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Cover: The Freedom Hall complex, a "living memorial to the life and work of Dr. Martin Luther King, Jr.," under construction in Atlanta. The complex includes the King Library and Archives, which will open in the fall of 1981. For a description of the Archives' holdings, see p. 80.

(Dexter Andrews, Photographer)

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CONTRIBUTORS

Karen Benedict has served since 1975 as archivist for Nationwide Insurance Companies in Columbus, Ohio. She is a member of the SPINDEX Users' Network and was a panelist on a recent American Society for Information Science symposium on Archives and Automation.

Nicholas C. Burckel is director of the Archives and Area Research Center at the University of Wisconsin-Parkside where he also serves as executive assistant to the chancellor. This article grew out of his experience as project director for a National Historic Publications and Records Commission funded survey of business records.

Joan Rabins, an archivist at the Archives of Labor and Urban Affairs, Wayne State University, is currently conducting a study of improved methods of subject access in finding aids funded by the National Endowment for Humanities. This article originated as a seminar paper at Wayne State and grew out of an interest in exhibits developed while she was with the Smithsonian Institution in Washington, D.C.

David E. Horn is archivist of DePauw University and of the United Methodist Church of Indiana. Part of this article is based on a paper prepared for the spring 1980 meeting of the Midwest Archives Conference.

Michael Plunkett is assistant curator of manuscripts at the Alderman Library of the University of Virginia. His article is based on a paper delivered at the 1979 Society of American Archivists convention.

Katherine F. Martin has been on the staff of the Southern Historical Collection, University of North Carolina at Chapel Hill, and the Microfilming
Corporation of America. Her article is based on a master's paper presented for an M.S.L.S. degree at the University of North Carolina at Chapel Hill.
ARCHIVES, AUTOMATION AND NATIONAL NETWORKING: IS THERE A FUTURE?

Karen Benedict

In the July 1976 issue of *American Archivist*, Michael E. Carroll discussed the UNESCO Intergovernmental Conference on the Planning of National Documentation, Library, and Archives Infrastructures held in Paris in 1974. UNESCO proposed the creation of a National Information System (NATIS) in the United States designed to provide users with access to all of the relevant bibliographic information on a given subject through documentation, library, and archives services. NATIS would meet international descriptive bibliographic standards and would be compatible with an international system similar to, but broader in scope than, the current World Science Information System (UNISIST).

The concept of an international network of all types of information services on a broad range of subjects is exciting, but is as far from fruition now as it was when UNESCO made its proposal for NATIS. The prospects for an international group of librarians, archivists, and information specialists reaching agreement on a set of descriptive bibliographic standards for all printed matter, nonprint media, manuscripts, and archival records; a standard format for recording that bibliographic data; and a universal system of subject classification for retrieving that information do not appear good. Within the United States alone, librarians and archivists cannot agree upon standards for the description of manuscripts and archival records, and archivists cannot even agree among themselves on standards and formats for description of manuscripts and records.
The library profession has had success in establishing national and international bibliographic standards for cataloging of print and nonprint media. In 1908 the library associations of Great Britain and the United States established the Anglo-American Code (also known as the Joint Code) in an effort to create an accepted cataloging standard throughout the English-speaking world. Through the years librarians continued to revise and amend the code to improve its usefulness and to adapt to the proliferation and dynamic nature of information generated in a high technology society. The end product of this effort was the 1967 Anglo-American Cataloging Rules (AACR) and the 1979 Anglo-American Cataloging Rules II (AACR II). The International Federation of Library Associations (IFLA) through its International Office for Universal Bibliographic Control has established International Standards for Bibliographic Description (ISBD) for monographs and serials.

In general archivists believe that the type of cataloging which librarians practice, with its subject matter orientation, is inappropriate for archival records, and archivists have rejected the descriptive standards for cataloging manuscript materials developed in AACR and AACR II. Nor have archivists created their own code for bibliographic description accepted by the entire profession, in spite of early efforts like Margaret Cross Norton's 1938 Catalog Rules: Series for Archival Material. Without any established standards for description of archival and manuscript collections, each institution has had carte blanche to go its own way and to devise its own descriptive information for collections. Until the archival profession sets standards for description, or cooperates with the library profession's efforts to do so, very little can be done to create a national information network.

Just as librarians are ahead of archivists in standardization, so have they had more success with cooperative and computerized networking ventures. Because most of their materials are duplicated elsewhere,
libraries readily discern financial benefits from cooperation. Networking allows libraries to distribute the cost of equipment, data bases, and technical computer staff among several institutions; and standardized bibliographic description has facilitated computerization of a number of operations, especially cataloging, interlibrary loan transactions, and acquisitions.4

Holdings in archives and manuscript repositories, on the other hand, consist primarily of unique items. Therefore most archivists do not see the same sort of financial gains accruing to their institutions from cooperation, thus eliminating the main incentive for cooperation and networking. Nevertheless there are good reasons for archives and manuscript repositories to cooperate and to form networks. Knowledge of the holdings of other institutions can prevent duplication of effort and unnecessary competition for collections in a subject or geographical area. Networking would also enable institutions to direct prospective donors to the appropriate repository for their materials. The greatest benefit of networking, however, would be in reference services and the major advantage would be for the user.

At present researchers must depend upon the Hamer Guide, the National Union Catalog of Manuscript Collections,5 and the work of fellow scholars to locate manuscript and archival collections for their work. None of these sources is exhaustive. The profession has not yet been able to marshal sufficient cooperation among institutions to create a comprehensive guide to institutional holdings on a national level. A combination of the lack of national standards for description of holdings, the absence of substantial financial incentive, and the lack of commitment to provide better reference service has kept archives and manuscript repositories from making meaningful efforts to cooperate and to create networks.

The last of these obstacles may be the crucial one. The archival profession has placed far more
emphasis upon administrative concerns than upon the need to provide information services. As James M. O'Toole pointed out in a 1975 address to the American Society for Information Science, "Archivists and manuscript curators . . . persist in handling similar problems in vastly different ways and in the fussy habit of holding crucial information in their own heads and confiding it to no one." For computer technology and the attendant possibilities for the creation of national finding aids and institutional networks to receive the support necessary to achieve significant results, a major shift in the focus of the profession to an emphasis upon the information function will be required.

The tendency to stress administrative control at the expense of greater intellectual control of collections to the detriment of the researcher is rooted in the history of the archival profession in the United States. Men like Theodore Schellenberg and Ernst Posner adopted the cardinal principles of provenance and original order from European archival practice, while developing the American practice of arranging records to follow the organization and function of the agencies which created them. They believed that arrangement should reflect the process by which the records came into existence.

Schellenberg, Solon Buck, and others devised the term "record group" to define the main unit of arrangement for the records of administrative units at the bureau level of government. These founders of the profession established that record groups be arranged in either organization arrangement, reflecting the hierarchical structure of the organization, or in functional arrangement, reflecting the interrelationship of function of several agencies and offices. The organization of record subgroups was based either on the organization or the function of sections within the administrative unit or upon the physical characteristics of the records themselves. Series within subgroups reflected the particular filing system of the
administrative unit. The series were made up of individual file units—volumes, folders, or individual documents—arranged sequentially as they were established by the creating body, based on their relationship to the organization, function, chronological period, place, or subject. Thus the arrangement of archival records as established by the National Archives was a well thought-out system based upon scholarship and the European experience.

The guidelines which were created for the description of the records, however, were designed for the purely practical task of maintaining control at the National Archives. The device used for description of archival records was the inventory, an initial brief list of record units. Katherine E. Brand of the Library of Congress designed a similar tool, the register, as the basic finding aid for manuscript collections. Neither the inventory nor the register describes the piece-by-piece contents or arrangement of a record group or collection. The register indicates the size, inclusive dates, and basic scope and content of a collection. The inventory contains the same sort of brief information for the record group, its subgroups, and series. Inventory description at the National Archives rarely, if ever, goes beyond the series level.

The decision not to implement description beyond the series level was pragmatic, the result of insufficient funds and staff to support the work. It did not reflect any reasoned conclusion that item-level description was inappropriate or unnecessary for archival records. Early archivists assumed that the inventory and register were preliminary tools to insure the institution's basic control over its holdings and that when staff and budget increased the collections would receive additional attention. However, time has shown that staff and budget never increase sufficiently to allow an institution to rehandle records that have received initial attention.
The unfortunate consequence is that, without any theoretical analysis of the ramifications of the failure to gain complete intellectual control over collections, item-level description has been eliminated as a viable practice for archives. Rare is the institution which has a staff large enough to prepare calendars and other detailed finding aids for its holdings. Moreover, the sad truth is that these sorts of detailed guides are looked upon by much of the profession as "unprofessional," the fussy work of little institutions run by dedicated ladies with time on their hands. What began as the accidental consequence of limited resources has been raised to a canon by the profession.11

Archivists must make a more reasoned decision about the level of description which all institutions should set as the standard practice. Archivists must also agree upon a uniform format for collection description before it will be possible to create a regional or national computer network. That format should cover the type of information which must be provided for each collection or record group, the measurements to be applied to them, the amount of detailed description expected, and the order in which the information is to be recorded.

In spite of the great obstacle of not having uniform standards for description, archivists have made some progress in creating networks and sharing information. The Library of Congress has taken the lead by launching projects like the National Union Catalog of Manuscript Collections (NUCMC) and Selective Permutated Indexing (SPINDEX) which have encouraged cooperation and have utilized computer technology.

NUCMC provided researchers with the most complete national guide to the holdings of manuscript repositories and set the first accepted interinstitutional standard for collection description. Because most archivists support the concept of a union list of manuscript collections, institutions have cooperated fairly well in providing the required information to the
Library of Congress; and to date approximately 39,770 collections have been reported. And because NUCMC requires repositories to collect and report certain information about each collection in a particular format, the cooperating institutions have tended to include the same information in the same format in their own institutional guides to collections.

However, NUCMC excludes archival collections which are maintained by their creating agencies. This seriously limits the ability of NUCMC to serve as a stimulus to full interinstitutional cooperation and as a source of information for a national network of collection information for archives and manuscript repositories. Not only is important information about archival holdings not available to researchers and other repositories, but the excluded archival institutions have not accepted the NUCMC format for description of their collections.

The Library of Congress developed SPINDEX in response to the overwhelming task of creating a date, author, and recipient index for the hundreds of thousands of items in the presidential papers microfilm project. This index project initially employed a punch card system of automated data processing to sort information, but in 1964 Library staff transferred the data to computer to complete the indexes. A decision to employ the computer for description of the Manuscript Division's 3,000 collections followed the success of this automated indexing venture.

The index produced for the presidential papers did not provide subject control; therefore the Library decided to create a system which would produce a modified "Key Word in Context" (KWIC) index based on subjects and names gleaned from the container lists which had been produced for the collections. This SPINDEX system employed a fixed-field format using the standard eighty character computer card. Testing proved that the fixed-field format did not provide adequate space for collection description, and in 1966 the Library of
Congress suspended the SPINDEX project.

The National Archives revived and revised the SPINDEX project in 1967 with the help of a $40,000 two-year grant from the Council on Library Resources. The new system, christened SPINDEX II, changed from a card to a tape format to allow for variable-length fields and utilized lower case as well as upper case type for the first time. The system now had the capacity for on-line correction and updating. Nine other repositories joined the National Archives and Records Service (NARS) to test the potential of the system for providing interinstitutional description for archival collections. Most of the allotted project time was spent attempting to produce a standard format which would be acceptable to all of the participating institutions and easily implemented by them. The testing of the proposed indexing system bogged down, and the grant expired before SPINDEX II could be implemented.

The National Archives then assumed full responsibility for the SPINDEX II project. Several of the original participating institutions dropped out of the project and others joined it. In June 1973 the National Archives held a conference of original and subsequent SPINDEX users to evaluate the system. At that conference NARS indicated that, although the system had been successfully used to index the papers of the Continental Congress and the guides to the captured German documents and other institution projects, the production of such detailed indexes to the Archives was not feasible, evidently for financial reasons. When other conference participants expressed concern that NARS abandonment of SPINDEX would endanger the concept of a national data bank, the Archives promised to make SPINDEX II available at a reasonable cost as it developed and to serve as the clearinghouse for information on the system. The Archives refused, however, to commit additional money to the development of an information retrieval system which would be used principally, perhaps exclusively, by other institutions.12
The SPINDEX II experience soured the National Archives on the prospects for indexing its holdings by subject. In his 1973 article "Automation and Archives," Frank Evans argued that it was futile for the Archives to attempt to analyze its entire holdings by item, folder, or series. Therefore the Archives would abandon the notion of information retrieval based on subject indexing in favor of a system of administrative control at the record group level.13

This was a severe blow to the prospects for institutional cooperation. Even though it is quite clear that its sole responsibility is its own administrative problems, its size and prominence make the National Archives the leader in the archival field. When the National Archives abandons the development of information retrieval systems with subject indexing capacity, it makes a de facto decision for the rest of the profession.

It was evident from the proceedings of the 1973 SPINDEX users' conference that some smaller institutions were less concerned than the National Archives with administrative control of holdings and more committed to the establishment of a national archival network.14 Therefore a number of archival institutions have adopted SPINDEX II in spite of its shortcomings. This has not, however, increased the viability of its adoption as a national network program, because individual institutions have had to modify the program to suit their particular needs. The South Carolina Department of Archives and History, for example, has modified the program so that it can supply a personal name index, a chronology, a place name or locality file, a main topic or subject list, and a list of documents by type.15 The modifications which have been made in the system vary from institution to institution and may inhibit the ability to interface programs.

While various institutions experiment with SPINDEX II, work is going forward on new automated systems for archival use. SPINDEX III, developed by Frank Burke,
creator of SPINDEX II, is designed to meet the needs of the National Historic Publications and Records Commission in the production of its Directory of Archives and Manuscript Repositories and subsequent projects.16 The archives of the University of Illinois in Urbana has created the Programmed Annual Report and Digital Information Matrix (PARADIGM) system for administrative control of its holdings at the collection level. Like the National Archives, the University of Illinois archives has rejected subject indexing.17

After conducting a $70,000 study, the National Archives has developed the A-1 system to meet its requirement for administrative control of records. NARS selected A-1, a computer-assisted system for text editing, rather than a system designed to retrieve information by subject because the latter necessitated the development of a thesaurus. "A dictionary of terms would have to be developed and applied systematically to all series description . . . ," the Archives' Alan Calmes explained after the decision was made, and "indexing would require that an archivist identify appropriate index terms for each series description. This would slow down the decision-making process during series description writing." The analysts recommended that subject retrieval receive serious attention only after the problems of administrative control were solved.18 Thus the National Archives administration does not appear to have revised its thinking over the years.

This is the state of automation in the archival profession today. In spite of the quality and quantity of effort that has gone into research and experimentation in the automation field, archivists are as far away from readiness to participate in a national information network as they were in 1976. As a profession archivists have learned the lesson that experimentation with computer technology is a costly business, and that if we deal only with tangible, dollars and cents, benefits it may be more expensive than the results warrant. What we have not done is to analyze realistically what the profession wishes to achieve through automation.
Are we seeking faster and cheaper methods to achieve administrative control over holdings? Are we looking for a reasonable means to provide greater depth of intellectual control over holdings? Do we want to provide users with more information about institutional holdings? Do we want to provide subject access to collections? Do we need more information about the contents of collections to achieve these goals?

As archivists we must clearly define our objectives before we can accurately assess whether automation will deliver sufficient benefits to warrant the expense involved. Once we have established our professional priorities, whether they be administration or a commitment to information and reference services, then we will be in a better position to determine whether we wish to join with other information service professions in a cooperative effort to create national access to information on a scale never before possible.

NOTES

1 Mr. Carroll is chief of the Machine Readable Archives Division of the Archives of Canada. He is also a member of the Society of American Archivists' Committee on Data Archives and Machine Readable Records and the International Council on Archives' Committee on Automation.

A more thorough discussion of the development of archival arrangement and description practices and the influence of library techniques on their development can be found in Richard C. Berner, "Arrangement and Description: Some Historical Observations," *American Archivist* 41 (April 1978): 169-81. Archivists reject AACR and AACR II standards for cataloging manuscript materials because they are based too closely upon those established for published materials and do not allow sufficient flexibility to deal with the uniqueness and variety of manuscript materials.


Management, Care, and Use (Nashville: American Association for State and Local History, 1975) which are based on Evans's work.

8 For a more complete discussion of the development of the American archival system and its principles and practices of classification and description, see Schellenberg, Modern Archives, and Berner, "Arrangement and Description."


10 Schellenberg, Modern Archives, pp. 208-10.


14 Cornell University was critical of SPINDEX II's failure to provide a subject-authority for the system. The Minnesota Historical Society was disturbed that the lack of a thesaurus for the system inhibited the
growth of computer usage by the profession. See Hickerson's discussion of SPINDEX in SPINDEX II at Cornell University.

15Duckett, Modern Manuscripts, pp. 157-58. The lists provide citations by record group, series, box or volume, folder or page, and item number.


17For more information on PARADIGM, see Hickerson, SPINDEX II at Cornell University.

A BUSINESS RECORDS SURVEY: PROCEDURES AND RESULTS

Nicholas C. Burckel

In the spring of 1978, the University of Wisconsin-Parkside's Archives and Area Research Center, a cooperative venture of the university and the State Historical Society of Wisconsin, undertook a survey of manufacturing records retained by business firms in the two cities which it primarily serves--Racine (100,000 pop.) and Kenosha (85,000 pop.). The two cities have over one hundred firms with fifty or more employees, including such nationally known companies as American Motors Corporation, J. I. Case Company, In-Sink-Erator, Modine Manufacturing, Snap-On Tools, Walker Manufacturing, Western Publishing, and S. C. Johnson and Company. The survey, funded by a grant* from the National Historical Publications and Records Commission (NHPRC), was a first step in developing an Archives of Industrial Society, a project that still continues. The university's location in the heavily industrialized area of the Chicago-Milwaukee urban corridor, its commitment to the study of modern industrial society, and the Wisconsin State Historical Society's concern for Wisconsin business history made the project a natural one for the Archives.

One of the major purposes of the project was to test a method for surveying noncurrent business records in a regional context. The project sought to update and expand data about businesses in the region which

*Anyone wishing a final copy of the grant report, including appendices of items used in the survey, should contact the author.
had been surveyed by the State Historical Society in 1949-1951; to inform manufacturers of UW-Parkside's interest in documenting the industrial development of the area; to locate and identify surviving archival material in the custody of companies; to survey records management practices of the firms; to begin to create an access system to records in private custody; and to persuade firms contemplating destruction of historically significant records either to retain and organize the material permanently or to transfer it to UW-Parkside's Archives.

During the year-long grant period, the Archives staff planned to survey all the major manufacturers in the area, develop inventories of their noncurrent holdings, and persuade firms to retain their historically significant records or deposit them at UW-Parkside. The Archives planned to provide staff to conduct records inventories on the premises of each cooperating company in order to minimize the companies' commitment of personnel to the project. The use of Archives staff for on-site inventories would also produce, both for the company and the Archives, detailed inventories of their noncurrent records.

The project proposal specified the creation of an advisory committee composed of university personnel and business leaders to provide suggestions and to serve as liaison with the business community. The Manufacturing Records Survey Advisory Committee included seven prominent area businessmen, three from Kenosha and four from Racine; seven members of the university community including the project director, associate director, and chancellor; and the state archivist. Business representatives were selected on the basis of the size and significance of their companies, their own role within the corporate structure, their past association with the university, and their commitment to community activities.

During its initial luncheon meeting, hosted by the university chancellor, the committee decided that the
survey should concentrate on those seventy-five local manufacturers having 150 or more employees. To introduce the project the staff sent to the chief executive of each firm a letter, a project statement, and a self-addressed stamped postcard requesting the name of a contact person in the company. The letter asked specifically for a contact familiar with all aspects of the firm and associated with the firm over a number of years. After three weeks a second letter was sent to those executives who had not responded. Of seventy-five firms approached, fifty-one responded and forty-three agreed to grant an interview.

From the information provided on the return postcard, the staff developed a contact file listing the company's name, address, contact person, and telephone number for each respondent. The staff later entered in this file summaries of all conversations and other communications with each firm. The contact file was also useful in recording who was responsible as the project moved through various inventory stages.

The initial interview with each cooperating firm's representative usually began with a presentation by the project staff on the purpose of the survey. The staff took a copy of the project statement, a preliminary checklist of business records which the State Historical Society of Wisconsin regards as worthy of retention, and additional information on business archives. The company representative usually reviewed the statement and checklist and raised some general questions about the project. The staff formulated clear answers to potential questions before conducting any interviews.

The staff realized that the interview might well provide the only opportunity to meet with some of the company representatives. Therefore, while trying to persuade a representative to cooperate in the project, the staff also sought information which they might not be able to secure later if the representative declined to participate further. To obtain information suitable
for comparison and analysis, the staff developed a series of interview questions. The first set of questions focused on the history of the company, including names of founders or significant company executives and important events associated with the firm's development, the manufacturing interests of the firm, any significant product or marketing diversification, and the focus of the firm's economic activity—regional, national, or international. Interviewers also asked whether the company had produced a history, anniversary publication, or chronology. The second set of questions concerned the firm's records retention practices. This segment of the interview concentrated on determining the existence of a records retention schedule and identification of those charged with its implementation, the rationale governing records retention practices (e.g., legal, administrative, or fiscal), and the physical location of records, their condition, and retrieval methods.

The State Historical Society's checklist of business records proved useful in determining which records business representatives identified as worthy of retention. Participants scanned the checklist, identifying those records which their companies retained, transferred to other corporate sites, or destroyed regularly. As the survey progressed and the first inventory had been completed, the staff was able, during the initial meeting, to introduce this inventory as a sample.* The interviewer also requested copies of available company histories and the current records retention schedule and asked that the Archives be placed on a mailing list for news releases, product brochures, annual reports, and other general information.

*All specifics which would have identified the company were deleted, however, in order to assure both the cooperating company and the interviewee that confidentiality would not be breached.
Originally the project proposal provided a timetable involving two successive stages. Following the interview stage, during which the staff contacted firms and interviewed the company representatives, the project was to proceed to an inventory stage, during which the staff would physically inventory the records of all participating firms. As the project developed, however, it proved neither practical nor possible to proceed through the stages as they had been planned, especially because some firms asked that inventories be conducted immediately.

The initial interview generally concluded with an invitation to the firm to proceed with an inventory of its records. The staff developed three alternatives for the records inventory: on-site inventorying by the project staff, a company supervised walk-through of storage areas, and a questionnaire. Actual on-site inventory of storage areas by the project staff generated the most accurate and consistent inventories. This method was also the most useful for participants, and in most cases the staff produced the most detailed inventory that had ever been made of the firm's records. Without committing personnel to the project, the firm could get an overview, on paper, of its storage areas and, on that basis, could decide which could safely be destroyed.

On-site inventorying also allowed the staff to gain first-hand information on the condition and quantity of the noncurrent records of businesses. Many companies retain records in a haphazard fashion, often well beyond the periods designated by their own retention schedules. The completed inventories reflect a general disorganization in the retention of department files—a disorganization which could only hamper reference use of these materials, even by company personnel generally familiar with the records.

The on-site inventory method followed standard records management procedures; diagraming each storage area, numbering boxes and cabinets in sequence, and
briefly noting the contents and inclusive dates of each. While printed inventory forms were useful at the beginning of the survey to train the staff, none could be used on site without adaptation. Forms used in accessioning records or inventorying smaller collections were not generally useful because of the wide range of material the staff encountered in surveying uncontrolled storage areas.

The second inventory alternative, a walk-through of the company's storage areas by the staff and a company representative familiar with the noncurrent records, allowed the company to supervise the inventory process, restricting those records it considered confidential. At the same time the project staff had an opportunity to view the materials and ask specific questions to determine the description, inclusive dates, and quantities of each record group. The staff then compiled this information into record groups and series.

The third approach involved a detailed questionnaire prepared by the staff and completed by the company representative most familiar with the company's noncurrent records. The questionnaire reflected the staff's experience in conducting its first on-site inventory early in the project, a review of business record inventories in the Division of Archives and Manuscripts at the State Historical Society of Wisconsin, and the advice of the university representatives on the advisory committee. The final questionnaire was lengthy, comprehensive, and included the major record groups of most manufacturers. For convenience, it was designed to be divided and circulated to company divisions and completed by those most familiar with different noncurrent record groups. Even so, most firms appeared unwilling to deal with areas which were no more than dumping grounds for inactive records. In addition, seeing the exhaustive questionnaire discouraged most interview participants who were unable or unwilling to devote personnel to the project.
In general those inventories generated by questionnaire were the least accurate. In these cases record groups were not consistently described by respondents, and it was difficult for most respondents to assess the approximate quantities of materials retained in each group. Firms frequently provided little or no description of their records, did not estimate annual volume accumulations, and hesitated to indicate which records they filed with the government. A questionnaire, for all its shortcomings, however, may be the only way to obtain information about the records when a firm declines to permit an on-site inventory. Any such questionnaire should be combined with a personal interview or a telephone survey to introduce the goals of the project, the staff, and the potential benefits to participants.

Once the staff finished an inventory or received a completed questionnaire, they prepared a detailed typed copy of that inventory for review by the company's representatives. Some provided information deleted in earlier submissions when specifically asked to do so. Unfortunately, however, most firms did not comment on the draft summaries of their inventories or suggest significant changes. Finally, after incorporating suggestions received from the company, the staff prepared a revised inventory. From the original forty-three interview sessions, the project generated twenty-three inventories, fifteen by questionnaire or walk-through and arranged by record group, and eight by on-site inventory which described records by physical location. Although this represents approximately a 50 percent response rate, the quality of the inventories varied greatly.

There were two major causes of reticence among those businessmen who did not agree to participate in the project: fear of breach of confidentiality and a lack of interest in business history. Businesses were generally willing to disclose the age, volume, and general description of their record groups if they had such information readily available. If they did not,
they were often reluctant to permit the project staff to review the records because such a review would obviously require analysis of the records. They appeared fearful that outside personnel might discover and disclose specific information about the firm which might compromise it.

Confidentiality is extremely important to competitive businesses in which reaching or maintaining a given share of the market rides on innovation and tactical maneuvering. The staff consequently took pains to assure businessmen that such detailed information would not be published. To encourage openness and confidence, for example, interviews were not taped although the interviewer did take notes. Immediately following each interview the staff transcribed the notes and summarized the participant's responses to questions.

Most company representatives also questioned the significance of business records to the archival and academic professions and hesitated to release any information about their records, expressing the fear that such documents would be misinterpreted by an outside researcher. Answering these inquiries posed the greatest difficulty for the project staff who had to assure companies that information collected from them would have restricted access while at the same time indicating to the representative that the inventories would serve some purpose. The staff emphasized that it was interested neither in evaluating the financial condition of the firm nor in locating personal information about personnel. The purpose of the survey was rather to determine the kinds of records manufacturers retain, for how long, and in what quantity in order to provide scholars with an idea not only of what records companies feel are important but also what material might likely be available for future research. As the staff became more confident in approaching companies, more expert in fielding their questions, and more experienced in conducting inventories, businessmen showed more willingness to share information.
In seeking the cooperation of business, the assistance of the advisory committee was indispensable. It was crucial to have a committee composed of representatives who came from important firms and who also had a long-standing commitment to the community. Some members of the committee were of considerable help in obtaining the cooperation of survey participants. Four representatives of large concerns, for example, took time to call or write other business acquaintances and encourage them to participate. However, the major effort of persuading firms to cooperate rested with the project staff itself.

While questions about confidentiality seemed to be the major stumbling block to participation, the staff often had to overcome a simple lack of interest by businesses in order to achieve even minimal results. Scholars and businessmen operate from two different perspectives. Corporate executives have little time or interest in lengthy explanations or discussions of an academic venture. To work effectively with them, the archivist must be able to explain his proposal concisely and present a crisp description of how he wishes the respondent to participate, how the results will be used, and how the business might benefit from cooperation. Although some businessmen might be amateur historians by avocation, in their professional role they are concerned directly with the present and future, and most find little utility in retaining detailed records of past performance. In the conduct of business, history is the profit-loss record of the previous year. To historians and archivists, the view of the past is far different; they are more concerned with preserving and using historical records than in disposing of them.

Generally, potential participants who saw little value in business history would not participate beyond the interview session. An extreme example illustrates the problem. One of the first postcards the staff received came from a manufacturer who agreed to an interview. The contact individual named on the return postcard was the firm's retired treasurer who periodically
made an appearance at the corporate headquarters. Unfortu-
nately, the staff did not realize that the inter-
view would not be with this contact person but with the
owner of the company, an elderly gentleman who had con-
trolled the firm since its creation. He not only saw
no benefits in the project for his company, but actu-
ally felt insulted by the entire survey which he re-
garded as an invasion of privacy. Consequently the in-
terview did not go well and this company did not par-
ticipate further in the survey. In such a case it is
wise to recall that the survey staff also represent the
university and any discussion had to be terminated dip-
lo matically.

The project staff later dealt with the corporate
secretary of that firm's leading competitor. He
routed the questionnaire to all company departments,
collated the information, and returned it to the proj-
ect staff. The staff also received copies of the com-
pany's old annual reports and other informational book-
lets. The firm's responses to questions on the value
of business history reflect the ideal attitude which
archivists hope to find in the business community,
"Educating the public on how companies get started,
grow and how they function in general can only benefit
the business community."

After six months all of the respondents to the
initial letter of introduction had been contacted by
phone or in person, and most had been interviewed. At
this point the project director convened a second ad-
visory committee meeting to review the progress of the
project. During this meeting members of the committee
examined a flowchart which indicated those firms which
had not responded to either the first or second mail-
ing, those which had participated in an interview,
those which had agreed to a records inventory, those
which had completed an inventory, and those which prob-
ably would not participate in the survey. The commit-
tee made plans to contact business acquaintances who
may have been hesitant to participate in the survey, to
assure them that the project had the support of other

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executives. In addition, members examined questionnaires and reviewed and commented on the possibilities of using the form as an alternative to the on-site and walk-through inventory procedures. The advisory committee's discussion assisted the staff in evaluating the methodology of the initial survey, in working with reluctant business representatives, and in directing the project through the inventory process.

Part of the budget originally intended for hiring graduate students had not been expended, and the advisory committee felt that the survey might profitably be extended to other businesses including smaller manufacturers and banking institutions. The staff had already invested considerable time in developing a questionnaire, had publicized the project widely, and had established fruitful communication with several members of the business community. To have terminated the project without attempting to see if it had applications beyond the major manufacturers risked sampling too small a cross section of businesses to draw meaningful conclusions.

With NHRCP approval the staff expanded the project. They prepared and mailed a questionnaire and individually typed letters, explaining the purpose of the survey and naming participants from the earlier phase, to forty-five smaller manufacturers which had not originally been included in the survey. This questionnaire was shorter than the original one but had been refined on the basis of information received from earlier responses. In final form it ran two pages, the first presenting general questions on the history of the company, records retention procedures, and the names of those most familiar with the firm's history. The second page listed major business record groups and asked respondents to check those which had been retained.

Only four companies returned completed questionnaires by the requested return date. The staff contacted the remaining forty-one companies and received
nine more responses. After consultation with university advisors and a banking representative, the staff developed another version of the questionnaire which was mailed to twenty-three area banks.* The staff received only two completed questionnaires and again conducted a follow-up telephone survey which yielded nine additional questionnaires.

The staff also developed another approach to locating business records using the State Historical Society of Wisconsin's 1949 survey of over fourteen thousand Wisconsin manufacturers, businesses, and retail stores. Using that survey, the 1950 and 1978 city directories, current telephone directories, and information supplied by the advisory committee, the staff identified those local companies which were no longer in operation and compiled a list of possible contacts from those firms. The staff hoped to learn of the existence of any historical records from these defunct or relocated manufacturers. More important, the staff wanted to determine the likelihood of records surviving the demise of an enterprise. The survey letter briefly indicated the purpose of the survey, named some of the participants in the project, and noted the endorsement of the two local Chambers of Commerce. This survey reached forty representatives from fifty-seven defunct companies and generated twenty-two responses of which three indicated that they had any surviving documents. These results indicate clearly the need to acquire business records while companies are still active or are in the process of changing ownership or dissolving.

Throughout the entire project the staff continued to publicize the project through presentations before business organizations and through the news media. Presentations before the Rotary Club and the Kiwanis

*The survey staff decided to omit savings and loan associations, credit unions, or other commercial lending agencies because most of these in the area are less than twenty years old.
Club made it possible to discuss the survey within the framework of business history and the wide range of subjects for which a knowledge of business and economic history is important. Individual meetings with presidents or executive directors of local Chambers of Commerce and the Manufacturer's and Employers Associations provided the same opportunity. Newspapers published press releases when the project received initial funding from NHPRC and again when the advisory committee was appointed. Contact with a reporter interested in the project produced a full-page story, with accompanying photographs, based on an extensive interview with one of the business representatives on the advisory committee. The effectiveness of such educational efforts cannot be measured, but certainly in conjunction with the entire survey they have informed business leaders of the university's interest in preserving the business history of the region and of the importance which scholars attach to business records. This was one of the project's objectives and it may, in the long run, be more significant than any immediate results.

There is really very little pattern to the responses received from business which might indicate firms most likely to cooperate in a survey. While smaller family-owned companies were often more conscious of their history, larger corporations were generally more willing to participate. Working with higher level company executives usually was more fruitful than working with public relations representatives. Much of the success of the project rested on the ability of the staff to present the survey, defend its legitimacy, and persuade skeptical business executives to participate. The desire of local corporate officials to cooperate with the university, which was expanding its business program, was another contributing factor.

One common ground could be found between the archivist and the corporate representatives: records management. Even corporations uninterested in business history had a general concern for the questions of
records retention and records disposal. To be effective both in the interview and actual inventorying, therefore, the archivist should be trained in some basic records management procedure and be equipped to determine the most efficient and consistent manner of inventorying records.

Finally, the task of appraising and acquiring business records from existing firms must be part of an ongoing education process initiated and maintained by interested archivists. Unless archivists deal more directly with business, there is little probability that noncurrent business records will be preserved for future research. Even with such dialogue the immediate prospects are not bright. Yet not to initiate that contact is to abdicate archivists' role as custodian of the significant records of the society of which they are a product.
ARCHIVAL EXHIBITS: CONSIDERATIONS AND CAVEATS

Joan Rabins

One striking cultural development since World War II both here and abroad has been the steady growth in the popularity of what is often termed "exhibit-going." Museum visits are no longer dutiful and infrequent. Rather, museums are struggling to cope with ever-increasing crowds who attend exhibits as a normal part of their social activities. Other institutions, including libraries, historical societies, businesses, and archives and manuscript libraries, find the public responsive even when rather recondite exhibit subjects are chosen. Because of this favorable climate, agencies for which exhibits are not a primary function must now decide whether or not to embark on such a program.

Archival institutions which face this question must constantly examine their priorities and resources to determine whether, and to what extent, they should venture into this area. This decision must take into account not only the relevance of a proposed exhibit to the institution's programs but also the degree to which the exhibition of archival materials may affect their safety and long-term physical condition. An agency which does begin an exhibit program must plan carefully not only for the display area and the exhibit itself but also for the scheduling and publicity which will maximize the exhibit's effectiveness.

Most archival administrators begin an exhibit program in order to publicize the institution's resources. Through exhibits an archive can dramatize the strong points of its particular collection and thus create a clear identity to which the general public as well as researchers can relate. Even in a university setting,
according to Judith Cushman, it is not uncommon for scholars on the faculty to become aware of the research potential of an archival collection only as the result of an exhibit.²

Albert H. Leisinger, Jr., speaking in 1961, emphasized a different reason for undertaking an exhibit program: the obligation to make "our institutions centers of popular education,"³ or, as the catchword of the time might have put it, "relevant." Since that time there has been increasing pressure on all institutions, both government and private, to open themselves as much as possible to the public and to relinquish any elitist pretensions. To the majority of the public, the word "archives" still has a vaguely dry and forbidding sound, and repositories can use exhibits to persuade the public to venture into the archives and to clarify the place of archives in the educational and intellectual structure. It is from such occasional impressions that the average citizen creates his image of the archives and its function in the community.⁴

In the same way, exhibits enable the archives to function as part of the broader intellectual and cultural community and of the university or cultural complex of which it is a part. It is fitting that the archives draw upon its own unique resources to contribute to the richness of the cultural experience available to the total community. One of the benefits for the archives is that such events provide natural opportunities for interaction with neighboring institutions or even those at some distance from which supplementary materials can be borrowed.

During the bicentennial year the Archives of Labor and Urban Affairs, a part of Wayne State University and located in a county named for Wayne, mounted an exhibit which exemplified such interaction. This exhibit focused on Anthony Wayne's 1796 visit as a representative of the United States government to accept the transfer of Detroit and Michigan from British rule. A number of institutions in the area, including the
Burton Historical Collection of the Detroit Public Library, the Michigan State Archives, the Clarke Historical Library at Central Michigan University, and the William L. Clements Library of the University of Michigan, contributed material to the exhibit, making it truly a community undertaking. The broad public interest in the exhibit testified to the soundness of the choice of theme.

Even archivists who are wary of seeking publicity must confront the economic realities of the purely research institutions in today's world. No matter how well-endowed at the outset, there are few collections which have not been compelled to solicit funding merely to maintain their operations. Scholars' use of archives is increasing steadily, and this increased usage adds to the pressure on the archives to secure more funding. Government or private support is essential to continued archival development, and a program of stimulating exhibitions which generates publicity and attention is an effective and relatively painless way to keep the presence and importance of the archives before an influential segment of the community.

Archives must also appeal to potential donors of collections of papers and manuscripts. An attractive exhibit provides an opportunity to make a favorable impression on an individual who owns a valuable collection, one whose own personal papers would complement the holdings of the archives, or the decision-makers in organizations whose records the repository seeks. Exhibits are also occasionally used to announce recent acquisitions and give recognition to donors.

One of the side benefits of an exhibits program is that it provides an outlet for the research talents and creative impulses of the staff. Those familiar with the holdings of the archives are uniquely qualified to select and research topics which show the collection to advantage. Tracking down and securing suitable supplementary materials can be an interesting challenge to those creating the exhibit, and the opportunity for
public recognition can contribute immeasurably to staff morale.

For these and other reasons many archives regard exhibitions as an extremely important part of their role. The National Archives, for example, feels an obligation "to place before the general public selected documents that have commemorative interest, exemplifying the traditions and ideals of the Nation, or serve . . . to dramatize or vivify important events and phases of its history." Presidential libraries devote part of their space to permanent exhibits on the life of the president. These exhibits, which memorialize the president and educate the public about his career and the history of his time, attract a large audience and are often strong tourist attractions. Naturally, such exhibits contribute considerably to the nationwide reputation of the institution.

An article in 1978 by a member of the staff of the Folger Shakespeare Library raises some of the arguments against undertaking extensive exhibits. These issues deserve serious consideration. The archivist's primary charge is to care for those materials worthy of preservation. It is surely a case of misplaced zeal if the materials are permanently damaged in the effort to enhance the prestige of the institution. Even with the precautions available today to protect papers and bindings from damage by light, improper humidity levels, and dust, the conditions of display cannot replicate the more ideal environment of the stacks or reading room; and there can be no question that the prolonged stress of exhibition takes its toll on original materials. Moreover, there is always the very real danger of theft or vandalism during an exhibit even when security personnel are present.

To avoid these pitfalls the imaginative curator can often convey the authentic flavor and impact of the original piece of paper without actually putting it on display. There are numerous processes available today to reproduce a document, possibly enlarging it
and using color which can impart historic atmosphere. Blowups using such techniques often make excellent backdrops for exhibits of three-dimensional objects which are used to amplify the theme of the exhibit. Or, in some instances, a document can be selected of which the archives has more than one copy and which is therefore expendable.

There are situations in which substitution would vitiate the impact of the exhibit, and in these instances the archivist must weigh the advantages of exhibiting against the disadvantages, balancing responsibility to the researcher and the donor against the obligation to serve the public at large. Naturally, the more rare and valuable the document, the more reluctant the archivist will be to use it for display for any prolonged time. If the decision is made to use originals for display, every precaution available through today's technology should be called upon to preserve the document in the condition it was before being shown.

The demand which exhibitions make on staff time and the cost involved might also dissuade an archives from beginning an exhibition program. If such a program would jeopardize the quality of service to users, an archives would be wise to forgo the ancillary benefits of exhibiting in favor of maintaining its standards as a repository.

Once the decision to exhibit has been made, the first practical consideration is the selection of the display area. Newer facilities generally include a specific exhibit space in their plans, but lack of a designated area for exhibits need not be a deterrent. It is often possible to convert an area into display space or have it serve a dual function.

The selection of appropriate themes for exhibits is of paramount importance. Topics should be selected on the basis of their timeliness, suitability to the particular collection, and overall appropriateness to
the goals of the institution's exhibit policies as well as their attractiveness to the public. The more an institution can utilize its own resources, the more successful the exhibit will be in projecting the intrinsic character of that institution.

An intangible but vital factor in the success of an exhibit is its aesthetic impact. Though laudable in every other respect, an exhibit which does not appeal to the eye will not achieve its aim. The best exhibits have an aesthetic cohesiveness of color and style, often achieved by a well-designed overall motif, a signature identified in the viewer's mind with the theme. Exhibit information must be translated into forms which will capture the attention of the viewer, and the message must be imparted by visual symbols rather than long, detailed captions. Often it is wise to highlight only a small portion of a manuscript, that sentence or two which sums up the whole. Care also must be taken not to overtax the patience of the viewer. A few arresting, well-chosen objects are preferable to cases crowded with redundant examples.

Another major element in the success of a program of exhibits is careful and realistic scheduling based on the budget and staff size of an institution. It is better to aim for a few notable exhibitions rather than an overly busy schedule of mediocre or amateurish attempts. Not every exhibit on a schedule can be a magnum opus. For the sake of the staff as well as the public, it is advisable to alternate major efforts with smaller ones.

Sufficient lead time for each exhibit is vital. Research, arrangements which must be made with cooperating institutions, printing, and construction require considerable time, and allowance also must be made for the inevitable delays which can wreak havoc with a tight schedule. Time must also be allotted in the schedule for dismantling each exhibit and returning borrowed items. Thus the time scheduled between shows
must realistically reflect the capabilities of the staff.

An exhibit schedule should also be flexible enough to take advantage of unanticipated opportunities for staging exhibits—visits by dignitaries, local events, anniversaries. Nor should an archives be committed to taking down an exhibit before it has lost its public appeal. A good schedule also takes into account holidays and vacation seasons which, particularly in a university community, can have a marked effect on attendance and staffing.

Once a schedule is settled, the full benefit can be derived from each exhibit by planning as many events as possible to tie in with it. A reception for the exhibit opening, for example, creates excitement and often assures press coverage. An exhibit is also a natural opportunity to set up symposia and lectures on related topics. Or the archives can reverse the process, planning an exhibit to coincide with an anniversary or talks being given either at the archives or at a neighboring institution.

The traffic flow through most archives is not so great that most repositories can rely on attracting exhibit viewers from among casual passersby as can a library or museum. Only by industriously generating publicity can an archives draw enough people to justify the effort and expense of an exhibit program. To interest the maximum number of people in an exhibit, it is essential to utilize the greatest variety of means available to reach the potential audience.

An effective publicity program begins with an up-to-date list of sources to be routinely informed of all events. Many newspapers and radio stations carry a weekly calendar of events, and concise, well-written press releases can sometimes lead to a mention in the columns of local papers. Media may also decide to provide coverage of newsworthy individuals who visit the exhibit, and this can reach an enormous audience.
An archives newsletter is a natural vehicle for articles and photographs of exhibits and related events. An archives volunteer "friends" group can provide enthusiastic support and help to interest others. The archives which is part of a university complex can utilize the various official and student publications; and, when appropriate, notices should go out to academic and trade journals.

An attractive, well-written publication providing background information should accompany the exhibit. Such a pamphlet, designed with taste and imagination, contributes to the impact of the exhibit and provides a convenient way to acknowledge those who contributed work, funds, or materials for the show. Extra copies can be used in mailings to attract an audience and sent afterwards to those interested in the archives as evidence of its activities.

A more elaborate catalog providing information to supplement the captions in the cases, although more costly to write and print, has the virtue of being salable. In many instances such a catalog can be sold long after the exhibit has closed and frequently will even become a profit-maker for the institution. This type of publication also has a certain prestige value and can be used to indicate the quality of an archives' exhibit program to a person or institution from which the archives seeks to borrow material for a future show. One historical society prepares carefully researched catalogs as a service to teachers who lead the numerous school groups to which the society's exhibits cater.

Detailed record keeping during and after each exhibit provides a reservoir of expertise for the staff. Taking photographs of each case and recording all texts and captions facilitate the re-creation of the same exhibit at some future date with a minimum of effort. Carefully itemized accounts help with future budgeting. Mailing lists should be kept current and samples should be kept of all press releases and publications. Detailed plans of any special construction should be kept.
in case a similar need arises in the future.

The final step in closing the book on an exhibit should be a detailed, critical report by the exhibit staff. Other members of the staff and selected viewers should be encouraged to contribute frank evaluations and suggestions on ways to improve the exhibit. This type of feedback is important to educate the staff and maintain a high standard for exhibits which will be a credit to the archives.

At this point many archives amortize the cost of an exhibit by sending their exhibits out on the road. Traveling exhibitions publicize the archives to a much wider audience and foster good relations with borrowing institutions. Preparing a touring exhibit requires considerable extra work and special staff expertise, however, and arranging for periodic transfer and supervising needed repairs consume additional staff time.\(^{15}\)

The decision to tour an exhibit should be made before design and construction of the exhibit begin. Then display panels and cases can be used which can be packed into shipping crates without being disassembled. These insure greater safety in shipping and are economical both in terms of material cost and staff time. Once an exhibit is away from the supervision of those who designed it, there is an increased chance of damage or theft; and therefore only reproductions should be used for traveling exhibits.

Rather than originating traveling exhibits, most archival institutions would probably be more interested in using the traveling exhibits mounted by a great number of museums, government agencies, industrial firms, and other organizations. One of the largest and best-known collections is the SITES (Smithsonian Institution Traveling Exhibit Service) program which currently offers almost two hundred exhibits on a wide variety of subjects.\(^{16}\) The fees charged vary and are based on the size and estimated value of the exhibit. SITES specifies the level of security which must be provided by
the borrowing institution as part of the agreement and rules regarding shipping, damages, insurance, and cancellation penalties. In general, their regulations are fairly typical of those which would be imposed by any other supplier of traveling exhibits.

Most archives draw upon traveling exhibits to fill out their exhibit schedules. This lightens the load on personnel who, in the typical archives, have duties other than those connected with exhibits. Most report favorably on their experiences with borrowed exhibits. The very fact that an exhibit emanates from another source means that it will be different in appearance and approach and will give variety to the archives exhibit program.

Any exhibit must be created with an eye to those factors which will insure success and bring prestige to the repository. An effective exhibit should be attractive to the prospective audience, done in a professional manner with a high level of visual appeal and aesthetic sophistication, and related to the noteworthy characteristics of the collection. Final success depends on the care which is given to publicity and scheduling and the extent to which the staff is able to build on past experience to steadily improve their offerings. If sufficient attention is devoted to these problems, an exhibit program can become the most effective means for an archives to promote its identity and mission.

There are many reasons which impel an archives or manuscript library to incorporate exhibits into its programs. Some institutions, because of the nature of their holdings or financial or staff limitations, will decline to enter this area. For those who do, the benefits which accrue to the institution are numerous and tangible.
NOTES


5 Information on the exhibit furnished by Margery Long, Audio Visual Curator, who is also responsible for exhibits.


8 Leisinger, "Exhibit."


10 Ibid. Very often the greatest danger of theft exists when an exhibit is being assembled and dismantled. For this reason most authorities advise completing these tasks outside public visiting hours so that control can be maintained over the number of people who have access to the objects on display. Duckett, Manuscripts, pp. 253-54.

Ideally, the exhibit should be in place one week before the official opening to permit those responsible to view it as a whole and make any alterations necessary to achieve its maximum effect.


Telephone interview with Betty Odle, Exhibit Designer, Cranbrook Academy, West Bloomfield, Michigan, October 17, 1978.

Letter, November 4, 1978, from Mary Lou Cocker, Registrar for Scheduling, SITES, Washington, D.C.
A CHURCH ARCHIVES: THE UNITED METHODIST CHURCH IN INDIANA

David E. Horn

A church archives is a good thing, but must be started and maintained only for the best of reasons. A church archives must be more than a place to dump, temporarily or permanently, bulky and poorly arranged papers that might or might not be useful. It should be run by professional archivists and, whether the archives is part of the church structure or a separate organization, its functions must be clearly understood. A church archives, like university or government archives, must be a collection of records created for administrative purposes, some of which are preserved permanently because of their historical value.

Though at times only a small percentage of the population has been church members, the endurance of many church bodies and the prominence in American history of many churches and their individual members make an understanding of church history necessary for an appreciation of our heritage. Like other historical collections, church archives frequently impart much information about the administration of churches and the elite--clergy and prominent lay people--without telling much about the vast majority of church members. Church archives do, however, contain much material on the activities of their members, and that material is essential for an understanding of many political, economic, and social movements.

In the late 1700's and early 1800's, Americans moved steadily from the original, seaboard colonies to the interior, including the Northwest Territory and the rest of the area now known as the Midwest. Elders or
ministers of various religious groups, most of whom had been directly involved in the religious fervor of the Great Awakening in the South, accompanied the first settlers who moved across the Ohio River from Kentucky into Indiana. Prominent among these groups were the Methodists. Their "circuit riders" traveled regularly to the many small settlements and farms in southeastern Indiana, developing and spreading services, theology, and morality well suited to the frontier.

Because these preachers visited each church only once a month, the responsibility for much of the organization was in the hands of lay people. The principal form of worship was the class meeting. The classes visited by one circuit rider comprised one circuit which might cover several present-day counties. Soon the circuits were organized into districts, and the districts were administered through an annual conference which is still the key administrative unit in United Methodism.* Each of these administrative units generated certain kinds of records, and the Archives of Indiana United Methodism at DePauw University has attempted to collect all of them.

Like most archives, the combined Archives of Indiana United Methodism and DePauw University started much later than the institutions it documents. The Indiana conference, virtually co-extensive with the state of Indiana, was formed in 1832. The combined archives was founded in 1951 through the efforts of Worth M. Tippy, who had sought historical materials of both institutions.

*At the time of its organization as a separate body in 1784, "Methodist Episcopal" was the official name of the church. Through many separations and mergers, other names were used over the years. In 1968 the name "United Methodist" was adopted, and that designation will be used herein to refer to the present institution and to the many different antecedent churches in the nineteenth and twentieth centuries.
for a book on Bishop Robert R. Roberts. In that year the three separate conferences in Indiana formally designated the Archives as their repository and pledged support for its original budget, which was about three hundred dollars a year. The Board of Trustees of DePauw University also established its archives to be combined with that of the Methodist church. These administrative and legal niceties required time and trouble, but resulted in a very clear statement of the establishment and purposes of the Archives—in effect a charter—and the appointment of a Joint Archives Committee.

By that time much material had been lost and what remained was widely scattered, but careful determination of what records should be collected and persistent efforts to collect those records have resulted in an adequate and in some ways excellent documentation of the Methodist people in Indiana. These records reflect the administrative history of the church.

Much more elaborate and stylized than present Sunday school classes, the original Methodist class meeting was the unique Methodist means of guiding people to personal sanctification and community service. Only members in good standing could attend, and their tickets had to be renewed regularly. A few tickets or other notes survive in old Methodist families, and the Archives still occasionally receives one or two documents from this period. To give a picture of the weekly discussions, questionings, and testimony, the Archives relies on contemporary accounts, including biographies and autobiographies of elders and bishops. When Methodist groups became larger and there were more ministers, the intimate class meeting died out, yielding to larger and more formal worship services.

Early circuit riders sometimes recorded thirty or forty meetings in as many different locations in a one-month period. Very few records of that activity survive. Only an occasional diary of the preacher, a few
pages of reminiscences, or a contemporary account in a local newspaper reflects the difficult journeys of these early ministers. Generally there was no inclination to record meetings, baptisms, marriages, or funerals, and no place to keep such records if they had been made. In addition, the rigors of travel wore most circuit riders out very quickly, so there was a rapid turnover and a loss of continuity.

Gradually the circuits shrunk to groups of a few churches, and eventually most congregations were able to support a full-time clergyman. Then records were made and kept, at first in notebooks or ledgers and later in official church record books designed especially for the Methodist church. Many of these records have been lost; surely the quantity surviving from the nineteenth century is much less than half of the original total, but those which do survive give many details of local church life—names of members, births and deaths, acquisition of property, references to occupations, and concern with the larger church, missionary work, social services, and contemporary issues. The Archives serves as the official depository for these local churches and has about twenty-one hundred separate books of their records.

The circuits were grouped into districts for administrative purposes, and the district superintendent or "presiding elder" exercised much authority, especially in the first century of Methodism in Indiana when the church's bishops spent most of their time traveling from one conference to another. Very few records of the district superintendents survive, although the Archives now tries to obtain district office records, which concern the growth and major changes in each church. Some of the records of the district meetings, which coordinate the work of local churches, have survived.

For Methodists, the annual conferences were and are the principal administrative unit; and, fortunately, these annual meetings are very well documented.
Careful records have been kept of each meeting of each conference, and the Archives' unbroken collection of detailed minutes and reports begins with the first meeting of the Indiana conference in 1832. Their existence compensates for the general lack of district records for many years and the many gaps in local records.

By 1849 the minutes were published, and this duplication and wide promulgation have contributed to the survival of virtually all of these important records. These printed minutes include a detailed record of the annual meeting, with all motions made and resolutions passed; the list of all members of the conference (i.e., ministers); the assignments to every charge (single church or group of churches) listed by district; the reports of all committees; a statistical report of all local churches giving membership, financial statements, property transactions, and other information; and memoirs or obituaries of all ministers and prominent lay people. Sets are probably available in the national archives of each denomination and are sometimes on microfilm, so even a beginning church archives can obtain this valuable information at little or no expense.

The collections described above document the Methodist Episcopal church which has been the largest branch of Methodism in Indiana. The Archives does not have equally good collections for all branches. There are fewer records for the Methodist Protestant and Methodist Episcopal, South, churches; and for some of the non-Methodist antecedent churches, the collection does not even hold complete runs of conference minutes. The conferences which have not been organized by territory—the German Methodist conference and the Central Jurisdiction for black churches—are particularly hard to document.

An important decision to make when planning a church archives is the exact collecting area. No
institution should collect church records in a given geographical area if doing so violates the administrative organization of the church. It is necessary to consult church officials to determine the needs of the churches. When these contacts at the area, conference, district, or regional office are made, at least a brief survey should be made to determine what records, what kinds of records, and what quantity of records are already available. The core of the collection, at least the majority of printed records, might be obtained from these offices.

The national archives of each denomination is also apt to have information about local and conference activities. For example, the activities of the "Indiana area" (somewhat like a diocese) headed by a Methodist bishop are documented by records from that office, which sometimes duplicate and replace sources from the local churches. Contact with state and regional church offices should be an important part of beginning a church archives.

There is no substitute, however, for contact with all the local churches. The conference or regional office's approval of some institution as the depository for local records should be communicated to local churches through the district meetings. The archivist should provide each district superintendent or his counterpart with a list of materials wanted and some description of the services provided by the archives. As local churches close, the superintendents can see that their record books are transferred to the archives.

One of the most important messages to convey from the start is that archivists are interested in recent and current records, not just in older materials. Some churches are not now even creating some vital records such as current membership lists, and many do not preserve their "older" records of twenty years ago. The archivist, as records manager, can encourage and advise on the creation of complete and clear records.
and their transfer to the archives as soon as they are not needed in each office for current administrative use. The present is just as important historically as any other era, and archivists must be sure that documents are created and do survive.

In contacting local churches, archivists will encounter the same situations which exist in other institutions. Some people will gladly hand over excellent sets of record books, but others will say they have nothing (or "nothing important") or that they still need the Sunday school notes from the 1890's. Small churches without storage facilities regularly allow secretaries and other officials of church organizations to take records home, and these will be difficult or impossible to retrieve. Visiting a few of these churches will give the archivist a clear picture of conditions and will make it easier to contact other churches by mail or telephone.

In Indiana there are now approximately fifteen hundred local churches, and DePauw is the official depository for all of them. In addition there are seven or eight hundred other churches which have been abandoned because of loss of membership or mergers. The Archives has some materials from about two thousand of these churches, but for most of them there is not enough material or not the right kind of materials. To apply records management techniques and to extend services to all these churches, the Archives undertook a Church Records Survey.

The Church Records Survey (CRS) began in 1975 with some preliminary announcements in the monthly newspaper, the Hoosier United Methodist. There followed a direct mailing to all churches of a specially printed folder describing church records and the purposes of the survey and two forms (which were not called forms). One survey sheet asked for exact present address, past addresses, other names by which the church had been known, and some basic historical information—date of first service, date of first full-time
minister, date of present and past church buildings, dates of moves and mergers, and special historical information. The second sheet provided space to list all the official records now in the church: minutes of the church board and other meetings; records of births, baptisms, confirmations, marriages, deaths, and transfers of membership; records of Sunday school classes and church societies; and any additional records available.

Five hundred of the original fifteen hundred churches have replied to the survey and the replies are extremely valuable. Making a list of records now in the church has helped local congregations realize that there are serious gaps in recent records and that their older records belong in the archives in order to prevent the unfortunate destruction of local records, which is all too often reflected in the sparseness of archival collections. Nonrespondents have already received two or three additional mailings, and the pursuit of this information will continue.

When these official contacts fail to turn up expected records, there are other possibilities. Retired ministers sometimes have kept either official record books (which they shouldn't have) or their own personal notes and pocket record books which can provide essential data. If the archives is located at a college, then the graduates of that college who are members and especially ministers of that church might have valuable material.

There are other sources of information on local churches and conferences. Most conferences have published a history of their church in that region, and some of these histories consist mostly of compilations or summaries of the information in the conference minutes or other reports. In addition, the county histories which were so popular in the late nineteenth century often contain very detailed information, especially about the founding of local churches.
Another important, though less formal, source is the local church history. Some histories held by the Archives are recent, thick, and detailed, while others are very short, handwritten accounts almost contemporary with the origins of the church they describe. Often the sources utilized in these histories are no longer available—the documents have been destroyed and the pioneers interviewed have died. While the accuracy of these histories must be questioned, they are often irreplaceable as the only source of information on the early years of churches.

In a few instances church bulletins supplement local histories. No archives can begin to save bulletins from churches, since they would take up too much space, but many churches have saved the special bulletins commemorating the dedication of a new building or an anniversary of the church. Often such bulletins, like local church histories, contain a list of ministers who served the church, and these are extremely helpful in writing church histories.*

How can an archivist do all this, make all these contacts? Only with help. The United Methodist Discipline states that every local church must have its own historian or archivist. Most churches do not, but in those that do the archivist has an interested colleague. In every conference of the United Methodist church, there is a Commission on Archives and History, ranging in size from four to twenty members. This commission can be very helpful in explaining archival programs like the Church Records Survey and in contacting people throughout the conference. Membership changes regularly, so new people become interested in church records and church history.

*To assist in writing such histories, the United Methodist church has published a pamphlet written by Wallace Guy Smeltzer, "How to Write and Publish the History of a Methodist Church." Many of the features of this pamphlet would be helpful for any local church.
Even with help, no beginning archivist can make all these contacts, and not all the strategies suggested above are appropriate for all churches. Each archivist should review the list to determine what is best suited for a particular archives and then give priority to a few.

The contents of many church archives are as might be expected--basic information on each local church and on the conference activities. However, the records of Sunday school classes, mission societies, and other local organizations also show the extent to which church members were concerned about social and political as well as religious issues. Most of the minutes of annual meetings of each conference contain the reports of the usual committees in education, finance, appointments, and other functions along with special committees which introduced more topical resolutions on slavery, assistance for freedmen, war, the use of alcohol and tobacco, card playing, gambling, observance of the Sabbath, and social services. The yearly reports and resolutions on such topics document the social concerns of church members, and the obituaries of ministers and lay leaders demonstrate the importance of these issues in the lives of Methodists.

This sort of material makes possible an understanding of the importance of churches and church leaders in people's lives, and good use of these sources will help give the best view of state and local history. Church archivists will find that an important and growing percentage of their researchers will be historians who are studying church history as part of a wider study. Church archives are also important in the study of the hospitals, homes for the aged, orphanages, schools, and other institutions founded by the churches in the nineteenth century, whether or not they are still controlled by the church.

Indiana Methodists gave special attention to schools. In the 1830's the church committed itself to a college-educated clergy and established many liberal
arts colleges (not seminaries) to provide a good edu-
cation. These colleges accepted students from other
denominations, but naturally attracted most of their
enrollment from the rapidly growing Methodist churches
in the state.

Just as it is impossible to understand DePauw
University without appreciating the history of Method-
ism in Indiana, so the reverse is also true. To under-
stand Indiana United Methodism, one must understand
the commitment of the church to higher education and
its occasional doubts about that education. Of the
fifteen or twenty colleges and universities estab-
lished by the antecedent churches of United Methodism
in the nineteenth century, only three survive with
church connections; and their endurance is due in part
to constant, statewide support of all kinds from local
churches.

Most of the people prominent in the history of
DePauw have been Methodists. All the presidents ex-
cept the current one have been Methodist ministers,
and six of them became bishops. Until recently the
majority of students and faculty were Methodist.
Though the university repeatedly reaffirms its connec-
tion with the church (and nine of the thirty-three mem-
bers of the board of trustees are appointed by the two
conferences), the student population is only about 20
percent United Methodist and the percentage is still
falling slowly. Likewise, the percentage of faculty
members who are Methodist is comparatively small.
These changes have occurred in many church-connected
universities, and the Archives must document these
changes and adjust to some differences in the college-
church relationship.

The Archives, a part of the administrative struc-
ture at DePauw University and since 1956 a unit of the
library, depends on this college-church re-
relationship. The staff are employees of DePauw, but the
two conferences share the annual operating costs of the
archives. The annual budget is drawn up each year by
the archivist, in consultation with the director of libraries and university provost, and reviewed by the Joint Archives Committee which includes representatives from the university, the commission on archives and history of each conference, and the board of trustees. Next the budget is approved by the university and by each of the conferences. The conferences then send their share of the operating expenses, including salaries, to the university which handles all disbursements for the Archives.

What do the two institutions get for their money? For the university the Archives functions as any college archives does, with responsibility for records management and as much involvement as possible in teaching, especially student use of the archives. The Archives provides a number of benefits for the United Methodist church and gives priority in its services to constituents of the two conferences, providing service by mail, some research, and free copying for official business.

The development and growth of the Archives and its present services have been in a pattern familiar to archivists. Just as the records collected by the Archives were originally created for administrative purposes and only later saved for their historical value, so the Archives itself was established to collect and preserve materials about DePauw University and United Methodism in Indiana for the use of people connected with those institutions, and only more recently have the collections proved helpful for general researchers.

For both administrative and historical purposes, church records must be created, preserved, and made available for use. Many churches—local, district, regional, conference, state—have not yet made provision for their records. Though some materials have been lost, there are enough available now to form good collections, and more will be available in the future.
With the establishment of church archives or the cooperation of archivists in such institutions as historical societies and university archives, this important part of our heritage can be preserved and understood.

Readers who desire more information on some of the activities of the Archives at DePauw may write to the author for copies of a leaflet describing the Archives, the current annual report, and forms used for the Church Records Survey.
USE RECORDS: A DILEMMA

Michael Plunkett

How should archivists handle circulation records?¹ It sounds like an easy question—the cynic would probably answer carefully—but the ramifications of the question are much larger, encompassing that hydra-headed monster of personal privacy vs. the public's right to know. The question of privacy, of course, concerns all archivists not only as keepers of records but as private citizens. The issue as it has arisen in the 1970's has a number of possible concerns to archivists: the fear of government encroachment; the right of an individual to his or her personal privacy; the right of an individual to gain access to public records; and not the least of all, the security of repositories.

It would be beneficial to study the question of access to circulation records of libraries and the response of professional librarians and the American Library Association (ALA). However, in spite of their similarities, there are many basic differences between libraries and special collections. A special collections repository contains a select group of records, most often unpublished and many times unprocessed. Inferences made from manuscript/archive use records therefore would be more amorphous than those made from library circulation records.

The question of confidentiality of library use records is a recent phenomenon arising with the ferment of the Nixon era. Before then, use records were consigned to dimly lit rooms and dingy file cabinets only to be frantically resurrected when statistics needed to be compiled. In 1970, however, United States Treasury
agents attempted to survey circulation records at Milwaukee Public Library in an apparent effort to find out which patrons read books about explosives. After an initial denial of the request, the city attorney released the records to the Treasury Department. On July 11, 1970, Internal Revenue Service agents attempted to look at circulation records at the Atlanta Public Library, searching for patrons reading "militant or subversive" books. The library's board of trustees denied the agents access to the records. 

There were also attempts in 1970 to search circulation records in Cleveland, Richmond, and California. In most of these and other reported attempts, there was no formal court-ordered process or subpoena.

The threat of government agents brought an immediate and strong response from the Executive Board of ALA which accused the government of "an unconscionable and unconstitutional invasion of the privacy of library patrons." The ALA Intellectual Freedom Committee drafted a policy on the confidentiality of library records which was adopted by the ALA council in January 1971. The policy recommended three main tenets for adoption by libraries: implementation of a policy which recognizes the confidentiality of circulation and other records which identify the name of the user; withholding designated records from state, local, or federal governments unless a "process, order or subpoena" is served; and resistance to such a court order until a "proper showing of good cause has been made in a court of competent jurisdiction." 

This action served to establish guidelines, but even a change in administrations did not lessen the demand for access by federal agencies. In October 1974 the Mesa Public Library in Los Alamos, New Mexico, reported FBI agents had requested access to circulation records. The request was denied. In March 1975 the city editor of the Odessa (Texas) American asked to see the circulation records of Ector County Library. The ALA's general counsel entered subsequent litigation on the dispute arguing that "disclosure of
circulation records would constitute an invasion of privacy and that it would have the effect of limiting a patron's freedom to read." The attorney general of Texas found for the library and stated that "information which would reveal the identity of a library patron in connection with the object of his or her attention is excepted from disclosure."7

As recently as 1979 the question of access to library records was still alive and disputed. An incident in Massachusetts highlighted the problem and also mirrored the changing temper of the times. The Boston Globe reported on March 15, 1979, that the librarian of the Goodnow Library in Sudbury, Massachusetts, had refused access to police who apparently were trying to trace the last reader of a book which contained a small amount of marijuana. The library's board of trustees, after the incident, adopted guidelines based upon those of the ALA.8

Although the reasons for access to circulation records might have changed somewhat, it is evident that librarians and their professional organization have taken a strong stand in defense of the individual's right to privacy. This was expressed eloquently in 1975 by I. M. Klempner at a joint meeting of the ALA Intellectual Freedom Committee and the Information Science and Automation Division:

It should be clearer now that whereas the individual's right to privacy is an all-pervasive and guaranteed right under the U.S. constitutional form of government, society's right to know particularly of private, i.e., personal, information is a delegated right, is a right narrowly defined and to be narrowly applied.9

Possibly because of the differences in the situations or maybe because, by nature, archivists are a more subdued lot, the response from archivists to the question of access to use records has been muted. Although state and federal laws governing access to

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https://digitalcommons.kennesaw.edu/georgia_archive/vol8/iss2/12
public records affect use records in many institutions, there have been few incidents involving access to use records at an archival or manuscript repository.\textsuperscript{10} Archivists concerned with personal privacy have interpreted the Privacy Act of 1974 mainly in terms of the confidentiality of case records and personal data included in archival records rather than their self-generated records.

The Code of Ethics for Archivists proposed by the Society of American Archivists (SAA) takes a more liberal view on access to use records than does ALA. Section VIII in the commentary on the code, Information on Researchers and Correction of Errors, states that "in many repositories public registers show who have \textit{sic} been working on certain topics, so the archivist is not revealing restricted information. By using collections in archival repositories, whether public or private, researchers assume obligations and waive the right to complete secrecy."\textsuperscript{11} The latter statement stands in almost direct contradiction to the ALA's policy on the confidentiality of library records. The ethics committee was not, it is assumed, thinking in terms of government records, but only individuals seeking further information on their specific topic, and possibly was not thinking in terms of deriving this information from use records.

Archivists seem to have a Jekyll and Hyde approach to the problem of confidentiality of use records. The public examination of the National Archives by the joint American Historical Association-Organization of American Historians' (AHA-OAH) Ad Hoc Committee to Investigate the Charges Against the Franklin D. Roosevelt Library contributed to this schizophrenic character. A perusal of the Final Report of the committee makes it quite evident that historians believe that it is the duty of archivists to inform researchers of all known comparable research being carried out. This makes the archivist the arbiter between personal privacy and the public's right to know. To promulgate this information means that use records will have to be divulged.

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The ALA believes in the complete sanctity of use records, the AHA wants complete identification of all parallel research projects, and the SAA holds a tenuous middle ground. The proposed Code of Ethics suggests that archivists should "endeavor to inform users of parallel research by others using the same material" but not at the expense of an individual's privacy. The University of Virginia has altered its registration form so that the researchers have an opportunity to decide whether or not they want to make their research project public and allow investigation of their use records. In the year since this form has been used, only two applicants out of 725 have requested confidentiality. This is a partial answer, of course, but does help to extricate archivists from becoming both judge and jury.

Maybe, though, archivists have been too cowed by implied compulsion to reveal all that is in repository records, both institutional and personal, and have not paid enough attention to personal privacy. Over the past five to ten years, archivists, in response to increasing pressure from donors and institutions to improve security measures, have required more detailed personal information on registration forms. While applauding the improved security, archivists sometimes forget about the responsibility of keeping these records confidential. The Ethics Committee has attempted to resolve the conflict between personal privacy and the public's need to know, but archivists should profit from the experience of librarians.

Requests for information from use records must be evaluated on an individual basis after archivists seek advice on the legal status of their own records. There should be no problem with the patron who wants to know if there are others working on John Dos Passos. Archivists can check use records and report the answer. However, if a patron wants to know what specific researcher is working on John Dos Passos, or what materials so and so looked at, archivists must be more careful. A form cleared through appropriate legal
authorities that allows dissemination of information is fine, but archivists confronted with a request which might encroach upon personal privacy must study it, discuss it, and have a policy on which to fall back.

NOTES

"Circulation" or "use records" in this context refers to any form or correspondence which documents what materials a patron used or intends to use.


Ibid.

Ibid.


During the 1976 presidential campaign, a number of patrons requested access to use records for Jimmy Carter's gubernatorial records. The Georgia Department
of Archives and History determined that the records fell under the Georgia Open Records Act, which opened all records not specifically exempted from coverage, and that use records were therefore available for inspection. As a result of this decision Republicans, Democrats, and journalists were able to ascertain which of the Carter gubernatorial papers had been used by the others (Harmon Smith, Georgia Department of Archives and History).

SECURITY AND THE ADMINISTRATION OF MANUSCRIPT HOLDINGS AT SOUTHERN ACADEMIC LIBRARIES

Katherine F. Martin

Part II:
Security Procedures and the Patron*

Protecting the manuscript collection against misuse by those whom its organization and administration are designed to serve demands the abandonment of reliance on public trustworthiness and the adoption of a body of coordinated security procedures. Foremost among these must be the habit of surveillance. It is this observation of the patron, and the accompanying regulation of his access to and handling of manuscript materials, that receives the most attention when discussion in the literature turns to the defense of a repository's holdings. The chief difficulty in applying any of the recommendations which relate to reader service lies, of course, in the concurrent striving to achieve that balanced state of affairs that provides for security without imposing undue or unwarranted restrictions on the patron.

Observation of patron behavior in the reading room is perhaps the central element in insuring the security of manuscripts in use. This practice can be carried out, although with varying degrees of effectiveness, in several different ways. Uniformly recommended is the

continuous posting of a trained staff member in the search room. As English archivist Hilary Jenkinson has noted, supervision should always include the presence of an official whenever manuscripts are in use, if only as a technical guarantee.\textsuperscript{1} It is the presence of such a staff member, or alternatively of a guard, which contributes the most to the impression of a concern for security and the intention to successfully maintain it.\textsuperscript{2} Yet of the eighty-six repositories surveyed only six (6.9\%) regularly station a staff member charged solely with the observation of patrons in the reading room; another three (3.4\%) alternate between this policy and delegation of certain responsibilities to this individual which require him to divide his attention or leave his post.

The most popular method of surveillance among those surveyed was stationing an attendant in the search room while assigning other distracting duties to him. As thirty-one of the respondents were dependent on one full-time professional assisted by at most one nonprofessional for care of their manuscript holdings, it is not surprising that these and sixteen other repositories, some having only part-time staff, found it necessary to demand such a division of tasks. In thirty-two cases (37.2\%) this practice went uncomplemented by any other means of surveillance. Twenty-six libraries (30.2\%) depended on indirect observation of patrons by staff in an adjacent area; ten (11.6\%) combined this with another form of surveillance, while sixteen (18.6\%) did not. Four special collections also utilized some form of video monitoring. Of the remaining eighteen repositories (two not providing information on this topic), fourteen (16.2\%) employed no surveillance procedures. In judging this apparent weakness in security practices, however, one might bear in mind not only the possibility of financial constraints but also the idea advanced by Alfredda Scobey, an attorney who has made a special study of the theft of archival and library materials, that "what is required in the way of surveillance depends less on the class of
people using the facilities than on the value of the holdings."³

Of the fifty-four respondents relying on attendants in the reading area to provide surveillance of manuscripts in use, forty-two (77.7%) maintain a staff member on duty at all times, and another four (7.4%) report that they usually do so. Thus, those who depend on staff in the search room to provide security are regular in their use of this method. The effect of this faithfulness is, however, reduced in some cases by the physical arrangement of the reading room. Of the seventy collections relying on staff monitoring in some form, eleven (15.7%) are handicapped by a physical layout which prevents simultaneous observation of all patrons. This must be recognized as a particularly serious situation for these repositories, and others with the same problem, because of the generally static quality of facilities and the expense, inconvenience, and bureaucratic entanglement involved in instituting any satisfactory changes in existing quarters.

The effectiveness of surveillance can be increased in one way by the exercise of some control over those permitted access to the collection. A registration procedure which includes provision of personal identification and references and an interview with a staff member has become a common precaution. The idea of screening that such a practice evokes has, however, met with disfavor in some circles, particularly as it suggests preferential treatment for those affiliated with the host institution or guaranteed special privileges under terms of an agreement with a donor.⁴ Manuscripts curator Robert L. Brubaker found in his 1964 survey of seventy-seven major manuscript collections that many libraries continue to prefer that their manuscripts be used only for serious research purposes, and hence are often reluctant to grant access to genealogists and undergraduates.⁵

As long as equal access prevails, however, it has continued to be acceptable to examine applicants'}
motives and abilities and to exclude those who have "demonstrated such carelessness or deliberate destructiveness as to endanger the safety of the material."6

Indeed, as archivist Theodore R. Schellenberg has observed, it is the duty of the repository to make "materials available only to the fullest extent consistent with a reasonable regard for their preservation, weighing the demands of present-day inquirers for their use against the demands of posterity for their preservation."7

Among the libraries surveyed, the interview is the most commonly employed screening device. As librarian Robert Rosenthal has noted, however, the procedure is of benefit to the patron as well as to the security-conscious staff. The interview not only constitutes the simplest way for a prospective user to present his credentials and explain his intentions, and in turn be informed of the regulations of the repository, but also can be used to make the reader aware of guides, services, and even manuscript materials unknown to him, and of others who are investigating the same or related topics.8 Interviews are required at least some of the time by sixty-four (74.4%) of the institutions surveyed; twenty-five of the fifty-four (46.2%) employing nonprofessionals permit these staff members to conduct examination and orientation sessions.

Forty-seven (54.6%) repositories demand some form of formal identification of those applying to use manuscript materials; in most cases, an item bearing a photograph of the bearer, such as a driver's license or student identification, is specified. While over half the repositories surveyed require interviews and presentation of materials of identification, only fourteen (16.2%) demand references of researchers. Of these, eleven use this requirement as more than a means of suggesting security consciousness; at these libraries patrons' references are frequently checked, particularly when application is made to use certain collections.
The determination that an individual's "preparation and purpose" are acceptable is, of course, only a part of insuring satisfactory behavior in the search room. Surveillance plays a large role in attaining this end. Perhaps equally important is the distribution of rules and regulations detailing restrictions and orienting patrons to the use of manuscript materials; in many instances, a prospective reader is required to sign a statement attesting to his examination and acceptance of such conditions. Further reinforcement in the form of posted signs summarizing such regulations and detailing the penalties for theft or mutilation of materials is also recommended.10

The value of such patron instruction is widely recognized by those in the survey group; fifty-one (59.3%) distribute to their researchers a list of rules and regulations governing use of their manuscript holdings. Of these, thirty-eighth (44.1%) also require a signed agreement to the same. It is the prevailing and widely advocated practice that such use contracts also include substantial personal information about the applicant, including his name, local and permanent addresses, educational background, institutional affiliation, research interests, purpose, and publication plans.11 Some institutions also require prospective readers to specify whether they intend only to examine materials, copy text or take notes, publish utilizing information so obtained, or publish the text of materials examined.

The most commonly suggested restrictions on use include checking of personal belongings with significant limitation of what may be carried into the search room and banning smoking, food, and ink. Thirty-two (37.2%) of those participating in this study indicated that they regularly store patrons' possessions outside of the reading room; another two libraries make such decisions on a case-by-case basis. Seventeen of the thirty-two repositories (53.1%) which limit what patrons may take into the search room permit only writing materials; thirteen specify that only paper and
pencil may be carried in, while three allow only "writing items." Four other libraries also permit researchers to retain their notes or mechanical aids.

Sixty-four of the responding repositories (74.4%) prohibit all smoking in their quarters; almost all of those which do permit the practice do not allow concurrent use of manuscripts. No respondee indicated that food is allowed in the collection. Thirty-seven repositories (43.0%) permit researchers to use ink, while one library reported that its policy on this matter varies. Typewriters are permitted by fifty libraries (58.1%); of the thirty which reported their prohibition, some noted the lack of suitable quarters for their use. Many collections also impose one additional regulation. Twenty-six (30.2%) of those surveyed indicated that patrons are assigned a place in the reading room, a procedure permitting staff to seat those using particularly rare or valuable materials, or those whose motives are suspect, in a highly visible location.

The maintenance of use records also contributes to protecting materials in patrons' hands. Twenty-nine (33.7%) of those surveyed produce access logs in some form. Fifty institutions (58.1%) require the patron to complete signed and dated charge slips before providing requested materials. These, if retained, constitute a virtually irrefutable record of an individual's use of materials at a given time, invaluable in determining possible culpability in the case of missing manuscripts.

One means of augmenting this procedure is the use of a daily register, where similar records are maintained under the name of the reader rather than the manuscript group. The lesser effectiveness of this generally more informal record is reflected in its less frequent use by those participating in this study. Of eighty-three repositories responding on this subject, forty-two (50.6%) use a daily register.
Staff supervision of photoduplication, and the maintenance of thorough records of this service, is another precaution which serves the same purpose as the charge slip and the daily register. Robert L. Bru-baker's 1964 study of major manuscript repositories in this country found an increasing liberalism in photoduplication policies; this trend is mirrored in the practices of those contacted in this study. Seventy-seven (92.7%) of the eighty-three institutions which provided information on duplicating procedures permit replication in some form. Of these seventy-seven, however, all but twelve (15.5%) allow researchers to do their own copying; two others require staff to do the duplicating in some cases.

Less information is available on the number which maintain records of these services. Of the fifty-four respondents to this query, twenty-six (48.1%) report keeping such statistics, either in the form of a log or through notations made on the patron's charge slips or registration form. Another three libraries keep notes on payments received or the number of items duplicated. Thus, only some 37 percent of those providing duplicating services can be definitely identified as producing records of their use.

Regulation of the number of manuscripts provided to the reader and of his access to unprocessed materials has also proven helpful in controlling theft and mutilation. Both those who have conducted studies of archival security and those who have had first-hand experience with manuscript theft recommend limiting the amount of manuscripts brought to a researcher at any one time. One box or a single volume is the ideal maximum suggested, although the role of staff constraints in implementing this policy is recognized. Seventy-two of the eighty-two institutions (87.8%) reporting their practice in this area impose some limitations, a number indicative of the broad recognition of the value of this elementary and easily introduced procedure. Some of the smallest and most lightly utilized repositories are quite strict about this practice.
On limiting access to unprocessed materials, however, those surveyed score somewhat lower marks. Of the seventy-nine which described their policies, forty-seven (59.4%) permit patrons use of these items. In most instances, where the bulk of the repository's collections has been processed, this is not a uniform practice; that is, it varies not only with the condition and organizational structure of a given manuscript group and with staff knowledge and availability to assist a scholar in its use, but also with such factors as the nature of the patron's need for access and the extent of the contemplated examination.

Perhaps the most effective means of limiting theft and damage is the inspection of materials when returned to the staff by the reader and the scrutiny of the researcher's belongings on his departure. Checking individual manuscripts in and out is, as the American Historical Association's Ad Hoc Committee noted in its 1951 report, both costly in time and a nuisance to the reader. Yet even as a cursory or random procedure, it can serve as a deterrent to the unscrupulous and the disturbed, and it can certainly be uniformly applied to particularly valuable items. In spite of the costliness of the practice in dollars and staff labor, sixty-six libraries (76.7%) report that they examine manuscripts to some degree, though frequently only upon their return. There is great variation in this practice, including an actual count of all items as returned, random checks of materials against inventory, and thorough inspection of certain marked folders with contents judged susceptible to theft.

While three-fourths of those surveyed thus make some attempt to control unauthorized removal of materials from the collection, only twenty-nine (33.7%) make any inspection of a researcher's personal possessions on departure. Perhaps those who examine their manuscripts feel that patron inspection represents an unnecessary duplication of effort. In many instances, however, such apparent neglect probably stems both from a reluctance to submit the innocent majority to such a
procedure and from the demands the practice, when combined with manuscript checking as well as other security procedures, makes on the staff.

Such security measures as surveillance, requiring of signed agreements to collection regulations, restrictions on possessions in the search room, use of charge slips, and examination of materials following use little profit the manuscripts repository if it permits special privileges to certain patrons. Such opportunities are extended to some researchers by thirty-nine (45.3%) of those surveyed; these include unsupervised use of manuscripts in closed studies, admittance to storage areas, issue of an extraordinary amount of manuscripts, after-hours access, and charge-out rights. Of these privileges, those that involve relaxation of surveillance during hours of operation are most commonly extended.

Some twenty libraries provide closed studies, seventeen allow some researchers bulk use of manuscripts, and fifteen permit certain patrons stack access. In addition, eleven allow after-hours entry and seven make provision for the circulation of manuscript materials. Three employ flexible systems, keying what is permitted to the special needs of the privileged patron. Multiple concessions are made by nineteen (48.7%) of the thirty-nine which make such arrangements. The most common pairing is permitting unsupervised use of manuscripts in closed studies and stack access.

Those surveyed are, however, somewhat more reluctant to permit the removal of manuscripts under their administration to other areas of the building or from the premises altogether. Carrying manuscripts from departmental jurisdiction is allowed by thirty-four repositories (39.5%). Twenty-one (24.4%) permit certain individuals, notably staff, faculty and school administrators, to take materials from the building. This latter practice is a direct violation of the Association of College and Research Libraries' Committee on
Manuscripts Collections recommendation, approved as ACRL policy in January 1974. It is disturbing that this number of repositories continue to entrust the supervision of such valuable materials to staff members untrained in their administration and frequently overburdened with the demands of their own departments, and alternately to the hands of those who will expose them to the risk of damage, if unintentional, in the outside world.

This lack of security consciousness in one important realm is not, however, indicative of a general absence of appreciation for the need for protective measures. Wide variation in practice and in the strength of the overall security program is evident among the repositories surveyed. Many of these institutions continue to be plagued by problems which are shared by others similarly concerned with the preservation of valuable materials. In fact, all but the most well-funded and staffed manuscript departments and special collections continue to suffer some weaknesses in their security programs. Yet many of the repositories participating in this study recognize these weaknesses and, as far as financial and administrative constraints permit, are implementing necessary improvements and modifications of existing procedures.

The analysis, on the part of those surveyed, of areas of continued weakness in their security procedures reflects the needs revealed in their reports of current practice. Only one of the eighty-six repositories participating in this project had at that time made any use of the Society of American Archivists' (SAA) security consultant service. Many others, however, by their expression of concern for their inadequacies, have demonstrated their awareness of the need for improvement. Only nine appear to have been motivated by theft during the last five years, and only six have employed the SAA's national registry of lost and stolen materials. Yet there is widespread evidence of an appreciation for the tenet that the first factor in security is prevention. At the same time, the
commitment to the service of scholarship remains strong, and balance, rather than the sacrifice of one end in the attainment of the other, is generally sought.

Foremost among those areas described as being in the greatest need of change was the number of staff members. This emphasis echoed the findings of library analyst Maurice F. Tauber, who has described organization and administration as one of the usual trouble spots in a library. Thirteen repositories (15.1%) suggested that their surveillance operations and the maintenance of adequate descriptions of their holdings have been severely handicapped by an insufficiency of personnel. In contrast, two others claimed the opposite problem, citing too many staff members as a security threat. Staff attitude, particularly as it affects the quality of surveillance, was cited as a problem area by another two repositories, while one reported the need for improved training of departmental personnel.

Inadequate surveillance procedures, a problem area closely connected to insufficient staff, are a cause for concern at ten libraries. That these two should be most frequently cited in this self-analysis of security weaknesses is not surprising. Thirty-one (36%) of the eighty-six departments function with only one full-time professional staff member, assisted by at most one full-time nonprofessional. And eighteen (20.9%) have only one full-time staff member. With the range of demands thus made on a limited number of personnel, the quality of surveillance together with that of other security procedures naturally suffers.

Other practices negatively affected by lack of staff are examination of manuscripts following their use and inspection of patrons' personal possessions prior to their departure. Sixty-six (76.7%) institutions report some scrutiny of manuscripts following use; for the most part, however, this is not the thorough examination that its effectiveness as a
security measure demands. Twenty-nine (33.7%) repositories inspect patrons' belongings for concealed materials. Thirty-two (37.2%) require the storage of some possessions outside the search room. Yet this is not widely recognized as an area in need of improvement, as only two (2.3%) repositories cite the development of more satisfactory storage for patrons' belongings as a security goal.

After problems related to staffing inadequacies, the physical arrangement of facilities is most frequently regarded as a pressing security matter. Seven (8.1%) respondents note that the separation of reading rooms from staff workrooms or storage areas, or alternately the barriers to surveillance presented by the collection layout, is a cause for concern. Three also report their need for improvement of storage arrangements, presently not sufficiently intruder-proof.

Physical protection as provided by fire and intruder detection is another focus for concern. For the most part, the seven libraries which express dissatisfaction with the fire-fighting systems in effect are anxious for their improvement rather than remedying any lack of basic protection. Such a goal is recognized as likely to be unattainable, however, since the modifications desired are expensive and often at variance with established library practices.

The provision of access control in the form of intruder alarms is a related area which also elicited various expressions of concern. Five repositories (5.8%) saw the absence of such alarms as a security problem, while three others (3.4%) reported a general uneasiness over the quality of their intruder protection. Other practices for regulating access to the collection also generated comment. Four respondents noted their apprehension about after-hours and hence unsupervised admission of maintenance and housekeeping personnel; they represent, however, only a small minority of the thirty-four (39.5%) which permit such entry. Two collections felt that their lock and key control
was inadequate, while two others voiced a general concern over regulation of entry to the department.

Collection control as it is provided through written records was the final area which was cited as a continuing security problem by those surveyed. Four repositories (4.6%) regarded their finding aids as inadequate for identifying holdings; another found similar fault with the state of its inventory, labeling this as the collection's most pressing security problem. Such concern for the quality of these tools mirrored the general findings of this study that fifty of the eighty-six respondents (58.1%) believe such resources are of value in identifying only some, if any, fugitive materials. Four institutions also identified record keeping as related to reader services as a problem area. Two expressed a need to produce photocopies to substitute for valuable items, a deficiency shared by twenty-nine (33.7%) of the repositories. The need to develop a registration and manuscripts use form was noted by two respondents.

For the most part, however, physical control of manuscript collections is well established among the survey group, although weaknesses remain in the areas of after-hours access regulations, keeping of vault use records, and stamping of manuscripts. It is with preservation as it relates to patron use of materials that these repositories sometimes fail to maintain adequate security. A narrow majority do interview prospective readers and require photographic identification of applicants, distribute a list of reading room rules and regulations to patrons, limit the amount of material presented for use at one time, prohibit use of ink while handling manuscripts, and require the completion of charge slips when requesting materials.

Yet only 37 percent of those surveyed impose any restrictions on patrons' possessions in the search room, and only some 33 percent examine these belongings on departure. Some 45 percent extend to readers a variety of scholar's privileges, and 59 percent permit
access to unprocessed materials. Nearly 85 percent of those which allow photocopying let the reader perform this procedure, and only 48 percent maintain any written record of the practice. Some 39 percent of the repositories participating in this study permit the use of materials in other areas of the building, and nearly one-fourth allow their removal from the premises.

Those surveyed are also grossly underprotected by insurance, with only eight (9.3%) holding "valued item" policies that attempt to reflect current market values. And only seven (8.1%) report any bonding of employees.

There are thus still many changes to be made before manuscript materials housed in academic libraries can be said to be secure from both human malfeasance and the elements. The concern for improvement voiced both in the literature and in the self-analysis of those participating in this study does interject a brighter note into the often gloomy statistics. Five libraries indicated that new buildings were being developed; in each instance, respondents reported that the recognition of security needs contributed substantially to the planning of special collection facilities.

In the end, it must be remembered that those who administer manuscript collections are striving not only to protect the materials entrusted to their care but also to extend the maximum public service possible without jeopardizing such preservation efforts. And, as noted archivist James B. Rhoads has remarked, even in the context of recommending procedures to thwart theft, there is no foolproof combination of deterrents in any situation.17 Certainly individual variations in size and value of holdings, and in volume of use, make differences in security procedures both understandable and acceptable. What archivists and curators can and should strive for is the minimal standard of patron screening, surveillance, and record keeping that permits the administrator to control and preserve his holdings.
NOTES


10Edmund Berkeley, Jr., "Archival Security. A Personal and Circumstantial View," Georgia Archive 4,


The Winthrop College Archives has received a grant that will enable it to assemble two photographic exhibits for the traveling exhibition of the South Carolina Museum Commission. The grant from the South Carolina Committee for the Humanities will provide partial funding for the $3,700 project. Both exhibits will be assembled from holdings in the college's Archives and Special Collections. One exhibit, "John R. Schorb: Portraits of York County," will show people of York County at the turn of the century as seen through the eyes and camera of one of the first commercial photographers in the United States. In 1979 the photographic works of Schorb, who died in 1908 at the age of ninety, were donated to the college. The collection includes rare nineteenth-century photographs, including glass plate negatives, tintypes, and daguerreotypes. The second exhibit will highlight, through the use of photographs, the early history of Winthrop College, founded in 1886. Project director and Winthrop archivist Ron Chepsiuk said he expects the exhibits to be added to the traveling exhibition program after November 1. Before joining the traveling program, the exhibits will be on display in the Winthrop Gallery in the Rutledge Building on the Winthrop College campus.

Legislation has been introduced into the U.S. House of Representatives to establish a National Afro-American History and Culture Commission. The commission, composed of nationally-representative Americans distinguished in the fields of art, history, and the sciences, is to establish a National Center of Afro-American History and Culture at Wilberforce, Ohio. The center would be a repository of Afro-American artifacts, a research institute, and exhibit site for visitors as
well as serious students. The center is to develop programs and exhibits that express major aspects of Afro-American history and culture which include educational, scientific, and religious accomplishments. The center is also to develop programs that will enhance and strengthen the network of those existing museums and collections across the country which are concerned with the cultural and historic contributions of black Americans.

The American Association for State and Local History (AASLH) will be offering several different educational opportunities of interest over the next several months.

The Charleston Museum will host a workshop on "Interpreting the Humanities Through Museum Exhibits" on December 7-10, 1980. This workshop is one of eight regional programs on how to conceptualize, plan, and design interpretive exhibits. It offers participants a unique educational opportunity to both study and practice interpretation and exhibit design under the guidance of acknowledged experts. Speakers will demonstrate how to conduct historical research, define interpretive objectives, communicate human values through artifacts, and create effective and economical exhibit designs. Participants will engage in discussions, individual consultations, and hands-on activities. Applicants must demonstrate a need for training in interpretive exhibit design and a willingness to prepare an exhibit for evaluation following the workshop. During the workshop two of the speakers, a regional historian skilled in interpreting the humanities and a regional museum advisor skilled in exhibit design, will consult individually with participants concerning their post-workshop projects. After participants return home, these two experts will continue to be available for consultation by mail or telephone. To conclude the training process, each participant, upon finishing his
or her exhibit, will submit a description for review by the regional historian and special AASLH exhibit consultant Arminta Neal, author of Exhibits for the Small Museum.

"Re-examining America's Past" will be the theme of another seminar sponsored by AASLH, January 25-30, 1981. The Historic Pensacola Preservation Board will be the site of the meeting, which will focus on the new social history and its implications for interpretive programs. Topics will include the family and domestic life, agriculture and rural life, towns and cities, race and ethnicity, women, and work and workers.

AASLH has also announced the first two courses in its new Independent Study Program: "Education: School Programs and the Museum" and "Documents: Interpretation and Exhibition." Developed with support from the National Endowment for the Humanities, these correspondence courses offer in-depth training for historical agency personnel—paid and volunteer—who cannot get the help they need from short-term seminars and workshops and cannot afford time and money for degree-oriented college and university courses. Written by recognized national authorities, the courses are designed to allow students to proceed at their own pace. Course materials include a loose-leaf study guide, books and artifacts for supplementary reading, one or more slide/tape programs, and tools and supplies needed to complete lesson assignments. When the courses are completed, these items become valuable additions to individual or institutional reference libraries. The courses are administered by mail from AASLH headquarters, where trained instructors review and comment on completed assignments and help students tailor course activities to their individual needs and institutional settings. Anyone may enroll who is affiliated with a historical agency or similar cultural organization or has permission to use the facilities of such an institution in carrying out course assignments. By designating one person as "correspondent" with
AASLH, students may also enroll in groups of up to four for a single fee. Institutions can take advantage of this opportunity to train several staff members at once. For information on all programs, write to: AASLH, 1400 Eighth Avenue, South, Nashville, TN 37203.

During the last three years, the King Library and Archives in Atlanta has been closed to allow the staff to devote its full attention to processing and describing the collection. Under a major grant from the National Endowment for the Humanities, the staff has prepared descriptive inventories for six of the major civil rights collections: Southern Christian Leadership Conference, Student Non-violent Coordinating Committee, Episcopal Society for Cultural and Racial Unity, Delta Ministry, United States National Student Association, and the Community Council of Coordinating Organizations. Work is in progress on the papers of Dr. Martin Luther King, Jr., the records of the Congress of Racial Equality, and the National Lawyers Guild records. Freedom Hall, a living memorial to the life and work of Dr. Martin Luther King, Jr., which is now under construction in Atlanta, will provide a new home for the collection. After moving into its new quarters in the Freedom Hall complex in the early fall of 1981, the King Library and Archives will reopen its doors to the scholarly community to allow research into the priceless collections which document the history of the American civil rights movement. Additional collections will be opened as they are processed. Inquiries may be addressed to the Archivist, Martin Luther King, Jr., Center for Social Change, 503 Auburn Avenue, Atlanta, GA 30312.
The National Historical Publications and Records Commission (NHPRC), in its annual report issued recently, provides an extensive assessment of NHPRC historical records grant projects completed during the fiscal year 1979. In this expanded report, which marks the fifth anniversary of the records program, the commission notes an increased professionalism in records programs and in sound program development at many institutions receiving NHPRC grants. The commission also points to improvements in planning and proposal review by state historical records advisory boards across the nation. By the end of the fiscal year, over forty state advisory boards had submitted statements of priorities and needs within their states. Such evaluations were the first ever attempted in almost every state, and they provided the basis for both discussion and action within the states and for broader analysis by the commission from a national perspective. Among the representative project activities discussed at length in the report are state archival processing projects, and projects involving historical photographs. Within these categories the report discusses the revitalization of existing programs, the establishment of new programs, the preservation of endangered records and images, tests of new techniques and methods, and improvements in access to different types of records. Overall, the report is evidence of the impact of the commission's 1978 "Statement of National Needs and Preferred Approaches for Historical Records." The records program assessment concluded with a complete list of the eighty-five records grants made during the 1979 fiscal year. The thirty-eight page Annual Report also details fiscal year activities of the publications program, NHPRC educational services, and the National Inventory of Historical Sources. Copies of the report are available free of charge from the National Historical Publications and Records Commission, National Archives and Records Service, Washington, DC 20408.
A new historical agency, the American Patriot Archives Society, has been founded in Biloxi, Mississippi. The society seeks historical materials from all nonprofit organizations and groups, with a particular interest in the records of civic clubs, social orders, fraternal groups, and veterans organizations. The scope of the society's collecting interest is national. For more information, contact the American Patriot Archives Society, Inc., P. O. Box 1036, Biloxi, MS 39533.

The National Endowment for the Humanities recently awarded to the Mid-South Humanities Project (MSHP) at Middle Tennessee State University in Murfreesboro, Tennessee, a grant which provides funding for the continuation of the regional education program which is directed towards promoting the use of local heritage resources in public schools. Begun in 1978, the project has established specially trained demonstration center teams of teacher/consultants in the states of the Southeast. A major objective of the MSHP in 1980-1982 will be the expansion of the state demonstration teams through teacher-training workshops which will feature the original teacher/consultants, project staff, and others qualified to speak on the use of local heritage resources in the classroom. Beginning in the spring of 1981 and continuing for eighteen months, two-day workshops will be scheduled in Alabama, Georgia, Indiana, Louisiana, Kentucky, Mississippi, North Carolina, South Carolina, and Tennessee. Application will be open to curriculum coordinators, supervisors, administrators, historical society representatives, museum education coordinators, librarians, and others who work with teachers and students. For more information contact: Mid-South Humanities Project, P. O. Box 23, Middle Tennessee State University, Murfreesboro, TN 37123.
A fourteenth century illustrated Persian manuscript, described as the first general history of the world, has been sold in London for the equivalent of $2.02 million, said to be a world auction record for any manuscript. The successful bid was made by a Geneva agent on behalf of an anonymous buyer, according to Sotheby's, the auction house which handled the sale. The manuscript, owned by the Royal Asiatic Society of Great Britain and Ireland, is dated 714 according to the Hegira calendar of the Moslem religion, or A.D. 1314. The text was written in Arabic by Rashid al-Din on order of the Mongol ruler Uljaytu, the great-great grandson of Ghengis Khan. Its sixty-three leaves are illustrated with one hundred miniature paintings. The text outlines the histories of the prophet Mohammed, of China and its genealogies of emperors, of India and its sultans, and of the Jews, based on the Old Testament. The author lived in Rashidiya, near the Persian city of Tabriz, which at that time was a rich cultural and cosmopolitan city.

L. Ross Morrell has been appointed director of the Florida Division of Archives, History and Records Management, by Secretary of State George Firestone. Morrell succeeds W. Robert Williams, who headed the division since its formation in 1969.

The Museum Assessment Program (MAP) is a general consultation service designed and operated by the American Association of Museums for the benefit of all museums interested in maintaining or improving the quality of their operations. MAP offers: a resource to review and evaluate overall programs; a diagnosis of strengths and weaknesses; a survey of recommendations for long-range planning; suggestions for technical assistance provided by museum service.
organizations; and a report to be used in securing financial support from private and public sources. Museum assessment is a program of practical, not abstract, assistance. A MAP survey is not meant to rank or judge a museum's performance. It is intended as a self-motivated review of progress, an encouragement for long-range planning, and an offer of help to museums which want to upgrade the quality of their achievement through the application of professional standards. MAP opportunities are open to any non-profit museum regardless of discipline, size, or financial resources. For more information write to: Museum Assessment Program Coordinator, American Association of Museums, 1055 Thomas Jefferson St., NW, Washington, DC 20007.
BOOK REVIEWS

The book review section of GEORGIA ARCHIVE seeks to keep readers informed of recent publications of interest to the archival profession. This includes works pertaining to (1) archives and archival administration; (2) libraries and library administration; (3) copyright law, replevin, and libel; (4) automation, information retrieval, and indexing; (5) historical collections and published editions of manuscript collections; (6) histories of institutions, agencies, and persons relevant to archives and archival administration; (7) micrographics; (8) audiovisual materials and equipment; and (9) conservation of historical objects. As broad as this list is, it does not include all possibilities. We therefore encourage our readers to bring to our attention publications that, in their view, warrant review in GEORGIA ARCHIVE. In addition we ask that those institutions which publish works appropriate for review in the journal send copies to the book review editor, Richard M. Kesner, Archives of Appalachia, The Sherrod Library, East Tennessee State University, Johnson City, TN 37601. In selecting reviewers, the Editor will make every effort to give SGA members an opportunity to write for the journal. Anyone interested in reviewing for GEORGIA ARCHIVE is encouraged to contact the Editor so that his or her name may be placed in the reviewer file. Forms for the file will be available at both the Society of American Archivists' and Society of Georgia Archivists' annual meeting.

One of the great voids in local records work has been largely filled through the publication of this book on local government records. In his preface, H. G. Jones expresses regret in not finding models to which those wishing to establish programs could turn. Now the challenge is for state archivists and records managers to form partnerships with local government officials to create these models, based on the parameters supplied by Dr. Jones.

Divided into parts, "Management and Preservation" which is directed towards local public officials, and "Use" which is primarily for researchers, the book is advocative rather than technical. In reviewing the history of records management, for example, a strong case is made for adoption of systematic records disposition schedules, which can result in major public benefits, including substantial cost savings. These savings are observable in less dead storage space, less duplication of effort, and easier document retrieval.

Use of this book, especially with the advice and assistance of state archives and records management personnel, will guide any nonmetropolitan county or small municipal government through the details of establishing a records management program. Included are sample forms, instructions on handling a "one-time" disposal to clear years of obsolete and valueless records, what to do with masses of records, options to building, flow charts, and much practical advice. Large metropolitan areas will need the assistance of full-time, experienced records professionals, in addition to the help which should be available from the state organization.
Micrographics have become prevalent in the management of local government records through the expanding use of computers. They deserve and have received a section in this book. The advantages and the pitfalls of a microfilm program are discussed with authority, based on Dr. Jones's experience in developing and implementing the first state-sponsored local records microfilm program in the United States.

Part II, which covers the research use of the records, gives a brief history of local government development, stressing the importance of the county court as the administrative body in areas other than New England, which used the town as its central governing administrative unit. The kinds of records, the information which one can expect to find within them, and the uses to which these records can be put are outlined for professional scholars, amateur historians, and genealogists. An exasperated archivist, whose patience has been strained by a steady flow of researcher-tourists for an entire summer, may be tempted to require that this section be read prior to requesting the heavy volumes through which the researchers hope to further their study.

The appendices, "Local Records Services of State Agencies" and "Selected Sources of Information on Archives and Records Management," will be helpful to local public officials, especially the first. It is probable that the latter appendix will be more useful to state agency personnel who work with local governments than to the targeted audience.

This book is authoritative and succinct, has clearly identified subsections, and is easily read. But in order to have any impact on the local records scene, it must be recommended strongly by national organizations in touch with county and state records agencies, local historians and genealogists, and citizens who have some influence upon those elected officials whose major concerns are the day-to-day business of their offices. It is doubtful that these officials
will take the two hours necessary to read "their" part of the book unless strong recommendations and endorsements are given by influential agencies and/or people.

Cleo A. Hughes


This bibliography is a result of the continuing efforts of the Society of American Archivists (SAA) Task Force on Automated Records and Techniques to provide "education and professional activities directed at bringing the archivist in closer touch with the world of automation." During the past few years, the Task Force has succeeded in raising the consciousness of the profession in regard to the management of machine readable records and considerations of automated control over and access to archival holdings. Richard Kesner, with the assistance of many colleagues on the Task Force, compiled this bibliography to "serve as a starting point, directing beginners to basic texts and alerting the more experienced to recent advances." There should be no doubt about the effect that computer technology has had and will continue to have on archives administration, and this timely and valuable bibliography will ease the archivist's transition into the cybernetic age.

The bibliography contains 293 entries, arranged alphabetically by author's name, which describe articles, periodicals, and monographs published between 1957 and 1979, plus one entry for 1980: Thomas Hickerson's Archives and Manuscripts: Automation, the most recent volume in the SAA basic manual series. (Actually, this manual will not be available until early
1981. The SAA publication of the Proceedings of A Conference on Archival Management of Machine-Readable Records, Held At the Bentley Library, the University of Michigan, February, 1979, which Kesner lists with a publication date of 1979, will be available around September 1980.) Each entry is concisely and judiciously annotated to provide the reader with a summary of the item's content and occasionally a note on the perspective or conclusions of an author. Several typographical errors aside, the entries are accurate and well-chosen.

Although most of the entries reflect archival applications, Kesner has wisely drawn a considerable number (approximately 25%) of references from closely related records management and library administration sources. There is also an excellent selection of introductory material on information management and automation in general, which provides the necessary background for understanding archival applications in a larger context. Forty-two of the entries describe examples of computer-assisted quantitative research. This is an inordinately detailed selection, in this reviewer's opinion, because most historical and other social science journals (especially Historical Methods Newsletter) regularly contain articles based on computer-generated data.

The bibliography includes three separate indexes: author name, journal title, and subject. In the absence of a topical organization to the volume, the subject index facilitates use of the bibliography. However, I found the index inconsistent and ultimately less desirable than a topical organization of the entries. Not all entries indexed under "computer output microfilm (COM)," for example, appear under "micrographics" even though the latter represents a more inclusive category. Names of software systems and institutional users are individually indexed, but Cornell University—an early SPINDEX user—does not appear. The indexed categories containing the largest numbers of entry references—automation and archives (general);
machine-readable archives; information indexing and retrieval; quantitative historical research; records management and the computer; micrographics; and software design—correspond generally with the topical categories used by Meyer Fishbein in a bibliography published in the American Archivist in 1975 ("ADP and Archives: Selected Publications on Automatic Data Processing," 38, no. 1 [January 1975]). It would be easier to peruse and compare topically arranged entries than to refer back and forth between index and text.

Kesner's compilation contains a score of entries describing bibliographies, including Fishbein's. These and the additional footnotes and bibliographies contained in the listed publications provide a comprehensive survey of information available on archives and automation. As Kesner states in his preface, however, this publication will gradually become outdated after it is issued. I have already begun annotating my copy and would suggest to readers my first two additions: Alice Robbin, "Understanding the Machine Readable Numeric Record: Archival Challenges with Some Comments on Appraisal Guidelines," The Midwestern Archivist 4 (1979): 5-23; and SUN, a newsletter of the SPINDEX Users Network.

New York State Archives

Thomas Mills


Most of the existing literature dealing with historic preservation discusses techniques for saving the built environment. Few preservationists, however, have explored the impact of subtle differences in context which may affect the successful implementation of these
techniques. Here authors Ziegler and Kidney study the special problems inherent in applying established preservation techniques to a specific context: small towns and rural areas.

Preservation in village and rural settings appears more difficult than in cities. Fewer sources of capital exist in small towns. Perhaps even more important are the different attitudes toward property to be found in these areas. In rural America, restrictions on the use of private property are not favorably received. To many of these people, the formal organizational framework so common in successful urban preservation programs seems artificial and unnecessary. Ziegler and Kidney set out to show how preservation has worked in a small town setting.

The book follows a format established in earlier works by the same authors: a general discussion of appropriate techniques followed by a series of case studies which illustrate how such techniques may be put into practice. The delineation of preservation techniques is excellent, concise and yet detailed enough to give the reader a workable command of most of the established preservation tools. As a first step, the authors recommend the formulation of concrete goals and the creation of an organization to pursue these goals. A detailed survey of historic properties within the community may also prove necessary, including nomination to the National Register where appropriate. Ziegler and Kidney next point out that a publicity campaign will tend to infuse the community with preservation-oriented attitudes. A number of legal devices, including covenants, facade and scenic easements, historic district zoning, and tax incentives, may also serve to encourage preservation activities. Various financial matters, such as fund drives, grant work, and fiscal management, are discussed in the context of actually carrying out organizational work and physical restoration. The authors integrate all of these tools into a master plan that addresses the development of small town preservation programs.
The six case studies describe briefly the experiences of preservationists in trying to save the historic character of six small towns in different areas of the United States. Essex, Connecticut, the first example, provides a frightening indication of what can happen to a pleasant small town environment when no action is taken, or taken too late. The remaining examples are more positive. Of particular value is the presentation of the preservation work in each town as an ongoing process rather than a single goal finally achieved once and for all.

At the end of the book, two appendices provide information on national preservation organizations and publications, and the addresses of all state historic preservation officers. There is also an excellent annotated bibliography covering all aspects of the preservation field.

This is a good, practical book for any preservationist working (or planning to work) in a small town or rural area. Perhaps the only serious objection which one might raise—not just against this book alone, but also against the preservation literature in general—lies in the underlying assumption that the attitudes of small town and rural residents, especially with respect to property rights, are somehow inadequate and backward. Preservationists, in their zeal to save the built environment, ought to be very careful not to destroy through excessive regulation the sense of freedom and independence prized by most rural people.

Jonesboro Civic Trust

Edward A. Johnson

This interesting guide describes the holdings of the East Carolina Manuscript Collection, East Carolina University, relating to American military history. Basically the plan of arrangement is by war, in chronological order from the Revolution to the Vietnam conflict. Since some of the collections of papers overlap these lines of demarcation, they are broken down into segments, each of which is described under the heading of the appropriate war. This arrangement might be an awkward one, but the compiler has provided ample cross references and a very thorough name index, which help the user avoid any difficulties.

Most of the collections are original manuscript and other hard copy materials, but others are microfilm copies of original documents loaned to the institution. Donors of each collection are identified, as are each acquisition's size and span dates. Oral history interviews are included; the length of the recording or number of pages in the transcript is provided.

Individuals represented range from the distinguished (several generals and flag officers) to the very humble (common soldiers, army nurses, and Red Cross workers). As is to be expected, many of them were natives or long-time residents of North Carolina. One does not normally associate North Carolina with the sea services, but it appears that a surprising number of North Carolinians have made a name for themselves in the Navy or Marine Corps, judging by the personal papers they have left to the East Carolina Manuscript Collection.

The Guide indicates that holdings concerned with the earlier wars are relatively thin; three pages suffice to deal with everything before the Civil War. The
Civil War itself takes twenty-eight pages to cover, and the period from 1898 to the present is dealt with in the remaining thirty-eight pages. Civil War materials are not limited to documentation from the southern side but include a surprisingly large number of private papers of Union officers and soldiers as well.

Noteworthy materials relating to World War II are the papers of Lt. Gen. Frank A. Armstrong, Jr., USAF, on whose service with the Eighth Air Force the novel and motion picture Twelve O’Clock High were based; Maj. (later Brig. Gen.) Paul A. Putnam, who commanded the Marine Corps fighter squadron that defended Wake Island in 1941; and papers of Maj. Gen. Ira T. Wyche, who led the Seventy-ninth Division in the 1944-45 campaigns in France and Germany. Several collections include papers of officers who served aboard the U.S. North Carolina during World War II. One collection, deposited by the chairman of the U.S.S. North Carolina Battleship Commission, consists of oral interviews with former crew members of the North Carolina.

Unusual items are the papers of a Greenville, North Carolina, chapter of the United Daughters of the Confederacy and of an American Legion post in Pitt County, North Carolina. Another novelty is the correspondence and notes of Professor William N. Still, Jr., author of Confederate Shipbuilding and Iron Afloat: The Story of the Confederate Armorclads.

As the product of only one decade of active solicitation, the military holdings of the East Carolina Manuscript Collection have already achieved respectable size and high quality. If they continue to grow at this pace, they are likely to become an outstanding source for military historical research. This guide is a most creditable finding aid and will be of interest to many military historians, particularly those specializing in American participation in World War II.

Military Archives Division
Robert W. Krauskopf
National Archives and Records Service
GUIDE TO THE AMERICAN LIBRARY ASSOCIATION ARCHIVES.

In 1973 the American Library Association (ALA) contracted with the University of Illinois "to have its noncurrent records of long-term value arranged, described, and housed at the University Archives." This guide is the fruition of years of labor by the archives staff to gain intellectual control over what was in 1973 a collection of more than five hundred cubic feet of documents. While the publication of this guide will no doubt be heralded as an important step in making records of the history of librarianship more accessible to researchers, the format chosen for publication and the system used to produce the guide are also noteworthy and deserve serious comment.

The guide itself consists of a pamphlet and two microfiche. The text provides a brief background of the archives and the PARADIGM system, as well as a selective bibliography of the history of ALA. The microfiche contain a list of record series in series number order with volume, date, and descriptor indications as well as a subject index of over 2,500 descriptors which refer to record series numbers. The microfiche appear to have been produced by filming computer printouts. As a result, the lines of the paper at times interfere with the legibility of the material. (It is unclear, for example, whether a particular listing reads .3 cubic feet or 3 cubic feet.) The real issue, of course, is whether the microformat will impede the use of the collection or decrease its accessibility. Mr. Brichford's hope that it will not is well-founded, given the anticipated audience and the high quality of the easily reproduced, negative microfiche.

However, those who expect to encounter a detailed finding aid in this guide will be disappointed. This limitation arises from the PARADIGM system used to produce the guide. The function of PARADIGM is "to
provide administrative control over archival holdings and subject access to finding aids," not, as Brichford points out, to "provide subject control at the box or folder level." The subject index of this guide therefore provides only very general access to the records. The subject index does include personal names, names of committees, and such curious entries as "Prejudices and Antipathies." However, a very serious vocabulary control problem limits the effectiveness of the index. For example, citations are listed under the rubric "Book Reviews," but no index structure exists to point the user to ALA's major book reviewing publications. Some entries appear only under one heading. More alarmingly, the record series listed under the descriptors "Library Schools, Foreign" and "Japanese Library School" are mutually exclusive. Examples like this abound throughout the subject index.

To make the subject index effective, more control is needed over the descriptors. While the computer makes natural language vocabulary usable for indexing, that vocabulary must be coordinated once all the descriptors have been assigned. Thus the subject index to this guide seems more a list of random words clustered around their places in the alphabet than an efficient, useful index. Although the record series list helps to order information around ALA's organizational structure, there is still no substitute for a post-coordinated index that gathers like subjects together.

Finally, some researchers may also be disappointed by the paucity of personal papers in this collection. Quite often personal papers amount to only one or two file folders that may cover many years of activity in ALA. Nevertheless, the publication and organizational records that make up the bulk of the collection remain a largely untapped source, and this guide will suggest some possible avenues of research.

Government Documents
Benjamin F. Shearer
Law Librarian
East Tennessee State University
ADMINISTRATION: A BIBLIOGRAPHY ON HISTORICAL ORGANIZATION PRACTICES. Edited by Frederick L. Rath, Jr., and Merrilyn Rogers O'Connell. (Nashville: American Association for State and Local History, 1980. Pp. vii, 227. Appendix, index. $11.95 AASLH members/ $14.95 others.) This volume is the fifth in a series of excellent annotated bibliographies prepared by AASLH pertaining to the management and preservation of historical materials. Drawing upon both monographic and periodical sources published since 1945, the editors have brought together over 2,400 citations. The bibliography is arranged by subject headings, including historical organization, resources for administration, financial management, fund raising, and buildings. While most of these recommended readings are directed to the needs of historical societies and museums, many of them touch upon areas of vital concern to archivists. In addition, section thirteen, entitled "Library and Archival Administration," deals with concerns particularly germane to archival administrators. Though this section does not include many surprises, it does bring together a useful list of readings organized by subject for the reader's convenience. The volume is well indexed and ought to serve as an excellent reference tool for many years to come.

A CONSERVATION BIBLIOGRAPHY FOR LIBRARIANS, ARCHIVISTS AND ADMINISTRATORS. Edited by Carolyn Clark Morrow and Steven B. Schoenly. (Troy, N.Y.: Whitston Publishing Company, 1979. Pp. viii, 271. Index. $18.50.) The editors have divided their volume into two sections. The first section groups readings by subject categories, such as "Environmental Protection" or "Conservation Techniques," and then in reverse chronological order under descriptive headings. Each citation is annotated and all of the listings draw from conservation literature published between 1966 and
The second section of the book provides an expanded version of the list in section one, without annotations, and arranged alphabetically by author. A subject index at the end of the volume directs the reader to specific citations in this latter section. While this work does include many useful references, one is obliged to ask to what extent it supersedes George Cunha's two-volume set. With the possible exception of a few publications which came out following Cunha's work, there is little that is new or interesting in this volume. Those seeking a background in archival conservation are well served by Cunha and the various publications of the Library of Congress. For more recent developments, the journal Technology and Conservation, available without charge to professionals, is a helpful tool.

INDEX TO GEORGIA POOR-SCHOOL AND ACADEMY RECORDS, 1826-1850. Edited by Marilyn L. Adams. (Atlanta: R. J. Taylor, Jr., Foundation, 1980. Pp. iv, 68. Index, appendix. Paper. $6.) This volume indexes the pre-1851 material contained in a group of poor (public) school and academy records which were submitted to the state of Georgia by local officials as a basis for allocating school funds. After passing through various hands, the records now reside in the custody of the state and have been microfilmed (Georgia Department of Archives and History #9-518 and #9-519) after being arranged alphabetically by county and then by type of school. Within these groups the records were arranged chronologically and then by district. The published index, which provides access to the microfilm version of the collection, is extremely detailed and very easy to read. It will no doubt serve for some time as the definitive finding aid to this interesting manuscript collection.
THE WEST TENNESSEE HISTORICAL SOCIETY: GUIDE TO
ARCHIVES AND COLLECTIONS. Edited by Eleanor McKay.
Pp. 74. Index. Paper. $4.95.) While the West
Tennessee Historical Society traces its origins to
1857, its official relationship with Memphis State's
Mississippi Valley Collection stems from an agreement
reached in 1974. This guide briefly describes the
materials pertaining to the history and development of
western Tennessee which came to Memphis State's
archives as a result of this arrangement. The volume
is arranged by object type, including archives, books,
photographs, maps, artifacts, sheet music, and tape
recordings. Some individual items, such as photo­
graphs, are discussed in detail while other portions of
the collection, such as manuscript materials, are de­
scribed in summary. A brief but helpful index follows
the text.

THE ROBERT R. CHURCH FAMILY OF MEMPHIS: GUIDE TO
THE PAPERS WITH SELECTED FACSIMILES OF DOCUMENTS AND
PHOTOGRAPHS. Edited by Pamela Palmer. (Memphis:
Memphis State University, 1979. Pp. 87. Index,
illustrations. Paper. $8.95.) This detailed guide to
the papers of the Robert R. Church family describes the
collection down to the item level. It is thoroughly
indexed and nicely packaged, including several fine
reproductions of documents and photographs. At first
examination, one would like to conclude that all archi­
val collections ought to be treated with such meticu­
lous handling. However, after more deliberate examina­
tion, one wonders why this particular collection was
selected for item level description. As impressive as
the final product appears, would it not have been more
useful to devote institutional resources towards a num­
ber of more modestly structured finding aids or guides?

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ANNUAL REPORT OF THE NORTHWESTERN UNIVERSITY ARCHIVIST. By Patrick M. Quinn. (Evanston, Ill.: Northwestern University Library, 1979. Pp. 19. Nine appendices. Paper. Free on request.) While many colleges and universities require annual reports of their archivists, few reports so effectively combine a well-written introduction with a series of highly informative appendices. The author explains the various services provided by his department with clarity. The appendices include detailed information pertaining to acquisitions, processing activities, archives holdings, collection backlogs, user services, and department practices. As an annual report, it serves as a helpful model for others responsible for the preparation of similar statements concerning archival operations and administrative activities in a university setting.

ANNUAL REPORT OF THE MISSISSIPPI DEPARTMENT OF ARCHIVES AND HISTORY. By Elbert R. Hilliard. (Jackson, Miss.: State of Mississippi, 1979. Pp. 66. Index. Paper. Free on request.) This brief volume provides a thorough introduction to Mississippi's Department of Archives and History. After a description of departmental objectives and personnel, the author discusses each of the department's administrative units, such as the state museum, the state historical society, and the state archives and library. Under the latter heading, the reader will find a listing of recent acquisitions from both state agencies and private persons.

SOUTH CAROLINA HISTORICAL SOCIETY MANUSCRIPT GUIDE. Edited by David Molke-Hansen and Sallie Doscher. (Charleston: South Carolina Historical Society, 1979. Pp. 154. Index. Paper. $5.) This guide describes the collections, encompassing over 1,200 linear feet of manuscript materials, held by the South Carolina Historical Society. Well over half of these collections predate the Civil War. These older collections receive greater attention than the more modern materials.
mentioned in the guide. The index includes subject headings and place names as well as the names of prominent South Carolinians mentioned in the collections.

THE GENEALOGISTS' GUIDE TO CHARLESTON COUNTY, SOUTH CAROLINA. By Richard N. Cotè. (Ladson, S.C.: Genealogical Publications, 1978. Pp. 44. $10.) This brief volume serves as a guide to both local and national sources of information for those engaged in genealogical research pertaining to the residents of Charleston County, South Carolina. It is an example of the type of tool other archivists and librarians might wish to produce for their own patrons.
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