Teaching Advocacy

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Abstract: This essay discusses the use and value of case studies in teaching students about archival advocacy. It also considers why and how educators need to rethink how advocacy fits into the curriculum and how students can produce case studies.

Introduction

Few individuals starting a graduate program in archival studies understand the reality of what their careers may involve. Many are attracted to these programs because of interests in history, collecting, and old stuff. They are not usually in these classrooms because they desire to be administrators, lobbyists, advocates, or publicists – and, yet, these functions are necessary if they are to be successful as archivists. It is the difficult job of the archival educator to introduce the students to these tasks without killing their enthusiasm for the field, no matter how romanticized it may be at the beginning, and driving them away before they get started. Educators need to equip their students with the idea of some basic approaches to advocacy by getting them to understand the challenges they will face in building support for and understanding of their programs.[1]

More than a decade ago, I wrote an essay on advocacy in North American graduate archives programs. [2] My thesis was simple: every aspect of educating future archivists concerns advocacy. After briefly reviewing the evolution of archival education and what these programs were then emphasizing in their courses, I argued that you cannot teach in this area without a focus on advocacy, without grappling with how the archivist often needs to be a publicist, lobbyist, or advocate for archival work in essentially every basic archival function. I believed

then, and still hold to this faith, that we must ground our students in real world challenges and problems, especially when it requires them to be good administrators and advocates for the values of archival work in their institutions and society at large.

Archival educators can easily fall into the trap of teaching more conceptually than practically about responsibilities such as advocacy. The reason is that these educators, in their one or two year programs, are covering a lot of ground, and sometimes they are squeezing considerable material into a small number of courses that does not allow as much depth as they would like. Indeed, there are few archival courses devoted to topics such as advocacy in any of the major graduate programs. Courses tend to be structured around the traditional basic archival functions such as representation, access and reference, and appraisal or on recording media such as still and moving images or electronic records. What might be seen as connected to advocacy resides in courses on topics such as legal issues or public policy.[3] As a result, it is possible for many graduates to enter the field unprepared for the real challenges they face in winning support for their archival programs that translates into the necessary staff, financial, and facilities resources that they need.

Lessons for the Students from These Case Studies

Fortunately, especially in the past decade, we have seen a growing number of books published featuring case studies on all aspects of archival work. For archival educators these case studies are raw materials for teaching and for grounding students in real world experiences. While it is important for the faculty to immerse students into the knowledge in the field, understanding the basic principles for

working with records and information systems and also being aware of the theoretical notions that provide insights into the fundamental nature of archives and records, case studies such as represented in this volume also can be drawn on to show how such knowledge has been constructed or to test out the viability of this knowledge.

So, what lessons can be teased from these cases that will be useful for grounding archival students into the reality of advocacy? What follows is a small number of lessons that seemed obvious from the cases in these volumes (others may see different lessons, and that is part of the beauty of the case study approach).

Students need to learn that the positions that they may be about to fill are the result of someone's past advocacy. J. M. Deken, discussing the advocacy to build and support the SLAC National Accelerator Laboratory archives, captures the fact that sometimes the turning point for an institutional archives is when the incumbent archivist resigns and leaves behind a useful assessment of the issues needing to be faced by the archives. New positions are created all the time because of the work done by someone to make the case for why they are necessary. Long-established positions recently vacated are also the result of deliberate advocacy. Since archives and archivists seem to have been around for such a long time, it is easy, especially for the younger students in their early twenties, to struggle with understanding why and how these programs and professional slots were established. Students need to realize that they were the result of hard work, crises faced by institutions, and campaigns to explain the value of archives in organizations and society.

The future of their jobs and the effectiveness in meeting their missions, students must learn, will be the result of how effective they are as advocates both within and outside their employing institution. This means being articulate about the benefits of good archival and records management work and constantly emphasizing the mission of archives and records management. This principle is very clear in Bruce Dearstyne's essay on New York's local government records programs, where considerable effort was made to keep out front "clear rationales" for these programs. One of the keys for being successful was developing and distributing documents with these rationales that could be drawn on, paraphrased, summarized, and reused as needed by multiple groups and individuals. Students need to be able to examine, critique, and learn from such documents used in successful advocacy efforts. While they are in the classroom, they are most often mulling over their own personal interests for pursuing this career, not thinking about being administrators or advocates. However, while they are learning about the challenges of appraisal, the details of archival description, and the technical issues raised by digital documents is also the perfect time for them to wrestle with the costs of such work and how these resources are obtained.

Archival advocacy requires conscious efforts by their custodians, affirming the value of their holdings with detail about the use of their materials, and students need to be introduced to the importance of such efforts. We can see this in Barbara Haws's description of the growing support by the governing board of the New York Philharmonic based on understanding the practical uses of its older records for the orchestra's contemporary activities. This is also evident in Roland Baumann's

description of being able to win support for his fund-raising campaign at Oberlin College, partly due to his having used every opportunity to make the archives program relevant to the college's ongoing work and documenting this relevance in a manner that enabled him to remind the college's administrators about the importance of its archives. Because most graduate archival education programs are focused on equipping students for their initial career post, this education can drift into training emphasizing nuts and bolts archival work such as arrangement and description or interacting with researchers in the reference room. Such skills are important, of course, but when we approach something like archival advocacy we are really more into the realm of attitudes (something broader than mere practice). When we orient students to the profession and its basic functions and principles, educators need to expose them to how they will need to describe in clear and pithy language why archives and archivists are important.

Students should be taught that effective archival advocacy requires persistence and learning from failures and successes alike. Kenneth Winn's essay about the long-term efforts to build support for government archives in Missouri provides a good window into how this works and, especially, how the developing and nurturing of partnerships with citizens, politicians, and the media can create positive change in support for archival operations. Such case studies are critical for students to learn from because they suggest the kinds of activities these new archivists will need to engage in if they are to be part of successful archival programs. While we ground them in basic approaches to selecting, preserving, describing, and making accessible archival records, there is no reason why we can't get students reflecting on how

they would use such knowledge for advocating on behalf of archives or learning about what kinds of resources are needed for carrying out archival tasks (in fact, it makes more sense to do this then rather than as some kind of added on task that appears disconnected from the real archival work).

In what may be a difficult lesson for many, students need to learn that being an advocate for archival programs requires going out from the stacks and reading rooms into the offices, meetings, and public spaces where important decisions about organizations are made. Archivists must know who the organizational leaders are who make these decisions and who they relate to, work with, and what they need to carry out their responsibilities. The importance of this approach is quite clear in Greg Sanford's description of his efforts to relate the resources of the Vermont State Archives to important continuing issues in state government and on behalf of the public. What does not come through in his essay is that Sanford is a large, outgoing man with gleaming baldhead and bushy red beard that you cannot ignore when he enters a room. His articulate descriptions of the importance of archives, in writing and in person, can hardly be ignored by anyone who has ever met him. The difficulty here is not recruiting students who look like Greg (although that could be fun), but in transforming some of the perceptions about archives as quiet, monastic refuges from the problems of the real world. While there are monasteries with important archives and archival traditions, the kind of vow that the new archivists need to take is one that commits them to being out in the organization, in the halls of government, and in the market square explaining, at every opportunity, the significance of archives in society. Such effective archival advocacy requires

understanding organizational culture, especially how decisions for setting priorities and determining funding are made. Archivists must relate their programs to the priorities of their employing organizations, as a number of authors in this volume suggest. This reality especially underscores why case studies, such as offered in this volume, are important. What works for one institution may not work in another one. There is great gap between how and what archivists should communicate in a for-profit organization versus that of a not-for-profit cultural organization. Archivists are not only experts about records and their systems, but they are experts on the organizational and societal cultures creating and supporting them.

One of the important matters to teach new graduate students is that archivists cannot take for granted that anyone else in the organization or in society really comprehends the importance of the archival records (and the evidence and information found in them). The essay by Donna McCrea and Ellen Crain about the effort to win public support for a seven and a half million-dollar bond to support the Butte-Silver Bow Public Archives is an excellent lesson about the need to be deliberate in building support. McCrea and Crain report how their campaign was a risk; if they lost the bond vote, it would be a dramatic indication of a lack of public support. What is revealing in this essay for students is how this successful campaign was the result of two decades of steady advocacy on behalf of the archives to the community. Educators can begin exploring the topic of public perception about archives by working with students to describe and evaluate their own interests, testing what they think they know about archives. The students bring with them every stereotype and assumption ever heard by archivists about archives, and a

requirement of daily reading in major national and local newspapers, news blogs, and other news services can help to demonstrate how there is a broad spectrum of ideas about archivists and what they do. Archival programs are often under-funded and high on the list of possibilities for saving money in poor economic times; history has proven that weak archives operations are often seen as unnecessary programs where funding can be cut, partly because of the stereotypes associated with archives as dusty, old, out of the way spaces where interesting, but usually non-essential, documents are deposited. Every case study in this volume offers some insights on the challenges presented by such images, and each suggests that often these popular perceptions of archives are supported by what archivists do and how and where they are seen working.

My point in identifying some of the potential lessons offered in these case studies is to suggest that in using such cases students can be grounded in the practical realities archivists face. Students can learn about both successes and failures in building archival programs, and, more importantly, they can begin to understand the utility of basic archival principles espoused by educators and the limitations of their own preconceptions brought by students into the graduate programs. Archival case studies can serve as a basis for rethinking the education of future archivists.

Reimagining Advocacy and Archival Education

Archival education programs need to devote more attention to advocacy than they have up to this point. I doubt there is a single educator who would disagree with this statement. However, most educators, myself included, would also state

that they need to devote more time and attention to nearly every other archival function and what they see as the peculiar challenges facing them, ranging from the immense, constantly shifting issues of digital technologies to the legal morass of intellectual property. Still, archival advocacy may fall into a different category (perhaps not unlike archival appraisal) in that it is essential for supporting work in every area (not that different from appraisal affecting every archival activity). If appraisal affects every function by the success of appropriate selection criteria, then advocacy affects every function by providing the foundation for sustainable financial and other resources and support for the mandate of the archival program.

Case studies such as these are useful in orienting students to archival responsibilities, other than processing or referencing historical materials (the traditional emphases of entry level archival positions), that they may not have considered when they made their initial decisions to start their archival careers. These case studies also raise other issues, not always anticipated by their authors, that archival faculty can use to provoke student thinking. While Barbara Haws nicely summarizes the ways the institutional archivist supports publicizing both the parent organization and their own program, she does not address how outsiders may or may not have access to the records (although she mentions that the Philharmonic is starting a ten-year program to digitize paper documents and concert recordings for placement on the web). If, as she states, the success of an archivist is "based on nurturing and maintaining important relationships and never missing an opportunity to demonstrate the value of the archives to the larger institution," how does the archivist deal with potentially controversial material that

may undermine this relationship? Being advocates for the establishment and continued development of archival programs requires addressing, at some point, the reality that archival records do not always put their creators' in the best light (it is why accountability and evidence are such important attributes of records).

Using case studies for educating and training archivists is nothing new in this field, as it has been documented as a viable teaching method more than thirty years ago.[4] Indeed, the early use of case studies for this purpose derives from the even earlier success of other professions such as law and medicine. The reasons for the use of case studies in the classroom have also been well documented largely due to their utility in telling stories that instructors can tease important principles from and in stimulating students' interests.[5]

For some time the problem was in having case studies to use in the classroom. Faculty generally had to draw on their own experiences, telling stories from their own professional work, or had to work in collaborative ways to build case studies by working with publishers to compile and edit case studies from multiple authors built around particular themes or contentious issues.[6] Now we possess an abundance of case study materials, with volumes that can be effectively used in graduate courses, workshops, and as independent reading assignments.[7] This present volume is yet another example of the growing number of such teaching resources. Incorporated into graduate courses, along with basic practice manuals, historical studies, and theoretical treatises, these case studies attest to the potential for a richness and depth in archival education not possible a generation ago.

We do have a new challenge, however, but one that clearly be addressed by the graduate education programs. One of the continuing issues with most archival case studies is the lack of truly independent case studies. The problem with most case studies in this field is that they are written by individuals who are directly involved in the events being described; a hallmark of good case studies is that they are done by external observers and researchers. I noted this problem in a study I did for the Association of Records Managers and Administrators a few years ago on the factors leading to the establishment of archives and records management programs.[8] Terry Eastwood, another archival educator, long ago also acknowledged that archivists needed to engage in systematic analysis of archival practice to support the building of a reputable and reliable archival knowledge.[9]

My intention is not to criticize the kinds of essays presented in a volume such as this, but, rather, to suggest new ways that archival educators can work with archival practitioners to prepare a new generation of archivists via the production of case studies. Greg Sanford, for example, provides a list of tips for working with the state legislature – becoming an information resource, researching the issues, knowing the current subjects being debated, and so forth. From an educator's perspective, these all seem like activities that an archival student could perform as part of an internship. Traditionally, archival internships have focused on a small set of archival functions – representation and reference – primarily because these reflect the profession's extraordinary pre-occupation with processing backlogs and chronic shortages of staff to provide daily reference room coverage. For the long-term, however, it might be better if we put emphasis on teaching future archivists

about how to be effective advocates in order to win the resources to support all facets of archival work.

Students can be engaged in producing, as well as using, case studies. If case studies -- assigned as readings, discussed in the classroom, and featured in lectures – can be extraordinarily beneficial in grounding students in archival principles and practices, then it stands to reason that having students do in-depth analysis to prepare case studies can add to the learning benefits. Students, inexperienced or not, can bring remarkably fresh and independent perspectives to the development of case studies. Pulling together media reports, professional and scholarly literature, interviewing individuals involved with the case, and scanning through the Web, students, even when traveling over very familiar terrain, can learn a tremendous amount in assembling a case study. Sometimes, these cases are publication worthy, and unburdened by their authors' immense experience or ingrained ways of thinking about certain issues, these case studies can make profound contributions to the profession.[10]

Thinking about advocacy case studies in educating future archivists suggests, then, the possibilities of new partnerships between archival educators, the students, and archivists in the field. Archival programs working on advocacy efforts could use the services of students, and students would gain by getting practical experience in advocacy ranging across the spectrum of activities described in the essays in this volume; there is not a single advocacy effort described here that could not have benefited from the employment of archival students. What students would learn

could serve as the basis for stronger advocacy activities in the programs they work for in the future.

There is work to be done, of course, by the faculty in the archival education programs. As I have previously mentioned, there is a need to strengthen advocacy in the curriculum in the graduate archival education programs. Archival educators need to reach out to archivists and archival programs to build practical assignments related to advocacy. This can be done through assignments in courses or as field experiences or internships. The latter requires conscious planning and execution on the part of faculty, site archivists, and students, but there is no reason to believe that some careful coordination and effort between all parties could not expand internships to be involved with archival advocacy activities.[11] The former requires faculty to assign cases to be studied and/or to work with archival programs to have students working with them. The nice thing now is that we no longer need to limit ourselves to archivists and their programs located in the immediate geographic vicinity of the universities hosting graduate archival education programs; since many of these education programs now teach online, cooperative projects can be done with archival programs and archivists remotely (and the abundance of materials now on archival repository websites only makes such efforts even more feasible).

Conclusion

There has probably been no other time more appropriate for arguing for the necessity of strong, sustained advocacy on behalf of archives and archivists and their roles in society. The economic crisis has pushed records professionals,

especially those working in cultural institutions, to explain their mission and its benefits. There is no reason to believe that this will change anytime in the future. If that is the case, individuals being educated in graduate programs to work in this field need to be introduced to advocacy and how to do it. Using and writing case studies should enable this to happen.

Endnotes

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[1] I discuss some of these challenges in "Unpleasant Things: Teaching Advocacy in Archival Education Programs," *InterActions: UCLA Journal of Education and Information Studies* 5, no. 1 (2009), available at http://repositories.cdlib.org/gseis/interactions/vol5/iss1/art8.

[2] Richard J. Cox, "Advocacy in the Graduate Archives Curriculum: A North American Perspective," *Janus* no. 1 (1997): 30-41.

[3] The University of Pittsburgh's program is unusual in its offering of a course on Archival Access, Advocacy, and Ethics, focusing about equally on each of these topics, sometimes with a lean toward one are over another depending on current issues in the field.

[4] Francis X. Blouin, Jr., "The Relevance of the Case Method to Archival Training," *American Archivist* 41 (January 1977): 37-44.

[5] See, for example, Clyde Freeman Herreid, "What Is A Case?" *Journal of College Science Teaching*, November 1997, available at http://ublib.buffalo.edu/libraries/projects/cases/teaching/whatis.html, and "What Makes a Good Case?" *Journal of College Science Teaching*, December 1997/January

1998, available at http://ublib.buffalo.edu/libraries/projects/cases/teaching/good-case.html, both accessed April 28, 2009.

[6] This explains exactly how one of me co-edited (with David Wallace) volumes came into existence; the resulting volume was *Archives and the Public Good: Accountability and Records in Modern Society* (Westport, Conn.: Quorum Books, 2002).

[7] Such as Margaret Procter, Michael G Cook, Caroline Williams, eds., *Political Pressure and the Archival Record* (Chicago: Society of American Archivists, 2005).

[8] Richard J. Cox, *A Minor Nuisance Spread Across the Organization: Factors Leading to the Establishment and Support of Records and Information Management Programs* (Pittsburgh, PA: ARMA International Educational Foundation, October 2005)

[9] Terry Eastwood, "The Origins and Aims of the Master of Archival Studies Programme at the University of British Columbia," *Archivaria* 16 (Summer 1983): 40.

[10] I have been successful with this in my course Archival Access, Advocacy, and Ethics, leading to a special issue of the journal *Library and Archival Security* published in Spring 2009, and I am currently working on a special issue of the *Journal of Information Ethics* to be published in Spring 2010.

[11] For a description of archival internships, see Jeannette A. Bastian and Donna Webber, *Archival Internships: A Guide for Faculty, Supervisors, and Students* (Chicago: Society of American Archivists, 2008).