



Advanced Electronic Records Institute

Agenda, Overview & Introductions

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Instructors & Staff

- Nancy McGovern
 - Head, Curation and Preservation Services, MIT Libraries
- Kari Smith
 - Digital Archivist, MIT Libraries
- CoSA
 - Sarah Koonts
 - State Archivist, North Carolina & CoSA President
 - Beth Shields
 - Electronic Records Analyst, Kentucky Department for Libraries & Archives
 - Anne Ackerson
 - CoSA Executive Director
 - Becky Julson
 - CoSA Staff

SERI Overview

- Launched July 2011
 - Initial telephone survey
 - DPCMM self-assessment
- Four areas of emphasis
 - Awareness
 - Governance
 - Best practices and tools
 - NHPRC Grant = PERTTS portal
 - Education and training
 - IMLS grant = This institute

Institute Goals

- Enhance ERM&P capacity in all state & territory archives
- Network of peers
- Action plans
 - Incremental
 - Realistic
 - One bite of the elephant
- Foundation for future collaboration
 - Between state archives
 - With external stakeholders

Institute Approach & Ground Rules

- Participant Diversity
 - Job responsibility – administrators, managers, archivists
 - Organizational – SoS, Historical Society, State Library, etc.
 - Erec program maturity
 - Curriculum strives for relevance to everyone
- Discussion Focused
 - Share your experiences
 - Be open and honest
 - Learn from others
 - There are no dumb questions!
- Government Archives Focused
 - Participant contributions key
 - Share your experiences
- Real World Examples
 - Tool demonstrations
 - Participant contributions key
 - Share your experiences

Schedule & Logistics

- Start at 9am, finish by 5pm
 - Long but INVIGORATING days!
- Breaks in AM & PM
- Lunch
 - 1.5 hours (noon-1:30pm)
 - On your own except Thu
- Group dinner Wed 6pm
- Afternoon breakouts
 - Administrators
 - Managers
 - Archivists
- End-of-day demos
 - Mon – Axaem & HP TRIM
 - Tue – TRAC Review tool
 - Wed – Archivemata & Preservica
 - Thu - BitCurator

Introductions & Expectations

- Name and where you work
- Did you attend the Introductory Institute?
- Administrative placement of state archives and records management
- IT context
 - Do you have your own IT staff and infrastructure?
 - Centralized IT staff and infrastructure
 - Hybrid
- One thing you hope to gain this week
- One electronic records challenge your institution has faced
- One electronic records success