Caring for Collections: Developing National Best Practices for Archival Accessioning
NLG Implementation grant → full invited proposal
Organization: Beinecke Rare Book & Manuscript Library, Yale University
Narrative

Summary

The Beinecke Rare Book and Manuscript Library at Yale University seeks a two-year Implementation Grant in the amount of $246,130 to support our goal of collaboratively developing the first set of comprehensive best practices for archival accessioning in the United States. Our research shows that there is both a demonstrated desire and a tangible need for iterative, scalable accessioning guidelines (for both physical and born-digital archival materials) that can be adopted and adapted for widespread use in the archival profession. The National Leadership Grants for Libraries program has a stated goal of creating resources that "improve the ability of libraries and archives to provide broad access to and use of information and collections with emphasis on collaboration to avoid duplication and maximize reach"– our project is in direct alignment with this goal. When developed, these accessioning best practices will assist individuals and organizations across the country who are seeking to strengthen and standardize workflows, to advocate for resources and staffing, and While supporting the labor of archival practitioners involved with accessioning is the primary goal of this project, these best practices will have a much broader impact: they will increase equitable access to collection materials, allowing institutions to illuminate the breadth of their holdings more efficiently and giving users quicker access to the rich materials stewarded by archives and special collections across the country.

Project Justification

Accessioning is the basis of all archival stewardship. It is a suite of activities through which we appraise, transfer, stabilize, and document archival acquisitions including:

1. selection, acquisition, and appraisal
2. arrangement and description
3. stabilization, storage, and preservation
4. labor, ethics, relationships, and the work environment
5. born digital accessioning and preservation

Accessioning provides pathways to access, informs future decisions, and promotes sustained resource commitment for the care of archival materials. Effective accessioning procedures enable foundational description, stabilization, and relationship building that is integral to managing collections ethically throughout their life cycles, avoiding duplication of effort, and establishing meaningful connections with creators and communities.

Currently, there are no profession-wide best practices for archival accessioning in the United States.

Individuals performing accessioning work often find themselves isolated and under-resourced, combatting misunderstanding of the necessity and complexity of their duties. To that end, we request financial support from IMLS to energize a community-driven effort to develop national best practices for archival accessioning that can be used by individuals or organizations, can be applied for both born-digital and physical materials, and can be adapted for implementation in a variety of environments.

Since 2019, Rosemary K. J. Davis (Beinecke Rare Book & Manuscript Library, Yale University) and Meaghan O'Riordan (Stuart A. Rose Manuscript, Archives & Rare Book Library, Emory University) have engaged in a long-term research project to examine archival accessioning in the United States. We have presented on our research at regional, national, and international conferences, including the 2020 Society of Georgia Archivists meeting, the 2021 Rare Book & Manuscript Section of ACRL/ALA annual meeting, the 2021 Archival Education and Research Institute (AERI), and the 2021 Society of American

Archivists (hereafter referred to as SAA) Research Forum. We were invited to speak as part of an esteemed panel of experts on accessioning for the launch of Audra Eagle Yun's edited volume, *Archival Accessioning* (2021). Our writing on accessioning has been published in the New England Archivists newsletter and in *The Handbook of Archival Practice* (2021, Rowman & Littlefield).

At the heart of our ongoing research project is a trio of goals:

- surfacing the lived experiences of people performing archival accessioning duties
- creating a well-resourced community of practice for those individuals doing this work
- defining a more useful, well-rounded interpretation of accessioning as a constellation of workflows and collaborative relationships that are foundational for ethical collection stewardship

After performing over a dozen in-person site visits and a deploying a survey that collected data about accessioning work from over one hundred and fifty individuals from across the United States, we heard the same story over and over: the reality of archival accessioning is not accurately captured by its traditional definition: taking physical, legal, and intellectual custody of newly acquired physical and born digital materials in archives/special collections repositories. Our online survey (which we discuss more below) collected responses from individuals working in every geographic region of the country including Alaska and Hawaii, plus a small handful of international responses. Moreover, the individuals who responded work in a variety of environments from single practitioners to Ivy League universities. The consensus from respondents–despite their varied experiences in accessioning-related staffing, physical environments, institutional support, and local workflows–was firmly rooted in the belief that national best practices would have a remarkably positive impact and would fill a large gap in archival scholarship.

That said–while accessioning labor is historically under-examined in archival scholarship and underrepresented within our professional organizations–several scholarly works provide perspective on the importance of treating accessioning as a critical function. In her foundational article, Christine Weideman defined the possibilities of archival "accessioning as processing," but this definition can and should be pushed further. Accessioning should be viewed as the first--and potentially only--phase of processing, serving as a gateway to initial access, rather than a precursor to access provided by more granular processing. As modern manuscript and born-digital collecting has increased exponentially in the last several decades, repositories are often no longer able to maintain the staffing levels and other resources needed to effectively process materials at a granular level. Implementing iterative, flexible accessioning procedures can be an effective strategy to mitigate the massive amount of undescribed material warehoused by institutions. Collection material should not languish in storage—it should be used.

Providing a foundational layer of description allows collections to be opened more quickly for use, which in turn helps produce real world usage statistics and critical researcher feedback that can help determine if additional processing is needed. Administration can then allocate resources strategically to provide more detailed processing for collections. Better accessioning helps address not only the processing backlogs that exist but also meaningfully addresses access struggles that users so commonly face. A majority respondents to a survey we deployed during our research reported that their institutions have a backlog of unprocessed archival material in their holdings—tens of thousands of boxes holding unique and important papers are currently sitting inaccessible on library shelves. Better accessioning practices, made freely available to all, will undoubtedly lead to an increase in availability of archival material to the public, in addition to improved collection description and increased labor efficiency.

There is a very small amount of archival scholarship focused on accessioning, but we would like to recognize works that have served as inspiration for our best practices working group. In her article "Beyond Control: Accessioning Practices for Extensible Archival Management," Rachel Searcy--

currently Accessioning Archivist at New York University--transformed the traditional custodial interpretation of accessioning into "examine, analyze, stabilize, and document our knowledge about a grouping of archival materials upon their arrival in order to confirm stewardship of them." This more precise language helps accurately contextualize the actions that archivists take during accessioning processes. Moreover, Searcy states that accessioning should be the "foundational archival function upon which all subsequent steps rely." This assertion reflects Daniel Santamaria's writings in his book *Extensible Processing for Archives and Special Collections: Reducing Processing Backlogs*, which advocates for accessioning as the first stage of iterative, flexible, and efficient archival processing. Lastly, we want to acknowledge the recently published volume, *Archival Accessioning*. Edited by Audra Eagle Yun and featuring contributions from a wide range of practitioners, this is the first monograph devoted solely examining the history and current practice of archival accessioning in the United States. And while we acknowledge the critical importance of these scholarly works, we also assert that these works do not provide a comprehensive set of structured and adaptable best practices–rather they serve as a theoretical and historical foundation for our working group's creation of guidelines that provide workflows for practical application. We are fortunate to have both Eagle Yun and Searcy as members of our working group's leadership team, along with other seasoned practitioners whose expertise can inform and enrich the output of our working group.

Building on this existing scholarship and drawing from the perspectives gathered during our own research, this working group (and the best practices it produces) will define contemporary accessioning as both a discrete process and as a set of core functions that are integral to archival practice. User-centered accessioning establishes clear ownership and provenance for better documentation of decision making, retention of institutional memory, and fulfillment of our financial and legal obligations to donors. If archival repositories intend to be user-centered, then they cannot just be warehouses of material over which control and custody have been established--they must have a comprehensive accessioning program that speeds acquisition, description, and discovery. Additionally, our research shows that without best practices for archival accessioning, professionals tasked with these duties often scramble to figure out how to do their jobs in ways that will benefit both their archival colleagues and users who wish to access materials. Also, unlike other archival functions, there are vanishingly few resources to help build skills and expertise in accessioning.

To address these issues, the best practices working group will endeavor to:

- create human-centered, transparent, and actionable practices for all types of accessioning labor
- increase visibility for the workers performing accessioning
- illuminate the operational impact of effective accessioning practices
- build an inclusive community of practice for individuals performing accessioning
- develop public-facing documentation that can be used by individuals performing or managing accessioning-related duties in all archives and special collections contexts

When archivists have these best practices as a blueprint and an engaged professional community to rely upon, they can create access to collections quickly after acquisition. But there are far greater and wider impacts possible. In fact, archival accessioning best practices create a demonstrable domino effect of positive outcomes for everyone interested or invested in access to a library's holdings. Archival practitioners involved in accessioning will have access to helpful, comprehensive resources that can be utilized to help strengthen and standardize their own accessioning practices. Materials acquired specifically for instruction purposes can be made available more quickly for use in classrooms. Curators can use relevant objects for exhibition and outreach events, increasing visibility of new acquisitions. Managers and administrators can make more informed decisions when advocating for staffing and resources. Outside of the library, accessioning best practices will help better fulfill the complex commitments institutions make to individuals who place their materials with them. Donors will see

quicker results of their donation decisions and will also less frequently feel the frustration of their life's work being hidden away due to lack of resources. Positive donation experiences will encourage donors to vouch for their experience working with repositories that employ accessioning best practices and to encourage others to collaborate with these repositories. And finally, the public will be able to find and use unique resources to enrich their educational, professional, and personal endeavors better than ever before. Improved accessioning supports increased community access to important and irreplaceable cultural heritage knowledge. All in all, we believe these best practices will aid in providing more efficient access to archival acquisitions, more consistent foundational description, and a stronger sense of understanding for accessioning work being performed at institutions across the country.

Project Work Plan

Background

In Fall 2020, Davis and O'Riordan submitted two simultaneous requests to the SAA:

1. a request to officially establish an accessioning-focused affinity group within SAA
2. a request to approve the formation of a working group to develop best practices for archival accessioning

Our working group request was approved by SAA Standards in October 2020. In Summer 2021 we received approval to formally add an accessioning focus into an existing affinity group. As of Spring 2022, there is now an SAA section called Accessioning, Acquisitions, and Appraisal. This section serves as the sponsor for our accessioning best practices working group.

After receiving resounding support from SAA, we circulated a call in for best practices working group applicants in Spring 2021. To get a full-spectrum picture of each individual interested in taking part, the working group application requested information about personal identity, professional experience, and motivation to improve accessioning work. After receiving over ninety applications, we selected thirty archival practitioners. Applicants were selected primarily based on their responses to the questions, "Why are you interested in developing best practices for accessioning" and "Explain your interest in any of the subgroups you selected in the previous question." There was also a section where applicants could say more about other work experience, publications, and scholarship related to accessioning they would like to share. In our selection process, we prioritized applicants who possessed practical experience, came from diverse backgrounds, and who expressed enthusiasm about the positive possibilities these best practices could support.

When selecting working group members from the applicant pool, we prioritized diverse applicants who were both qualified professionally and who self-identified as a member of a marginalized community. As a result, the working group membership includes:

- individuals who identify as Latinx, disabled, LGBTQ+, Black/African American, white, and Asian-American.
- individuals with all levels of experience ranging from new professional (0-2 years of experience) to seasoned practitioner (10+ years of experience)
- individuals who are precariously employed, who serve as managers, who are faculty members, and who have a wide range of job titles and descriptions that involve accessioning of both physical and born-digital archival materials
- individuals working at historical societies, corporate archives, public and private colleges/universities, and philanthropic foundations

We worked to select working group members that provided the best balance of diversity ***and*** skilled expertise to be sure these best practices will be developed with a wide spectrum of individuals and environments in mind.

To provide effective, distributed leadership for such a large working group, five subgroup leaders were appointed:

- **Maureen Cresci Callahan**
  - Sophia Smith Collection Archivist, Smith Libraries, Smith College
  - Leader for the Pre-Custodial Work subgroup
- **Audra Eagle Yun**
  - Head of Special Collections & Archives and University Archivist, UCI Libraries, University of California Irvine
  - Leader for the Arrangement and Description subgroup
- **Tammi Kim**
  - Special Collections Technical Services Librarian, Special Collections & Archives, University of Nevada Las Vegas
  - Leader for the Born Digital Accessioning subgroup
- **Eve Neiger**
  - Lead Archivist, Boston Public Library
  - Leader for the Stabilization, Storage, and Preservation subgroup
- **Rachel Searcy**
  - Accessioning Archivist, Archival Collections Management, Knowledge Access & Resource Management Services, New York University
  - Leader for the Labor, Ethics, Relationships, and the Work Environment subgroup

In addition to serving as co-chairs for the working group at large, Davis and O'Riordan each sit in on a subgroup that best reflects their areas of interest and expertise -- Davis on Labor, Ethics, Relationships, and the Work Environment and O'Riordan on Stabilization, Storage, and Preservation. Bi-weekly co-chair meetings and monthly leadership meetings are used to determine goals, develop tools for the larger working group, and plan for quarterly subgroup meetings and full working group meetings. At the time of this writing, two full working group meetings have been held, one in October 2021 which focused on learning more about each member their motivations for working on accessioning best practices; and one in January 2022, which utilized a collaborative exercise to workshop an official working definition of accessioning. That definition has now been finalized by leadership and will be shared at the third full meeting later this spring. Other activities at these meetings include breakout group discussions of relevant topics, presentations from leadership members, and an ongoing collaborative literature review.

Davis, O'Riordan, and the subgroup leaders each expect to spend approximately 5-7 hours/month for the duration of this project. Working group members are expected to spend approximately 3-5 hours/month. The first eight months of the working group's inception has involved establishing a strong theoretical and logistical foundation for the first iteration of practical work—which will include goal setting for each subgroup and developing together initial content outlines--that will kick off during the April 2022 full working group meeting. Here is an overview of our entire proposed timeline:

- **Fall 2022-Winter 2022/3** → Participants will work virtually within focused subgroups to write initial drafts of best practices sections and convene for virtual share-back, peer review, and strategy sessions. Each subgroup has one leader, five working group members, and is focused on a functional area of accessioning, including pre-custodial work; arrangement and description; born digital accessioning; stabilization, storage, and preservation; and labor, ethics, relationships, and the work environment. Subgroups are required to meet at least quarterly but meet more

frequently as needed. Meetings are focused on combining targeted work done asynchronously and setting objectives for the next quarter of work. All working group members have access to a dedicated Slack instance, which includes channels for each of the subgroups, where they can communicate in between meetings and share resources.

▪ **Spring 2023** → Participants convene for a three-day summit to finalize a draft of the best practices to share out for broad and targeted public feedback. Each day will be split between collaborative writing/editing sessions (focused within each subgroup) and community-building and skill sharing sessions (for all working group members).

   o *Alternative plan in case of COVID-19 restrictions*: Should the ongoing COVID-19 pandemic impede our ability to meet in person in Spring 2023, we will have either a hybrid or fully virtual event. For the hybrid event, we will provide each participant with daily rapid COVID-19 tests for the duration of the summit. Each participant will be required to provide proof of vaccination and booster shot. Understanding that, even given those precautions, there may be people who feel uncomfortable participating in person, we will provide a virtual option for all meetings and activities if all working group members are not able to attend in person. Our end goal is to host a productive event that is accessible and fully funded for all 32 participants, regardless of how we meet.

▪ **Summer/Fall 2023** → Participants will collaboratively edit and approve a final draft to circulate for feedback based on the work completed during a three-day in person summit. Davis and O'Riordan will present at the annual meeting of the sponsoring affinity group--the SAA Accessioning, Acquisitions, & Appraisal Section of the Society of American Archivists and present about the work thus far completed by the working group.

▪ **Winter 2023/4** → Using listservs (primarily organizational ones associated with SAA, RBMS, and regional archival associations) and social media, public feedback will be solicited from SAA members and relevant sections, including: the Accessioning, Acquisitions, & Appraisal Section, the Archives Management Section, the Collection Management Section, and the Description Section. We will also solicit feedback from individuals in allied archives and special collections organizations throughout the country, including RBMS, OCLC, NARA, and regional archives organizations such as Northwest Archivists, New England Archivists, Mid-Atlantic Regional Archives Conference, Society of Southwest Archivists, Society of California Archivists, Midwest Archives Conference, and Society of Georgia Archivists. Additionally, nearly all sixty applicants who were not invited to become part of the final working group have already agreed to provide targeted feedback on drafts of the best practices. Drafts will be disseminated through an open Google Drive link and directly through email attachments. We will request feedback in writing, through a series of focus groups held via Zoom, and with a brief survey.

▪ **Spring – Summer 2024** → Perform revisions based on internal peer review and broad public feedback; submit final revised draft to SAA Standards Committee for approval + subsequent publication in SAA Standards Portal, where access to the Best Practices will be freely available to all.

▪ **Summer 2024** → Daylong public gathering adjacent to SAA annual meeting so working group members can publicly share the final product and build community; will be free and open to all. There will be a virtual option available to ensure even those who are not SAA members and/or are unable to attend the conference will be able to participate if they so desire.

- *Alternative plan in case of COVID-19 restrictions*: Should the ongoing COVID-19 pandemic impede our ability to meet in person in Summer 2024, this public SAA meeting will be migrated to a virtual environment and will remain free for all attendees regardless of SAA membership or attendance.

- **Fall 2024** → The co-chairs, with support and participation from working group members and leadership, will develop a free webinar to provide a primer on the best practices themselves, to make space for discussion about community-building efforts focused on accessioning, and to illuminate the development process for archival standards. The initial webinar will be held live and recorded. Both the live link and the recorded version will be shared with the archival profession through sources listed in the draft feedback section above. Davis and O'Riordan will host the webinar, which will include a moderated question-and-answer section moderated. There may be more than one webinar scheduled depending on expressed interest and need.

  Like the immensely important OCLC "Total Cost of Stewardship" project, members of our working group will ask for space at regional and national conferences to share the best practices broadly and to discuss implementation possibilities with practitioners in the field. For national conferences, this task will be taken on by the co-chairs and subgroup leaders. For regional conferences, we will ask working group members local to those regions to submit requests or proposals. Best Practices for Archival Accessioning working group members will approach professional archivally-focused events and submit proposals to present at conferences to discuss, promote, and answer questions about the best practices.

- **Maintenance and revision after initial publication of the best practices** → The SAA Standards Committee has procedures in place for development and review of existing standards Section V of these procedures details the promulgation, maintenance, and review of adopted standards:

  All adopted SAA standards will be either assigned a review cycle of no more than five years, with a formal review commencing no later than three years following adoption or reaffirmation (section V.D.), or approved for ongoing review (section V.E.). However, in both situations, comments and revisions to the standard and proposals to revise adopted standards may be submitted at any time. At the end of an assigned review cycle, the SAA Council will be asked to reaffirm, agree to revise, or rescind the standard.

  Accordingly, after adoption is confirmed by SAA, these best practices will be reviewed on a five-year cycle and will continue to be overseen by the Accessioning, Acquisitions, and Appraisal Section.

Diversity Plan

In order to develop truly collaborative best practices, we want to eliminate as many participation barriers as possible. Our funding request includes allocations for stipends, meals, travel, and lodging, so all individuals can take part in this community-building work without a negative economic impact.

To create an actively anti-oppressive, safe, empathetic, and productive work environment, a detailed community contract and code of conduct was developed within the working group's leadership team and will be applied to all virtual and physical spaces. In these documents, we detail our commitment to centering inclusivity and justice as expansively as possible by:

- engaging openly and collaboratively with marginalized communities
- critically examining library traditions that sustain white supremacy
- highlighting the connection between positionality and the power inherent in contextualizing archival materials through accessioning and other labor forms that take place in archives and special collections
- advocating for and uplifting the labor of those who undertake this work, often in undervalued or precarious positions.

Moreover, we have established a core set of guiding principles for the working group:

- We believe everyone has something to contribute; not everyone needs to be a self-identified expert.
- We focus on shared and comprehensive concerns, recommendations, and possible workflow models, rather than focusing on specific technologies or tools.
- We enable the adaptability of best practices across contexts, communities, and levels of resourcing.
- We develop recommendations consciously as an inclusive expression of professional ethics and values.

We believe that to be truly transformational and inclusive, our work must be conducted in a space that acknowledges the power dynamics of bringing together workers across professional contexts, roles, and job classifications, acknowledging institutional privilege and the lack of representation of marginalized people within the archives, library, and technology sectors.

Project Results

Without nationally recognized best practices for archival accessioning, every individual and organization performing this work must develop their own practices from the ground up, leading to a massive duplication of effort, brilliantly innovative approaches that go unshared with a larger community, and piecemeal workflows that function more as stopgaps than as comprehensive and consistent strategies.

As mentioned earlier, in Fall 2019, Davis and O'Riordan circulated a survey designed to learn more about the state of archival accessioning in the field. They received 118 complete responses. Amongst a wide of answers to questions about job classifications, acquisition, and accession capacities, and how job duties were parceled out to staff members, there was unequivocal evidence that respondents were frustrated at the inconsistency in workflows and the heavy burden of figuring out practices in isolation. In particular, the survey results showed that 86% of respondents have a backlog at their repository, demonstrating that there is a real need for figuring out how to create efficient procedures that make material visible and available to users. While an accessioning standard is not the **sole** solution to this multifaceted problem, it would create clearer pathways for more effective resource allocation and give critical support to practitioners in need at institutions throughout the country.

It is clear that accessioning is often misunderstood or unacknowledged as essential within the profession. As a result, many people responsible for accessioning are tasked with doing so without the proper tools or a network of colleagues. Other critical functions--including reappraisal and deaccessioning, description, and digital preservation--have well-documented standards to follow, visibly situating that work as foundational and valued by the archival profession. While we acknowledge that flexible and iterative best practices for archival accessioning will be challenging to create, we believe it is important to do so and possible with the elite working group we have assembled. Conducting a project focused on the development of nationally recognized accessioning best practices tangibly addresses four immediate needs:

- **Workflow improvements** → Comprehensive accessioning best practices will allow for more efficient and effective accessioning work throughout the archival profession. Collaborating with active practitioners from across the country helps ensure the best practices are structured, actionable, and thoughtful—by subdividing the larger working group into focused subgroups, we can create detailed guidelines that apply to all material types and can be scaled for use in any archival environment. This includes for digitized and born digital material, including web archives, which institutions are collecting at an increasingly high rate as we move further into the 21st century. There has been limited scholarship on accessioning in general, for sure, but even less for these materials stored on precarious formats or in unregulated cloud storage. While the finalized version of best practices will be published in the SAA standard portal, it will be open for use by all individuals.

- **Community connections** → Project development events will help formally establish a community of practice where individuals performing accessioning can support and learn from each other. Being able to meet in person - if possible given funding and public health - is crucial to building and sustaining our community and allowing a natural flow of ideas and contemplative discussion.

- **Professional visibility** → Investing intellectual and financial resources in accessioning will provide recognition, support, and validation for individuals and organizations performing this work. Accessioning is an historically undervalued archival function when there are those who would argue it is the most important activity for the long-term stewardship of materials. A federal institution funding an accessioning-focused project significantly increases the status of the function and those who perform it across the field. Increased status often translates to increased internal staff and financial resources at our institutions to better perform the work.

- **Increased access for all** → This project seeks IMLS support to create best practices that can improve archival accessioning in institutions across the United States. Better accessioning means quicker description, more visibility for collections, and an exponential increase in user access to an incredible amount of undescribed material in archives and special collections. These best practices not only help archival practitioners work efficiently and ethically, but they will help ensure that materials can be more readily available for all who seek them out.

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Schedule of Completion

Year 1 (2022-2023)

Activity	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Co-chairs continue to meet biweekly	■	■	■	■	■	■	■	■	■	■	■	■
Co-chairs and Subgroup leaders continue to meet monthly	■	■	■	■	■	■	■	■	■	■	■	■
Complete 4th subgroup meetings cycle	■											
Continue drafting sections in subgroups	■	■	■	■								
Quarterly full working group meeting		■			■			■			■	
5th subgroup meetings cycle		■	■	■								
Summit prep		■	■	■	■	■	■					
6th subgroup meetings cycle					■	■	■					
Participants peer review subgroup sections				■	■	■						
Finalize first draft in advance of summit						■	■	■				
Participants convene for a three-day summit to construct full draft								■	■			
7th subgroup meetings cycle									■	■	■	
Participants edit and finalize final draft									■	■	■	■
8th subgroup meetings cycle											■	■
Present at Society of American Archivists (SAA) Accessioning, Acquisitions, & Appraisal Section Meeting on work completed thus far												■

Year 2 (2023-2024)

Activity	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Co-chairs continue to meet biweekly	■	■	■	■	■	■	■	■	■	■	■	■
Co-chairs and subgroup leaders continue to meet monthly	■	■	■	■	■	■	■	■	■	■	■	■
Complete 8th subgroup meetings cycle	■											
Finish first revision based on summit and approve draft to circulate for feedback	■	■										
Quarterly full working group meeting		■			■			■			■	
Solicit public feedback		■	■	■	■	■	■					
Optional 9th and 10th subgroup meeting cycles		■	■	■	■	■	■					
Participants revise based on public feedback							■	■	■	■		
11th subgroup meeting cycle								■	■	■		
Approve final draft to share at SAA annual meeting.											■	
Daylong public gathering adjacent to SAA annual meeting to share the best practices											■	■
Final presentation to Society of American Archivists (SAA) Accessioning, Acquisitions, & Appraisal Section Meeting											■	■
Develop free webinar to be hosted and/or released in the fall as a primer										■	■	■
Develop presentation proposal materials and assign relevant conferences 2024-2025 to appropriate participants										■	■	■
Submit final revised draft to SAA Standards Committee for approval												■

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Digital Products Plan

Type - What types of digital products will you create?

Our end product will be a living document outlining best practices for archival accessioning, and it will be made available digitally on GitHub and accessible via direct link and the Society of American Archivists (SAA) Standards Portal. Additionally, the working group is maintaining files related to the creation of the best practices, including meeting minutes and agendas, outlines, and drafts of sections, on Google Drive–these materials are available at an open link which can be shared with anyone. We are maintaining an ever-developing bibliography of articles and resources that inform the working group's output on Zotero, which we will make freely available to others. The best practices will include charts, tables, and workflows created digitally, which we will make available as separate files on Google Drive. Most of our working group meetings will be recorded, and the recordings uploaded to Google Drive along any captured chat logs. Finally, the informative webinar(s) we plan to create after the best practices have been approved and published will also be recorded and made freely available. All static documents will be available via PDF.

Availability - How will you make your digital products openly available (as appropriate)?

All digital products noted above will be openly available online via standard web browsers.

Access - What rights will you assert over your digital products, and what limitations, if any, will you place on their use? Will your products implicate privacy concerns or cultural sensitivities, and if so, how will you address them?

Any files made available via the open Google Drive link, GitHub, SAA Standards Portal, and Zotero will be released under open-source licenses to maximize access and promote reuse. We will require attribution for use of charts, tables, and workflows we created.

Sustainability - How will you ensure the sustainability of your digital products?

The only digital product that requires permanent preservation is the end product: the best practices for archival accessioning. SAA has committed to maintaining this standard in perpetuity following procedures outlined by the Standards Committee, which includes equitable and open online access. The Google Drive link will remain static and open for approximately one year after the publication of the best practices, at which point it will be archived.

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Organizational Profile

Yale University mission statement

Yale is committed to improving the world today and for future generations through outstanding research and scholarship, education, preservation, and practice. Yale educates aspiring leaders worldwide who serve all sectors of society. We carry out this mission through the free exchange of ideas in an ethical, interdependent, and diverse community of faculty, staff, students, and alumni.

Source: https://www.yale.edu/about-yale/mission-statement
2021 Fact sheet: https://oir.yale.edu/sites/default/files/factsheet_2021_vf_04062021.pdf

Yale Library mission and vision statement

We advance teaching, research, learning, and practice through staff expertise, diverse collections, inclusive programs and services, and welcoming spaces.

We aspire to be a catalyst for individual and societal growth. We will foster a culture of curiosity and discovery to advance the University's mission. We will commit attention and resources to address systemic inequities by making knowledge more broadly available.

Source:https://library.yale.edu/about-us
Yale Library governance structure: https://live-library-yale-edu.pantheonsite.io/sites/default/files/files/YUL_Org_Chart.pdf

Excerpt from Beinecke Rare Book and Manuscript Library mission and aspirations

The Beinecke Rare Book & Manuscript Library collects, catalogs, preserves, and makes accessible rare books, manuscripts, and other formats from ancient to modern times in support of the teaching and research mission of the students and faculty of Yale University and visiting scholars throughout the world. To support intellectual communities at Yale and beyond, the library sponsors conferences, classes, fellowships, symposia, digital initiatives, and print publications related to its collections. Beinecke Library exhibitions, lectures, concerts, and other cultural events seek to enliven and enrich the Yale and New Haven communities.

The Beinecke Library holds more than one million books, many millions of manuscript pages, and tens of thousands of papyri, photographs, maps, posters, paintings, and art objects, as well as extensive audiovisual material and born-digital content. Collections range from ancient fragments on papyrus through works by living authors.

In 2015 the library's Technical Services—cataloging, archival description, acquisitions, accessioning, and digitization work—consolidated operations in a state-of-the-art facility at 344 Winchester Avenue.

Source: https://beinecke.library.yale.edu/mission-vision-and-aspirations-2027
Source: https://beinecke.library.yale.edu/about/history-and-architecture
Annual report: https://beinecke.library.yale.edu/article/beinecke-library-2019-2020-annual-report