COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS
[Note: The CA TOT curriculum is undergoing copy-editing; small changes and a few missing links (in red below) will be incorporated soon. 2022-02-26]

INTRODUCTION

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 they need for preservation planning. The more people organize CAWs, the more likely a diversity of historic collections will be saved and accessible.

The California Training of Trainers (CA TOT) was a model for regionally-based training funded by the Institute of Museum and Library Services. TOTs were held in 2019-2020 in the Southeast, Midwest and West. Each TOT was led by a regional CAW Mentor working within an "anchor site," and there was a second trainer for all TOT sessions. Both were experienced CAW organizers.

Central to each TOT was a CAW that occurred on Day 2 of a three day in-person training. The CAW Mentors did the pre-CAW planning, including the selection of a CAW partner (in CA the Sacramento Public Library Special Collections) and negotiation of the goals, collection scope, and data template. The CAW Mentor and partner worked together on logistics for the CAW.

Each regional trainee group was composed of 3-4 different organizations. Each of the organizations made a commitment to organize a local CAW after the TOT to practice what they had learned. Mentoring on pre-CAW tasks happened afterwards as the participants planned their own CAWs.

The CAW Mentor for the West region was Pamela Vadakan at the anchor site California Revealed. Jimenez and Vadakan were the TOT trainers, with assistance from Shahed Dowlatshahi. The TOT curriculum was created by Mona Jimenez and Pamela Vadakan and was informed by previous TOT designs by Kelli Hix and Marie Lascu, and by numerous resources created by Community Archiving Workshop, in particular the CAW Handbook. The authors are thankful for the generosity and dedication of the CAW Committee and the numerous CAW partners and volunteers over the years.

A PDF is available with all of the materials that were part of the CA TOT: CA_TOT_CUR_2019.pdf [link forthcoming]. Each element below is also available as a separate document using the links below.

TABLE OF CONTENTS

Agenda

Full California Training of Trainers Agenda
CA_TOT_Full_Training_Agenda

Webinar #1 - Welcome and the CAW Concept

CA TOT Webinar 1 Trainers Notes: Welcome and the CAW Concept
CA_TOT_Webinar_1_Trainers_Notes

CA TOT Webinar 1: Welcome and the CAW Concept
CA_TOT_Webinar_1_Presentation

CA TOT Webinar 1 Presentation Speaker Notes
CA_TOT_Web1_ Pres_Speaker_Notes

CA TOT Webinar 1: Welcome and the CAW Concept
CA_TOT_Webinar_1_Presentation_Video

CA TOT Instructions to Participants
CA_TOT_Webinar_1_Participant_Instructions

CA TOT Homework for Webinar #2
CA_TOT_Homework_Webinar_2

Sample CAW Memorandum of Understanding
CA_TOT_memo_partners

Webinar #2 - The CAW Collaboration

CA TOT Webinar 2 Trainers Notes: The CAW Collaboration
CA_TOT_Webinar_2_Trainers_Notes

CA TOT Webinar 1: The CAW Collaboration
CA_TOT_Webinar_2_Presentation

CA TOT Webinar 2: The CAW Collaboration
CA_TOT_Webinar_2_Presentation_Video

CA TOT Webinar 2 Presentation Speaker Notes
CA_TOT_Web2_ Pres_Speaker_Notes

Homework for On-site Training
CA_TOT_Homework_On-site_Training

On-site Training Day 1

Trainers Notes Day 1.1: Welcome and Agenda Review
CA_TOT_Trainers_Notes_Day1.1_Welcome

CA TOT Trainers Notes Day 1.2: The Scope and Arrangement of the CAW Collection

CA_TOT_Trainers_Notes_Day1.2_Scope

CA TOT Trainers Notes Day 1.3: The What and Why of the Data Template

CA_TOT_Trainers_Notes_Day1.3_Template

CA TOT Trainers Notes Day 1.4: AV Basics – Inspection and Inventory of Film, Video and Audio

CA_TOT_Trainers_Notes_Day1.4_AV_Practice

CA TOT Day 1 Presentations

CA_TOT_Day1_Presentations

CA TOT Day 1 Presentations Speaker Notes
CA_TOT_Day1_ Pres_Speaker_Notes

CA TOT Data Template
CA_TOT_CAW_InventoryTemplate

CA TOT CAW Presentations
CA_TOT_CAW_Presentations

CA TOT CAW Presentations Speaker Notes
CA_TOT_CAW_ Pres_Speaker_Notes

CA TOT CAW Workflow Cheatsheet

CA_TOT_CAW_Cheatsheet

AV Archiving Resources

CA_TOT_AV_Archiving_Resources

On-site Training Day 2

CA TOT Trainers Notes Day 2: CAW Day

CA_TOT_Trainers_Notes_Day 2_CAW

CAW Day Evaluation Form

CAW_TOT_CUR_CAW_Evaluation

On-site Training Day 3

CA TOT Trainers Notes Day 3.1: CAW De-Brief

CA_TOT_Trainers_Notes_Day3.1_De-brief

CA TOT Trainers Notes Day 3.2: Review of Next Steps for Regional CAWs

CA_TOT_Trainers_Notes_Day3.2_Next_Steps

CA TOT Trainers Notes Day 3.3: Priorities for the Mentoring Phase & Wrap-Up

CA_TOT_Trainers_Notes_Day3.3_Priorities

CA TOT Day 3 Presentations
CA_TOT_Day3_Presentations

CA TOT Day 3 Presentations Speaker Notes

CA_TOT_Day3_ Pres_Speaker_Notes

CAW TOT Evaluation

CAW_TOT_CUR_Evaluation

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

California Training of Trainers Full Agenda

Webinars

Webinar #1: Welcome and the CAW Concept
Friday, April 5, 2019, 1:00 - 2:30

Webinar #2: The CAW Collaboration
Friday, April 12, 2019, 1:00 - 2:30

On-site Training

Sacramento Public Library Special Collections

828 I Street – Between 8th and 9th Streets | April 22 – 24, 2019

Monday, April 22, 2019

Gather in the West Meeting Room for Coffee (1st floor)

Sacramento Room (2nd floor) for remainder of day

8:45 – 9:00 – Meet James at the I Street entrance

9:00 – 9:30 – Coffee

9:30 – 10:15 – Welcome and Agenda Review

10:15 – 11:15 – The Scope and Arrangement of the CAW Collection

11:15- 11:30 – Break

11:30 – 12:30 – The What and Why of the CAW Template

12:30 – 1:15 – Box Lunch

1:15 – 3:45 – AV Basics – Inspection and Inventory of Film, Video and Audio

Simultaneous practice sessions – 2 small groups:

Film Inventory

Video and Audio Inventory

3:45 – 4:00 – Break

4:00 – 5:00 – Intro to the Digitization Process and the Video Digitization Kit

Tuesday, April 23, 2019

West Meeting Room (1st floor) all day

9:00 – Coffee

9:00 – 9:30 – Overview of the Workflow

10:00 – 11:00 – CAW Set Up

11:00 – 4:30 – CAW

1:00 – Catered Lunch

4:30 – 5:00 – CAW Wrap-up

6:30 – Dinner

Wednesday, April 24, 2019

West Meeting Room all day (first floor)

9:00 – Coffee

9:00 – 10:15 – CAW De-Brief

10:15 – 10:45 – Review of Next Steps for Regional CAWs

10:45 – 11:00 – Break

11:00 – 11:45 – Priorities for the Mentoring Phase

11:45 – 12:30 – Wrap-Up – Box lunch

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

Webinar 1 Trainers Notes: Welcome and the CAW Concept

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 model, including its history and results
- To understand in broad strokes the overall TOT curriculum and goals, and the immediate agenda
- To understand their participation in the expansion of the CAW model, how participants fit in and can have impact on the TOT and CAW model
- To increase clarity about the project-specific expectations and regional timelines

Please note: The CA TOT was a model that used a CAW Mentor who did the pre-CAW planning and selection of a CAW partner and collection prior to the training. The focus of the TOT was primarily on carrying out a CAW; mentoring on pre-CAW tasks happened afterwards as the participants organized their own CAWs. Before the TOT each trainee group or organization needed to commit to carrying out their own CAW after the TOT to practice what they earned.

This session does not need to be a webinar; that was just the model for the CA TOT because the trainees were from several different parts of CA 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, and might be longer to allow for more active learning.

Please also note that “trainee” and “participant” are used interchangeably throughout the curriculum. Also, the trainers notes were written for two trainers, so you will see a suggested breakdown, but the material can be delivered in any way that makes sense. Adding examples from your CAW experiences always helps a lot.

PRE-SESSION WORK:
At this point the trainers (likely led by a CAW Mentor in an anchor site) will have already worked with the trainees - they may have been recruited or have self-organized. In any case, they should have a good sense of the full TOT agenda (See CA_TOT_Full_Training_Agenda.) And, as noted above, they should have committed to when and where their post-TOT CAW will be held.

Several weeks before, participants were sent instructions:
CA_TOT_Webinar1_Participant_Instructions

The trainees were asked to watch one of a number of videos listed below under EQUIPMENT AND RESOURCES that were available at the time of this writing. However, trainers should choose the most appropriate videos for their circumstances. See Past Workshops on the CAW website..

Part of the instructions asks each trainee to send a summary of their organization and its collections, along with a few pictures of their space and collections. Of course the trainee group may take many different forms, and affiliations may not always be important. If appropriate, the trainers integrate this information into the slides for the Webinar 1 presentation: CA_TOT_Webinar_1_Presentation.

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
30 min.	Trainers will begin with the opening slide of the presentation. The trainers will welcome the participants, introduce themselves, acknowledge any funders/partners, and set the stage for where this TOT fits in the CAW history and vision. Trainer 1 (aka CAW mentor) starts off with a few words about the anchor site, and participants introduce themselves, and their affiliations, if appropriate. Figure out how much time each participant can take with their intro based on the total number of participants. Another way to start the webinar is to do intros before the presentation starts. This gives more face time to each participant and helps with intros. Some trainee teams will be self-organized and know each other, but the trainers may not know them. For context as you present the topics for today: ● Acknowledge that we are at the beginning of a process of training and mentoring. Today is about the what and the why and some of the how. More specifics about the CAW collaboration and the CAW planning process will be covered in the next session. At that time, we will also take a deeper look at the agenda for the three days of On-site Training.	Lecture/presentation and large group discussion Slides 1-8 of CA_TOT_Webinar_1_Presentation The slides of the geographic spread are c. 2019 and would need to be updated if used again.
20 min	Trainer continues with presentation at WHY COMMUNITY ARCHIVING WORKSHOPS? At slide 24 - brief pause for discussion/reactions/questions to information thus far?	Lecture/presentation and large group discussion Slides 9-24 of CA_TOT_Webinar_1_Presentation Second trainer presents CAW Mentor (first trainer) can jump in to lead a short discussion from slide 24.
15 min.	Trainer continues with presentation at CAW PRINCIPLES ? At slide 31 - brief pause for discussion/reactions/questions to information thus far?	Lecture/presentation and large group discussion Slides 25-31 of CA_TOT_Webinar_1_Presentation

		Can switch off trainers or keep same roles
25 min.	Trainer moves on to OUR WORK TOGETHER. First, spend a few minutes discussing the points on slide 33, which is a chance for the participants to share about impact, the strengths they bring to the CAW, and their training needs. One of the trainers can take notes and share them with the group. This is good information not just to guide the trainers, but also so that the trainees can look back at their training needs as they choose skills to practice (through, for example, the roles they choose for the CAW), and where they are at the end of the TOT. Present the full TOT agenda (slide 34) as known, which serves to summarize the TOT. Take questions. This is a good time to review the basic components of the TOT, and to check expectations – what will be covered and what may not, but how a training need outside of the scope might be met. You can also provide this agenda as a handout. See example: CA_TOT_Full_Training_Agenda You could also incorporate a review of other norms/expectations of working together in this section, such as showing up, listening, constructive feedback, etc. Slide 36 YOUR CAW TIMELINE is a reminder of the commitments of the trainees to carry out their own CAWs. Wrap-up with a reminder of date/time for Webinar 2: The CAW Collaboration, their homework and where to find the information. Remind them that they should challenge themselves when they choose roles for the day of the CAW, to gain the skills/knowledge they expressed earlier. See homework doc: CA_TOT_Homework_Webinar_2 In the regional TOTs, agreements were signed between the anchor site and the participants (two people per organization). A written agreement/confirmation is a good idea, considering the commitment by the trainers.	Lecture/presentation and large group discussion Slides 32-38 of CA_TOT_Webinar_1_Presentation CAW mentor (first trainer) leads

EQUIPMENT & RESOURCES:

- Platform (Zoom, Google chat, Skype) or laptop/projector
- Presentation(s): CA_TOT_Webinar_1_Presentation

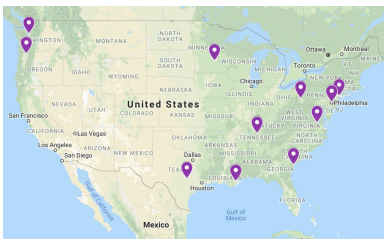
OTHER CONSIDERATIONS/MATERIALS

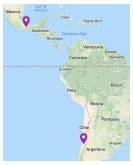
- If the session is done in person, there may be time for an ice-breaker (for intros) or to otherwise make the session more interactive.
- You are meeting in person, a flip-chart/markers or blackboard/chalk is helpful to chart their responses during discussions, or you can take notes in a file that is projected.

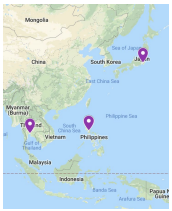
COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS

[place, date, logos of partners]

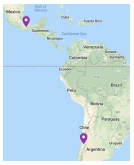
[Please update as needed if you are affiliated with communityarchiving.org]

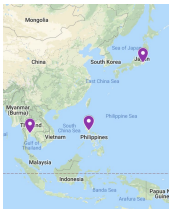






[Please update as needed if you are affiliated with communityarchiving.org]





HELLO AND WELCOME!

* your name and position

*your mission and basic programs

*the communities you serve

*# of staff, members and regular volunteers

*types of archival collections you hold, in particular your audiovisual holdings - number and formats

[Names & logo, photos, etc. of organizers, location trainers]

[pages with participant organizations names & logos, photos, etc., location names of trainees]

WELCOME & THE CAW CONCEPT

introductions
why community archiving workshops?
CAW principles
our work together

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

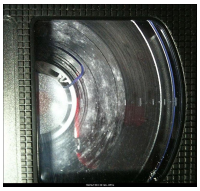
builds awareness & interest about collections

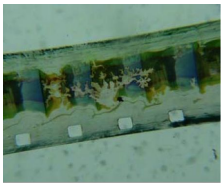
WHY THE URGENCY?

obsolescence of equipment

few decks, parts, or experts

inherent deterioration



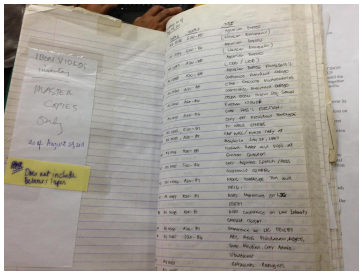


contamination

mechanical damage

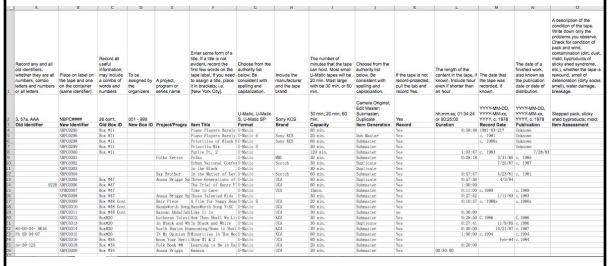
loss of information

transform older records…



not searchable

…into electronic form



searchable, more data

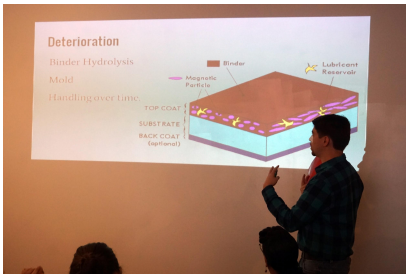
make a preservation plan

and preserve!

YOUR OBSERVATIONS

Do you relate to the challenges we described?
What are your challenges?
What are your accomplishments?

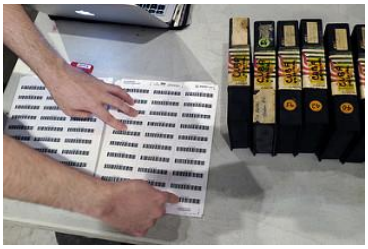
CAW
PRINCIPLES



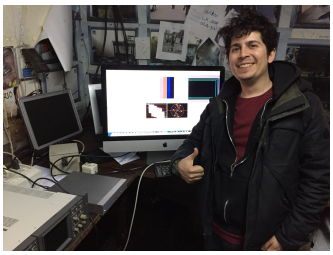
teach about audiovisual collections & their care

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

collect core data about the collection & its condition



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

YOUR OBSERVATIONS

Can you imagine an impact in your organization and community of a CAW? In what way?

Any other take-aways or observations from the video, the web and this introduction?

OUR WORK TOGETHER

YOUR OBSERVATIONS

*what are the community resources (people, organizations) that will help make your CAW a success?

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

*what do you feel you need to practice/learn?

TRAINING TIMELINE

* [today's date]: Webinar #1: Welcome & The CAW Concept

*[date]: Webinar #2: The CAW Collaboration

*[dates for 3 days] – On-site TOT Sessions & Community Archiving Workshop
[location]

[insert photos of location, collections, etc.]

YOUR CAW TIMELINE

[dates and locations of CAWs organized by participants to practice skills gained in the TOT]

next meeting: webinar #2

*[date]: [time]

*[agreement between trainers & participants, if any]

*[review homework]

THANK YOU!

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

Instructions to Participants

Dear _____,

We are excited to begin the first webinar for the Community Archiving Workshop Training of Trainers. **The webinar will be held on [date, time]**.

We will connect using [platform, instructions, contact for problems]

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

1. **Please send to [contact] a brief summary of the following**, along with a few photos of your organization and archival collections that we can use in our presentation.
    - Your mission and basic programs
    - The communities you serve
    - How many staff, members and regular volunteers you have
    - The types of archival collections you hold, in particular your audiovisual holdings - approximate number and formats (feel free to refer to California Revealed's AV Format Guide)

2. **Watch videos** that document two different Community Archiving Workshops that were organized by the NYU's Moving Image Archiving and Preservation (MIAP) Program. Reflect on what you see and take notes. Questions to consider are below.
    - 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/
    - Extra credit! Community Archiving Workshop in New York City with Downtown Community Television Center: http://communityarchiving.org/workshops/2015-newyork

3. **Browse the Community Archiving Workshop website** at communityarchiving.org. The pictures of "Past Workshops" are particularly fun to flip through. Be sure to review "Before the Workshop" tasks. Reflect on what you see and take notes.

For example, you can record your observations about such areas as: the overall CAW process, necessary tasks, roles and responsibilities, and forms of collaboration.

Please come prepared to discuss:

- What are the one or two top things you hope to learn by the end of training? Be as specific as you can. In other words, instead of stating “how to run a CAW”, you could be more specific. You might have a need to learn organizing tasks like how to choose a collection for a CAW or how to do volunteer recruitment. Or you might place as a priority skills such as how to gauge the condition of films or how to design a data template to collect description for the materials.
- What do you feel most confident about in terms of CAW planning and delivery? What skills/knowledge do you feel you will bring to the training and CAW planning?

We look forward to our discussion!

As a reminder, the second webinar will be held on [date] from [time] via Zoom again.

And we look forward to seeing you in [on-site location] for the on-site training [dates]. **Many thanks to [partners] for hosting our training!** The agenda can be found here: [link].

Please feel free to call [contact] at [phone #] or email us if you have any questions or concerns.

Best regards,
[trainers names and emails]

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

Homework for Webinar #2

As a reminder, Webinar #2 will be held [date, time].

You will connect using [platform, instructions, contact if problems]

Before the webinar, please read the memorandum of understanding (CA_TOT_memo_partners), an example of an agreement between the planning team and a partner with a collection.

Please also review the following typical roles on the day of a CAW. Please come prepared to discuss during Webinar #2 the top two roles you would like to practice during the CAW TOT and why.

Typical roles on the day of a CAW:

- Welcome table and evaluation: 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. This person also makes sure no one leaves without filling out an evaluation form, and does a preliminary report on the evaluations during the de-brief (on Wednesday).

- Table captains: We need 4 people in this role. The table captain helps the teams at their table put the data template/spreadsheet on their laptop, and makes sure that everyone names their template files correctly. At the end of the day, the table captain collects all of the files from the participants at that table. The table captain reviews the first few entries by each team, and consults with the trainers for any questions about how inspection or description is being done. 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. They assign boxes and a set of labels to each table, and when the boxes are collected, re-box them as needed. 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 3 brave presenters. One presenter will present background on magnetic media, one on film, and one person will provide the what, why and how of the CAW (modeled after the Webinar #1 presentation). The presentations will be prepared by the trainers, but these people will actually present the materials and with the help of the trainers, 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!

We look forward to our discussion

Community Archiving Workshop

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

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

Webinar 2 Trainers Notes: The CAW Collaboration

TIME: 60- 75 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 planning, implementation, and follow-up processes that are necessary for a successful CAW
- To understand the core tasks associated with these processes
- To understand the various roles and responsibilities necessary to carry out the tasks, differentiating among the contributions of a planning group, a partner, and volunteers
- To understand the practical requirements of a CAW partner, a collection, and a space
- To become familiar with documents that help with CAW organization and support good partnerships
- To understand the larger framework within which the TOT is happening, and the TOT Toolkit

Reminder: This session does not need to be a webinar; that was just the model for the CA TOT because the trainees were from several different parts of CA 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, and might be longer to allow for more active learning.

Please also note that "trainee" and "participant" are used interchangeably throughout the curriculum. Also, the trainers notes were written for two trainers, so you will see a suggested breakdown, but the material can be delivered in any way that makes sense. Adding examples from your CAW experiences always helps a lot.

PRE-SESSION WORK:
At the end of the previous session (Welcome and the CAW Concept), participants were asked to do homework (CA_TOT_Homework_Webinar_2), consisting of :

- Reading the memorandum of understanding (CA_TOT_memo_partners)
- Reviewing the list of typical roles on the day of a CAW, and coming prepared to discuss the top two roles each person would like to practice during the CAW TOT and why

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
45 min.	Some the main points of this session are: ● There are many people that make a CAW successful: organizers, partner organizations, and volunteers: community members, students, professionals.	Lecture/presentation and brief large group discussion Second trainer starts with slides 1-3

	• How do all the people work together? A well-planned CAW helps everyone feel clear about the process and their role(s). • Each of us will have specific role(s) during the upcoming CAW to ensure success and to allow them to practice skills. • The preparation for this CAW will be unusual as much of the planning has been done by the CAW mentor and anchor site; in other words, differentiate between a typical process and the one for the regional TOTs. Remind them that they will be trained in all the stages through the upcoming 3-day training and post-CAW mentorship. Trainers should feel free to swap out examples, especially for slides like 9-11.	CA_TOT_Webinar_2_Presentation CAW Mentor - slides 4-25 Second trainer joins in on discussion, slide 25. A good break is slide 17 (the tasks for the CAW Day) to divide between the two trainers.
25 min.	The final discussion caps off the learning (which may have been overwhelming), where they think about the tasks in relation to their own community. After going through slide 26, move on to explain that through the On-site Training, they will be prepared to carry out the core work of the CAW - the inspection and inventory. It could be helpful to insert a slide about the partner's collection, the goals, scope and proposed workflow for the CAW (Day 2 of On-site Training) before or after slide 27. Ask the participants whether they have chosen a role. (Some may not have.) Discuss their choices/concerns and set a date for their final decision. Wrap-up and reminder of date/time for on-site training. Example: CA_TOT_Full_Training_Agenda The Homework for the On-site Training (CA_TOT_Homework_On-site_Training) will ask them to download and review the data template and cheatsheet for the CAW, if available. In any case, they should be provided with an integrated set of a data template, a cheatsheet and presentations. Trainers can feel free to use the CA TOT examples below as a basis for a CAW appropriate to their partner: CA_TOT_CAW_Cheatsheet CA_TOT_CAW_InventoryTemplate CA_TOT_CAW_Presentations	Large group discussion/presentation continues Starts at slide 26

EQUIPMENT & RESOURCES:

- Platform (Zoom, Google chat, Skype) or laptop/projector
- Presentation(s): CA_TOT_Webinar_2_Presentation

OTHER CONSIDERATIONS/MATERIALS

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

COMMUNITY ARCHIVING WORKSHOP
TRAINING OF TRAINERS

[place, date, logos of partners]

THE CAW COLLABORATION

what are the core tasks for a well-planned CAW?

who are typical CAW collaborators &
what are their roles and responsibilities?

what makes successful CAW partnerships?

what are the practical requirements of a CAW?

PRE-CAW
CORE TASKS

[insert pics/logos of the partner that the CAW Mentor selected]

find a collecting organization or individual(s)
to partner with
(if needed)

PRE-CAW
CORE TASKS

agree on basic goals & roles

CAW GOALS

1. To label, inspect, inventory, and re-box collections
2. To collect the data into a spreadsheet
3. To process 100 videotapes, audiotapes, and films with 25 staff & volunteers
4. To select the Sacramento Room's first 20-30 items for digitization and preservation

PRE-CAW
CORE TASKS

California Revealed

- prepares presentations
- brings inspection kits, supplies & equipment
- recruits volunteers
- provides ongoing support

Sacramento Public Library

- provides collection(s)
- provides space & projection equipment
- recruits volunteers
- provides refreshments

MOU/Agreement

YOUR OBSERVATIONS

Any questions/comments about the MOU?

For your CAW, do you anticipate partnering with others or using your collection as a focus?

PRE-CAW
CORE TASKS

agree on collection & scope

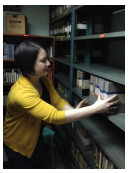
PRE-CAW
CORE TASKS

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



PRE-CAW
CORE TASKS

decide details of workflow

PRE-CAW
CORE TASKS

- Planning Committee (2-4 people): Site logistics/equipment/supplies, outreach, create data template for inventory/inspection
- 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 brave people): Present CAW overview; magnetic media inspection and inventory; film inspection and inventory

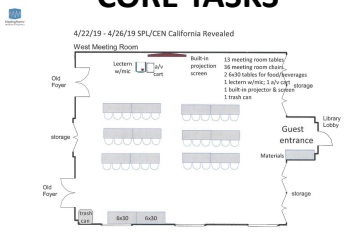
decide roles

PRE-CAW CORE TASKS

Title *	Anglo California National Bank	
Date	1950	
Creator		
Description	Reating 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 CORE TASKS

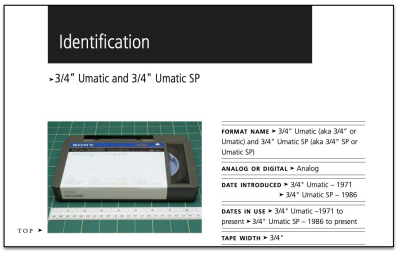


plan space/equipment/supplies

PRE-CAW CORE TASKS

publicize & recruit volunteers

PRE-CAW CORE TASKS



compile resources for volunteers & send out with reminders

CAW DAY! CORE TASKS

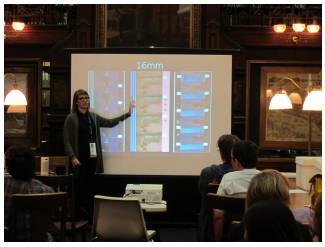
set up space according to workflow

CAW DAY CORE TASKS

welcome & orient volunteers

load data template (if needed)

CAW DAY
CORE TASKS



welcome by partners & presentations

CAW DAY
CORE TASKS

inspect & inventory

CAW DAY
CORE TASKS

summarize accomplishments &
discuss next steps for collection

CAW DAY
CORE TASKS

thanks & evaluation

POST-CAW
CORE TASKS

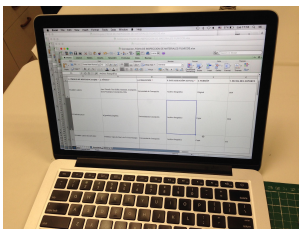
5. Was this your first time participating in a Community Archiving Workshop?
Yes: 11 participants (79%)
No: 3 participants (21%)

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
CORE TASKS



merge all files &
summarize learning from the data

POST-CAW CORE TASKS

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!

YOUR OBSERVATIONS

Who do you envision as a partner, if any?

Who do you envision as volunteers?

What community resources do you have for your CAW collaboration?

OUR CAW ROLES

Welcome & evaluation (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 brave people):
Present CAW overview; magnetic media inspection and inventory; film inspection and inventory

next meeting: CAW TOT!

[date, location of On-site Training, typically scheduled 1-2 weeks following the webinars]

download and review the data template & cheatsheet

THANK YOU!

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

Homework for On-site Training

As a reminder, the [name] training will be held [dates] at the [place].

Before the on-site training:

1. If you have a laptop, download the data template and bring your laptop to the on-site training. The template is a [software] spreadsheet and you must have that software to use it.

   The template is here: CA_TOT_CAW_Cheatsheet]

   The associated cheatsheet is here: CA_TOT_CAW_InventoryTemplate]

   If you don't have a laptop no worries! You can open it on a desktop version of the program. Please find a way to open the template in [software] and browse the template before the on-site training. You will be trained in the use of the template on Day 1 of the On-site Training [date]. The cheatsheet also includes instructions..

2. For those who have taken on the role of a presenter, please review the appropriate presentation.

   Others are welcome to review as well! The trainers will also present them during Day 1 of the On-site Training for the practice session.

   Presentations included are: Welcome and the 'why" of a CAW; AV Basics, the CAW workflow; and instructions for the data template.

   The full presentation is here: CA_TOT_CAW_Presentations]

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

Trainers Notes Day 1.1: Welcome and Agenda

TIME: 45 min. Times are approximate and based on the CA TOT Full Agenda (CA_TOT_Full_Training_Agenda). 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 fellow participants
- To understand the agenda and learning goals for the On-site training

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
15 min.	Welcome and bring people back to the overall goal of the TOT and the excitement at beginning the On-site Training. Have participants reintroduce themselves. Depending on the size of the group, Trainers may design an ice breaker to get the trainees interacting.	Large group discussion
20 min.	Before this session, revisit the notes from the training needs discussion during Webinar 1, so that you can point out where the agenda will (hopefully) match the activities of these three days. (Some of the needs may relate to the pre-CAW organizing tasks done by the CAW Mentor that will be accomplished through the post-CAW mentorings sessions.) Trainers could summarize what they had expressed as needs, and ask if there are any to add. The agenda will be in their packet (if any) or can be added to CA TOT Day 1 Presentations (CA_TOT_Day1_CAW_Presentations). Go through the agenda, summarizing the activities and general goals of each session. Take questions and compare what is planned for the next 3 days to the needs just discussed, being honest about what can be done and what might need to be addressed in another way. Trainers can also briefly generate from the group some norms to keep in mind as we go through the training to help us work productively. (This may have been done in Webinar 1 and can this discussion can just be a reminder.)	Large group discussion

10 min.	Review the packet, if any. The trainers may wish to create a package with the agenda, maps, local area info, anchor site/partner/participant info, bios, etc. Cover housekeeping (coffee, bathrooms, collections locations vs. food, etc.) and locations for the training/social activities. Take questions on logistics.	Large group discussion

EQUIPMENT & RESOURCES (For Day 1 in general, not for this session):

- For a full set of materials for the CAW, which will include much of what is needed for Day 1, see Sample CAW Equipment/Supplies List (CAW_TOT_CUR_Equip_Supplies). This one is for media collections; review if you are using film. However, it describes general needs, such as power strips, jump drives, etc.
- Laptop/projector and laptops for practicing with data templates (some may be provided by trainees)
- Presentation(s): CA_TOT_Day1_Presentations can be adapted to include the agenda.
- Need access to the collection materials for the CAW and safe storage between Day 1 and Day (CAW Day).
- Tables for sorting collection materials and for practicing use of the template, and equipment/supplies for carrying through the workflow planned for the CAW. The number will depend on collection and number of trainees. See example workflow description in this set of presentations: CA_TOT_CAW_Presentations

OTHER CONSIDERATIONS/MATERIALS

- As noted above, a packet for the participants may be provided.
- Trainers may wish to include one of the various CAW kits. CA TOT used a video kit. Search for “kit” in the CAW Toolkit for more information.
- A flipchart/markers or blackboard/chalk is helpful for all days of the On-site Training.

Trainers Notes Day 1.2: The Scope and Arrangement of the CAW Collection

TIME: 60 min.

LEARNING GOALS:

- To gain an overview of the factors that go into determining the scope, workflow and specific tasks for a CAW
- To understand how the scope was determined for tomorrow's TOT CAW and why
- To become familiar with the collection to be used at the TOT CAW
- To practice determining how the TOT CAW will be organized in terms of collection and space arrangements

PRE-SESSION WORK:

Before this day, the CAW Mentor and partner should have agreed on the collections, scope, and the CAW goals. All of this should have been laid out weeks or more ahead in an MOU. The negotiations should also be complete in terms of the design of the data template. The template should be consistent with the partner's capacity and their existing or new and improved descriptive practices. The CAW Mentor and partner should have agreed on a proposed workflow, including the depth of inspection, whether labeling will be done during or before the CAW (and who will provide the labels), whether re-boxing will be required, etc. Some CAWs call for a couple of proposed workflows; for example, one for media and one for film. Agreement should also be made about how many tables are needed and how coffee/snacks/lunch will be provided and where. Much of this will have been incorporated into the MOU.

Day 1 sessions will depend a lot on the familiarity of the trainees to AV materials and their conservation/preservation. Feel free to be creative and adjust the session to make it challenging but accessible to all learning levels. You might rely upon the more experienced members to answer questions or propose solutions, rather than jumping in as a trainer. While AV Basics are covered in the next session, you may need to introduce formats in this session for those new to them. For example, when a newbie says "What's this?", turn it over to a trainee by saying "Is there anyone who would like to give some background on this format?"

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
20 min	The content starts with slide 2, which is the agenda for this session. Through this session and the next on data templates, the participants should understand that these are the two major points of negotiations between Caw organizers and partners. Remind them that in this case these negotiations have been done prior to today, but they will be experiencing these as organizers of their own CAWs.	Slides 1-10 CA_TOT_Day1_Presentations

	Through this part, the trainer can use examples, and where appropriate, the CAW Mentor can interject using the partner's collection as a case study. (However, the second part of this session covers in more detail how the collection scope and CAW goals were determined.) The trainer uses slides 2-4 to encourage the participants in selection of collection(s) that are both impactful for the partner and what will make for an interesting and successful CAW process. Using slides 5, the trainer conveys that the scope is a narrowing of focus to the extent of work that can be reasonably achieved in the typical CAW five hour timeframe. In other words, a collection might include 500 Mini-DVs and the scope might be defined as the oldest 150, thinking that the oldest might be in the poorest condition. Or one might select the most significant in terms of content, or the highest quality versions. The trainer makes the point that factors of age, condition, obsolescence and significance often enter into the decision-making about both collection choice and scope. Using slide 6, the trainers can give examples of how more formats and deeper inspection (in the case of film) means more complexity, needing more different expertise and affecting equipment, supplies, set-up, the content of presentations and the design of data templates. Trainers use slides 7-8 to lay out some of the decisions on workflow to achieve the CAW goals, as each goal represents a series of steps, or tasks, that taken together make a CAW workflow. Stress that planning will result in a workflow, but it is largely conceptual until one is in the same room with the collection. At that point the rubber hits the road and plans may need to be adjusted. Using slides 9-10, the trainer makes the point that the proposed workflow also meets reality when one is actually in the space for the CAW. In this case, a floor plan was provided. The arrangement of the collection further reflects collection priorities, and the facility may have surprises!	
20 min	The lead person(s) from the partner organization give background on collections to be used in tomorrow's CAW. It is best for this to happen around a table where the collection materials can be examined.	Large group discussion There are no slides for the rest of this session.

	Background can include things like how/where/by whom the materials were produced. how/when they were acquired, storage conditions, current description of the collection, priorities according condition/significance, etc. The second trainer teases out how the collections were selected, the different stages of the negotiations between the CAW Mentor and the partner to settle on the final goals, scope and workflow for the CAW. For example: ● What are their high priority items and why? Did this change during the negotiations? ● What was determined not to be a focus as the negotiations continued? ● How were decisions made about the data template? As noted above, there may be more than one collection or proposed workflow. You may need more time if the CAW will be more complicated.	
20 min.	If possible, everyone should go to the space for tomorrow's CAW and get a sense of the arrangement, or if possible actually move the furniture around or set up stations. The participants may be grouped according to their roles (all table captains together) to talk about their set-ups. The trainers will facilitate on such points as: - How many tables do we need and how would we distribute the work among the tables? (Tables can be labeled in the process, with each table having a jumpdrive and cheatsheet). - How do you plan to organize the box table? The trainers can let the participants take ownership of the process, and encourage decision-making. They can help by asking clarifying questions, summarizing decisions, and by calling on participants for suggestions or answers. If it is not possible to get into the space, a map can be drawn, either on flipchart paper or on the computer.	Group Activity

EQUIPMENT & RESOURCES (See CA TOT Trainers Notes Day 1.1: Welcome and Agenda Review - CA_TOT_Trainers_Notes_Day1.1_Welcome for general supplies for Day 1)

- Laptop/projector
- Presentation(s): CA_TOT_Day1_Presentations
- Need access to the collection materials for the CAW and safe storage between Day 1 and Day (CAW Day).

- Identification guides for film and media such as the California Revealed Audiovisual Formats: A guide to identification.

OTHER CONSIDERATIONS/MATERIALS

- A flipchart/markers or blackboard/chalk is helpful for all days of the On-site Training.

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

Trainers Notes Day 1.3: The What and Why of the Data Template

TIME: 60 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 increase understanding of 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
- To increase understanding of how and why the data template was determined for the TOT CAW, including the connection between the data template and the partner's existing descriptive systems

PRE-SESSION WORK:
The Homework for the On-site Training (CA_TOT_Homework_On-site_Training) entails downloading and reviewing the data template, cheatsheet and CAW presentations. They serve as an integrated set of documents, and they all need to correspond. These examples may be used as a start, and the CAW Mentor will design the final versions with the partner prior to Day 1. See links below under EQUIPMENT & RESOURCES.

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
35 min	Trainer begins with the agenda for this session. Negotiating a data template is one of the two primary points of agreement between organizers and a partner (along with deciding on a collection and scope). Archivists and other AV experts are keenly aware of the need for a computer-based descriptive system in order for preservation and access to proceed. Depending on the expertise of the partner, the step to a spreadsheet may be against leap, something that is a common practice, or simply a segue to an already established database. The partner likely has some form of description, but it likely	Lecture/Presentation and Large Group Discussion The second trainer could start, as the CAW Mentor has a role later. Slides 12-24 CA_TOT_Day1_Presentations This could be done as interactively as possible, but there is probably not time for

	does not yet capture key data from the item that captures all of the available information. One aspect of the descriptive system is the unique identifier. Again, experts know that this identifier is essential for all aspects of collection management, and that it is likely that the preservation file name will incorporate the unique ID, to link back to the physical item. The container and item also need to match. Sometimes there are no IDs, sometimes they are not unique, sometimes they contain illegal characters or spaces that make trouble for interoperability - there can be any number of issues. Often a new unique ID is needed and decisions about labeling will be required. Of course these needs will be different for film and media. Essentially, this is another place where education may be needed, but capacity must be considered. Learning as much as you can about your organization will serve you well. You may be teaching about standards and practices through your negotiations. Or you may find that (and acknowledge) that your trainee group knows quite a bit about metadata. This is another place where if it is not new info, they can learn something from modeling how to present the info. The trainer acknowledges that the data template design is one thing ("what"), but how the data is gathered is also important ("how"). This training has presented a model of using files that are later merged; using a Google sheet is also possible. This again is where organizational capacity (the Internet) is a big factor, and the extent of comfort with a web-based spreadsheet Overwriting each other and losing data through Internet drops can turn a fun event into extreme frustration. Trainer presents slides 17-24, introducing the various types of metadata, and how they are combined to make a data template. Each bit of information is needed, for different aspects of collection management, preservation and access. Sometimes with CAWs the volunteers can be overwhelmed by the amount of data entry and can question why some info is repeated. This is another place where the learning can model answering these questions during a CAW. And of course everyone likes to do things their own way, and CAW organizers often have to answer questions about why entry is done a certain way. Giving examples of the problems of inconsistent data will help at this point.	small group work unless the time is increased.

	The template should now be loaded onto everyone's laptop, file names assigned and saved. This allows the participants to follow along for the next part.	
20 min.	The partner shares about their current descriptive system and its status, and any planned changes, expansions, re-designs, access plans, etc. How do they plan to integrate the info collected at the CAW, if at all? The partner and the CAW Mentor can then talk about the parts of the template, what purpose they serve, and how they came to agreement on the template. The partner may have data (either from another file, a document or a content expert) that they want to incorporate during the inventory. Or they may need to incorporate standard fields (such as a record group number or series name for an archive). The trainer can tease out the finer points, for example, were there columns (fields) that one party thought was necessary and the other didn't? Participants should be encouraged to engage and ask questions.	Large group discussion Partner starts, CAW Mentor also contributes
5 min.	Guide participants to boxes for the next session.	

EQUIPMENT & RESOURCES:

- Laptop and projector (for presentation)
- The template, cheatsheet and CAW presentations that are appropriate to the CAW. The templates for the CA TOT were as follows:
    - o CA_TOT_CAW_Cheatsheet
    - o CA_TOT_CAW_InventoryTemplate
    - o CA_TOT_CAW_Presentations
- Tables for sorting collection materials and for practicing use of the template, and equipment/supplies for carrying through the workflow planned for the CAW. The number of tables will depend on collection and number of trainees.

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

Trainers Notes Day 1.4: AV Basics - Inspection and Inventory of Film, Video and Audio Collections

Note: The CA TOT included a session following this one that explained and demonstrated the process of digitization using the CAW Video Digitization Kit. Funding for the CA TOT (and for similar TOTs in the Southeast and Midwest) included money for several kits that could be borrowed by the trainee organizations. Since having such a kit and including a demo is not critical to a CAW and no Trainers Notes were created at the time, this curriculum does not include information on this session. These trainers notes are the last ones for Day 1 of the On-site Training.

TIME: 2.5 hours

LEARNING GOALS:

- To increase skills in format identification and film/media inspection and to reinforce factors in setting priorities among the selected materials for the CAW
- To gain confidence in sorting and developing priorities among collection items
- To increase skills in using spreadsheets and specifically the data template for tomorrow's CAW
- To increase comfort in assisting others with the inspection and inventory process and checking records, especially for those assuming a table captain role

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
20 min.	A trainer begins the session with a reminder that the presentations include multiple parts - are we clear on who is presenting each part? Explain that the focus of this afternoon are three of those parts: "AV Basics," "Our Workflow," and "Inventory Template." The trainers can ask for volunteers to present so that they may practice their section. If there are no takers, the trainers can divide up the work. The CA TOT CAW included both magnetic media and film. Thus the AV Basics presentation included both. To keep it simple, edit out a media type if it is not used, and add others, such as optical media, if needed. AV Basics is an overview of the physical attributes of film and magnetic media, risks and deterioration factors, and ends with what one achieves through an inspection. Take	Lecture: Presentation Use AV Basics part (slides 12-39) of the CA TOT CAW presentations: CA_TOT_CAW_Presentations

	questions at the end, holding off on those that are best answered during the next part of the session.	
20 min.	This part is designed to give a hands-on introduction to the materials introduced earlier in the day. They also should gain a better understanding of how collection materials give useful information that factors into a final CAW workflow. Divide the group up into small groups of 2-4 people and give them each a box and some lint-free clothes. (The size of your groups will depend on what is feasible within the time.) Group them so that there are some experts in each group, and some that are new to AV issues. Remind them about what they just saw about the danger of dust and demonstrate wiping down the items as needed. Give the group about 10 minutes to learn as much as they can about the box; whatever they think is interesting or necessary to know. They may take things out as needed. Ask each group to summarize what they have learned about their box. Facilitate discussion to 1) reinforce identification skills and deterioration factors; 2) raise awareness of how sorting (increased familiarity with content) can aid with inspection/inventory; 3 discover factors inherent with materials that can help prioritize the materials for the CAW. Again, rely upon some of the more experienced people in the group to teach those who are new, rather than answering all the questions. Point out that even once scope is established for a CAW, there are still decisions to make that can make sure the most endangered, highest value items are addressed first. This part will be less critical if the trainee group is made up of all AV experts. However, this scenario is unlikely. Even the most experienced can benefit from the practice of mentoring others.	Small group work CA_TOT_CAW_Presentations Also files like these: CA_TOT_CAW_Cheatsheet CA_TOT_CAW_InventoryTemplate
45 min.	The rest of this session calls for the participants to familiarize themselves with the data template by practicing making a few entries each. The group can be divided as above, where those new to AV materials and/or spreadsheets can be grouped with someone more experienced. The trainer	Small group work Present the workflow and data template instructions from template the CAW Mentor devised with the partner; sample: CA_TOT_CAW_Presentations Also files like these: CA_TOT_CAW_Cheatsheet CA_TOT_CAW_InventoryTemplate

45 min.	Groups switch and experience the other AV type.	Small group work
20 min.	Closing discussion - reactions to experience? Readiness for tomorrow?	Large group discussion

EQUIPMENT & RESOURCES:

- See CA TOT Trainers Notes Day 1.1: Welcome and Agenda Review - CA_TOT_Trainers_Notes_Day1.1_Welcome for general supplies for Day 1)
- Laptop/projector
- As with previous session, the template, cheatsheet and CAW presentations that are appropriate to the CAW. The templates for the CA TOT were as follows:
    - CA_TOT_CAW_Cheatsheet
    - CA_TOT_CAW_InventoryTemplate
    - CA_TOT_CAW_Presentations
- As with previous sessions, access to the collection materials for the CAW and safe storage between Day 1 and Day (CAW Day).
- Identification guides for film and media such as the California Revealed Audiovisual Formats: A guide to identification.

OTHER CONSIDERATIONS/MATERIALS

- A flipchart/markers or blackboard/chalk is helpful for all days of the On-site Training.

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS

[place, date, logos of partners]

COLLECTION SCOPE & ARRANGEMENT

choosing collection(s) & determining scope of work

workflow decisions & strategies

arranging space & collections

WHAT MAKES A GOOD COLLECTION?

strong benefit to organization & users

strong likelihood will lead to preservation & access

unique materials/valued content (usually not commercial collections or viewing copies)

WHAT MAKES A GOOD COLLECTION?

interesting & engaging material (form or content or both)

collection needs match skills of organizers/local experts

the range of media types/formats & tasks can be managed

WHAT MAKES A GOOD CAW SCOPE?

typically 100-200 items for 25-30 participants in 4 hours

tasks provide a sense of completion

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

management of tasks matches people power (numbers & skills)

single format (all Mini-DV)

multiple formats, same media type (various formats of video)

multiple formats of magnetic media (video & audio)

multiple media types (magnetic media & film or optical media)

depth of inspection/inventory film: inventory or full inspection?

TASKS & WORKFLOWS

is a box table needed for coordination? will items need to be re-boxed?

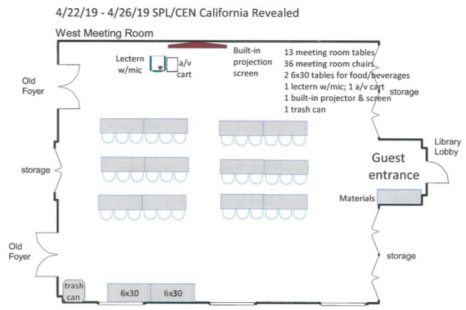
will items be labeled? at the box table or inspection/inventory tables?

will there be any demos (like with the video digitization kit) or playback?

TASKS & WORKFLOWS

will the inventory be done through an Internet-dependent platform like Google sheets or through a spreadsheet program like Excel?

based on available laptops or desktops, what will be size of the teams? Will participants work in pairs or groups of 3 or more?



ARRANGING SPACE & COLLECTIONS

priorities within the collections - what is most important to complete in terms of collection needs & value?

are there arrangements of the items that will help facilitate the work? (sorted by year, #)

what room/table layout best matches tasks?

how will the computer power needs be met?

THE WHAT & WHY OF DATA TEMPLATES

principles of template design

strategies for data collection

metadata types
& controlled vocabularies

our data template

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

WHAT IS THE CURRENT SYSTEM OF DESCRIPTION?

paper list(s)

word-processed list(s)

spreadsheet(s)

catalog/database(s)

collection management system

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

WHAT IS METADATA?

ADMINISTRATIVE METADATA

unique identifier

old numbers

box numbers

date of production

location

general note

DESCRIPTIVE METADATA

- title
- collection
- series
- date of production
- description
- annotations

TECHNICAL METADATA

- format
- recording standard
- generation
- duration
- capacity
- recording speed

PRESERVATION METADATA

- item condition
- container condition
- digital copies
- preservation actions
- preservation technical environment

METADATA ABOUT DIGITAL OBJECTS

- file name
- date created
- codec
- wrapper
- size (bytes)
- directory (location)

CONTROLLED VOCABULARIES

utilizing standards & accepted practices

- titles/series
- format
- generation
- recording standard
- container type
- recording speed

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

	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**

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS

CALIFORNIA 2019

[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!

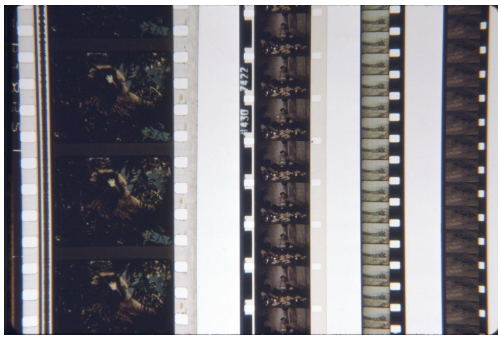
AV BASICS

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

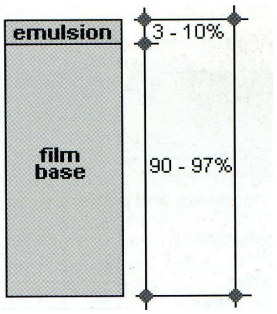
Photo: Smithsonian Institution Human Studies Film Archive

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



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

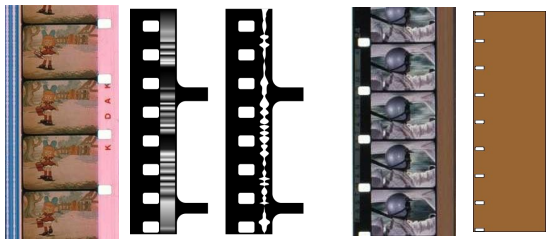
dimensionally stable

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

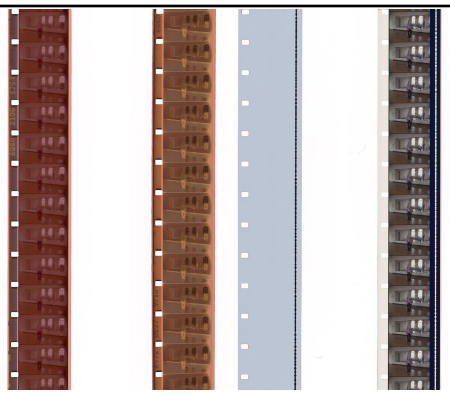
Color Camera Negative

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

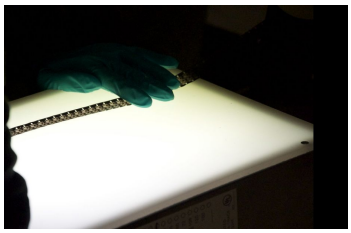
Optical printing

SCANNING/DIGITIZATION

BASIC FILM INVENTORY

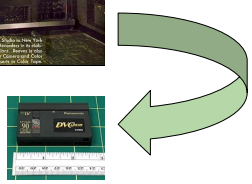
identifying information: surface glance format • state of container • state of wind • assess overall condition • smell • contamination (dust/mold)

IN-DEPTH FILM INSPECTION



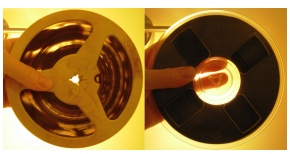
detailed information: unwind!
edge code date • assess edge damage and condition of splices • measure shrinkage • add leader • repair • rewind onto core and rehouse

AUDIO/VIDEO BASICS



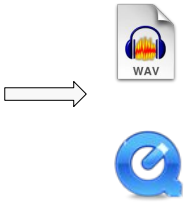
more than 70 videotape formats total - almost all with a polyester base but varying sizes, track layouts, signal & recording standards, and physical composition of binder systems

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

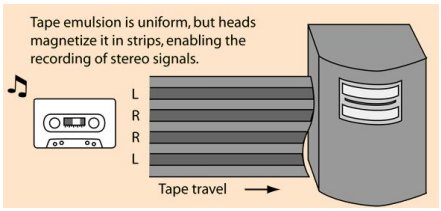
Last updated June 2018
team@californiarevealed.org

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

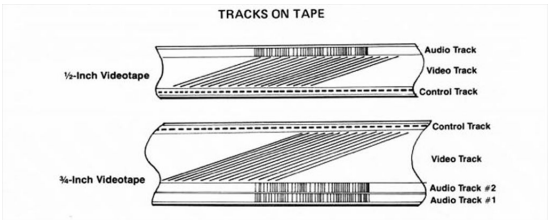
binder with magnetic particles, lubricants & other additives in a plastic base

substrate

back coat



VULNERABILITY OF TRACKS (SIGNAL)



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

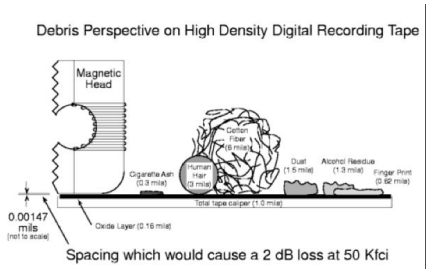
→

shrinkage (affecting alignment on playback)

brittleness

can encourage shedding of binder (loss of signal)

VULNERABILITY TO CONTAMINANTS/DAMAGE

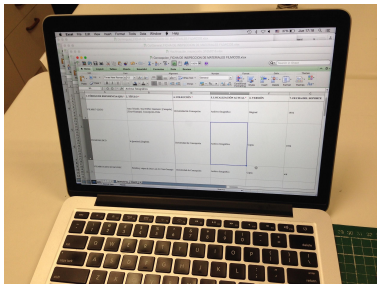


BASIC VIDEO/AUDIO INSPECTION

(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**

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

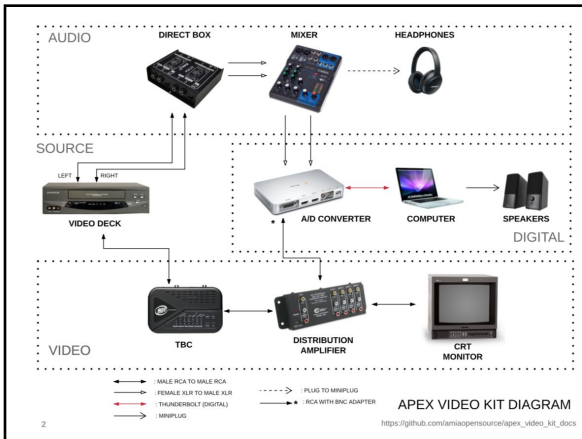
Last name, First name, role	Example: 00:15:00	Examples: 20, 30, 60, 90
Contributors	**Duration**	**Capacity**

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

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

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

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



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:
    - 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!)

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

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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:

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CALIFORNIA TRAINING OF TRAINERS

AV Archiving Resources

Below are multiple resources intended either for a/v archiving professionals or small organizations and individuals to deal with their media archiving needs.

Media Identification & Care Info

Videotape Identification and Assessment Guide, Texas Commission on the Arts, 2004
http://www.arts.texas.gov/wp-content/uploads/2012/04/video.pdf

Audiovisual Formats, A guide to identification, California Revealed, 2018
https://californiarevealed.org/sites/default/files/2018AudiovisualFormats.pdf
Additional California Revealed Project Resources that may be of use:
https://californiarevealed.org/partners

Association for Recorded Sound Collections (ARSC) Guide to Audio Preservation
https://www.clir.org/pubs/reports/pub164/pub164.pdf

Preservation Self-Assessment Program
https://psap.library.illinois.edu/collection-id-guide/videotape

The Field Audio Collection Evaluation Tool (FACET), Mike Casey, 2008
http://www.dlib.indiana.edu/projects/sounddirections/facet/facet_procedures.pdf

Care, Handling, and Storage of Photographs, Library of Congress
http://www.loc.gov/preservation/care/photo.html

AV Compass, Bay Area Video Coalition (BAVC)
http://www.avcompass.bavc.org

Museum of Obsolete Media
http://www.obsoletemedia.org

A/V Artifacts Atlas, BAVC
https://bavc.org/preserve-media/preservation-tools/av-artifact-atlas

Home Film Preservation Guide, Film Forever
http://filmforever.org

Care, Handling, and Storage of Motion Picture Film, Library of Congress
http://www.loc.gov/preservation/care/film.html

Caring for home collections & the film preservation handbook, Australia National Film and Sound Archive
https://www.nfsa.gov.au/preservation/guide

Digital

A Primer on Codecs for Moving Image and Sound Archives, Chris Lacinak, 2010
https://www.ischool.utexas.edu/~galloway/spring2017/INF392K2017/AVPS_Codec_Primer.pdf

Best Practices for File Naming, Stanford University Libraries
https://library.stanford.edu/research/data-management-services/data-best-practices/best-practices-file-naming

The Digital Rosetta Stone
http://www.fileformat.info

Preserving Social Media, Sara Day Thomson, 2016
http://www.dpconline.org/docman/technology-watch-reports/1486-twr16-01/file

Personal Digital Archiving, Gabriela Redwine, 2015
http://www.dpconline.org/docman/technology-watch-reports/1460-twr15-01/file

Personal Digital Archiving, Library of Congress
http://www.digitalpreservation.gov/personalarchiving

Webrecorder, Rhizome
https://webrecorder.io

Digitization Stations & Kits

Minimum Viable Video/Audio Digitization Stations, list of equipment and links to purchase - crowdsourced by audiovisual archivists

Memory Lab, D.C. Public Library
https://www.dclibrary.org/labs/memorylab
Memory Lab Network project: https://www.dclibrary.org/memorylabnetwork

Culture in Transit Toolkit - photo and object scanning
http://metro.org/cit-toolkit/equipment

Recollection Wisconsin Digitization Kit - photo scanning
https://recollectionwisconsin.org/digitization-kits-for-public-libraries

APEX Video Digitization kit
https://github.com/amiaopensource/apex_video_kit_docs

Analog & Digital Storage

Media Storage Quick Reference, Image Permanence Institute (IPI)
https://www.imagepermanenceinstitute.org/webfm_send/301

Backblaze Hard Drive Stats 2018
https://www.backblaze.com/blog/hard-drive-stats-for-2018

Know Your Digital Storage Media, University of Texas San Antonio (UTSA)
http://lib.utsa.edu/knowyourmedia

Vendors

Guide to Developing a Request for Proposal for the Digitization of Video (and More)
http://www.avpreserve.com/wp-content/uploads/2013/10/AVPS_Digitization_RFP_Guide.pdf

Tool for Long Term Planning

Cost of inaction calculator (AVPreserve)
https://coi.avpreserve.co

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

Trainers Notes Day 2: CAW Day

.
TIME: 8-9 hours. Generally speaking, CAW's run from 11:00am - 4:30 or 5:00 pm. Your start time will depend on the amount of preparation that was able to be done on Day 1, and the requirements of the site and partner. The organizers typically arrive at 9:00 am or earlier. It's helpful to have the volunteers come for coffee starting at 10:30, so that they can be settled at inspection/inventory tables by 11:00 am. Lunch and breaks may be scheduled or more flexible. Thirty to 45 minutes before the end of the day, work stops, data is 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 no more than 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:

In this model, the CAW Mentor, working with the partner organization, handles all of the pre-CAW planning. The anchor site and the partner organization will have worked out who would bring what. The breakdown in responsibilities should be outlined in an agreement, such as a Sample CAW Memorandum of Understanding.

Generally speaking, in this case the CAW Mentor will arrive with everything needed to carry out the inspection and inventory: the presentations, cheatsheets, data template (often on a number of jump drives), equipment and supplies for inspection, laptops, power, etc. The CAW Mentor 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.

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, and was able to look over the collections and make decisions about the space and collection arrangements.

With some CAWs there is much more set-up. Also, 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 reminding 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, or you may see people leaving who need 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. The trainers can decide what general areas they will each keep and eye on or simply both be floaters, checking in 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 everyone celebrates the accomplishments, 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: CAW_TOT_CUR_CAW_Evaluation

- Examples of other relevant docs (also more information and sample forms are included in the CAW Handbook):
    - CAW_TOT_CUR_Roles
    - Film Kit Supply & Equipment List
    - Midwest Film Kit Guide

Community Archiving Workshop

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
CALIFORNIA TRAINING OF TRAINERS

Trainers Notes Day 3.1: CAW De-brief

TIME: 90 min. The time on this session was 75 min., according to the CA TOT agenda. However, the session needs 90 min., so that is how the times are written below.

Note: With the CA TOT, the Day 3 activities were compressed because several of the participants had a very long drive home ahead of them. You will notice that with the sessions on this day, it is recommended to increase the time. This will allow for more depth in each session and for more active learning. Feel free to adjust and redesign this day.

LEARNING GOALS:

- To practice analyzing the CAW, both in terms of practical considerations (space, workflow, etc.) and human dynamics/needs
- To practice analyzing what could be improved about a CAW
- To gain an awareness of how the workflow for the TOT CAW might match or diverge from regional needs/priorities and impact the planning of their local CAWs
- To gain a preliminary perspective on how the CAW could work in their local community

PRE-SESSION WORK:
The trainers will need to merge the files and make some observations about the data collected, such as number of items completed, broken down by format. The presentation CA_TOT_CAW_Day 3 gives an example of the kind of information you could provide.

As seen, in the presentation, a breakdown of attendees and their affiliations can also be interesting and show success in outreach and publicity. The trainers will also need to analyze the CAW evaluations before the session, summarizing the volunteer experience, what worked and what needs improvement, and whether the attendees would like to organize or attend another CAW.

Note: CA_TOT_CAW_Day 3 contains all of the slides for Day 3. The presentation below doesn't include the evaluation summary or the agenda for the day.

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
~ 15 min.	Welcome the group to the day and give thanks all around for their work on the CAW. Present the summary of the accomplishments of the CAW. Ask for any observations about the materials, encouraging comments both about the needs of the collection (such as obsolescence, poor condition, fragility) and opportunities (significant content, good condition, depth of data). Very briefly review the agenda for the day. Explain that we will get to our CAW De-brief in a minute, but first let's look at what the volunteer evaluations revealed. Present, by flip-chart or slides, and briefly summarize.	Brief lecture/presentation Slides 2-3 show examples of accomplishments CA_TOT_CAW_Day 3
30 min.	This session is an opportunity to reflect on the CAW, from the perspective of participants and organizers.. There are pros and cons to most approaches, and there will always be personal preferences. The point is to understand the impact of planning on the success of a CAW, recognizing that CAWs can have their chaotic moments, especially in the beginning. Trainers can help by bringing specificity to the discussion, for example by asking clarifying questions and trying to look toward solutions (i.e.; "You say the presentations were too long, what part would you remove?"). The presentation contains these questions, but you could also flip-chart them. You should have some way of taking notes that is visible to the participants. ● Overall, what was your experience of the CAW? ● 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?	Large group discussion Slides 4-11

	● 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?	
45 min.	The CA CAW was composed of two people from 4 separate organizations. You may be working with one large group or some other combination; adjust times/process accordingly. Each regional pair meets to reflect on their own region, followed by a reporting out (15 min. in small groups, 7-8 min. for each of 4 small groups to report out). Topics for small group reflection are focused on partnerships, recruitment, and logistics (as opposed to skills, which will be dealt with in the later session Priorities for the Mentoring Phase): ● In your region, what archives might be good candidates for CAWs? Who might help with a site or needed equipment for those archives without those resources? ● How easy or challenging will recruitment be? For example, are there experts, allies, or communities of learners that could be interested? ● What collections might be appropriate and feasible? ● What about your region will help make your regional CAW a success? Do you foresee any obstacles to organizing your CAW?	

EQUIPMENT & RESOURCES:

- Laptop/projector
- Presentation(s): CA_TOT_CAW_Day 3
- A flip-chart/markers or blackboard/chalk is helpful to chart their responses during discussions, or you can take notes in a file that is projected.

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

Trainers Notes Day 3.2: Review of Next Steps for CAWs

TIME: 30 min. The time on this session was 30 min., according to the CA TOT agenda. As with the previous session, more time would allow for more depth and interaction

LEARNING GOALS:

- To understand with clarity the next steps in organizing their local CAWs
- To use the CAW experience to conceptualize a timeline and process for a regional CAW
- To understand what is provided by the CAW Mentor and anchor site

PRE-SESSION WORK:
Note: The presentation below doesn't include any slides about the post-CAW processing of the spreadsheets.

POST-SESSION WORK:
Again, the CA TOT had a particular structure, where the attendees were from four different organizations and the CAWs they planned were with their own collections. This will not be the case with all TOTs. The mentoring activities for their CAWs were beyond the scope of this TOT curriculum. However, future iterations could describe this phase in more detail.

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
15 min.	The trainers describe the immediate follow-up for a CAW, where the organizers typically merge and conform the data from all of the different files. Depending on the familiarity with spreadsheets, the trainers can also demonstrate the process of cutting and pasting the files, and point out a few common places where data may need to be conformed among the files. (Of course the merging will not be necessary if Google sheets were used, but you can expect that you will still need to make some corrections.) 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	Lecture

	important it is for the table captains to check records after a few tapes are done, to prevent inconsistent entries.	
15 min.	A trainer presents an overview of the various tasks that will be necessary as they plan their CAW. Trainers can remind participants that the slides and video for Webinar 2 are a good introduction to pre-CAW tasks. As noted previously, each organization or team of trainees will have committed to organizing a CAW on their own, with the help of the CAW mentor. This part of the session ends with a confirmation of the times and locations for the CAWs that the participants will organize to practice the TOT skills.	Lecture Slides 12-15 CA_TOT_CAW_Day 3 Trainers may wish to consult the TOT Toolkit and CAW Handbook for resources that can help build out these slides.

EQUIPMENT & RESOURCES:

- Laptop/projector
- Presentation(s): CA_TOT_CAW_Day 3
- A flip-chart/markers or blackboard/chalk is helpful to chart their responses during discussions, or you can take notes in a file that is projected.

COMMUNITY ARCHIVING WORKSHOP
CALIFORNIA TRAINING OF TRAINERS

Trainers Notes Day 3.3: Priorities for the Mentoring Stage/Wrap-up

TIME: 60 min. An extra 15 minutes has been added to this session.

LEARNING GOALS:

- To identify their areas of confidence in beginning the planning process for the regional CAW
- To identify and prioritize the additional knowledge and skills needed that will guide the mentorship phase

SESSION STRUCTURE:

Time	Content/activities:	Teaching Approaches/Trainer
45 min. (5 min. Intro; 25 min.; 15 min report out	This part of the session is best done as a discussion among the trainees, without trainer facilitation. If all of the trainees will work together to organize one future CAW together, they can stay together. If there are sub-groups (such as different organizations) who will each plan a CAW, have them work together. The trainers will direct the group(s) to, rather than work their way through each question, read through all of them and then brainstorm answers. Ask them to assign a notetaker. Explain that this is just to get them started, as their discussions will continue as they begin planning and work with the CAW Mentor to refine their mentoring needs. Trainers can prompt the groups halfways through that they have 12-13 min. Left. After 30 min. Ask the groups to reconvene and report on their discussion, using their notes. Trainers can also take notes for use later by the CAW Mentor, making note of common needs. Encourage them to prioritize their top two needs of the list they generate.	Large/small group discussion Slides 16-26 CA_TOT_CAW_Day 3
15 min.	The trainers end by presenting (on the Web) the main sections of the Toolkit, pointing out both how it can be utilized, and how they may contribute.	

	Take questions, have the participants do their evaluations, and wrap up with thanks to all.	

EQUIPMENT & RESOURCES:

- Laptop/projector
- Presentation(s): CA_TOT_CAW_Day 3
- Evaluation form for CAW TOT such as CAW_TOT_CUR_Evaluation
- A flip-chart/markers or blackboard/chalk is helpful to chart their responses during discussions, or you can take notes in a file that is projected.

COMMUNITY ARCHIVING WORKSHOP TRAINING OF TRAINERS

CALIFORNIA 2019

[sample] SPL CAW TOT STATS

- 23 participants
  - 4 trainers/AV archivists
  - 10 trainees
  - 9 volunteers
- representing 7 organizations
  - * Sacramento PL Special Collections
  - * African American Museum and Library at Oakland (AAMLO)
  - * Karuk Tribal Libraries
  - * Owens Valley Paiute Shoshone Cultural Center and Museum
  - * West Sacramento Historical Society
  - * Galt Historical Society
  - * John Salter Collection

[sample] SPL CAW TOT STATS

- 169 items labeled
- 149 items labeled and inventoried
- 3 full film inspections
- 2 VHS tapes digitized
- Formats: 16mm film, Super 8mm film, ¾" U-matic, VHS, Video8, DVD(-R), ¼" open reel audio tape, audio cassette, microcassette, CD

CAW DE-BRIEF & REFLECTION

focus on:

what did you learn from the CAW experience that will affect how you organize your CAW?

what are pros and cons of different approaches and what would work for your CAW and why?

what worked in terms of the welcoming and orienting of CAW participants?

what are there things you would change for your CAW, if any?

what worked in terms of the presentation and instructions?

what are there things you would change for your CAW, if any?

what worked in terms of the inspection and inventory process, especially for those new to the process?

what are there things you would change for your CAW, if any?

did you think the scope and scale of the collection worked well? why or why not?

what are there things you would change for your CAW, if any?

what worked in terms of the template?

what changes would you make to the template for your CAW, if any?

what were some of the strengths of the CAW workflow? what are some of the challenges?

what are there things you would change for your CAW, if any?

PLAN NEXT STEPS

gather resources - people power

- planning committee: 2-3 people
- find partner orgs if needed
- volunteers

recruit and send out:

- outreach letters
- a save the date: come!
- reminders leading up to the CAW
- volunteer packet

CAW planning timeline

- conduct site visit
- determine scope and goals
- develop workflow
- prepare template
- prepare documents- resources, volunteer packets and project agreement if needed
- determine and gather supplies
- organize work space
- finalize agenda and workshop schedule

CAW TOT timeline

[dates for each planned CAW]

PRIORITIES FOR MENTORING PHASE

how confident do you feel about finding a partner(s) and negotiating the roles and responsibilities?

what kinds of practice, mentoring or resources will help increase your confidence?

how confident do you feel about finding a space and gathering all the necessary supplies and equipment?

what kinds of practice, mentoring or resources will help increase your confidence?

how confident do you feel about publicizing the CAW and recruiting volunteers and experts?

what kinds of practice, mentoring or resources will help increase your confidence?

how confident do you feel about selecting a collection & determining the scope for the CAW?

what kinds of practice, mentoring or resources will help increase your confidence?

how confident do you feel about developing a data template that meets the needs of the partner and follows best practices?

what kinds of practice, mentoring or resources will help increase your confidence?

how confident do you feel about the inspection and inventory process for the media you plan to focus on?

what kinds of practice, mentoring or resources will help increase your confidence?

how confident do you feel about orienting volunteers and doing presentations at a CAW?

what kinds of practice, mentoring or resources will help increase your confidence?

how confident do you feel about facilitating the work of the volunteers/experts during a CAW?

what kinds of practice, mentoring or resources will help increase your confidence?

how confident do you feel about
merging and evaluating
the data after a CAW?

what kinds of practice, mentoring or
resources will help increase
your confidence?

THANK YOU!

Community Archiving Workshop

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!