on box	Total number of each format; if you decide to separate similar formats, such as Betacam and Betacam SP, be consistent	Part of a series? a production? Anything you can quickly observe that will help with box relationships and prioritization	Camera originals? Edit masters? Stock footage? Rough edits? Time-coded work tapes? Be consistent about your use of terms	From tape annotations or from knowledge of formats. Can use circa (e.g., c. 1990s) if not sure	Hongos, polvo, agua, humedad, cinta arrugada, cinta cortada, deterioro del aglutinante, moho, mal olor, mal rebobinado, etcétera	Anything you notice that can't fit in another column

verifying content through playback

Seattle, WA, Three Dollar Bill Cinema

demos of digitization or full film inspection
digitization and/or DVD digital file extraction

Vieques, PR, Archivo Histórico de Vieques

ARRANGING SPACE

❏ sign-in table
❏ 6-8 people per inventory table box table or staging area
❏ if needed, tables for extra activities
❏ power to tables or dedicated charging area
❏ set-up for projection to screen or wall
❏ blackboard, stand or wall space for flipchart paper
❏ refreshment area separate from collections

HOMEWORK

choose roles for CAW day

review sample data template, presentation & cheatsheet

meet & discuss tasks and workflow [after site visit or additional discussions w/partner]

Webinar #4 - CAW Negotiations: Data Templates
_____
[date, time]

- [how we will connect]

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Speaker Notes Webinar 3: CAW Negotiations: Collections

Provided below is a copy of the speaker notes also contained within the associated presentation slides (CAW_TOT_CUR_Web_3_ Presentation).

Slide 2:
Here is our agenda for today - we will start with criteria for choosing a collection and coming to a common understanding of the collection or collections to be the subject of the CAW, and the focus for the work on that collection. We will talk about how the goals determine the tasks to be carried out (you can think about this as the 'what'), and the process or workflow (you can think about this as the 'how'). These decisions will guide you on different configurations for the workshop space and will lead to more concrete plans for the supplies or equipment that are needed for the day. Much of this may not be new information to many of you. However, we intend this presentation to also model ways to educate your partner (as needed) and help you mutually choose collections and workflows that will have the most impact toward their preservation goals.

We will end with some materials to review for Webinar #4, and a short discussion of next tasks.

Slide 3:
Negotiating with your partner is where you bring all of your skills of observation, inquiry, and listening. You have heard us mention a few times the criteria for selection of an organization and a collection. To review, the point of a CAW is to jumpstart efforts toward preservation, because we know that AV materials are at great risk and hold irreplaceable content. The time to digitize is now. In large part we are building enthusiasm about future access, demystifying the process of getting there, and building confidence among staff, allies, and volunteers.

Hearing about the partner's vision is a first step. Do they look forward to programming and exhibitions? To creators making new work? To researchers, educators and students mining the collection? Also, in some cases you as a planning team may also have a vision, depending on your motivation and how the CAW meshes with our own programs. That can also be legitimate and meaningful.

Slide 4:
You want to identify collections that are in need of attention and are unprocessed or minimally processed. What do we mean by unprocessed or minimally processed? In traditional archival practice, collections are typically processed first at the box level, then the folder level (which does not apply to audiovisual materials), and lastly at the item level. Each level offers a degree of intellectual control (information about content) and physical control (an ID and home that allows for tracking and access). Item level description is particularly important for AV materials, because there are often multiple copies of varying quality and it is important to find those that are the highest quality when doing preservation.

Many organizations accumulate media that they do not own in the process of doing now defunct programming. These commercial productions are often mixed up with materials that are rare or unique and reflect their own history and communities. Viewing copies of other people's productions are often found, and complicate preservation and access. However, they may be a repository for collections for which they do not have rights, but where they suspect are rare - such as those of a small production company that is now out of business. We often need to ask probing questions to find the most unique materials, and to set priorities. It can be helpful to do sorting at the site visit. This goes against traditional archival practice, which respects the order and arrangement of a collection, but may be a practical step.

Slide 5:
Selection of the collections is one task, and scope refers to the extent of the work planned for a given collection, and/or defined sub-collections. Your scope is usually planned but somewhat in flux until you are actually able to physically examine the collection. We recommend that the scope be ambitious yet realistic considering the resources (human, technical, space, etc.)

Slide 6:
Keeping the CAW simple to a few goals can be very effective. Materials affect workflows. As you become more comfortable with the process, you can add more workstations as time goes by. As with everything, it is important to know your partner and think about what will advance their goals. Magnetic tape-based media is the easiest, as it requires little training.

Slide 7:
When processing film, there needs to be more definition in terms of tasks. Some CAWs will only involve a visual inspection, with no unspooling. Others will involve the use of a light table and some unspooling. Others will involve a full inspection, and the data entry may be in one or two steps. Any experience offers an opportunity for volunteers to better understand the needs of film, but it is likely no one will gain enough skill to safely handle anything but a brief visual film inspection after the CAW.

Slide 8:
CAW developed a film kit that provides the basics of what is needed for film activities.

Slide 9:
Optical media falls under our purview, but has historically been an uncommon focus at our workshops. It is likely to become a more common feature as more previously digitized to optical media content needs to be migrated to alternate digital storage for long term care.

Slide 10:
There is a five webinar course on FAIC's website "Physical Media to Digital Storage" that should be free as of November 2021 and can be drawn upon as a resource for incorporating content on removable media.

Slide 11:

We have discussed many times the importance of meeting the organization where they are, and striking the balance between respecting local methods and educating about archival practices, particularly where you know those practices are essential for the preservation work to be sustainable and for true access to result. So we need to be sensitive to organizational capacity and what works best in any given context. But don't be afraid to push a bit in a constructive direction, as avoid assumptions about what you think is possible.

We also always like to watch our assumptions. In Oaxaca, Mexico, there was a CAW using the collection of documentaries and production elements of Ojo de Agua Communicación, a group of creators that had no paid collection manager. As you can see, to get the inventory done, the group set up in part outside. Organizers wondered how the work could possibly continue. However, there was one volunteer who was trained as an archivist. Not only did she continue the inventory, but she wrote a manual for how to catalog. With her permission, NYU's program Audiovisual Preservation Exchange (APEX) adapted her manual for subsequent cataloging projects in Uruguay, Chile, and Spain. We never could have imagined that.

We will now go through a few of the areas of decision-making as you get more clear on the actual tasks and workflows you will employ during the CAW.

Slide 12:

This is an example of a typical CAW agenda. It will of course vary depending on the requirements of the site, and how familiar you are with the collection, and how much set up you were able to do the day before. While the volunteers are coming in and getting settled, you are preparing for the work to begin as soon as the presentations are done. As we mentioned, you will want to get to work ASAP so the welcome presentations should not go more than an hour. You may decide that it is better to have the table captains do the instruction on the template at the tables. Presenting the template to the large group has its advantages, as everyone sees the same example and any questions raised are heard by the entire group. Breaks can be taken together or as needed. A formal lunch time can cut into the work time, and it is best if food can be available on-site to avoid losing people. The table captains also will need to keep an eye on people who may need to leave early, to make sure they deliver their file and fill out an evaluation. It is critical to leave a good amount of time for the wrap-up, as it is an important moment of celebration and a teachable moment.

Slide 13:

Let's take a look at some of the decisions on specific tasks that will be needed to make the day flow and to accomplish the maximum inspection and inventory.

Slide 14:

In almost all cases the materials are labeled with a unique ID. The organization may have categories established and a numbering system, and all numbers must be respected and retained, but it is important to communicate how critical it is to preservation to have unique IDs. Best practices call for labels on both the media and the container, so double sets of labels will be needed.

Slide 15:

We are suggesting that it is very helpful to have a workstation (we are calling that a box table) where one or more people manage the distribution of boxes to the inventory tables. You will have arranged these boxes the day before or the morning of the CAW. Distribution of the boxes should be ordered according to the priorities developed with the partner. Re-boxing may be needed for a number of different reasons. A collection or sub-collections may be spread across numerous boxes, and through the CAW, we find that it makes more sense to group these materials together. The boxes may be deteriorating and contaminating the media with dust and debris, or they may just be packed inefficiently. Best practices also call for media and film items to be stored in a certain orientation to prevent dimensional changes, so this could be another reason for re-boxing. Also, some items may need to be separated, such as in a case of mold.

Slide 16:

Webinar 4 will cover the structure of the template; this discussion is about how it is used. There are again decisions about tasks that affect workflow. We strongly recommend always having tabel captains and one jump drive per table. The table captain makes sure the template is on every laptop and that every file is named properly, answers questions and checks records, interacts with the box table, and collects all files. This distribution and collection can also happen through email, if there are compatibility issues with drives if there are no longer useful ports on a laptop. We have mentioned before the pros and cons to using Google vs. Excel. There are interoperability problems, especially with drop down menus that contain authority lists, so do some testing if you plan to go back and forth between programs. You will also want to have a plan for supporting consistent data on the fly; for example for authority lists for title, or suggestions for descriptors of condition.

Slide 17:

Team configurations are often done on the fly, and may vary from table to table. It is recommended that you facilitate team work by who has laptops, pairing the participants to mixed levels of expertise in such areas as AV archiving or handling, and skills with Excel. Table captains will need to be observant about group dynamics. While it is great to complete a predetermined amount of work, for some partners the jump-start and networking is as important or more important than the numbers.

Slide 18:

These are some of the activities that have occurred at past CAWs. As we have said, we think this first CAW that you plan should be as simple and straightforward as possible. The first two activities listed are actions on the collection that may be as important as the item level inspection and inventory, or may take up a portion of the time of the CAW. For example at a Richmond CAW, there were a large number of boxes that were all part of PSAs where businesses had completed for the best PSA. There was no rhyme or reason to the boxes. The CAW committee first got the inventory tables going and then a few others tackled the sorting of the collection. Rather than dive right into an inventory, they spent an hour or more sorting and organizing the collection, with the permission of the archivists, so that they could have an approach for later work. Only in the last few hours did the group begin the inventory of that collection.

The act of organizing was a gift to the partner. In the same way, if the writing is on the wall that not all boxes can be touched, some of the volunteers could work on a box level inventory. This kind of flexibility is great, but must be managed.

Slide 19:
On a rare occasion, collection items can be viewed. This allows for much deeper content information to be documented. However, the collection managers must be informed of any risk and be comfortable with the risks. Also, acquiring decent equipment can be difficult.

Slide 20:
With all of these last few activities, you want to make sure you are still attending to the partner's goals. In some cases, we have had other partners in the room that are doing digitization. It can be great fun, but requires extra planning, like where will the files go? We do not recommend it for the TOT CAW. We have found that it is more realistic to demo digitization, and to do a few sample reels. Volunteers can rotate through the demo stations, but the core work can continue.

Slide 21:
To summarize, you will set up your space and collections according to your goals, your identified tasks, and what you think makes for the best workflow. Here are typical space elements.You will be working within limitations and have seen how one can have a large, bright, and spacious space with great power and Internet, or you can be working in a combo inside/outside space with no Internet. In the best case scenarios, you can arrange the room and collection and set up again the day before. Or you might be arriving the morning of the CAW and working on your feet.

Slide 22:
Here is the homework for the next session. It's time to choose your role(s) for the CAW. Remember to choose something that will challenge you and meet your learning goals. To be ready for Webinar 4, look over the set of materials from the California TOT: the data, template, presentation and cheatsheet. All of these documents need to match. [See CAW_TOT_CUR_Web_4_Homewk]

By this time you should be well into the CAW planning, hopefully having made a site visit or have otherwise requested/received info on the collections from the partner. You should be continuing to refine your timeline and planning tasks, as well as your CAW tasks and workflow.

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Homework for Webinar 4 - CAW Negotiations: Data Template

As a reminder, **Webinar 4 will be held [date, time].**

Before the webinar:
1. If you have not done so already, **please make final decisions about the assigned roles for the CAW** and include them in your timeline. Descriptions of typical roles are pasted below. Some people will need to take on more than one role. Feel free to propose modifications or new roles during Webinar 4 that you think may better match your workflow.

2. **Hold a planning meeting** to discuss the topics raised in Webinar 3, and reach out to your partner to the extent needed to finalize your MOU or other agreement. Adjust your timeline and tasks as needed.

3. **Please review the documents listed below** that are from the 2019 Training of Trainers in California.

   They constitute examples of a data template, a presentation and cheatsheet that all correspond. You will need to create the same elements for any data template you develop. The presentation will also be useful for knowing what each part of the presentation typically entails. We will discuss this more in Webinar #4. These documents are in the following folder: [link to folder].

   ● CA_TOT_CAW_Presentations contains the presentations for the start of the CAW.
   ● CA_TOT_CAW_InventoryTemplate is the data template.
   ● CA_TOT_CAW_Cheatsheet is the cheatsheet; a copy should be made for each inventory table. The cheatsheet includes both general instructions on the inspection/inventory process and instructions for each column (field) represented in the data template.

Please remember that we all borrow from previous presentations for our CAW materials. We suggest crediting the CAW community in the presentation speaker notes as follows: "The presentation, templates and other materials that we use have been shared freely and adapted

widely, and have been informed by the generosity and dedication of countless CAW organizers, partners, and volunteers."

We will look forward to hearing about your site visit and how it has impacted your planning. Please feel free to share any documents provided by your partner.

Typical roles on the day of a CAW:

- Lead Site Organizer(s): 1-2 people are the lead contacts for the partner and site, and deal with any logistical issues that arise during the CAW. They will keep track of time and make sure the group moves along on the agenda. They will coordinate the answering of questions that would be useful for the whole group (getting the group's attention and facilitating or answering the question(s). These workers will also lead the discussion of the accomplishments and next steps at the end of the day, or recruit someone to do that.

- Welcome table: 1 person works at the welcome table, greeting participants, signing them in, and assigning each person to a table. Participants are assigned so that there are a mix of people who are new to archiving with those who are more expert.

- Evaluation Coordinator: This person also makes sure no one leaves without filling out an evaluation form, and does a preliminary report on the evaluations during Day 3 (December 3rd). We will provide a sample evaluation form that you are free to adapt.

- Table captains: We need approximately 4 people in this role to facilitate physical inspection and inventory of magnetic media and/or film. (One per table for each of the final number of inventory tables.) The table captain helps the teams at their table to load the data template/spreadsheet on their laptop(s), and makes sure that everyone names their template files correctly. After a few records are completed, the table captain checks them for accuracy and consistency, and consults with the trainers as needed for any questions about how inspection or description is being done. At the end of the day, the table captain collects all of the files from the participants at that table. This is a wonderful way to become experts with the template and to practice facilitation.

- Box table: We need 2-3 people in this role. The workers at the box table keep track of the totality of boxes that are being inspected and inventoried, distributing and retrieving the boxes to the tables. When a box is fully inventoried, they may need to re-box the items. These workers are responsible for tracking what item numbers ultimately end up in what boxes. This role gives you a chance to practice the tasks in the overall

management of the CAW, and to experience first-hand how the archival materials are organized and tracked.

- Presentations: We need 2-4 presenters, depending on whether you decide to present the template to the entire group, or train each table separately on the template. Also, the presentation will depend on the media types represented in the collection(s).

  The slides for the presentation time are: opening, intro of the partner and collection, and CAW goals; instruction on media and film or both; the CAW workflow; and the introduction of the template. As noted above, we are providing you with a sample presentation that covers all of these points. You will present the slides and with the help of the trainers (if needed), answer questions. This is a great way to learn about deterioration factors for video and film, to become an expert in the template and workflow, and to practice presenting.

	AV Type	Holding Organization	Collection	Collection ID #	Series #	Box ID #	Unique ID #	Other IDs	Extent	Title
Description of field (see cheat sheet! https://docs.google.com/document/d/1GuCUEA_kSsDqyqPPZRKlEtCmyoka5A3bpUJ_U5J5qN4/edit)	Film; Video; Audio	Sacramento Public Library Special Collections; West Sacramento Historical Society; Galt Historical Society	Sacramento Amateur Movie Makers Club records; Hughson, Jeff collection on Sacramento music; Sacramento Artifical Media Collection	Collection Number	Series Number. If processed as Artifical Media Collection, assign series as: Series 1 (Film); Series 2 (Video); Series 3 (Audio)	Box ID	Identifying Number. Format as CollectionID_AVType_####	Other Numbers	Total number of reels or tapes.	Clearly indicated title on the item. For some recordings, a title may not be evident. In this case, record the first few words and/or numbers on the tape label. If you need to assign a title, place it in brackets; e.g. [Compilation].
How to modify this field for your org	This field helps you to filter and create lists of types of materials and is useful for advocacy and understanding the needs of your collection. Use a controlled vocabulary here.	Use a controlled vocabulary here.	Collection name, if processed as a collection. Refer to box label.	Collection number, if processed as a collection. Refer to box label.	Series number, if processed as a collection. Refer to box label or assign above as part of an artificial collection.	Box number, as assigned by holding oranization or Box Table.	Use the system your org already uses. This is also an opportunity for you to develop a new numbering system if you need to.	Old numbers on the item.	List as parts.	
Example	Film	**Sacramento Public Library Special Collections**	**Sacramento Amateur Movie Makers Club**	**MC 13**	**Series 5**	**MC 13 Sacramento Amateur Movie Makers Club records Box 1**	**MC13_FILM_0001**	**Tape 9**	**1 of 1**	**[Dog show]**

Description	Label Info / Annotations	Record Date	Production Date	Creator(s)	Contributor(s)	Duration	Capacity
Information regarding content, if known, as clearly indicated on the item. If location of the content is known, please include Street/Neighborhood and City/County. If this information cannot be found on the item, enter "Unknown".	All relevant info as it is recorded on housing and item label(s). Record all text verbatim. Indicate where annotations are found (container or recording itself; face or spine). Include alternate titles, list of titles for compilations, or additional credits. Use semi-colons between lines of content. If there are checked boxes for technical specs, record all boxes checked. If some annotations are illegible, indicate in	YYYY-MM-DD or YYYY-MM-xx or YYYY-xx-xx or Unknown	YYYY or Unknown	Last name, First name, role; Last name, First name, role. Separate multiple entries with a semicolon. If this information cannot be found on the item, enter "Unknown".	Last name, First name, role; Last name, First name, role. Separate multiple entries with a semicolon. If this information cannot be found on the item, enter "Unknown".	Run time or the length of the content, if known. Include hour even if shorter than an hour. Format as hh:mm:ss (hours: minutes: seconds). Use Kodak's film calculator for film duration (with 18 fps as default speed): https://www.kodak.com/US/en/motion/Tools/Film_Calculator/default.htm	**If duration is unknown, use capacity of tape or film reel.** Record the number only; do not include 'min.'
	On container and/or item.	The date that the film/tape was recorded, if known. This could be the same or different from Production Date. More likely to include month and day.	The date of a finished work, also known as the publication date or date of distribution. Usually only listed as a year YYYY. Choose a consistent way to write the date. Camera originals	Main credits: producer, director, interviewer; writer	Additional roles: Camera; Cast; Editor; Interviewee; Music; Musician; Sound; Speaker.	If duration is known.	If duration is unknown, use capacity of the tape or film reel (sometimes it's written on the box/tape/reel).
Sacramento	**Face of container: Casey Jones, 12/3/74, 5 min. [illegible]. Spine of container: Jones 1974. Reel: Jones on street with dogs 12/3/74 #3.**	**1974-12-03**		**Dawson, Jewell**	**Unknown**	**00:15:00**	**30**

Reel Diameter (Inches)	Format	Stock	Generation	Color/B&W	Sound/Silent	Base Material Type	Housing	Condition	NOTES	Date inventoried	Inventoried By
For open reels only, if duration or capacity can't be determined. Measure the reel diameter in inches for open reel audio and video or use film measuring stick for film.	Choose from controlled vocabulary, based upon PBCore authorities. Be consistent with spelling and capitalization.	Include the manufacturer and tape brand/film stock. Be consistent with spelling and capitalization.	Listed on label or identified during inspection.	Listed on label or identified during inspection	Listed on label or identified during inspection	Listed on label or identified during inspection	Material type of the container.	A description of the condition of the tape/film material, the tape cassette, and/or the housing. Check for contamination and record any odors. Write down only the problems you observe, otherwise leave blank. **Red flags**. Examples: dusty, case cracked, case missing, evidence of mold, evidence of vinegar syndrome, evidence of sticky shed syndrome, loose wind, stepped pack, slide cracked, etc. For	Any info deemed relevant that did not fit into other fields.	YYYY-MM-DD 2018-10-09	Last Name, First Name
	Use a controlled vocabulary here.	Manufacturer and Brand	Use a controlled vocabulary here, based upon the specific elements of the collection. Consider production history, if known. Add	Use a controlled vocabulary here.	Use a controlled vocabulary here.	Use a controlled vocabulary here.	Use a controlled vocabulary here.	You may choose to create a set of controlled vocabulary for this field.			
	16mm Film	Kodak Kodachrome	Reversal	Color	Silent	Acetate	Metal	**Dusty with a faint smell of vinegar syndrome. Uneven wind. Loose end- taped down. Overall good condition. See Film Inspection Form for more details.**	**Lovely dog collage on the container!**	2019-04-22	Scott, James

[insert name and pic of your CAW partner]

WHY COMMUNITY ARCHIVING WORKSHOPS?

catalyst for preservation of endangered media & film
_____

owner better understands collection
content & needs

catalyst for preservation of endangered media & film
_____

owner better understands collection
content & needs

collects item information
and reveals risks & condition

catalyst for preservation of endangered media & film
_____

owner better understands collection
content & needs

collects item information
and reveals risks & condition

enables prioritization to
begin preservation

builds network of support
_____

sharing of skills/knowledge

---

builds network of support
_____

sharing of skills/knowledge

attracts allies & volunteers

---

builds network of support
_____

sharing of skills/knowledge

attracts allies & volunteers

builds awareness & interest about collections

---

collection information
in electronic form

searchable, more data

---

then make a preservation plan

and PRESERVE!

AV BASICS

FILM BASICS

GAUGE

physical dimensions and
layout of the sprockets,
picture & sound elements

8mm, **Super 8mm**, 9.5mm, **16mm**, 17.5mm, 28mm, **35mm**, 65mm, 70mm
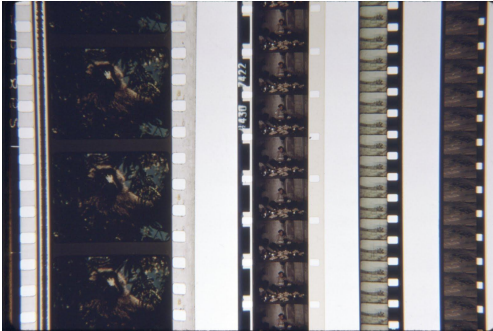
35mm   16mm   8mm   Super-8

Photo: Smithsonian Institution Human Studies Film Archive

EMULSION

carries photosensitive
material in a
gelatin binder.
Image creating layer.

BASE

the physical materials of
the carrier for the
emulsion that contains the
picture & soundtrack

emulsion   3 - 10%
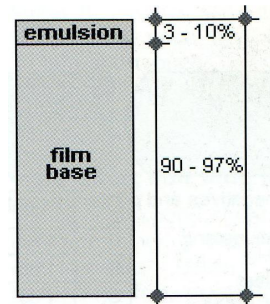
film
base   90 - 97%

Restoration of Motion Picture Film, Paul Read &
Mark-Paul Meyer

NITRATE
1893-1952

flammable

ACETATE

1910s/1920s - present

dimensionally unstable –
problems with projection &
duplication

subject to decomposition

POLYESTER

1955 - present

dimensionally stable

extremely strong &
resistant to tearing

CONTINUOUS SOUNDTRACKS
(if sound is present)

optical   magnetic

TRADITIONAL WORKFLOW 1

shoot camera original negative or "reversal" (positive) → create workprint & edit → cut negative to conform with workprint →
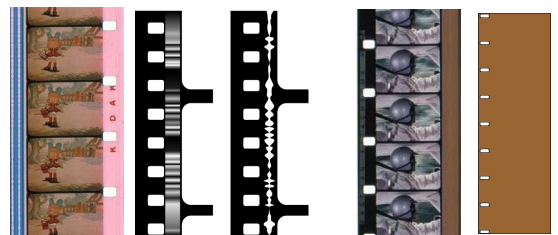
Color Camera Negative

BW Camera Negative

Color Camera Reversal

TRADITIONAL WORKFLOW 2

create interpositive → create internegative & sound negative → create composite positive →
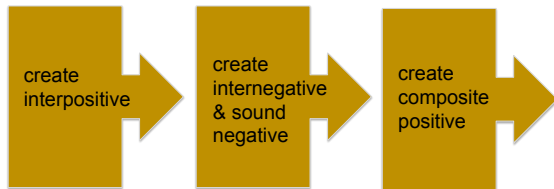
interpositive

internegative & soundtrack

positive print

PROCESSING

PRINTING

Contact printing

Optical printing

SCANNING/DIGITIZATION

BASIC FILM INVENTORY

identifying information: surface glance
format • state of container • state of wind • assess
overall condition • smell • contamination (dust/mold)

IN-DEPTH FILM INSPECTION
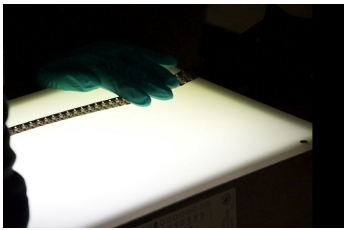
detailed information: unwind!
edge code date • assess edge damage and
condition of splices • measure shrinkage • add
leader • repair • rewind onto core and rehouse

AUDIO/VIDEO BASICS
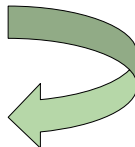
more than 70 videotape formats total - almost all with a
polyester base but varying sizes, track layouts, signal & recording
standards, and physical composition of binder systems

Take your pick

12" stereo records
OR
8-track cartridges
OR
tape cassettes
OR
reel-to-reel tapes

contemporary audio
formats
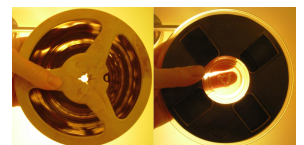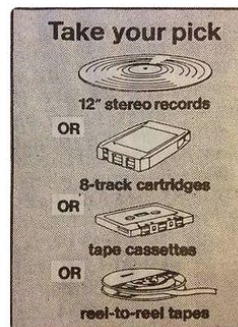
¼" audio reels

acetate base   polyester base

recordings: tapes to tapeless

wav icon: GPL, https://commons.wikimedia.org/w/index.php?curid=476687

Audiovisual Formats

A guide to identification

CALIFORNIA
REVEALED

Last updated June 2018
team@californiarevealed.org

https://californiarevealed.org/sites/default/files/2018AudiovisualFormats.pdf

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binder with magnetic particles, lubricants & other additives in a plastic base ⟶ 2-5 μm

substrate ⟶ 10-40 μm

back coat ⟶

Tape emulsion is uniform, but heads magnetize it in strips, enabling the recording of stereo signals.

L
R
R
L

Tape travel ⟶
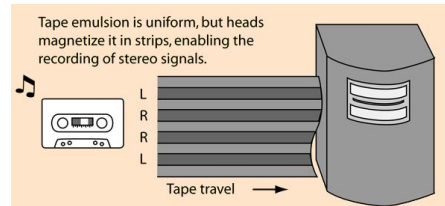
VULNERABILITY OF TRACKS (SIGNAL)

TRACKS ON TAPE

½-Inch Videotape — Audio Track, Video Track, Control Track

¾-Inch Videotape — Control Track, Video Track, Audio Track #2, Audio Track #1
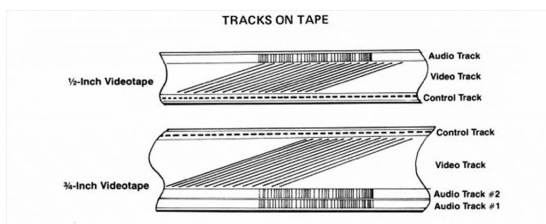
VULNERABILITY OF BINDER SYSTEM

binder hydrolysis (moisture)

lubricant loss ⟶

called soft binder or "sticky shed" syndrome

stick/slip when played back

stretching/ distortion

shedding/flaking off of binder (loss of signal)

ACETATE DETERIORATION

vinegar syndrome

production of acetic acid through introduction of moisture

→

shrinkage (affecting alignment on playback)

brittleness

can encourage shedding of binder (loss of signal)

VULNERABILITY TO CONTAMINANTS/DAMAGE

Debris Perspective on High Density Digital Recording Tape
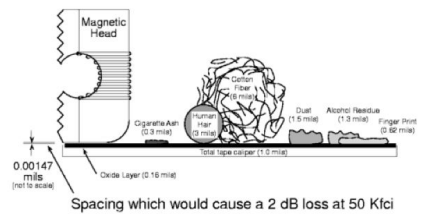
BASIC VIDEO/AUDIO INSPECTION
(no playback)

identifying information: surface glance format • state of container • state of wind • assess overall condition • damage to tape • contamination (dust/mold) • dimensional change

OUR WORKFLOW
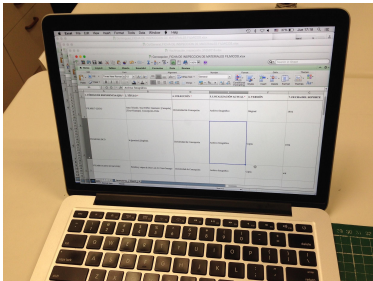
load inventory template (Excel spreadsheet) onto your computer

add organization code, CAW site, table number & last name to .xlsx file name

Examples:

SPL_Sacramento_template_1_Jimenez.xlsx

WSHS_Sacramento_template_2_Jimenez.xlsx

GHS_Sacramento_template_3_Jimenez.xls

the Box Table will give you a box of tapes or a pile of films and a sheet of prewritten labels by organization

choose an item and wipe it down before opening

for cassette tapes, write protect as you go (remove or flip a record tab)

gently wind and tape down ends where necessary with acid-free tape

apply matching labels to housing and cassette (may need to cut)

avoid covering existing information

inspect and inventory using the Excel template

if you see white or brown powder, crystalline formations, or filaments, ask for help!

when a film or tape is complete, set it aside until your table finishes the box

notify Box Table & ask for more items

save often!

take breaks as needed

consult the cheat sheet and template instructions often

don't hesitate to speak up and ask questions!

before you leave, save your spreadsheet to the thumb drive for your table

spreadsheets will be merged from all the separate spreadsheets

fill out an evaluation!

INVENTORY TEMPLATE

Example: Film	Example: Sacramento Public Library Special Collections	Example: Sacramento Amateur Movie Makers Club records
AV Type	**Holding Organization**	**Collection**

Example: MC 13	Example: Series 5	Example: MC 13 Sacramento Amateur Movie Makers Club records Box 1
Collection ID #	**Series**	**Box ID #**

Example: MC13_FILM_0001	Example: MC14F4	Example: 1 of 1
Unique ID #	**Other IDs**	**Extent**

Example: [Dog show]	Example: Sacramento	Examples: Face of container: Casey Jones, 12/3/74, 5 min. [illegible]. Spine of container: Jones 1974. Reel: Jones on street with dogs 12/3/74 #3.
Title	**Description**	**Label Info/Annotations**

Record Date	Production Date	Creator
YYYY-MM-DD	YYYY	Last name, First name, role

Contributors	Duration	Capacity
Last name, First name, role	Example: 00:15:00	Examples: 20, 30, 60, 90

Reel Dimensions	Format	Stock
In inches	Example: 16mm Film	Example: Kodak Kodachrome

Generation	Color/B&W	Sound/Silent
Examples: Reversal, Print, Negative, Original, Master, Copy	Color, Black and White, Color and Black and White	Sound, Silent

Base Material Type	Housing	Condition
Nitrate, Polyester, Acetate, Mixed Acetate and Polyester	Paper, Plastic, Metal	Examples: Dusty, container missing, uneven wind, vinegar smell

NOTES	Date Inventoried	Inventoried By
Examples: Tape and housing do not match; Series information obtained from Rose Roque.	Example: 2017-04-01	Example: Scott, James

APEX VIDEO KIT DIAGRAM

https://github.com/amiaopensource/apex_video_kit_docs
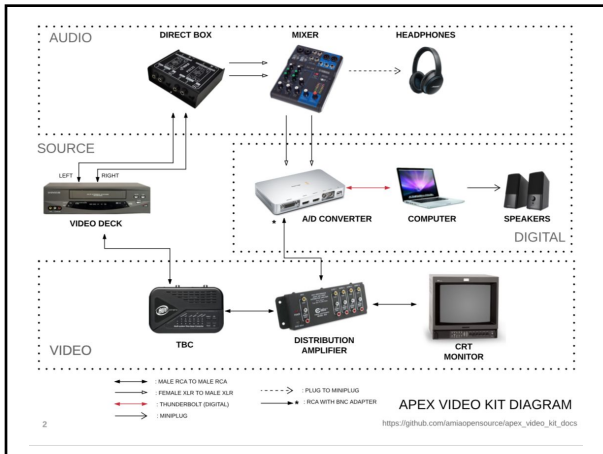
THANK YOU FOR COMING TO SPL'S COMMUNITY ARCHIVING WORKSHOP!

LET'S GET STARTED!

PLEASE REMEMBER TO LEAVE YOUR INVENTORY & FILL OUT AN EVALUATION IF YOU LEAVE EARLY!

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS
Sacramento Public Library Special Collections

WORKFLOW CHEATSHEET

LOAD THE TEMPLATE

- ❖ Use the inventory data template (Excel spreadsheet) on the supplied thumbdrive

- ❖ Add organization code, CAW site, table number, and last name to .xlsx file name

- ❖ Examples:

    SPL_Sacramento_template_1_Jimenez.xlsx

    WSHS_Sacramento_template_2_Jimenez.xlsx

    GHS_Sacramento_template_3_Jimenez.xlsx

- ❖ Remember to save/backup the .xlsx file on the thumbdrive often!

PREP THE TAPE OR REEL

- ❖ The Box Table will give you a box of tapes or a pile of films and a sheet of prewritten labels by organization

- ❖ Choose an item and wipe it down before opening

- ❖ Write-protect cassettes, such as by removing the record tab

- ❖ Tape down loose ends of tapes and films with acid-free tape

APPLY LABELS

- ❖ Apply duplicate labels to container and to cassette/reel inside (may need to cut apart)

- ❖ Place the tape container label on the container in a consistent place and orientation to be determined by the organization (usually on the spine).

- ❖ Place the tape cassette label in a consistent place, such as on the bottom right of the cassette in the label area, or on the front spine

- ❖ Label should read left to right when the cassette 'door' is to the back

❖ For film, place the film container label on the side (not on the face), and place the film reel label on the reel (not on the film). Labels should read left to right.
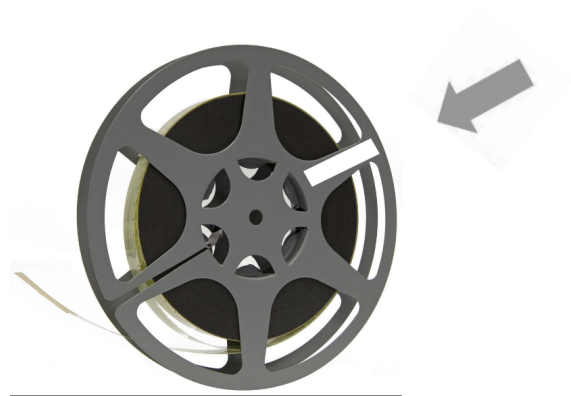
❖ Do not cover any existing text on the container, tape cassette, or film reel. Look for a spot close to the correct placement that does not cover information. Ask for help if you are unsure where to place the label.

INSPECT & INVENTORY

❖ Begin inspection and inventory using the inventory data template (Excel spreadsheet) on the supplied thumbdrive

❖ The following problems are noted in the Condition field:

    o Check container & tape/film for "red flags" indicating damage/contamination or dimensional change (describe)

Examples: dusty, case cracked, case missing, evidence of mold, evidence of vinegar syndrome, evidence of water damage, brittleness, flaking, etc. (If you see white or brown powder, crystalline formations, or filaments, ask for help!)

    o Video and audio cassettes only: note if tape is not rewound

    o Check on status of film/tape pack and/or film/tape dimensional change (describe)

Examples of problems: loose wind, uneven wind, stepped pack, popped strands, cupping, warping, or other forms of dimensional change.

RE-PACK FOR LONG-TERM STORAGE (VIDEO & AUDIO ONLY)

❖ When a tape is complete, set it aside until your table finishes a box

❖ When a box is fully inventoried, place tapes back into box and notify Box Table workers

❖ Ask for another box!

RE-PACK FOR LONG-TERM STORAGE (FILM ONLY)

❖ After a film is labeled and inventoried, take it to the Film Inspection Table for an in-depth film inspection and condition assessment, using the Film Inspection Form. Notes from the Film Inspection Form will be transferred to the .xlsx file later.

❖ Films will be stored flat directly on the shelf, rather than in a box

IMPORTANT!

❖ Save often!

❖ Consult the cheat sheet and template instructions often

❖ Don't hesitate to speak up and ask questions!

❖ Take breaks. Don't forget to eat & drink (away from the table and media).

❖ Before you leave, save your .xlsx file on the thumb drive for your table

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS
Sacramento Public Library Special Collections

DATA TEMPLATE CHEATSHEET

Please note: these instructions and examples are also contained in the first few lines of the inventory template.

Also note: The tape/reel is the primary source of information and the container is second most important source, as the tape and container may be mismatched.

AV Type
Film; Video; or Audio. This field helps you to filter and create lists of types of materials and is useful for advocacy and understanding the needs of your collection. Controlled vocabulary.

Holding Organization
Sacramento Public Library Special Collections; West Sacramento Historical Society; or Galt Historical Society. Controlled vocabulary.

Collection
Collection name, if processed as a collection. Refer to box label.
Collection Identifier
Collection number, if processed as a collection. Refer to box label.

Series Number
Series number, if processed as a collection. Refer to box label.

Box Identifier
Box number, as assigned by collecting organization or Box Table.

Unique Identifier
Use the organization's system - Format as CollectionID_AVType_####. Refer to the pre-written label on the object.
Examples: MC13_AUDIO_0001; MC13_FILM_0001; MC13_VIDEO_0001

Other Numbers
Record any other old numbers found on the container or on the tape/reel.
Example: Tape 9

Extent
Total number of reels or tapes.
Examples: 1 Part of 1; 2 Parts of 2

Title
Clearly indicated title on the item. For some recordings, a title may not be evident. In this case, record the first few words and/or numbers on the tape label. If you need to assign a title, place it in brackets as a temporary title; e.g. [Compilation]. Titles can be updated after digitization.
Example: Labor Day Parade; [Women's March]

Description
Information regarding content: visible at a glance and clearly indicated on the item. If location of the content is known, please include Street/Neighborhood and City/County. If this information cannot be found on the item, enter "Unknown". This field will be filled in after digitization.

Label Info / Annotations
All relevant info as it is recorded on housing and item label(s). Record all text verbatim. Indicate where annotations are found (container or recording itself; face or spine). Include alternate titles, list of titles for compilations, or additional credits. Use semi-colons between lines of content. If there are checked boxes for technical specs, record all boxes checked. If some annotations are illegible, indicate in brackets.
Example: Face of container: Casey Jones, 12/3/74, 5 min. [illegible]. Spine of container: Jones, Thurs. am 12/3. Checked boxes: VITC, MONO, LTC. Face of tape: Jones on street with dogs 12/3/74 #3. Spine of tape: Jones 1974.

Format
Be consistent with spelling and capitalization. Controlled vocabulary.
Audio Vocabulary:
https://pbcore.org/pbcore-controlled-vocabularies/instantiationphysical-audio-vocabulary
Film Vocabulary:
https://pbcore.org/pbcore-controlled-vocabularies/instantiationphysical-film-vocabulary
Video Vocabulary:
https://pbcore.org/pbcore-controlled-vocabularies/instantiationphysical-video-vocabulary

Record Date
The date that the film/tape was recorded, if known. This could be the same or different from Production Date. More likely to include month and day. Format options are YYYY, YYYY-MM-DD, YYYY-MM-xx, or Unknown. To approximate circa, use a ~.
Examples: 2008; 1972-03-25; 1999-08-xx; 1978~

Production Date
The date of a finished work, also known as the publication date or date of distribution. Usually only listed as a year YYYY. Format options are YYYY or Unknown. To approximate circa, use a ~.
Examples: 2008; 1978~

Creator(s)
Main credits: Producer, Director, Interviewer; Writer. Write as Last Name, First Name and include Role. Separate multiple creators with a semicolon. If this information cannot be found on the item, enter "Unknown".
Examples: Hughson, Jeff, Interviewer

Contributor(s)
Any other credits beyond main creators: Camera; Cast; Editor; Interviewee; Music; Musician; Sound; Speaker. Write as Last Name, First Name and include Role. Separate mutliple contributors with a semicolon. If this information cannot be found on the item, enter "Unknown".
Examples: Greater Carmichael Traveling Street Band, Musician

Duration

Run time or the length of the content, if known. Include hour even if shorter than an hour. Format as hh:mm:ss. For film duration, use Kodak's film calculator (with 18 fps as default speed): https://www.kodak.com/US/en/motion/Tools/Film_Calculator/default.htm
Examples: 01:34:24 or 00:25:00

Capacity

If duration is unknown, use the maximum number of minutes that the tape or reel can hold in standard play (sometimes it's written or stamped on the box/tape/reel). Record the number only; do not include 'min.'
Example: 20, 30, 20, 60

Reel Diameter

For open reels only, if duration or capacity can't be determined. Measure the reel diameter in inches for open reel audio and video or use a film measuring stick for film.

Stock

Include the manufacturer and tape brand/film stock. Be consistent with spelling and capitalization.
Example: Sony KCS

Generation

Listed on label or identified during inspection. Controlled vocabulary, based upon the specific elements of the collection. Add vocabulary at the end of this CAW cheatsheet as needed.
Generations Vocabulary:
https://pbcore.org/pbcore-controlled-vocabularies/instantiationgenerations-vocabulary

Generation	Element
Copy	Dub – from one format to another
	Dupe – from one format to the same format
Master	Broadcast Master
	Edit Master – final edited version of finished program
	Submaster – one generation from the Edit Master that is used for making other copies
Original	Camera Original
Negative	Film only - used for making positive prints
Print	Film only - positive print used for projection
Reversal	Film only - indicates camera original

Color/B&W

Listed on label or identified during inspection. Controlled vocabulary.

Sound/Silent

Listed on label or identified during inspection.. Controlled vocabulary.

Base Material Type
Listed on label or identified during inspection. Controlled vocabulary.

Housing
Material type of the container. Controlled vocabulary.

Condition
A description of the condition of the tape/film material, the tape cassette, and/or the housing. Write down only the problems you observe, otherwise leave blank. For the material, check for contamination (dirt, dust, mold, byproducts of sticky shed syndrome) and record any odors (such as 'dirty socks smell' indicating deterioration). For the housing, check for water damage, breakage, chipping, cracks and/or contamination.
Examples: Tape: small amount of mold; crystalline formations covering 1/3 of pack, white powder; dirty/dusty; tape curl; tape bending; label is detaching. Housing: Water damage on side; broken on bottom.

Also include a description of the condition of the pack and whether the tape is rewound.
Examples: Even wind; slight stepped pack; severe stepped pack; popped strands; not rewound.

Notes
Any info deemed relevant that did not fit into other fields, such as:

> Record any of your assumptions.
> Examples: Tape and housing do not match; Title assumed from paper insert; Series information obtained from Rose Roque.

> Describe additional notes/sheets/inserts that you discover that are inside the housing or attached to it. For example, a paper shot list, vendor receipt, note, etc.
> Examples: Shot list attached to housing; Vendor receipt indicating tape transfer on 4/13/09.

Date Inventoried
Today's date. YYYY-MM-DD
Example: 2017-04-01

Inventoried By
Write as last name, first name.
Example: Jimenez, Mona

Additional authority list for Generation as needed:

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Webinar 4 Trainers Notes: CAW Negotiations: Data Templates

TIME: 60 - 90 min.

LEARNING GOALS:

● To gain an overview of how one collects data during a CAW including the utility and limitations of a spreadsheet
● To gain an overview of different types of metadata and how each give the collection caretakers (and potential users) important information
● To understand the importance of incorporating standards and best practices, including data definitions and authority lists
● To gain an overview of guidelines for evaluating an existing descriptive system (paper, computer) of the partner organization and the importance of negotiating a data template that is compatible with their current system and needs, and incorporates best practices
● To understand how and why the data template was determined for the TOT CAW, including the connection between the data template and the collection partner's existing descriptive systems

PRE-WEBINAR:
It is recommended to send participants a reminder about the presentation date/time 1-2 days prior. If necessary, the homework document can be re-shared as a friendly reminder.

At the end of the previous session (CAW Negotiations: Collections), participants should have been given a homework document CAW_TOT_CUR_Web_4_Homewk. Work entails downloading and reviewing the data template and cheatsheet for the CAW. The data template, cheat sheet and presentations all need to correspond. These examples can be used as a sample, and the CAW Trainer(s) will design the final versions according to the needs: CA_TOT_CAW_Cheatsheet, CA_TOT_CAW_InventoryTemplate, CA_TOT_CAW_Presentations.

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
2 min	Trainer(s) will focus on the structure and concept of a data template for the basic workshop model activity of inventorying. The goal is to convey the need to prepare details ahead of time for this seemingly simple task, and to give trainees some ideas about how to communicate the importance of this task to partners and to demonstrate how the completed or in process inventory will be usable for them moving forward.	Presentation Slides, lecture. CAW_TOT_Web_4_presentation Slide 2-3

5 min	Explain why the CAW model focuses on computer-based inventory, containing all useful information that impacts management and preservation decision-making. Explain that at least an inventory is needed before serious preservation work can begin in order to centralize and organize information to make concrete priorities and logistical projections.	Presentation Slides, lecture. Slides 4-7
10 min	Trainer(s) will utilize concepts covered in the previous 3 sessions to anchor a data template design for a specific CAW. Information should be imparted to trainees in a way to illustrate to them how to communicate these concepts to collection partners - especially those who are not entrenched in the archiving world. Cover important questions to ask a partner before creating/adapting a data template. Cover important factors to consider when determining template software for the workshop. The presentation slides highlight Excel vs. Google Sheets. Stress compatibility considerations.	Presentation Slides, lecture. Slide 8-13
15 min	Give an interview of very basic metadata types and controlled vocabulary principles in relation to AV media, and how it is integrated into the data template and CAW inventory practice. The goal of this section is to understand how CAWs think about and use metadata in relation to AV material, but also how to simply convey this information to collection partners - particularly those who are not archivists. The goal is to convey to trainees how to think about finalizing a data template for the workshop that can be clearly demonstrated to day-of volunteers as well as the collection partner, and will continue to be used by the collection partner after the workshop.	Presentation Slides, lecture. Slide 14-25
10 min	Review some common pitfalls that have been encountered in previous CAWs related to data entry. Included are tips for how to catch or remedy these issues. There are examples in the associated slides relevant to Excel and Google Sheets.	Presentation Slides, lecture. Slide 26-31
10 min	This section contains two case studies focused on specific CAW events and the data template negotiation process and outcome. The purpose here is to share two real world examples of very different collections and needs, and to share the similarities and differences of the final agreed upon data templates, while also demonstrating how the partner's benefited from the workshop completion.	Presentation Slides, lecture. Slide 32-38

	Change or add case studies as needed. They will be strongest and most detailed if the trainer uses examples from their own experience; however, these examples can also be used.	
10-20 min	Trainer(s) can step out of the presentation to guide a discussion that includes questions related to what was just presented and updates on planning for the CAW. This should include referencing the assigned homework task of finalizing CAW role assignments (which includes the presentation, data template, and cheatsheet) for Discussion should conclude with concrete next steps in preparation for the 3-day onsite training which the CAW trainees are planning. It is recommended to schedule at least 1 mentoring meeting between this session and the upcoming Day 1 onsite training.	Discussion. Slide 39

EQUIPMENT & RESOURCES:

- Platform (Zoom, Google chat, Skype) or laptop/projector
- Presentation(s): CAW_TOT_Web_4_presentation

OTHER CONSIDERATIONS/MATERIALS

- Here and in the case of the other sessions, you may find ways to make the sessions more interactive if they are not webinars, scheduling them for two hours instead of 90 min.

- If you are meeting in person, a flip-chart/markers or whiteboard/markers or blackboard/chalk is helpful to track their responses during discussions, or you can take notes in a file that is projected.

COMMUNITY ARCHIVING WORKSHOP
TRAINING OF TRAINERS

[name of planning team (trainees)]

Webinar #4
CAW Negotiations: Data Templates

CAW_TOT_Web_4_presentation

CAW NEGOTIATIONS: DATA TEMPLATES

prepping for inventorying, the primary CAW activity!

CAW NEGOTIATIONS: DATA TEMPLATES

why we focus on a computer-based inventorying

deciding on a template design

metadata types & controlled vocabularies

common pitfalls

template case studies

WHY WE FOCUS ON A COMPUTER-BASED INVENTORY

COMPUTER-BASED INVENTORY
_____

manageable activity

essential component of a/v archiving

inventories tell us what we have

inventories can record:
physical location of assets
condition of assets
running time, format, other technical data
content information or annotated content information

COMPUTER-BASED INVENTORY
_____

supports prioritization &
preservation planning

allows projected costs of conservation,
preservation & digital storage

expedites access for research,
education & new works

COMPUTER-BASED INVENTORY
_____

needed before preservation can begin

without unique IDs, risk loss of
relationships among various instantiations

items not described become
a low priority for archivists &
can't be found by users

DECIDING ON A TEMPLATE DESIGN FOR YOUR WORKSHOP

WHAT IS THE CURRENT SYSTEM OF INFORMATION MANAGEMENT?
_____

paper list(s)

word-processed list(s)

spreadsheet(s)

catalog/database(s)

collection management system

WHAT CAN BE ADAPTED TO YOUR WORKSHOP TEMPLATE?
_____

fields in use that are applicable to media

fields not in use that would be essential
moving forward

old or new numbering system

new standardizations for certain information

CHOOSING TEMPLATE SOFTWARE
_____

relatively common

free/easy to access

widely compatible

easy or no install

use does not require its own separate
training session (we will see what the
future holds)

EXCEL - MULTIPLE FILES	GOOGLE SHEETS - CLOUD
must collect & merge individual files	can overwrite another person's entry
spreadsheet software & versions can vary	if Internet drops out, data is not saved
no danger of over-writing	no need to merge post-CAW
not Internet dependent	no need to have compatible software
possibly broader familiarity with Excel vs. Google	may more readily notice inconsistent data entry

COMPATIBILITY CONSIDERATIONS
_____

confirm main partner can use software!

let people know in advance what software is needed

let people know in advance how the template
will be accessed

plan for possible alternatives (just in case)

check for data loss between any software conversion

don't assume anything

we can't control what will be widely available and in use,
but we can be flexible

METADATA TYPES
&
CONTROLLED VOCABULARIES

METADATA TYPES
_____

Administrative
Information needed to responsibly manage the object or collection.
Includes provenance, rights information, and security issues.

Descriptive
The content; meant to facilitate finding and identifying the resource

Technical
The technical characteristics of items: format name, base type, duration of
content, carrier type, frame rate, recording speed, footage length, etc.

Preservation
To keep track of what's required to maintain and preserve items,
and what has already been done.

ADMINISTRATIVE
METADATA

unique identifier

old numbers

box numbers

date of production

location

notes

DESCRIPTIVE
METADATA

title

collection

series

date of production

description

annotations

TECHNICAL
METADATA

format

recording standard

generation

duration

capacity

recording speed

TECHNICAL METADATA (ABOUT DIGITAL OBJECTS)

file name

date created

codec

wrapper

size (bytes)

directory (location)

PRESERVATION METADATA

item condition

container condition

digital copies

preservation actions

preservation technical environment

WHICH METADATA FIELDS ARE MOST IMPORTANT?
_____

what information makes the collection navigable?

what information makes an item identifiable and usable?

what do you most need to know up front to make use of your collection?

what do you most need to know to assist with preservation planning?

CONTROLLED VOCABULARIES
_____

utilizing standards & accepted practices

titles/series

format

generation

recording standard

container type

recording speed

Structuring Data
_____

The preferred forms of terms or names that will be used consistently

➡ **Howard Ng**
Howie Ng
Ho-Yin Ng

Structuring Data
_____

Rules for how certain types of data are entered

~~Month Day, Year~~	~~January 20, 2016~~
~~MM/DD/YY~~	~~01/20/2016~~
~~DD/MM/YY~~	~~20/01/2016~~
~~Day Month Year~~	~~20 January 2016~~
YYYY-MM-DD	2016-01-20

CONDITION DESCRIPTORS

item & container

contaminants
dirt • dust • mold

damage
scratches • dimensional
change • breaks

state of wind
not rewound • poor wind •
popped strands

strong odors
vinegar • dirty socks

COMMON PITFALLS
(& tips to avoid them)

AUTO FORMATTING OF NUMBERS

Pitfall: Auto reformatting of numerical info

Solution: Format all columns (whole sheet) to Plain Text

Number format settings	outcome	intended
Plain Text	00:45:05	00:45:05
(defaults to a) Time	0:45:05	00:45:05
Time	12:45:05 AM	00:45:05
Number	0.03	00:45:05
Duration	0:45:05	00:45:05

Number format settings	outcome	intended
Plain Text	2021-11-20	2021-11-20
Automatic	44520	2021-11-20
Number	44,520.00	2021-11-20
Date	11/20/2021	2021-11-20

LACK OF NUMERICAL STRUCTURE

Pitfall: Lack of numerical structure for Unique IDs

Solution: Use leading zeros or provide structured numbers ahead of time

EXAMPLE: 000001, 000002, 000003
EXAMPLE: HAITI_001, HAITI_002, HAITI_003
EXAMPLE: BT-AV-2004_0001, BT-AV-2004_0002

LACK OF NUMERICAL STRUCTURE

Pitfall: Lack of numerical structure for Dates

Solution: Record Date information in one structure to support sorting and searching

EXAMPLE: YYYY-MM-DD structure
EXAMPLE: 2021-05-08, 1979-08-21, 1888-02-14
EXAMPLE: XXXX-07-26, 1976-07-XX

LACK OF FORMAT NAMING STANDARD

Pitfall: Multiple spellings for format names

Solution: Record format names in a single established way to support sorting and searching

EXAMPLE: U-matic, U-matic SP **vs.** ¾ inch U-matic **vs.** 3/4 inch U-matic **vs.** ¾" U-matic **vs.** 3/4" U-matic
EXAMPLE: Super 8 **vs.** Super-8 **vs.** Super 8mm **vs.** Super-8mm

Slide 1

SORTING: 'EXPAND THE SELECTION'

Example: sorted column without 'expand the selection'

CONTROL #	OLD #	BOX #	SCRIBE BOX #	SERIES TITLE	DATE
133547	617, 547	5911017		Community Visions	1994-12-02
133549	619, 549	5911017		Community Visions	1994-12-17
133907	938, 907	5911017	23	Community Visions	1994-12-17
133908	939, 908	5911017	23	Community Visions	1994-12-17
133550	620, 550	5911017		Community Visions	1995-02-06
1331755	17,741,755	16981769	39	Community Visions	1992-11-05
1331758	17,771,758	16981769	39	Community Visions	1992-11-19
1331759	17,781,759	16981769	39	Community Visions	1993-01-02
1331760	17,791,760	16981769	39	Community Visions	1993-01-06
534494	566 494	16981769	40	Community Visions	1993-01-06
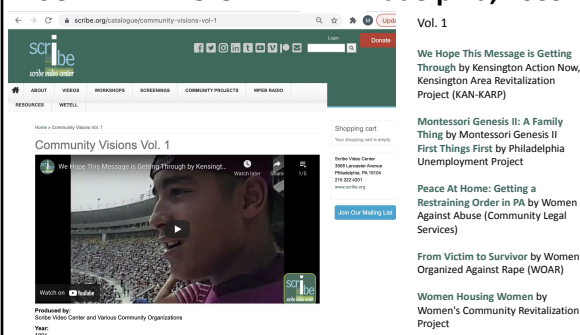
Example: sorted column with 'expand the selection'

CONTROL #	OLD #	BOX #	SCRIBE BOX #	SERIES TITLE	DATE
133546	616, 546	5911017		Community Visions	1992-11-05
133547	617, 547	5911017		Community Visions	1992-11-19
133549	619, 549	5911017		Community Visions	1993-01-02
133907	938, 907	5911017	23	Community Visions	1993-01-06
133908	939, 908	5911017	23	Community Visions	1993-01-06
133550	620, 550	5911017		Community Visions	1993-01-25

Slide 2

TEMPLATE
CASE STUDIES

Slide 3

CASE STUDY 1

SCRIBE VIDEO CENTER - Philadelphia, 2009

Vol. 1

We Hope This Message is Getting Through by Kensington Action Now, Kensington Area Revitalization Project (KAN-KARP)

Montessori Genesis II: A Family Thing by Montessori Genesis II
First Things First by Philadelphia Unemployment Project

Peace At Home: Getting a Restraining Order in PA by Women Against Abuse (Community Legal Services)

From Victim to Survivor by Women Organized Against Rape (WOAR)

Women Housing Women by Women's Community Revitalization Project

Slide 4

CASE STUDY 1: WORKSHOP GOALS

pre-existing inventory and tracking system - 2000+ entries
(tapes were already labeled using a unique ID)

CAW focused on a specific series of productions
w/ priority of final edited versions & camera originals

Scribe priorities:
- maintain critical historical info contained in old Excel sheet including unique IDs

Organizer suggestions:
- improve & standardize data collection & incorporate other available collection info
- transition to new Filemaker database using IMAP template
   - CAW template becomes model for the transition

Slide 5

CASE STUDY 1: TEMPLATE

CONTROL NUMBER [formerly OLD CONTROL NUMBER]	OLD NUMBER [all numbers, separated by commas, from the following columns: SYSTEM CONTROL, NEW CONTROL, INTERNAL NUMBER and SHELF LOCATION/LAST DIGITS]	STORAGE FACILITY BOX # [formerly BOX #. When the Scribe spreadsheet says 'shelf at scribe', change to blank]	SCRIBE BOX # [formerly NEW BOX #]	PROGRAM TITLE [take from the authority list for Community Visions titles; the information currently in TITLE/DESCRIPTION and TITLE 2 may be the title or may form the basis for tape/container annotations]	TITLE ON TAPE [NEW - verbatim title from tape. This helps with identification of the individual tape]
133904	935, 904	5911017	23 The new faces of AIDS		7/14 We the People - interviews 1

MAIN CREDITS [where the full name of the community group is listed; see authority list. May also list others if roles are known from tape/container information. Format is: produced by Reconstruction, Inc.; directed by Serena Reed; written by Joe Jones.]	DATE OF PRODUCTION [Current information in PUBLICATION DATE is a mix of production date and record date. Production date is simple year.]	RECORD DATE [NEW Current information in PUBLICATION DATE is a mix of production date and record date. Reformat record date as YYYY-MM-DD]	NUMBER OF REELS [Only used when the content runs over several tapes, not to indicate tape numbers such as a shooting sequence for a production. OK to maintain format of currently used by Scribe; i.e., 1/4.]	FORMAT [See authority list]	RUNNING TIME [Sometimes found in other fields. This is only for the total length of recording; i.e. 15:04 or 1:35:03., if there are separate titles each with a running time, put that information in the Notes column.]	SOUND [Take from Scribe spreadsheet if present. Do not assume.]
produced by We the People Living with AIDS/HIV of the Delaware Valley, Inc.		1993-07-14		Hi 8 mm		sound

Slide 6

CASE STUDY 2

AsiaVisions / IBON Foundation / UPSLIS SEAPAVAA - Manila, 2017

CASE STUDY 2: WORKSHOP GOALS

overall, to assess & improve IBON's AV archiving infrastructure

train IBON Foundation staff & local volunteers in basic collection assessment and management to support continued processing of the entire AsiaVisions Collection

connect IBON Foundation with local and international network of archivists, vendors, and volunteers to further assist in their archiving endeavors

label & inventory a subset of AsiaVisions collection

CAW focused on a specific series of productions
w/ priority of final edited versions & production elements

CASE STUDY 2: TEMPLATE

Old Unique ID	Barcode	Box ID	Series	Title
Record the tape number beginning with UMAV, DU, UM, UGD, or U2. No space between the letters and numbers. Any other numbers on the tape will be recorded in the Text on Housing and/or Text on Tape columns.	Place duplicate labels, one on the tape and one on the housing (See Workflow Cheatsheet for exact placement)	Record box number (assigned by box table)	If relevant.	For finished programs, refer to the AsiaVisions Filmography. For some tapes, a title may not be evident, In this case, record the first few words and/or numbers on the tape label. If you need to assign a title, place it in brackets; i.e. [Women's March] or [Compilation].
Example: UMAV21	See barcodes	Example: 04		Example: Labor Day Parade

Cassette Condition	Tape Pack Condition	Text on Tape	Text on Housing
A description of the condition of the tape in the cassette, and/or the cassette itself. Write down only the problems you observe. otherwise leave blank. Check for contamination (dirt, dust, mold, byproducts of sticky shed syndrome), record any odors (such as 'dirty socks smell' indicating deterioration), water damage, breakage, chipping, cracks.	A description of the condition of the tape pack and whether it is rewound.	Record all text on the tape verbatim. Include any checked boxes. Indicate where annotations are found (face or spine). If some annotations are illegible, indicate in brackets. Use semi-colons between lines of content. If there are checked boxes for technical specs, record all boxes checked.	Record all text on the housing verbatim. Include any checked boxes. Indicate where annotations are found (face or spine). If some annotations are illegible, indicate in brackets. Use semi-colons between lines of content. If there are checked boxes for technical specs, record all boxes checked.
Examples; Small amount of mold; crystalline formations covering 1/3 of pack, white powder, dirty/dusty; tape curl, tape bending, label is detaching.	Examples: Flat pack; slight stepped pack; severe stepped pack; popped strands; not rewound.	Example: Face: Casey Jones, 12/3/74, 5 min. [illegible]. Spine: Jones, Thurs. am 12/3. Checked boxes: VITC, MONO, LTC.	Example: Face: Jones on street with dogs 12/3/74 #3. Spine: Jones 1974.

DISCUSSION
&
NEXT STEPS!

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Speaker Notes Webinar 4: CAW Negotiations: Data Templates

Provided below is a copy of the speaker notes also contained within the associated presentation slides (CAW_TOT_CUR_Web_4_ Presentation).

Slide 2:
This presentation will focus on data templates for the basic workshop model activity: inventorying. An electronic spreadsheet-based inventory may be an imperfect system, particularly for very large collections, but spreadsheets have become very common to help organizations and individuals move along and hopefully forward.

We will share some points to keep in mind during negotiations - both how to understand and how to share this information, and then we'll share some previous workshop data template negotiation examples.

Hopefully you have had a chance to review the data template we provided, that was used in a California training of trainers in 2019. Our goal is to convey the need to prepare details ahead of time for this seemingly simple task, and to give you some ideas about how to communicate the importance of this task to partners and to demonstrate how the completed or in process inventory will be usable for them moving forward.

Slide 3:
In this presentation we will cover why the CAW model focuses on computer-based inventorying; basic considerations that influence decision-making on the established template design for a specific workshop (that also may be a primary template moving forward); an overview of metadata types and establishing controlled vocabularies - which are essential concepts for designing your template; a few common pitfalls we've encountered in working to make our template easy to use in a large group; and then we will present two template case studies from past workshops - intended to demonstrate similarities and differences, highlight negotiation considerations, and further illustrate that there really is no one way to do this work.

We will also leave time at the end for discussing next steps for the onsite training and CAW workshop.

Slide 4:
Why do we focus on inventorying, and more specifically, an electronic or computer-based inventory?

Slide 5:
Inventorying is a manageable activity that both produces a useful outcome for the collection partner, and creates a good learning opportunity for participants, particularly those who do not have experience with these materials. Again, for our purposes, we are focusing on audiovisual material, and for many volunteers this is a new experience for them.

Item level inventorying is an essential component of our practice as audiovisual archivists. Generally speaking, inventories tell us what we have, how much we have, where we have it, etc. More specifically, inventories can record: location of assets, condition of assets, technical data such as format or run time, known content information, annotations on containers, etc. All useful information that impacts management and preservation decision making.

Slide 6:
A computer-based inventory more easily supports centralizing information, adding on to documented information, supports prioritization and preservation planning when you can more easily sort information, pull out statistics, check condition information, locate content information etc -- this leads to being able to project costs of conservation or preservation, including projecting digital storage needs. Electronic information access, as you know, makes research and other types of access easier, allows for wider access for education purposes, as well as the potential creation of new works.

Slide 7:
We feel strongly that *at least* an inventory is needed before serious preservation work can begin in order to centralize and organize information to make concrete priorities and logistical projections. Digitization and other preservation projects that begin without clear knowledge around the what, where, how many, and what is prioritized tend to encounter a lot of redundant work or hit copyright walls, or are paused due to physical deterioration issues or perhaps other content concerns arise.

Slide 8:

The following slides will reiterate concepts shared over the last 3 webinars, but are also intended to serve as examples of how to communicate this information to future partners, specifically those who may not be ensconced in the archiving world.

Slide 9:

As mentioned previously, it is important to meet people where they are. Unless we are starting from square one, we don't want to totally override current systems of information management. It is important to understand how your partner is currently managing media and information in general as related to their collections. How can our intended process fit in without rewriting their rules? All of this preparation is necessary to make both the eventual process of digitization easier, but post-digitization and long term management sustainable. Digitizing material that is unorganized and/or undocumented often leads to a jumble of files that cannot be associated to original items or easy to discover or access.

Professional archives typically take this path from paper lists to databases, and especially in the past decade+, to collection management systems. Of course, we work with many community-based archives that may never get to the database software stages. It is useful for them to understand why one adopts these steps, how having a database is a necessary step before digitization, and how it ultimately impacts access and long-term preservation. We often point out that if they decide to collaborate with a larger archive at some point, their materials will likely be accessible more quickly because they have collected this information. We all know the limitations of paper lists, which are not searchable at all and difficult to share. They can contain very deep information, but the data cannot be manipulated in any way. Word processed lists allow for keyword searching and the ability to move the data around, but only manually but via cutting and pasting, a real time saver.

Spreadsheets – originally meant for financial records, not for our use – allow us to separate out the information about each item into rows and columns, which act similarly to records and fields in a database. Again we can do a simple keyword search, and do some simple sorting (like ordering all the rows by date), and there are a few simple graphs we can make. We can embed controlled vocabulary to help standardize the info. But databases are a real step up, giving much more ability to manipulate and query the data; for example you can search for all tapes in the U-Matic format that were recorded between 1988 and 1992, and you can create a report to that effect. Collection

management systems are an even bigger step up for archives, as they can correlate data within and across different types of collections, and they embed processes that automate access and preservation.

Slide 10:
We are often starting an inventory from scratch with partners who may not have any information management system, or may not have begun integrating their audiovisual media into their existing systems. Before presenting a template, however, we need to know what inventories they may already have, as any inventory may include useful data. If they have even a partial computer-based inventory, while it may not be something you can immediately build off of, we often find there's at least a couple of fields that stand out as necessary additions to the template we are bringing to the table. And their systems reveal what is important to capture from their perspective. Most often, we are identifying more granular fields for them to break out information into, incorporating fields essential for access and preservation, and allowing for easier searches and to get more out of the sorting functionality.

Slide 11:
At this stage, we usually create a template in Google Sheets (for ease of sharing and collaboration during planning) and we convert the template to Excel. For the workshop, we download the sheet as an Excel file, copy it to 5 or more thumb drives, and the drives are distributed to participants by a table captain who is responsible for loading the template and then collecting the resulting files at the end of the day. These will then make their way to whomever is tasked with merging sheets for final delivery to the partner. We recognize that it may become more and more difficult over time for people to access Excel files, both for reasons related to ports available on laptops and issues related to software compatibility.

Slide 12:
Since Excel and Google Sheets are the two primary spreadsheet programs we use, here is a list of pros and cons - reiterating some of what was already stated.

With Excel - you have to manually provide access to the file, which we do on thumb drives, and at the end of the workshop need to manually collect multiple files you will need to merge. The program is not internet dependent/cloud-based, so the danger of data being overwritten by multiple users is eliminated, as is the dependence on internet

connection. Currently, there is broader familiarity with Excel as opposed to the Google Drive cloud suite.

With Google Sheets - as mentioned, multiple users can accidentally overwrite data if they are in the same field at the same time and are unaware there is another user. If the internet connection drops out in the middle of use some data can be lost or access for the day can be lost. The benefits, of course, are that you won't need to merge files after the workshop if everyone can work in the same sheet, you won't need to worry about software compatibility since it is cloud-based and accessed through a web browser, and inconsistent data entry could more readily be noticed by workshop organizers.

Slide 13:
It is important to emphasize compatibility considerations. Both in regard to the day-of the workshop but also in regard to providing a data template the collection partner will be able to continue accessing for their continued use. We cannot assume people are familiar with certain software. We cannot assume everyone has access to the same software or use programs in the same way. We cannot assume people can bring laptops or their laptops are loaded with the same programs or updated to the same operating systems or can automatically access the internet. We cannot assume people are familiar with the same cloud-based programs, we are encountering people of all age ranges who are not at all comfortable with Google Drive or Google Sheets.

It is important in the early planning process to decide the data template software and how that software will be accessed both by the planning committee and the collection partner, as well as the additional volunteers on the day of the workshop. Decide early on what volunteers need to be made aware of in advance, whether it is asking them to download free software on their laptops (if they can bring them), or sharing a sample Google Sheet file in advance and asking them to get familiar with it. Plan for solid presentation time to walk people through not just the template and how to fill it in, but also how to access the template software.

Our roadblocks in person thus far have been minimal: lack of access to internet, or unreliable internet going in and out (which is very bad for using Google sheets), losing ports for thumb drives on laptops, Mac laptops that can't open Excel. We have been able to remediate these issues in the moment by going offline and merging spreadsheets later, or having a person partner with someone with a laptop that is compatible with the software we are using, etc. We don't know what is coming next, but

we all know something will be, and likely with little concern about how easy it is for people to upgrade to it.

Slide 14:
Let's move on now to metadata. Partners often ask, 'what is the most important metadata to capture for audiovisual material?' We don't want to assume everyone lives with this term daily, so very quickly, let's define *Metadata*. Data about data - a description and context of the data. It helps to organize, find and understand data. Metadata is essential in the management of any type of asset, but particularly essential to media items that would otherwise need to be played in machines to access specific contextual information. Controlled vocabularies are - standardized and organized arrangements of words and phrases and provide a consistent way to describe data. Metadata creators assign terms from vocabularies to improve information retrieval.

Slide 15:
These are the basic metadata types or categories all metadata fields in your data template will fall under. There is no prescribed amount of fields under each category: **[read slide text]**.

Slide 16:
Here are examples of common administrative metadata fields. You will hopefully recognize most of them from the templates that have already been shared.

Slide 17:
These are common examples of essential descriptive metadata field types. You will notice that 'date of production' also falls under descriptive metadata. The metadata types we are presenting are not hard and fast rules, and it's important to remember that pieces of information can serve multiple functions.

Slide 18:
Having good technical metadata helps us have information that directly impacts digital preservation planning, vendor communication or in-house digitization planning, all the way down to planning for access and exhibits.

Slide 19:
These are further examples of technical metadata focused on digital object information.

Slide 20:
Lastly, preservation metadata. Tracking the state of items, as well as preservation actions needed and completed is important for long term care.

Slide 21:
Circling back to the common question: which metadata fields are most important? We don't believe there is a single way to create an inventory for audiovisual media - as with all things in audiovisual archiving, it depends! Because we are often working with partners who are starting from the beginning with their AV collections, we present a simple template and then work with them to decide if it makes sense to add or rename fields, and then confirm that field definitions and instructions are understood. This all happens *before* the workshop.

If you had to create an inventory from scratch, the basic approach to deciding which fields you want is asking which fields will help you best capture the Who, What, Where, When, How, Why (and all the rest can go into Notes). Negotiating a data template will almost always require some education on your part, as you have the experience of using the metadata for the various purposes we just discussed. So it is, again, a balance between what you know and what they know and care about. Since we are trying to jump-start preservation, think about what information will make it easiest for ongoing volunteers or colleagues to be able to look through the inventory and gain a basic understanding of what the collection contains and how to locate the information they need. They will also need to understand why we recommend data being collected in a particular way, and why some data is repeated. We know what information is required for preservation planning and long-term sustainability of the collection, and we have experience with the best way to organize that information in a relatively simple form.

Slide 22:
To repeat, establishing controlled vocabularies helps to organize information with terminology that makes it easier for the search and retrieval of the data. It is often lacking in existing inventories. We rely on the information written/typed on labels on cans, cases, or cassettes both for content and preservation planning, as most often we cannot access media items and view or listen to them to confirm label information or even more thoroughly catalog them (cataloging comes later, if your organization has the resources). That is why it's important to structure the inventory process so that

information is organized and recorded in a standardized way that can be explained and passed on.

Deciding on controlled vocabularies at the beginning of a project, and clearly documenting those decisions ensures that all work moving forward will use consistent terminology, which is essential in making content discoverable into the future. If it is clear HOW information was organized then it is clear HOW that information can be retrieved.

Slide 23:
The following slides will show typical issues that you will see with existing inventories and where you have an opportunity to explain the WHY of controlled vocabulary.

This first example shows three different ways this person is identified - none of those versions is the wrong name of this person, however, for the sake of navigating content related to them it is useful to choose one form of their name as the OFFICIAL NAME. And whatever the official name is, this must be documented so that you and maybe other researchers know that THIS is the name I search for in order to find the most items related to this person. If all three versions of this person's name are indeed essential, then it is important to capture all three versions and to make it clear that it is possible that a single person can be identified in the following three ways. This information could be recorded in a single field, or you could break it out into three fields, and additionally comment on this fact in a Notes field.

Slide 24:
Similar to establishing an 'official name' for a person, agreeing on a uniform way to record specific types of information, such as a date or address is essential. All of this drives home the point of consistency - if the dates are all recorded the same way, you know how to search through the information and know that a record won't be left out because it may be missing something. We prefer the four-digit numerical year to lead because when sorting information by date, that is the information that will lead, and it is more common to search for something by the year in which it was created or took place, as opposed to doing a search for 'September of any year' or 'the 20th of any month or year'.

Slide 25:

Not every field in your template will require standardized vocabulary, but for something as potentially subjective as *Condition*, you don't want to cast the net too wide. Establishing a range of descriptions, either explaining them above the field or putting them in the cheatsheet, will keep all persons inventorying on the same page.

In one of our common templates, we have a single field for the field *Condition* but you might consider having a single field in addition to specifically mark in case of mold. This is particularly handy if you encounter a large quantity of moldy items, and having a single field dedicated to mold alone will allow for quick sorting when determining what to do with these moldy items. Similarly, if a large quantity of films need archival cans, having a single field called *Housing Type* would allow for a quick sort to pull out anything that is recorded as, say, 'metal can' or 'no can', and then an equipment purchase or request can be made.

Slide 26:

This is not an exhaustive list, but we thought it was worth highlighting some common data entry issues we encounter.

Slide 27:

We generally record run times with two digits for hour, two digits for minutes, and two for seconds. The default settings in both Google Sheets and Excel at best remove that extra leading zero, and at worst, if the seemingly logical 'Number' setting is selected, can render the numerical information you are recording totally incoherent. There is similar trouble in relation to dates, though Google Sheets seems a little more generous than Excel. Both examples in the slide show the intended information, and how it might be reformatted automatically if the column is not intentionally formatted to 'Plain Text', which allows for the most control by the user. Instead of guessing, the easy solution to avoid problems is - before any typing begins, highlight the entire spreadsheet and format it all to 'Plain Text'.

Slide 28:

To reiterate, a common pitfall that primarily affects searching and sorting in an electronic-based inventory is a lack of structure for numerical data. The concern is both the 'Plain Text' setting to control the numerical structure AND deciding on a structure for manual input. The sort function requires the same amount of alphanumeric characters to ensure that everything is being understood as sequential or alphabetical. In regard to

something as essential as a Unique ID, we often advise partners, if they are creating new Unique IDs for items, to use a structure that ensures every ID has the same amount of digits/characters because this will impact the sorting process in a spreadsheet, but will also impact use in any future database software that might be used.

Slide 29:
Similarly to Unique IDs, important numeric based information for Dates should also follow a structure. All of the information for a full date is often not available. Having at least the four digits of a year is a good option. For sorting, if the month leads it will list, say, all the January dates first in order by year, then February, etc. The only way to sort by year is for the year to lead.

Slide 30:
Variables come up for multiple field types, similar to the example regarding the preferred spelling of a name. This example highlights media format names. In the instance of U-matic tapes, all of the examples shown are correct. All the more reason to agree on one option. The main problem you'll encounter in an instance like this is if one person is recording the term 'U-matic' and another is recording '¾ inch U-matic' - when you sort this information these formats will be separated, and it might not be immediately apparent.

Slide 31:
It is also worth mentioning that when orienting anyone to using a computer-based spreadsheet, especially when there will be multiple users accessing the same sheet, it's important to ensure they are comfortable using the sorting feature (which will make data pulling much easier). Because it is possible to sort information in a single column and unintentionally disassociate information from its original row, make sure they know this before selecting the final 'sort' function to ensure they have also selected 'expand selection' to keep all associated information in the row together. It seems like a small thing, but can lead to big problems. This is primarily an issue in Excel, it appears that Google Sheets auto expands the selection unless set otherwise.

Slide 32:
The following slides review two partner case studies in order to demonstrate similar outcomes to slightly different scenarios. We want to support you with templates to clarify the CAW model, but we also don't want to limit you. We want to show you how we are

able to alter our own templates as needed. You will see that the collaboration really depends on the need of the group and the organizers. You will see that we have found that embedding instructions into the data template itself is very helpful during the CAW. These instructions are present in both examples.

Slide 33:
Founded in 1982, the Scribe Video Center is a media arts center located in Philadelphia, PA and states its mission as follows: "to explore, develop and advance the use of electronic media, including video and audio, as artistic media and as tools for progressive social change." In 2009, Scribe generously responded to a request by NYU's Moving Image Archiving and Preservation program to hold the first public Community Archiving Workshop. Participants included Scribe staff and volunteers, MIAP students, and AMIA members. Scribe identified a series as the subject of the CAW called Community Visions, where community groups were trained to make videos about their issues. You can see in the slide the contents of Vol. 1.

Slide 34:
These workshop goals should sound familiar! Interestingly, the very first public CAW was one of the most complicated in terms of data. With Scribe Video Center, they already had a long-standing, logical system for managing their collections. They had been storing the collections off-site with a storage vendor, and were tracking the materials at the item level through an Excel spreadsheet with thousands of entries. The spreadsheet was very metadata-rich, with many of the same fields that are recommended for archiving and preservation, and it contained information that was essential to Scribe as they carried out their primary mission of creation and dissemination of independent media. However, the spreadsheet was unwieldy simply due to its size and its interface. Also, over time, a number of different staff had maintained the spreadsheet and there were no authority lists. In some cases the structure of the data was inconsistent (in categories like format, date, and production element type). It was critically important to Scribe to maintain all of the data in this main spreadsheet, but the organizers could see how the expanded capabilities of a database (more complex searching, the ability to design and generate reports, the built-in authority lists, etc.) would be very useful. It was difficult to imagine how this spreadsheet could be used during the CAW.

There happened to be a sample FileMaker database template available to non-profits through Independent Media Arts Preservation (IMAP) that incorporated best practices

for cataloging AV materials. Thus, the organizers helped Scribe think beyond their current system, suggesting that after the CAW they could convert the main spreadsheet to a Filemaker database. The CAW offered an opportunity to develop a data template that would work for this transition. It was agreed that the most important tapes to re-inventory were final edited versions and camera originals, and that we should start with the oldest tapes first, due to age and format (Hi8). It turned out that Scribe had another document, made to facilitate distribution, that could be used to establish authority lists for the name of the organization, the final title, any subtitles, the production date, and the names and roles of key members of the production team. From Scribe's main spreadsheet, organizers generated individual Excel files by production. Boxes were requested from the storage facility and organizers selected and arranged the tapes by production before the CAW. Then at the CAW, participants were given a set of tapes for a given production, the new data template, the export from the main spreadsheet, and an authority list.

Slide 35:
You will see that we have found that embedding instructions into the data template itself is very helpful during the CAW. These instructions are present in both examples. Here are excerpts from the data template used during the CAW. In this case, you can see that some of the instructions also include info about the source of the data. The 'Program Title' and 'Main Credits' explicitly point to the authority list. Tape and container information was taken directly from the items (not shown) that complemented the information in the main spreadsheet. Credits were often present in the main spreadsheet, so they were incorporated, but the Main Credits instructions explain the standardization for the entry. 'NEW' was a field not present in the main spreadsheet.

Following the CAW, boxes were re-packed. Box numbers needed adjusting before they were returned to the storage facility. When the CAW was over, one merged file was created representing all of the CAW inventories. That was then imported into the Filemaker database. Then a metadata crosswalk was created for the remaining records in the main spreadsheet, and that info was imported into the FileMaker database. The database is still in use, and the main spreadsheet has been retained for institutional memory. Scribe selected a few tapes that were digitized by NYU-MIAP as part of a Video Preservation class.

Slide 36:
In 2017, University of the Philippines School of Library and Information Studies (UPLIS)

professor Bono Olgado reached out to the Association of Moving Image Archivists (AMIA) (of which he is also an active member) to propose a community archiving workshop as part of the annual SouthEast Asia-Pacific AudioVisual Archives Association (SEAPAVAA) annual conference. Olgado and his students had already connected with the IBON Foundation, a development organization that seeks to

promote understanding of social, economic, and political issues confronting Philippine society and the world through research and education. IBON were stewarding an important collection by a now defunct independent media collective called AsiaVisions. AsiaVisions was composed of filmmakers, photographers, and journalists who documented the realities, atrocities, protests, and political movements during Martial Law in the Philippines under Ferdinand Marcos. The Collective produced newsreels and documentaries which served as tools for awareness raising against the propaganda materials that were being disseminated by the Dictator. The content created by AsiaVisions is unfiltered, rare, and an extremely important historical resource. Upon its dissolution in 1998, AsiaVisions transferred its collection to IBON Foundation.

Slide 37:
The IBON Foundation has no AV archivist on staff and trusted Olgado and his students to establish a working system for their video materials. IBON staff were not involved directly in the development of the data template. Olgado and his students also committed to completing the inventory of the whole collection of over 800 tapes, and planned to continue consulting on moving the collection toward digitization & access (and digitization has proceeded). They also had some experience with inventories and cataloging, and comprised the majority of the volunteer group. In addition there were three representatives of the CAW committee and AMIA, and a healthy additional mix of SEAPAVAA attendees and local volunteers. There were 27 participants total, and 167 tapes were inspected and inventoried. In the interval between Scribe in 2009 and Manila 2017, best practices had evolved and AV preservationists debated the pros and cons of different field names in the data template. Thus, this template included fields that had not been present in 2009, and even within the fields the information tended to be more granular.

Slide 38:
Here are excerpts from the template. In this case, the tapes were also labeled with a tape number and you can see from the first field that the instruction helps the volunteers find that number. Rather than recording other old numbers, a "text on tape" field held

that information. Barcodes were generated for the new unique ID, and we believe this was the first use of a cheatsheet as they wanted to be consistent about how the tapes were labeled.

Professor Rose Roque was present, who had done extensive research on the collection, so a great deal of attention was paid to getting the structure of the data for the titles. You can see they thought it important to separate out information on the tape and the housing, referring to this info as "Text on Tape" and "Text on Housing" (called in the Scribe template "Container". The Scribe template combined all of this info into an Annotations field). In this case, the organizers also separately recorded the condition of the tape and the housing. You can see from the specificity of these fields that the organizers were preparing for both preventive conservation (for example, changing tapes of deteriorated housing or re-affixing labels) and for digitization. As they recorded the text on the labels, they were sure to capture all of the technical metadata (for example, noting which boxes were checked for mono or stereo sound).

Sample CAW Equipment/Supplies List - Media Collections

_____ **Labels for unique IDs**
(for tape/film, one each for tape and container; optical media use one just for container)

_____ **Markers** if making handwritten labels and for labeling optical media
(~ 4-6 per table; fine-tipped permanent markers; for optical media also see EMG pens.

_____ **Flipchart paper or chalkboard** for posting shared info/instructions like authority lists

_____ **Markers** for box table for box labeling and flipcharting

_____ **Paper or tape** for labeling tables #1, #2, etc.

_____ **Pencils** for marking unique IDs on paper materials, photos, etc.

_____ **Folders** (one per table) for paper materials found in tapes (if they are separated)

_____ **New archival boxes** (if needed)

_____ **Jump drives**
(one per table preferably loaded with data template(s); all the jump drives should be formatted as EXFAT and each should eventually be labeled with a table #)

_____ **Laptops loaded with spreadsheet software**

_____ **Port adaptors** for loading jump drives as needed

_____ **Extension cords and power strips** for computer re-charging

_____ **Projector & screen** (screen is optional if a wall is available)

_____ **Lint-free cloths** for cleaning media/film containers (several per table)

_____ **Gloves** (variety of sizes; white cloth to protect materials; nitrile to protect people)

_____ **Cheatsheets** (one or more per table)

_____ **Sign-in sheet and pen**

_____ **Name tags**

_____ **Evaluation forms**

_____ **Any COVID supplies** - masks, hand sanitizer?

_____ [anything else that comes up!]

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
CAW TOT On-site Training Agenda

[overall dates]
[location; if different for different days, include below]

[date]
DAY 1 - Final Preparations/Practice for a CAW
[start time - end time]

[time; 15 min.]   Welcome [if start at noon can include lunch for 60 min. session]
[time; 40 min.] Evaluation of Collections/Workflow Proposals
[time; 35 min.] Final Workflows & Roles
[time; 15 min.] Break
[time; 30 min.] Space Configuration & Collection Arrangement
[time; 30 min.] Review of CAW Presentations/Presentation of Data Templates
[time; 60 min.] Data Templates Practice
[time; 30 min.] Wrap-up

[date]
DAY 2 - Community Archiving Workshop (CAW is [start time - end time])
[start time - end time]

[time; 30 min.] Overview of the Day
[time; 90 min.] CAW Set Up
[time; 2 hr.]   Welcome/Presentations/Begin Inventory & Inspection
[time; 30 min.] Lunch
[time; 3 hr.]   Inventory & Inspection
[time; 30 min.] Accomplishments & Next Steps
[time; 60 min.] CAW Clean-up

[date]
DAY 3 - Debrief/Follow-up Tasks for a CAW
[start time - end time]

[time; 45 min.] Data Merging/Analysis of Evaluations
[time; 45 min.] CAW Debrief

DAY 3 - Debrief/Follow-up Tasks for a CAW (cont.)

[time; 15 min.] Break
[time; 45 min.] Partner Follow-up

[time; 40 min.] Our Work Ahead
[time; 20 min.] Wrap-up/TOT Evaluation

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Day 1 Trainers' Notes: Collections/Workflows Planning

This session is held on Day 1 of the On-site Training. It is represented in the TOT Onsite Agenda in two parts: Evaluation of Collections/Workflow Proposals and Final Workflows & Roles.

TIME: 75 - 90 min.

If this is the first time that the trainers and trainees are together, or the partner is present, there may need to be introductions. The time can be adjusted for this purpose. Since Day 1 of training is only four hours, there can be a working lunch prior to this session where everyone can get to know each other, and team members can meet the partners.

LEARNING GOALS:

- To increase understanding of how proposed workflows are affected by the actual status of collections
- To practice identifying collection needs and priorities and refining and adjusting workflows & roles
- To consider various scenarios for arrangement and distribution of collections to tables, and for the disposition of items once they are inspected and inventoried

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches
15 min or more	Each person can introduce themselves and can be asked to report one or two things. This can be in the form of an icebreaker for simply getting to know each other, or can be something related directly to the training. As much time as needed for intros depending on size of group.	Discussion
40 min.	Evaluation of Collections/Workflow Proposals - by this time, the team should have received the 3-day agenda, so introduces the agenda for the day and cover any housekeeping tasks (i.e., location of bathrooms). Then introduce the goals and tasks of this session, and start the first part. This intro should take no more than 5 minutes.	[Presentation slide with onsite agenda or printed handout optional]

	At this point, the planning team should have a workflow in mind, and have prepared labels, final versions of data template(s), cheatsheets, etc. They should also have a general idea of how the collections will be arranged in the space and distributed to the tables for inventory and inspection. Thus this session serves as a check on whatever assumptions have been made about the collections, and gives the team an opportunity to make any necessary refinements or adjustments to the workflow. Often the evaluation reveals collection priorities for the first time. This session will vary depending on a number of different factors. The level of understanding of the collections coming into the training may vary. There may be a lot of descriptive info, or none at all, and any info may or may not have been shared with the planning team. Also, this understanding of the collection and AV materials may vary among planning team members; for example, if not everyone may have been able to attend a site visit. **Thus, this session also helps get everyone on the same page.** Before beginning the evaluation, one or more team members should summarize what they know about the collection, and the basic parameters of their proposed workflow. Ideally, key people from the partner organization will be present to orient the team to the collection, and to answer questions. The evaluation can be done in a large group or in small groups. For example, if there are multiple formats, small groups can take on the evaluation by media type (i.e., film, video, audio or optical media), by production type, by content, etc., or simply by choosing a set of boxes. Groups should be encouraged to propose options that can be discussed in the second part of this session, if they can't come to final decisions. Trainers explain that they should consider these points during the evaluation, and be prepared in 30 min. to share their findings with the larger group. Questions can be flipcharted or provided in a handout and uploaded to a share drive. ● Are there any new collection(s) needs that you discovered today?	Reference: Sample CAW On-site Training Agenda CAW_TOT_CUR_On-site_Agenda [Presentation with evaluation questions listed in notes optional]

	● Is there a need for a box level inventory in addition to the item level work? ● Is there an order among the items that is important to maintain during the CAW? Is there a need to re-box the items? ● Are there collection priorities that will affect how the media are arranged or distributed? What is the basis of those priorities? ● Is it possible and appropriate to sort or arrange the collection(s) to facilitate the inspection & inventory? ● What is the best distribution of the collection(s) to the tables? ● Are their changes in the workflow that are needed and are feasible, considering the CAW will be held the next day? Will the changes affect the assigned roles for the CAW?	
35 min.	Final Workflows & Roles - Each small group will report on their findings, and trainer(s) will guide the group on finalizing a workflow for the day-of CAW, and any lingering role assignments will be settled.	Discussion. [projected slides or notes optional]

EQUIPMENT & RESOURCES:

- Laptop/projector (optional)
- 3-day Agenda Handout CAW_TOT_CUR_On-site_Agenda

OTHER CONSIDERATIONS/MATERIALS

- You are meeting in person, a flip-chart/markers or whiteboard/markers or blackboard/chalk is helpful to track their responses during discussions, or you can take notes in a file that is projected.

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Day 1 Trainers Notes: Space Configuration and Collections Arrangement

TIME: 30 min.

LEARNING GOALS:

- To practice translating the final workflow into a physical workflow for the collection material with the partner and space provider
- To gain an understanding of what needs to be negotiated with the partner regarding space and what is essential and feasible vs. ideal
- To increase understanding of the set-up tasks for the CAW Day 2 and what may be feasible/ideal on Day 1.

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer & Related Documents
30 min.	Trainer(s) will prompt the team to explain their original conception of the use of the space. With any changes in workflow coming from the previous session, there may need to be changes in space configuration. The trainer(s) will facilitate a discussion of those changes. If possible, the space can then be configured for the next day (move furniture around, move in and set up equipment/supplies). If collection materials can be secured, they can even be brought into the space and placed on the box/staging tables. If this is not possible or if it is thought that the team would benefit from more time in the next session, the group can create a map for the next day's set-up. In other words, this session can be as long as is needed, given the group's other needs.	Large group discussion

EQUIPMENT & RESOURCES:

- Laptop/projector (optional)

OTHER CONSIDERATIONS/MATERIALS

- You are meeting in person, a flip-chart/markers or whiteboard/markers or blackboard/chalk is helpful to track their responses during discussions, or you can take notes in a file that is projected.

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Day 1 Trainers Notes: Presentations and Data Templates

This session is represented in the TOT Onsite Agenda in three parts: Review of CAW Presentations/Presentation of Data Templates, Data Templates Practice, and Wrap-up.

TIME: 90 min. The time may need to be increased if the CAW will include more than two types of AV materials, or more than one data template. See Data Templates Practice below.

LEARNING GOALS:

- To practice the clear presentation of the data template (presenter) and to experience orientation to the template from the perspective of a CAW participant (rest of team)
- To gain experience with the data template and to increase skills and confidence with the inspection/inventory process and checking records, especially for table captains
- To understand last-minute issues that may arise with the instructions, cheatsheets, the template, and spreadsheets in general and how they may be resolved

PRE-SESSION:

The trainee team should have circulated the final CAW presentations, the final data template, and the final cheatsheet before the CAW. If this has not happened, these documents will need to be loaded onto their laptops. They should also have decided who will take what part of the CAW welcome and presentations. Each person should have reviewed the materials.

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches
30 min	Review of CAW Presentations/Presentation of Data Templates Ideally the group will divide into pairs, with each pair working on a laptop. Team members less experienced with the spreadsheets and AV materials should be paired with those more experienced. The less experienced should take the lead in the data entry, with the more experienced coaching them. First, the trainer will ask the team to describe how they envision the partner's participation during the welcome, and clarify how that part of the CAW will unfold. The team should then run	Presentation; small group practice & large group discussion

	through the CAW presentation slides up to the beginning of the workflow and data template slides, confirming what will be presented and who will present for each section. (They will not actually present, just a review of slides.) The person assigned to the workflow/data template section will then actually present this section. This activity will give that team members practice in the presentation, and will introduce all team members to the template. The participants will follow along on their own laptops.	See slide 40 of CA TOT CAW Presentations as an example of where to start the actual presentation
60 min.	Data Template Practice The team will practice inspection and data entry with CAW collection materials. If there are two different types of collection materials, the group can be divided into two, and the trainers will prompt them to exchange places after 20 minutes. In this way they will have some practice with each of the collection types. If there are more than two types of materials, you will need to increase the time for this part. You will also need more time for practice if you are using more than one data template or are using more than one workflow. For example, if you are inventorying both film and media, and the film inspection requires a two step process of a paper-based form and then data entry. The point is to design this part based on the trainee needs, to give them sufficient practice to feel comfortable with the materials and the data template(s). After about 40 minutes of practice, bring the large group back together for the last 15 minutes and lead a discussion of the experience. Take any questions about the process that can benefit the whole team. Check in about any last minute prep tasks for the next day, summarize, and close looking forward to the CAW!	

EQUIPMENT & RESOURCES:

- Laptop/projector for the presentations; CAW presentation, data template, & cheatsheet
- Laptops and supplies for distribution of data template and for inspection and inventory

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Day 2 Trainers Notes: CAW Coordination Practice

Note: these Trainers Notes are inclusive of all of the activities listed for Day 2 in the Sample Full Training Agenda (CAW_TOT_CUR_Full_Agenda)

TIME: 8-9 hours
Generally CAW's run from 11:00am - 5:00 pm. Start time will depend on the amount of preparation that was done on Day 1, and the requirements of the site and partner. Organizers typically arrive at 9:00 am or earlier. It's helpful to have the volunteers come in the 30 min. interval before the start time (could be a coffee time) so that they can be settled at tables and have data templates loaded by 11:00 am. Lunch and breaks may be scheduled or more flexible. Thirty to 45 min. before the end of the day the work stops, data files are collected, and collections are re-packed. Typically the last 30 min. is dedicated to celebration of the work of the day, reminders about next steps in preservation and access, thanks, and evaluations. Clean-up follows, usually taking about one hour.

LEARNING GOALS:

- To gain direct experience of a CAW, from set-up through clean-up, thereby increasing understanding of the dynamics of a CAW, including the roles and responsibilities of the organizers, partner representatives, and volunteers
- To practice various roles during the CAW Day, as well the general tasks of education, skill sharing, and problem-solving with participants, partners and each other

PRE-SESSION WORK:

The CAW is the culmination of all of the planning done by the trainees since the first webinar. The breakdown in responsibilities outlined in the agreement will determine who is doing what on the CAW Day, and precisely who brings what materials according to the goals of the day. Organizers (in this case the trainee team) will typically arrive with everything needed to carry out the inspection and inventory: the presentations, cheatsheets, data template (often on one jump drive per table), equipment and supplies for inspection, laptops, power, etc. The organizers or partner may bring labels, any needed new boxes, projection equipment and evaluation forms. The partner often provides refreshments and registration. See under EQUIPMENT & RESOURCES below a link to a checklist of typical CAW items.

From Community Archiving Workshop Training of Trainers Curriculum, CAW_TOT_CUR.pdf

The circumstances of CAWs can vary widely. The description below is based on a scenario where the trainee team had good information about the collection prior to Day 1. They were able to look over the collections, review/adjust their workflow(s), and make final decisions about the space and collection arrangements. The partner also took care of many details, such as sign-ins and refreshments. The work varies at the end of the day, depending on the needs of the collection and the proximity of the partner space and storage.

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
~ 90 min. set up; 6 hours CAW, 60 min. cleanup	This is a time to let the trainees lead. The trainers should resist the urge to run the show. Like those in the lead organizer role, you will be keeping an eye on the room. For any issues that arise, you will serve more as a facilitator and advisor than a problems-solver, although sometimes you may need to step in. It's helpful to serve as a supporter and timekeeper, to check in on how the trainees are doing in their roles, and to remind the trainees of key points/actions, as they will be very busy. For example, the table captains may need reminding to check the data after a few tapes to make sure that easily-fixed errors are caught early; or you may see people leaving early and can remind a trainee to distribute evaluation forms. You will be a good member of the community, but not necessarily in charge. At the beginning of the day, it is helpful for everyone to gather and for the lead organizer(s) to make sure everyone knows what their initial role is, to go over what needs to happen before the CAW and to take questions. Trainers can jump in where they see gaps. The trainers can decide what general areas they will each keep an eye on; in other words, they can also assume particular roles. They can also simply both be floaters, checking with each other at key moments such as the beginning of the presentations, the start of the inspection and inventory, at lunch and breaks, when the work is winding up, and at the end of the day.	Support trainee practice and facilitate/advise as needed

EQUIPMENT & RESOURCES:

- Laptops/projector and other items as sourced during planning - see example: CAW_TOT_CUR_Equip_Supplies
- Final presentation(s), cheatsheets, data templates adapted for the CAW
- Evaluation form for CAW volunteers such as CAW_TOT_CUR_Evaluation
- Examples of relevant docs (more info and sample forms included in CAW Handbook): CAW_TOT_CUR_Roles, Film Kit Supply & Equipment List, Midwest Film Kit Guide

COMMUNITY ARCHIVING WORKSHOP EVALUATION
CAW organized by [partners]
[date, location]

Please tell us what you think about the Community Archiving Workshop! We are always looking to make the workshop better and your feedback will help us determine what works and what we need to improve. Thank you for participating!

1. What did you like about the Community Archiving Workshop (CAW)? (i.e. activities, instruction, networking, room setup, etc.)

2. What would you like to see improved regarding the CAW workshop model or day-of instructions and activities?

3. Do you have any other comments about your experience today?

4. After experiencing a Community Archiving Workshop, would you be interested in having a similar event at your own institution/organization?

       Yes   No

       If yes, please tell us a little about your collections and write your contact info below. Thank you!

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
Day 3 Trainers Notes: Data Merging/Analysis of Evaluations

TIME: 45 - 60 min.

LEARNING GOALS:

- To reflect upon objective information gained through the CAW before beginning the more subjective process of the CAW De-brief
- To practice merging data from multiple spreadsheets and extracting information relevant for priority-setting and preservation planning
- To practice summarizing information from CAW evaluations relevant to future planning

PRE-SESSION

It is best to have one or more people from the trainee team merge all of the various inventory files together before this session. Ideally this role would have been assigned before the CAW or at the end of the CAW day.

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/
20 - 30 min	This session gives the trainees a chance to examine the information collected during the CAW and the feedback from the CAW evaluations before the CAW De-brief. One approach is to divide the team into two groups, one examining for the data files and one examining the evaluations. Each group is instructed to summarize the information they find and assign a person to take notes and present the info. For the data, the small group should summarize info such as the number of items inventoried, items inventoried broken down by AV type, format, production type, generation, or any other relevant fields or discoveries. For evaluations, the categories to summarize are self-evident. As noted above, it is best if the data files have already been merged, but if not, this can be started during this session. The evaluations need not be collated beforehand, because a summary of that information is much easier.	Work groups with the option to project documents.

	Trainees assigned to managing the collected data templates should work together to merge and clean up data. For the purpose of the training, this task should be performed by at least 3-4 people to allow for experience. This work can be performed on personal laptops, and if one team is up for projecting their work to allow other group members to get a feel of the work, that is a possibility. Alternatively, the whole trainee team can concentrate on the files and time can be reserved (see below) for the whole team to read and discuss the evaluations. If you have participants with less familiarity with spreadsheets, the process of merging, sorting and analysis will be instructive and more important to experience than the evaluations. Doubling up the work in this way would shorten the session.	
10 - 15 min	The trainers then ask for a summary of the findings from the group working on merged data. Someone should be assigned to present the findings. Trainer(s) should guide the presentation into a discussion, encouraging reflection on collection priorities, a summary of common data entry errors found, and template changes trainees might like to make for future workshops - whether that is adding fields or providing different instructions, etc. How the data template was designed and presented to the workshop volunteers can also be discussed more during the CAW De-brief session.	Trainee presentation and large group discussion.
10 - 20 min	The trainers then ask for a summary of findings from the group analyzing the evaluations.Trainers can guide a discussion, noting where CAW participant feedback is useful and might affect next steps (for example, if there is interest in volunteering or more CAWs). Alternatively, this can be a time where everyone reads through evaluations, and are asked to focus on common statements - positive and negative. The trainer(s) should make sure to point out that a single negative comment does not invalidate multiple positive comments! Trainers summarize and move on to the CAW De-brief.	Work groups and/or document review; large group discussion Reference: CAW_TOT_CUR_CAW_Evaluation

EQUIPMENT & RESOURCES:

- Laptop/projector

- Or shared cloud-based document

OTHER CONSIDERATIONS/MATERIALS

- You are meeting in person, a flip-chart/markers or whiteboard/markers or blackboard/chalk is helpful to track their responses during discussions, or you can take notes in a file that is projected.

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
CAW De-brief

TIME: 45 min.

LEARNING GOALS:

- To practice analyzing a CAW in terms of practical considerations (space, workflow, etc.), group dynamics, and meeting the goals of the partner organization
- To gain an awareness of how planning decisions can impact the effectiveness of a CAW

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
45 min.	This session is an opportunity to reflect on the CAW, from the perspective of participants and organizers. Beyond their own experience of the day, trainees can be encouraged to consider what they learned from the CAW evaluations. In addition, they can reflect on both the planning process and the CAW itself, and how that will impact the planning of their local CAW. Emphasize that each CAW is different, and there are many factors that can affect the accomplishments and group dynamics. Each person will see pros and cons as to the goals, scope, workflows, levels of complexity, etc. of a CAW. Also, everyone will come with their own personal preferences and styles, including how comfortable they are with the lively CAW process, which can for some feel a bit chaotic. The overall point is to understand the impact of planning on the success of a CAW, as well as how to carry out the CAW itself. Trainers can help by bringing specificity to the discussion, for example by asking clarifying questions and trying to look toward options (i.e.; "You say the presentations were too long, what part would you remove?"; "You feel the partner did not understand	Large group discussion There are no presentation slides for this session, but a visual of the questions is helpful for some learners, either on a flipchart or as a presentation.

| | some of the columns in the spreadsheet, is there anything about the template negotiations you might do differently?'). Below are some questions that are designed to stimulate discussion on various aspects of planning and running a CAW. There are no presentation slides for this session, but a visual of the questions is helpful for some learners, either on a flipchart or as a presentation. One participant or the second trainer can take notes for later reference. Overall, what was your experience of the CAW? How well do you think the CAW met the partner´s stated goals? What role(s) did you take on? How did you feel about your role? In terms of process, what were some of the strengths of the CAW workflow? Are there things you would change? What worked in terms of the welcoming and orienting of CAW participants? Are there things you would change? What worked in terms of the presentation and instructions? Are there things you would change? What worked in terms of the inspection and inventory process, especially for those new to the process? Are there things you would change? Did you think the scope and scale of the collection worked well? Why or why not? Did you think the template worked for both the participants and the organization? Why or why not? | |

EQUIPMENT & RESOURCES:

- Laptop/projector or a way to flip-chart questions

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
CAW TOT Day 3 Trainers Notes: Partner Follow-up/Our Work Ahead

TIME: 1 hour 45 min.

This session is held on Day 3 of the On-site Training. It is represented in the TOT On-site Agenda in three parts: Partner Follow-up, Our Work Ahead, and Wrap-up/TOT Evaluations.

The composition and needs of the trainee group will vary, and therefore the timing and emphasis of these sessions may vary. For example, if the trainee group is less experienced with spreadsheets, deeper instruction may be needed on data merging. With a trainee group representing multiple organizations, and thus more CAWs to be organized to practice their new-found skills, more discussion time will be needed. The discussion of future mentoring ("our work ahead") will likely also be more complex. In some cases, post-CAW meetings with a partner are very brief and little follow-up is expected. In other cases, the organizers may plan to use a post-CAW meeting to further guide or train the partner, and a collaboration may continue for more months to come.

The structure of the TOT calls for mentoring to continue post-CAW, when the trainees plan their own CAWs. These mentoring activities are beyond the scope of this TOT curriculum. However, future iterations of the curriculum could describe this phase in more detail; we encourage contributions in this area.

LEARNING GOALS:

- To gain clarity about the typical tasks carried out by the organizers post-CAW
- To increase understanding of the possible components of a follow-up meeting with the CAW partner(s) that support preservation and access
- To gain clarity about the next steps in organizing their local CAWs, and the roles, responsibilities, and expectations of the trainers and trainees going forward
- To be reminded of the larger CAW and TOT projects and communities and to reflect on ways that we all can continue to work together in support of future CAWs

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
45 min.	PARTNER FOLLOW-UP	Lecture and large group discussion

	The trainers briefly review the follow-up tasks for a CAW. If any questions about the tasks come up, remind the group that their trainee for the post-CAW mentoring will be addressed after this discussion. Confirm who and by what date this work will be done. Explain that it is not unusual for this work to take ½ a day. The data merging can really drive home the point of how important it is for the table captains to check records after a few tapes are done, to prevent inconsistent entries. Move on to a discussion of what a follow-up meeting could entail. As noted earlier in the day, CAWs reveal much information about risk and condition. Again, note that the partner will utilize the data to set priorities for preservation and collection management, along with other information, such as about content, significance, uniqueness, etc. Remind the group of the overall goal of a CAW: to help an organization jump-start their preservation efforts. Ask the group to reflect on organization capacity and to list possible short and long term preservation/conservation actions utilizing the data collected. See CAW_TOT_CUR_Follow-up_Agenda for the components of a follow-up meeting to help shape this discussion and to lead to preliminary decisions about the meeting date, the agenda items and content, and any needed preparation.	There are no slides for this session, but they could be developed for future TOTs. See CAW_TOT_CUR_Follow-up_Agenda
40 min.	OUR WORK AHEAD As noted previously, each participant or trainee team will have committed to organizing a CAW with the help of the trainers as CAW mentors. It is important to confirm these commitments including a preliminary month for each CAW, but also to learn where the participants would like any future mentoring to be focused; in other words, where they feel they need the most confidence and where they need guidance and support. Mentoring needs can be explored through a large group, but small group discussions without trainer facilitation are often more productive. If all of the trainees will work	Lecture and small or large group discussion See slides 16-26 from the California TOT CA_TOT_CAW_Day 3 for examples of questions to assess mentoring needs Trainers also may wish to consult the TOT Toolkit and CAW Handbook for resources

	together to organize one future CAW together, it makes sense for them to stay together for the discussion. If there are sub-groups (such as different organizations) who will each plan a CAW, have them work together. See Slides 16-26 CA_TOT_CAW_Day 3 for examples of questions that can help identify mentoring needs. The trainers should direct the group(s) to, rather than work their way through each question methodically, read through all of the questions and then brainstorm answers. Ask each group to assign a notetaker. Give them about 25 min. for discussion, prompting them at the halfway point. Ask each group to report on their priorities. Trainers can also take notes for use in planning mentoring activities. In the last few minutes, ask them to rank their top 2-3 needs.	that can help build out these slides.
20 min.	WRAP-UP/TOT EVALUATION Most of the time will be taken with the participants filling out the TOT evaluation form. Express excitement about your upcoming work together, give the participants time for any last comments/questions, confirm any upcoming meeting dates, and give thanks all around.	CAW TOT Evaluation

EQUIPMENT & RESOURCES:

- Laptop/projector (optional)
- Sample CAW Follow-up Meeting Agenda, CAW_TOT_CUR_Follow-up_Agenda and CAW TOT Evaluation

OTHER CONSIDERATIONS/MATERIALS
You are meeting in person, a flip-chart/markers or whiteboard/markers or blackboard/chalk is helpful to track their responses during discussions, or you can take notes in a file that is projected.

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS
CAW TOT Evaluation | [overall dates of training/mentoring]

The overall goal of the CAW Training of Trainers is to increase the skills and knowledge of participants so that they may plan and carry out a CAW with confidence.

Please circle responses.

1. Do you think that the goals of the course were reached?

   Yes   Somewhat   No

   Please elaborate:

2. How useful and relevant were the webinars to your learning?

   Webinar #1 - The Goals & Process of a CAW

   1   2   3   4   5
   Not useful   Somewhat useful   Extremely useful

   Webinar #2 - Finding & Developing a CAW Partnership

   1   2   3   4   5
   Not useful   Somewhat useful   Extremely useful

   Webinar #3 - CAW Negotiations: Collections

   1   2   3   4   5
   Not useful   Somewhat useful   Extremely useful

   Webinar #4 - CAW Negotiations: Data Templates

   1   2   3   4   5
   Not useful   Somewhat useful   Extremely useful

Please elaborate on your above responses:

3. How useful and relevant were the mentoring sessions to your learning?

1	2	3	4	5
Not useful		Somewhat useful		Extremely useful

Please elaborate:

4. How useful and relevant were the assignments (include homework, group work, writing work)?

1	2	3	4	5
Not useful		Somewhat useful		Extremely useful

Please elaborate:

5. Please respond to the usefulness of each section/topic below:

Evaluation of Collections/Workflows

1	2	3	4	5
Not useful		Somewhat useful		Extremely useful

Please elaborate:

Space Configuration & Collection Arrangement

1	2	3	4	5
Not useful		Somewhat useful		Extremely useful

Please elaborate:

Data Templates Practice

1	2	3	4	5
Not useful		Somewhat useful		Extremely useful

Please elaborate:

Data Merging/Analysis of Evaluations

1	2	3	4	5
Not useful		Somewhat useful		Extremely useful

Please elaborate:

Partner Follow-up

1	2	3	4	5
Not useful		Somewhat useful		Extremely useful

Please elaborate:

6. Overall how confident do you feel about conducting a CAW in the future??

1	2	3	4	5
Not confident		Somewhat confident		Extremely confident

Please elaborate:

7. What additional resources/training/mentorship do you need to feel confident?

8. How conducive were the session types (lecture, small group work, discussion, etc) and trainers styles to your learning? What would you change?

9. Any other ideas for how the Training of Trainers workshop could be improved:

Thank you again for all of your hard work, time, and consideration!

Sample CAW Follow-up Meeting Agenda

The purpose of the follow-up meeting goes back to the overall goal of a CAW: to help an organization jump-start their preservation efforts. The meeting gives the CAW organizers and partner(s) time to reflect on what they learned about the results and the process of the partnership. CAW organizers and partners discuss the experience of the CAW, what was gained from the community-based effort, and if and how their partnership together or with volunteers may continue. It is an opportunity for CAW organizers to help the partner understand what is revealed by the data collected and how that might be shaped into a preservation plan.

It's important for the organizers to take some time before the meeting to consider what their relationship with the partner can be going forward, and generally what follow-up they can do beyond this meeting. However, it's also a good idea to remain open to what will come next. As with all partnerships, it's important to remain honest about your own ability to deliver. In many cases, this meeting may be the only follow-up possible or necessary.

One contribution may be connecting the partner to known resources, whether educational materials or people and institutions. In some cases, these supporters could be invited to a follow-up meeting, if it is OK with the partners.

These are some of the agenda items to consider:

1. **De-brief on the CAW process & summary of evaluations**

This is an important time for all organizers/participants to reflect on the day: on their personal experience, what they felt worked or was gained through the CAW, and any ways they might have organized the CAW differently. This can include both the day itself, and any feedback on how the work together proceeded as a planning group.

The CAW organizers or the partner may be the ones who collected and analyzed the data, and can deliver a short oral and/or written summary of the evaluations. If the organizers have done the summary, they can turn the evaluations over to the partner.

2. **Handover of documentation**

In some cases, you may find that you have accumulated documentation - documents, photos, video, etc. - that would be helpful to the partner. This is a good time to do the handover and/or

to point them to where the documentation lives. You may even have time to view a little, to remember the excitement of the CAW.

3. What does the inventory tell us?

Before getting in the details of the inventory, check and see that the collection made it to its home safely and if there are any questions about the organization of the collection.

We often end a CAW by emphasizing that our goal for the day was not to make beautiful labels and well-organized boxes, but to help them prepare for preservation, as the media is so endangered and action cannot be delayed. We often say "If someone walked through the door and offered to preserve 20 tapes, which ones would you choose?" We say that the inventory can help them make this decision, as they are the content experts. They need to understand both what is in the inventory, and how the inventory is used in collection management, preservation and access.

In most cases, the CAW organizers will have more expertise than the partners, and will not have delivered the data yet. This is an opportunity for the CAW organizers to not just hand over the data, but to share what they see from the point of view of risks to the content, given the formats, condition, etc. They will need to choose the most significant content, while taking into consideration the risks that each category of materials represents. You want to avoid at all cost the sad outcome that the partners find they can't use the data in the form of a spreadsheet, or the information is lost because it is not backed up.

It will likely be necessary to walk through the inventory, particularly if the partners are new to spreadsheets. Basic care of the inventory (backups) can also be reviewed. This may be as simple as several members keeping copies until a preservation plan is devised.

If possible, hand over not just the inventory spreadsheet, but a short description of what you have observed and suggested next steps. You may make one or more charts that help them to understand their collection; for example, to show the formats by number and percentage of each format in the collection, as you talk about obsolescence, the urgency of re-formatting, and the relative ease or difficulty in re-formatting. They can then use the charts for education of their supporters or for fundraising. This information can also just be conveyed orally and they can take notes.

4. Next steps

A good way to start this discussion is to hear from the partner about their plans and aspirations. You can then lend your expertise to what it will take to achieve their plans. This will also involve a discussion of whether any of the CAW volunteers can continue to do this work.

This is an opportunity for the organizers to educate about typical steps in preservation planning. This can be very basic, if the partner is very inexperienced and under-resourced. Or it can be more strategic; if for example, the partner has archival practices in place that just need to be adapted or expanded. You may even wish to make presentations about preservation planning, digitization, or digital preservation. You can also point the partner to other resources for learning about these issues, including those that are part of the [Community Archiving Workshop Toolkit](#).

You should have a good sense through the CAW planning process of the capacity and experience of the partners that will guide this agenda item, helping them see what short-term actions can lead to preservation and access. It is often very difficult for organizations to manage both preservation and access; they may be able to host access, but the long-term management of digitization and digital preservation may be beyond them. In many cases, the partners will need to find local and regional resources to help them continue. For example, they may be encouraged to collaborate with a library or archive on storing preservation elements, but can mirror their content through a statewide or regional access portal. However, the collecting institution may be the most expert in some aspects; for example, a media access center may be the most logical site for a digitization. This session is usually more about brainstorming than leaving them with a specific roadmap.

If you are planning specific follow-up, make sure and settle on a rough timeline and what the next action will be, who will do what, and by what dates.