The purpose of this project is to document and evaluate the creation of the Southern Archival Sources Graduate Advisory Board (SASGAB). SASGAB will assist the Manuscripts Department in the Wilson Library in a variety of ways including: collection development, university and public outreach, publications, and instruction/education. This paper evaluates the processes and steps taken by Laura Clark Brown, Tim West, and myself to develop this graduate student board into a self-sustaining and functioning entity by Fall 2005. This paper covers the process from the initial meeting with Ms. Brown and Mr. West through the decision to beta test two standing committees. Volunteer interviews with the board members are included as well as examples of the constitution writing process.

Headings:

Advisory boards

Archives -- administration

Archives -- collection development

Archives -- public relations

Archives -- reference services

Special collections -- case studies
THE SOUTHERN ARCHIVAL SOURCES GRADUATE ADVISORY BOARD: A CASE STUDY

by
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Approved by

_________________________________________________________________
David Carr
Introduction

The Manuscripts Department

The Manuscripts Department consists of four collections: the Southern Historical Collection (SHC), the Southern Folklife Collection (SFC), University Archives, and General Manuscripts. The collections are housed on the fourth floor of Wilson Library at the University of North Carolina at Chapel Hill.

The Southern Historical Collection (SHC) was officially created in 1930. UNC professor of History, Dr. J.G. de Roulhac Hamilton, was installed as the director. Dr. Hamilton earned the nickname “Ransack Roulhac”, as he was known for driving around the South in a Ford Model T and asking individuals for their family’s materials. The SHC houses materials representing all periods of Southern history from the late eighteenth century,¹ and is particularly strong in the following areas: the American Civil War, Antebellum South, slavery, Civil Rights era, business, communities, family, Journalism, labor, literature politics, race relations, religions, social activism, and sociology.²

In 1968 the UNC Folklore Archives was established by the Folklore Department’s faculty. UNC purchased the John Edwards Memorial Collection (JEMC) from California in the fall of 1986. The archives and the JEMC combined, and in April of 1989 the Southern Folklife Collection (SFC) officially opened for public research. The SFC contains over 160,000 sound recordings representing formats such as cylinders, acetate discs, wire recordings, records, cassettes, compact discs and open reel tapes. Along with the recordings, the SFC also has supplementary materials such as photographs and other
assorted ephemera. The SFC is considered one of the nation’s foremost archival
collections for the study of American Folk music and popular culture.³

University Archives is the official repository for UNC’s records. It contains
approximately five million items, and includes records dated from the founding of UNC
in 1793. The General Manuscripts Collection is simply named so because its contents do
not really fit in the other three departments. Included in this collection are the J.M. Dent
& Sons Papers and A.P. Watt & Company Papers. Both are affiliated with publishing
firms in England.⁴

Origins of the Project

I was initially approached by Laura Clark Brown, Head of Public Services at the
Manuscripts Department, about taking on this project. She and Tim West, Curator of the
Manuscripts Department and Head of the Southern Historical Collection, discussed the
possibility of starting some sort of graduate student advisory board to “advise” the
Manuscripts Department. Ms. Brown and Mr. West had broad areas where they hoped
this group would be an asset, including collection development, instruction, and, most
importantly, outreach to the campus and greater community.

Last May, a former employee of the Manuscripts Department and Library Science
masters’ student, Matt Turi⁵, conducted a survey to assess use of the collections by those
on campus.⁶ Matt found that the majority of collection use is derived from visiting
scholars and researchers, a statistic surprising to both Ms. Brown and Mr. West. This
statistic alone was one of the main reasons to start an advisory board.
At this point in the venture, summer 2004, neither Ms. Brown nor Mr. West were quite sure what they expected from this advisory group specifically. They were positive, however, that they wanted to invite graduate and professional student to join, as opposed to faculty. In the past, the department has tried to form faculty boards, but experienced little success, as faculty members usually proved too busy to participate and their attendance fell off after the initial meetings. Mr. West and Ms. Brown also felt and continue to feel that graduate students are the link between the undergraduate student body and the faculty, as they have access to both as teaching assistants.

Initial Goals and Expectations

Prior to formulating how we would go about creating the graduate board, Mr. West, Ms. Brown, and I met to discuss their expectations and goals for this group. It was determined that I would act in a secretary/organizer role, as well as the Library Science representative to the board. In this way, we could ensure that I received the information I needed to write the paper, which would become the official records of the board.

There were several areas in which Mr. West and Ms. Brown felt the department could benefit from student input. Those areas include collection development, campus and public outreach, and instruction and education. Mr. West, as the Curator of the Manuscripts Department and Head of the Southern Historical Collection, is responsible for collection development within the Southern Historical Collection. He envisioned the graduate board taking a role in possible future additions to the collection within the community, helping in the evaluation of potential collections for their historical value, especially in cases when members of the board had more expertise in a certain area than
he could provide, and receiving input prioritizing future collection areas and initiatives of the collection. Not only does Mr. West feel that he and the SHC can benefit from the input, but believes University Archivist, Janis Holder, and Head of the Southern Folklife Collection, Steve Weiss, can as well.

As indicated from Matt Turi’s study, outreach to the campus and community is a major goal of the Manuscripts Department. Mr. West and Ms. Brown hope not only to increase use by graduate and undergraduate students on campus, but also to raise community awareness of the collections. Past outreach endeavors, on the part of the Manuscripts Department to raise awareness, have included informal presentations by faculty and local scholars who presented the research they have conducted within the Manuscripts Department’s collections.

The third major area in which Ms. Brown felt that the Manuscripts Department, and its Public Services could benefit was education and instruction. Ms. Brown already had set in place a number of tools to aid instruction. Last year an online tutorial was developed by Ms. Brown and a graduate student to provide instruction about the collections, including an opportunity to register for the collection online. Along with the tutorial, Ms. Brown extended a chance to faculty to bring their classes in for presentations or projects utilizing the materials the department holds. Although Ms. Brown has experienced some success publicizing the Department’s services to faculty, she would like to see more undergraduates receive proper instruction on the use of primary materials.
The Process

Member Recruitment

After the initial meeting I attended with Mr. West and Ms. Brown, the planning process for the Board came to fruition. Ms. Brown utilized one of the tools, the reader registration website, in Public Services to research possible graduate students to invite to join the group. Ms. Brown wanted to invite graduate students from various disciplines that have all used the collections previously. Since the initial board was more of a “planning board” for the Graduate Advisory Board, she felt that those with at least some experience would be most beneficial in the planning process.

The initial list of invitees numbered sixteen and represented the following disciplines: History, Journalism, Political Science, Education, Religious Studies, Music, and Folklore. Again, I would serve as the Information and Library Science representative. A personal invitation was sent out to each invitee via surface mail from Mr. West inviting them to join the group and attend an initial information session. We had eleven of the sixteen invitees attend the information session and join the group, however, two dropped out after a few meetings. The members represented the invited disciplines as follows: five from history, and one each from English, Education, Music, Political Science, and Folklore.

Meetings

The group decided that they would meet twice a month, for approximately one hour and a half. Meetings began in August 2004. For the frame of this paper, I will be
including information from the beginning of the process to March 2005. Ms. Brown and I usually met before each scheduled meeting to discuss and plan an agenda. We tried, from the beginning, to plan a rough schedule for the entire year.

Our original goal was for this group of graduate students to be the planning board for the advisory board and take the Fall 2004 to plan the group, including the structure, constitution, and bylaws. By Spring 2005, we hope to start with the actual graduate advisory board. Things did not go as planned. It took us a lot longer than expected to work out all of the planning. We ended up well into the Spring 2005 semester before we were ready to test two committee beta groups.

The basic meeting structure consisted of an opening icebreaker to help the group members become comfortable with one another, as most members did not know each other prior to joining. An example icebreaker is going around the table and having everyone, including Ms. Brown, Mr. West (if he attended), and myself telling the group something about ourselves, like our favorite childhood toy or the first concert we attended. We found that everyone seemed to enjoy these icebreakers and it seemed to make the meeting environment quite comfortable. Members even began to suggest their own icebreaker topics for future meetings. After the icebreaker, Ms. Brown (or I) typically introduced the agenda for the day, and the rest of the meeting took on a brainstorming type model. We all even took turns bringing snacks for the meetings.

Balance

As you will see mentioned in the interviews included later in the paper, this group encompassed a variety of personalities. Many of the members were far more outspoken about their views and ideas for the group. A few individuals emerged as “dominant
personalities” in the meetings. As the members shared below, that is quite common, but it often caused issues to drag on for longer amounts of time than we had originally thought. This is the primary reason that process took a lot longer than we expected. Certain issues, such as the official name of the group, took almost an entire meeting to discuss and for the members to agree on an outcome.

Another major issue that arose was the balance of leadership. What sort of role were Ms. Brown, Mr. West, and myself to take in this project? It was hoped that eventually this group would turn into a self-sustaining, self-governing board. That is not to say that Mr. West and Ms. Brown, or the Departments would no longer have an authority over the matters of the Board, but there was some confusion over what role, specifically, they would play. From the beginning, Ms. Brown and Mr. West referred to themselves as ex-facto members of the Board, which is to say they were participants but played no real active role in the day-to-day operations. Instead, they would meet and share their ideas and projects that they wished the Board to pursue, and have final say over decisions. This is understandable, as one could not expect a graduate board to supercede the authority of a University Department. This group was, after all, created with the idea that it would assist the Manuscripts Department. The role that the Department and Mr. West and Ms. Brown would actually play, however, was never fully clear until later in the process. When writing the constitution, it was crucial to include this and to make sure there was a clear explanation of roles within the Board. It was pointed out that this group was not meant to be the unpaid staff of the Manuscripts Department, taking over tasks that were neglected by the staff, but instead a supportive structure to assist when necessary.
Structure of the Board

During the Fall 2004 semester, the planning group agreed on a structure for the future Board. It was decided that SASGAB will consist of an executive board and an additional general membership of 25-50 graduate students. Membership will be by application or by invitation from a member of the executive committee or the Manuscripts Department. The executive board will consist of two co-chairs, a treasurer, a secretary, and standing committee chairs. SASGAB will consist of the following committees: public outreach, campus outreach, collection development, instruction, publicity and publications, and membership. Every member of SASGAB must serve on a committee. The following is a brief list of the goals for which each committee is responsible.

MEMBERSHIP COMMITTEE: This committee is responsible for: the application process, which consists of recruiting and processing applications; designing a brochure about SASGAB to use in the recruitment process; maintenance of membership records over time; keeping membership rosters for the entire board, including membership in each committee; facilitation of new membership orientation; committee member assignment; and devising a membership process that encourages and supports the Board’s ability to become self-sustaining.

PUBLIC AND CAMPUS OUTREACH COMMITTEES: These committees are responsible for: raising awareness and usage of the collections; creating, coordinating,
and overseeing public programming; and assisting the Manuscripts Department with planned events.

COLLECTION DEVELOPMENT: This committee will: act in an advisory capacity and Mr. West will set the agenda; explore new collection development initiatives, follow possible leads, and advise the Curators of the Collections of new collection possibilities; and help evaluate and prioritize accessions for place on processing queue.

INSTRUCTION/EDUCATION COMMITTEE: This committee is responsible for: advancing primary source literacy; improving presentation of materials and sources; help prepare standardized packets for various visiting groups; assist the Head of Public Services with selection of primary sources used in class presentations; and help seek ways to increase access of collection.

PUBLICITY/PUBLICATIONS: This group is responsible for: producing guides to subject areas in the collection; and provide printed resources and support for Manuscript Department events and Board activities.

The Constitution or “What’s In A Name?”

Perhaps the most time consuming and frustrating part of the entire process was the drafting of the constitution and bylaws. The Board finished the structure of the Advisory board and committees near the close of the Fall 2004 semester. The original plan was for Ms. Brown and myself to do a rough version of the constitution and bylaws, send it around to everyone via email, have each member make their recommendation for
changes, and then I would compile them all for the first meeting of the new semester. Well, as often happens, plans did not go exactly as proposed. Due to the holidays, only a few members of the board had the opportunity to read over the rough constitution and bylaws and send his or her changes. As a result, we had to postpone the plan until the first meeting of the 2005 semester.

As I alluded to previously in this paper, we did not stay on the original schedule as planned. The constitution proved to be much more time consuming and detailed than expected and we did not finish until mid-March, when the beta-groups were formed. One of the main sources of time taken was debate over constitutional wording. The “What’s In a Name” debacle is perhaps most memorable for the group. The original name of SASGAB was SSGAB, or Southern Sources Graduate Advisory Board. It was not until the first line of the constitution was written, which refers to the name of our group, was there any second thought to it.\footnote{Needless to say, 45 minutes after the meeting began, we finally came to the consensus, or lack there of, to add “Archival” to the title, as some thought it may add some more meaning to the group. So, at the end of the first meeting of the new semester, we had gotten as far as the title. To follow suit, other objections arose throughout the process, and the constitution drafting took much, much longer than expected.}

The End of the Road

In March, the Board decided to beta test two committees, the Outreach and Membership committees. Mr. West sent out another round of invitations to a group of graduate students who were recommended by the members of the Board. The Board officially took over the beta groups, with two members of the board acting as co-chairs
for each committee. The rest of the Board members were split between the two committees. This is where my job as recorder/secretary ended, as well as the stopping point for the examination for this paper.

**Literature Review**

The literature that I found is not very expansive or relevant to the creation of this board. From what I can tell, or as far as what is documented, there are not many Graduate Advisory Boards to special collections out there. The most relevant information I could find was that of general “How To” books and materials about creating Boards in general, and these were geared to the business and executive setting more than not. I opted not to read “how to” book, after “how to” book, as most of them contained the same information and were tailored to businesses, and the information was quite stretch to make fit. The book I found that relates most to boards in general is Cyril O. Houle’s *Governing Boards*. Houle describes governing boards as being “both concerned with the boards that control the not-for-profit institutions in the private sector and with those that govern many public agencies”⁹. Although this board does not “control” the Manuscripts Department, I found some similarities with the setup of our board.

Houle says that, “people are chosen for the boards membership in four major ways: they are invited…they are appointed…they are elected…and they are selected”¹⁰. This was a major issue for the board. How are you selective about members for a group that is only starting to exist and has no reputation. Well, the board decided that instead of dropping the hope of recruiting quality members, we would rely upon the reputation of the Southern Historical Collection and the Manuscripts Department. As, Houle points out
and as indicated in the interviews with the members, there are mixed reasons for joining; reasons ranging from those who have altruistic motives to those who would like a credit on their CV.\textsuperscript{11}

One of our biggest concerns was achieving diversity within the Board. Houle points out that it is now generally accepted that boards should have diversity, unlike twenty-five years ago when the issue had to be pushed onto the Board. He points out several categories of diversity, such as age, location, and sex. Our board is most concerned with fostering diversity among the academic disciplines represented.\textsuperscript{12}

Houle remarks on the importance of written records.\textsuperscript{13} Originally we did not plan on having a constitution and bylaws for the board. However, Ms. Brown decided that the best way to ensure longevity and consistency is with a written record. Houle goes on to discuss board size, committees, and assessing the quality of the Board. These were all factors we considered when writing the constitution and we made sure to write in coverage for all three.

The other surprise I discovered a few weeks ago, was the existence of an undergraduate library board at Pennsylvania State University, while performing yet another Internet search. Calling itself the Library Student Advisory Board, it was started in 2003 to help promote the library to students. The group meets about once a month, and the library found its usage has gone up since it began. They have a constitution and helped the library raise money to purchase new materials, such as books and DVDs.\textsuperscript{14} I found evidence of faculty boards, but this was the only online student run library affiliated board I could locate.
Interviews

Perhaps the most important aspect of this study is the interviews. It is very easy for me to relate my experience with the Board, but I want to present as much unbiased information as I can. I was heavily involved in the organization and creation process of this group from the beginning. As a result, my experiences of the process may be slightly colored in a positive light. As a result, it was very important to me to have the opinions of the other group members involved, as they would be the force driving the group once I leave.

All of the members of the Board, as well as Mr. West and Ms. Brown were given the opportunity to be interviewed. I decided to conduct the recruitment in this fashion, as I knew there was no way I could guarantee the anonymity of the participants after the interviews. This is a public board, whose records will be kept in the University Archives. As a result, access to the identities of the members is inevitable. Each of these interviews was completely volunteered and some members chose not to participate in the interviews.

In addition to Tim West and Laura Clark Brown, I interviewed seven members of the Board, including one member who decided not to continue as a member after the first semester. All of the members were asked the same questions and were given the chance to speak freely about any part of the process. Mr. West and Ms. Brown were asked a separate set of questions, as there was a different aspect of the process I wanted to ascertain from them. The first group of questions and remarks presented are those of Ms. Brown and Mr. West, followed by the set of questions for the Advisory Board members.

What factors led you to the decision to create the Advisory Board?
Ms. Brown:

Well it came out in a brainstorming session with Lynn and Tim, Lynn Holdzkom and Tim West, who is the Curator of Manuscripts. We were talking about use of the collections and the fact that many of our users are outside of the UNC community, and this was frankly a source of contention for Tim; that bothered him. There was also…a SILS student who wrote his masters paper about the use or nonuse of the Southern Historical Collection by UNC users, and his finding were that a lot of people knew about us, or had heard of the Southern Historical Collection, but were not or for whatever reason had not used us or had used us in the past and hadn’t bothered to come back, and this distressed Tim quite a bit. So, we were brainstorming, Tim and I, and I think I mentioned first, well what about gathering together some graduate students and getting to the two different populations who seem to be a little bit out of our reach right now. The undergraduates and the faculty do not seem engaged with our collections, but the graduate students clearly are because they are the ones who are in our search room. So, since they are already engaged and find us useful, lets tap them as a resource and as an intermediary population, because they have contact with the undergraduate students, who we are trying to reach out to and the faculty. They are specially positioned to help us bring about a high profile for the collections on campus.

Mr. West:

My memory is, is that Laura Clark Brown and I had discussions about many things including increasing use of the collection, increasing programming for the collection, and increasing the involvement of various communities on campus.

Mr. West and Ms. Brown both mention an overall desire to increase the use of the collections both on campus and in the wider community. There seems to be a large emphasis on bringing undergraduates to the collections, as well as increasing faculty involvement.

_Did you originally want graduate students, or did you consider other options (faculty, undergraduates)?_

Ms. Brown:
We briefly considered faculty, and I think we dismissed it pretty quickly because we felt that faculty would be very difficult to engage. Faculty have a lot of expectations on them, and they are difficult to bring into working groups. Absenteeism would be a huge problem, I think, with faculty, and undergraduates were never considered to my recollection. The graduate students were seen, again, as the ideal population. We tried to look at the benefit to the graduate students. If nothing else this could be very good experience for them, something to put on their CV. We thought that maybe some of them would see it maybe as an honor to be asked to assist us, and we’d have an interest particularly in the collecting aspect of our work. We felt that faculty were not going to use our board to build their resumes and would not have as much invested.

Mr. West:

A more traditional thing would have been an advisory board with faculty I think. I think there had actually had been one for the Manuscripts Department or Southern Historical Collection some years ago, and that is something I guess I had thought about. I had not planned anything too specific or anything like that, but thought it might be a possibly good idea. As we talked and especially given Laura’s associations with current graduate students it began to seem like that would be a different way, and quite possibly a more productive way to go, although we didn’t necessarily rule out the other. We may have faculty recruitment at some point, but this seemed to be where the energy was following, and of course the classic argument we have been making is that the graduate students are in between the faculty and the undergraduates and can reach out in both directions. I think that carries a lot of weight and makes a lot of sense.

Over the course of the planning committee, we have discussed ways to involve faculty in the collections. Ideas have ranged from a faculty round table luncheon to discuss ideas, with the idea that it is not a permanent group like SASGAB. We also discussed reaching out to faculty and encouraging them to use the collections in their lesson plans and assignments.

*What were your initial goals for the group?*

Ms. Brown:

I think it was pretty nebulous in the beginning, but at the first meeting when we sort of introduced the concept, my recollection is that we brainstormed about some of the ideas and we sort of had different areas that we wanted the group to
assist us with, advise on, and actually do some critical work in terms of programming. The very first original ideas were to get them connected, get us connected to their faculty and their undergraduate students they come in come in contact with and promote use of the collections that way...I think ideas sprung from that initial thing...

Mr. West:

Two main goals I have for the department are to increase use of our materials. That is across the board, from physical use by people who visit us, to use via email, to digitized use on the web. So that is one arena. The second one is to keep trying to figure out ways to increase programming; especially programming that gives people who have actually done research with our materials opportunities to report on that research to the campus. I don’t think we have quite found the magic formula for doing that real well, but I thought graduate students would know as well as anybody, probably better than anybody if there are strategies, because I’d like to think of us as an operation that collects the materials, preserves them, makes them available, and then also facilitates use of the materials, both as direct use by individuals and then spreading the news about what people are discovering the materials. So that is where the programming part comes in, and where I think graduate students can really be helpful. I think that was part of my initial thinking about it. I never thought about undergraduates, although we do have some undergraduate assistants that have some genuine interests in the collections...Collecting is goal...advice from these folks. Once we get something going and I know one of the proposed committees is a sort of collecting advisory committee, I think I will end up consulting that group pretty regularly. I have had occasions already during the process of organizing it. What I have now are a few faculty that I can call up. I think people in my position have to weigh the perspectives that they get from various people, because an individual is going to have a particular bias one way or another that is not going to reflect to well often the long term potential research interests in a particular body of material that we might take in. Anytime we take something in whether we purchase it or whether it is a gift it costs us a good amount of money and resources, so it is important, when we can, to get a broad perspective on people’s predictions...if it’s worth the effort and the money.

I can remember the first meeting I had with Ms. Brown and Mr. West, and how they were not quite sure what kind of group they wanted. They knew that they wanted an advisory board made up of graduate students, but I do not believe they knew exactly what role the advisory board should or would play in the department. In addition to the idea of the board itself, Ms. Brown and Mr. West also had broad goals for the board to achieve.
The purpose and role of the group truly blossomed from the SASGAB meetings and brainstorming sessions.

*Have the original goals changed any during the process? How and why?*

Ms. Brown:

I don’t think my original goals for the group have changed much. I know there has been some discussion about is this truly an advisory board in the sense that this group is just going to sit around and talk about ideas. I guess I always saw it as a more active organization that would take initiative, not just share their ideas, but also develop some of them, particularly again, in the area of programming. Now there are certain aspects of our work that they clearly can’t do anything with except maybe advise us, so in that sense I do see them as an advisory board with areas like collecting and instruction, and I hope that they will be able to contribute something to that, but definitely very active in the area of programming.

Mr. West:

I probably can’t give much of a direct answer here, but the process to establish the Southern Archival Sources Graduate Advisory Board has surprised me in two ways. One, I had not thought about or anticipated that there would be as much preparatory work that would need to be done, and I appreciate that because I can see the intention and value of laying a foundation that the activities are going to continue over time. I think we are doing the best to make that happen, it still may not happen, but it still could dissolve at some point, but I think by having a constitution and bylaws and established committees makes it more likely that there will be something that will last for a while. The other thing is the number of people that might be involved. When we talk up to fifty graduate students, I would have been thinking in terms of ten or fifteen. I wonder, when you are not around to help, if we can maintain the effort. I haven’t really talked to Laura, to see if a subsequent graduate research assistant in public services would be a standard part of the group, because as you know, it takes quite a bit of maintenance and facilitation. It will be different, I guess once things are in action. I have noticed that you and Laura have pretty often referred to the fact that this group is going to be carrying on more on its own. They will be making decisions in concert with us, but as far as the actually day-to-day leadership goes, we are trying to set something up that will be turned over to them, and I admire your ambition and I hope it works. I think this was a great project, and I hope it is appreciated by your faculty advisors, because I can’t imagine going at something like this with more energy and organization and long term ambition than you have, so I think it will be useful to other institutions.
Tim played more of an outside advisor role in the planning process. Due to his busy schedule, he was unable to attend all of the meetings. Ms. Brown and I did most of the planning and legwork in the beginning and planning throughout the process. We kept Tim updates throughout, and included his input and goals in our agenda for the meetings.

After participating in this initial planning group, do you feel confident about the longevity of the advisory board?

Ms. Brown:

I desperately want to be confident that this will work. I think the Fall will be the true test. I think we have a number of folks that are very dedicated to seeing this succeed, however, I think most of those folks are at the end of their programs, and so I think it is sort of on their shoulders to promote the board itself and do some really great recruitment to establish something solid and attractive for graduate students to participate in. I am concerned about, in our last meeting, the initial planning group’s executive committee, we talked about the Southern Historical Collection staff, me, yourself, and Tim, pulling back a little bit and letting them take over these beta committees, for membership and for public outreach. This I believe will be the true test if they can succeed with this then my hopes will be great but I do worry that the organizing aspect will become somewhat of a burden to them and they might stumble with the expectations on them and the actual having to do the work. Frankly the hardest part of being in any kind of group that is taking action is the organizing aspect of, and you should know this quite well. The pulling together of people’s schedules, and calling a meeting, and then running a meeting, very difficult to do. I think it will be a challenge for them. I don’t think they’ve had much experience in that, although a couple of them definitely do. I wouldn’t say I was confident, but hopeful, very hopeful. I do believe this board can do some really wonderful things, and really help us gain a higher profile on campus.

Mr. West:

Well, I certainly feel confident that things are going to proceed in the early stages; some things are going to happen. I don’t have any lack of confidence in what you all have done, you’ve done great. I just don’t know how, I mean as you say this is sort of an effort that you don’t see parallels for so it is hard to predict how its going to work. You seem to have identified and nurtured a small group of people who are dedicated, and I bet you there are some more people that we brought in to test the committees that turn out to be that way, so that gives me confidence. We may be trying to involve a large group of people, but the fact that there seems to be a core group that has developed a pretty strong
commitment to what we are trying to do gives me confidence. The proof for me, well one thing, will be a series of programs the group has a big hand in planning and producing. If that happens, that will give me more confidence.

If asked to provide the biggest theme that has permeated throughout the SASGAB meetings, I would have to say it is the idea of SASGAB becoming self-sustaining. Ms. Brown, the board, and I worked very hard to build in mechanisms that would ensure longevity, as the turnover rate for membership is naturally going to be high, as student will come and go according to their program lengths. We found it important to have a written record, so if the worst should happen, and we lose the entire membership, the process would not have to start over from scratch. Instead, the new members could go to the constitution and bylaws, as well as past meeting notes and agendas and know how to function as a group.

*Did the planning process proceed and accomplish what you envisioned? Did you envision a process?*

Ms. Brown:

…I think many of them [the members] were surprised at the longevity of the planning process, and that came as a little bit of a surprise to me that it took so long. I guess I hadn’t truly thought through the process of starting from an organization from scratch with the single-minded intention that this has to be established and then self-sufficient, self-sustaining, and self-run, so that rather than becoming an extra duty for my job or for any of our staff members who are already overbooked, to say the least, that this would actually become something that would help us in our work, help us to accomplish things that we wouldn’t be able to accomplish otherwise and not have it be so much work for us. So, I guess I really did know what was involved with pulling people from all of these different areas, people who are essentially volunteering their time. You are at the mercy of their good will and energy and willingness to participate, and it is hard to truly have the incentives for them to really remain loyal, and I think it really depends on the individuals you pull together. I do think we well not everyone survived after the first semester….but we do have a core group of folks that are eager to see the group succeed and establish it as something, and if for nothing else having spent so much time organizing and planning the group it would be tremendously disappointing if it didn’t succeed. I guess I maybe oversimplified the process in
my head. You know that idea that it wouldn’t take as long as it did. That idea that we could borrow heavily from other organization, but what I think we’ve discovered that this is not like anything that we know of that is out there already, so in a sense we were…inventing our own wheel and there were hurdles on that road that we could not have foreseen. I think I thought that there were very likely good models for us to follow and there were. We did use a lot of ideas about structure and the written documents, the rules, the bylaws, the constitution from other organizations, but it took a lot more time thinking through those things.

Mr. West:

Well it is hard for me to talk about the planning process, because I didn’t have a clear vision of the process, but as I said before, it surprised me that you were going to a fairly lengthy process of setting up the structure…I appreciate you thinking about that, because I didn’t think about it that much, but as I think about it now, I can see value of investing in the early stage, so that you build a framework that makes it possible to carry on as independently as possible…because there will be regular and frequent transitions of people coming and going. That is one of the things that makes this trickier than say a Friends of the Library group, when you have people there for twenty years. Anyway, extremely worthy effort, and I am honored to be involved to try something innovative like this, not only for the field that it is kinda new idea, but we can’t find anyone who at least advertises that they’ve done it, so we’ll see. It may morph over time…but I am quite hopeful and pleased.

As aforementioned and quite evident throughout this paper, the process was much more involved and carried on much longer than we ever expected. I do not think it is even possible to predict a process length when beginning a new group, and planning for a constitution and bylaws, especially when there is no precedent to build on.

The SASGAB Members’ Interviews

*What about this group attracted you to participate?*

Barbara Hahn:

I thought it was an honor. One, to help the collections with whatever they wanted to accomplish, and two, to be part of the decision making process. I thought it was an honor. There were also careerist sort of elements in play as well in a sense that
not only is it the Southern Historical Collection and I coming out here deliberately marking myself out as a Southernist by my topic, but also as a University wide committee; that seemed like a good thing to put on my CV as well as being a leader in departmental governance.

Blaine Waide:

What initially attracted me about being on the committee, when I got the letter I thought it would be an interesting experience. I had never been on a committee, and I thought it would be something, selfishly, to put on a CV. Another way of being associated with something prestigious like the Manuscripts Department and rub elbows with people like Tim…I thought it would be a good experience in terms of learning another academic experience.

Dwana Waugh:

Well I think I use the collections a lot for my research, and I think after getting the letter I thought it would be useful to learn more about the collections, so I think that was what initially attracted me to participate.

Aidan Smith:

I was drawn to participate because, well for two reasons. One, because I think historians can do a better job being involved in the community and making the work they do more public and more accessible to the public. Also, historians need to be better aware that their work could be served by being more familiar and aware of what goes on behind the scenes in the archives and with the materials that they use. It is not something I had any background or knowledge in…The opportunity to be involved in a group that would in some ways make these materials more accessible or more readily used, or influence the way they are used both by historians and non-historians.

Paul Quigley:

I think the main thing is that I rarely say no to anything like that. I feel so flattered and glad to be asked…in this case I was interested because… I had used the collections some and wanted to use them more and also was interested in finding out more about how the collections work…and I do value opportunities to help do service type stuff and help share these kinds of resources with other people. I think when I first start thinking about the whole undertaking one of the first things that came to my mind was the instructional value and I had just begun to teach my own classes and had been figuring out ways of using primary sources with undergraduate students and so this seemed like a good arena to explore good ways to do that.
Nancy Schoonmaker:

When I got the letter inviting us to participate, I thought it would be really, really fun to be on an advisory board for the Southern Historical Collection, because I love working in the collections, I like the people there, and I thought it would be a great opportunity. Initially, I thought it would just be a group that sat around and talked about the collection. Just fun, and maybe what would be good to add. I had no idea that as we talked through the planning process we would find so many ways to expand the vision, and that’s kind of exciting. It is no fun in some ways to do the nuts and bolts in and this committee work of putting the organization together, but because I really like the group and really respect everyone on it, I think we have a good diversity of opinion and perspective; I’m very pleased with what we’ve come up with.

The reasons for joining, as mentioned in the literature review, are varied by person and range from a desire to be involved with the archives to wanting a line on a CV. However, despite the individual reasons for involvement, for the most part, each member seems devoted to SASGAB and SASGAB’s success, and genuinely interested in the collections.

What were your initial expectations for the group? How have they changed over the process?

Barbara Hahn:

I am not sure that I had any. And it is hard to separate from the experience of actually having been in it and develop. When I think about I guess I thought we’d be doing sooner and more assigned into groups. I kinda thought I guess that I would be advising on collecting more tobacco things, even though I make a joke about that in the meeting…I kinda thought I would be coming to the meeting and be told and in that my expectations were entirely met, but it is hard to distinguish how it has changed from the beginning over the course of the process.

Blaine Waide:

I don’t know if I had many initial expectations. It was the summer so I wasn’t very busy so I was more than happy to come. I was a little surprised… when I found out the librarians were going to let us loose. That there goal was to remove them selves from the process, which was fine…
I didn’t see what the group was going to accomplish by the end. I thought a lot of it was a bunch of hot air bouncing around the room… I just don’t see undergraduates ever using this place. To me that was just an unreal expectation. It is not a criticism of the library or undergraduates. I just didn’t see how in their assignments this place would become attractive to them doing this sort of research. In terms of graduate students, as people talked about a lot of them one of my reactions to the group members was I came here as an employee and it looked like they much more wanted our input as people who did research here, and folklorist although we do, I mean we obviously do research, and it is written into out theory class…but as our field develops we are supposed to do field work, so it never enters our mind to come do archival work. I thought the group was more dominated by people who had been doing archival research here, and I didn’t feel I had much to add to that.

Dwana Waugh:

I think initially I thought of the group as just talking about how to bring more people into using the collections… I think as the group meetings have gone on I have seen that it is much more in-depth than getting people to come in, explaining about the collections, and creating the constitution was definitely something I didn’t think we were doing a constitution…that made it more concrete to me, more official.

Aidan Smith:

I had no idea what to expect as for the first meeting, and that was fine. I don’t think there was anything more that could have been or should have been done to prepare or set expectations. I think that it is probably better that people did not come in with a whole set of ideas or agenda about what they wanted to do…but instead were, well at least for me, a lot of those developed out of the group, working with the group as whole. Now, I think in part too, what was really nice was having, in a certain sense, you and Laura gave us the expectations of the group right up front and that was very helpful. I think also what was nice was that the group, the participants in the group were permitted and were able to not change, but sort of mold those expectations in ways that it saw feasible or that they would be interested in doing over the course of the semester, and some expectations that were given were flexible enough that they could be changed.

Paul Quigley:

Yeah they have definitely changed and I don’t really remember fully what my expectations were. I don’t know if I really had strong, fully formed expectations about what we were going to be doing. I guess I thought, and I still wonder if the name of an advisory board sort of suggests something slightly different than what it turns out we are trying to do, and so I guess I thought maybe there would just be a handful of people and the library staff would be asking us how do graduate
students feel about this…basically drawing on us as a resource instead of giving us a submandate to support them in ways we have identified. Actually, one of the first things that came back into my mind, one of the first things that I thought of when this opportunity came up was that now I have a forum in which I can advise the Southern Historical Collection to replace the pencil sharpener in the reading room…and I never got around to asking but I noticed recently that it had been replaced…Not that I seriously thought that would be the only type of thing we would do. And actually another friend of mine who I mentioned it to, a history graduate student, his first reaction was know I can tell them that they should get bigger tables in the reading room. So, if you think about an advisory board, sometimes that is the kind of thing that you think of, and so I suppose in a sense those were my initial expectations; that it would be stuff like that. I guess with the first couple of meetings it became clear that we had some more ideas of ways that we could work and ways that we would support the collections and it’s definitely evolved, and I think mostly in good ways.

As mentioned by some of the SASGAB members, one factor that led to opinions being formed is the use of the word “advisory” in the title of the group. Advisory, in this sense, has so many possible means, so it is the individual who establishes meaning in his or her head. One of the biggest contentions was just how accurate the word “advisory” conveys the purposes of SASGAB. As the issue was debated, however, no better word could be found to take the place of “advisory”, so SASGAB decided to keep “advisory” in the name of the group.

*Did you feel the planning process has evolved smoothly?*

Barbara Hahn:

I think that the planning process has in fact evolved smoothly. I don’t think there is anything wrong with the way it has gone. The attempt to set in place the machinery, setting clear lines of authority and deciding what people should do and how the general organization should function and what its goals should be has gone exactly as one would hope such a thing would go through the making of rules, making decisions, debating about what it’s for has all been exactly what I would hope for…from an advisory organization…I would expect it to take some time to figure that out.

Blaine Waide:
I missed the third meeting, so I can’t say how smoothly the planning process developed. And I just couldn’t get that excited about constitutions and developing ideas…It would seem as if it all evolved pretty quickly, it seems as if a lot happened in what would have been the third meeting… and by the time I showed up at the next one it seemed as if a lot had been accomplished. So, in that sense maybe it was evolving smoothly. Since my interest level wasn’t that high, I can’t speak personally.

Dwana Waugh:

I think for the most part all the meetings have gone pretty well. There have been some interjections that sometimes I feel are useful but it takes up a lot of unnecessary time that could be better spent elsewhere, but I think for the most part the meeting have gone smoothly. Planning the constitution and going over the constitution has gone smoothly.

Aidan Smith:

...I can’t speak about the planning process, but the things we did in group as far as how the meetings were planned, but the evolution of the group’s work did evolve smoothly. There were certainly times…there was one point there developed a debate about how much influence or role the organizers of the group should have in the direction of the group and setting the agenda and setting some of the goals for the group, and some members of the group felt that as little sort of top down control or administrative control would be desirable. It was interesting to me to hear those comments because there were times I actually felt the complete opposite, which was that at certain points if might have been helpful had there been more top down administrative control simply to improve efficiency of the group, and the decision making process. That is not to say that questions that we were debating or talking about weren’t significant or important, but there were times especially in things like constitution writing and other sort of administrative functions where working solely or exclusively by group consensus wasn’t maybe the most efficient or fruitful way to approach some of the drafting of the documents and things like that given the infrequency in which we met and given the time we spent together in some cases it might have been more helpful to have some of that planned out ahead of time more before we met, or the flipside of that is if it was something that we really wanted the plans completely by the group then we all should have committed to meeting more frequently or to a longer period of time to do it, as opposed to have the stopping and starting…Having said that, that would have been the only thing I would have changed about the process.

Paul Quigley:
I think looking back now that I think the second or third meeting in the Fall, I missed and that was the meeting where it was decided that we would spend this year formulating plans and doing the constitution, and deciding what the structure of the group would be and maybe identifying some main ways that we could work…so I wasn’t there when we decided we would become a planning group…well I could understand why I wonder now if we shouldn’t have set limits on the planning process. I think at times it has gone on a bit more and more… I have in the back in mind been thinking we should have gotten this stuff figured out more easily and more quickly than this and actually started stuff. I guess looking back I wish that we could have gotten the planning done by Christmas and then moved into some actual work this semester.

Nancy Schoonmaker:

I thought the process went very smoothly. I think the meetings were always well thought out in advance, they were very well managed; there were good visuals so we could follow along, the expectations were clear, and it was done in small bites. It was just a good planning and gentle, subtle management of the process.

What, if anything, would you have changed about the process?

Blaine Waide:

As far as what to change, everybody was very pleasant and like with any group you are going to have people who are more dominant and people soft spoken or not spoken. But I thought a couple personalities during the process were a little too much and maybe personalities that due to their connections to the place felt that they had more voice to give or felt that had a bigger podium on which to stand, but you know everyone was pleasant and it was an enjoyable group of people to sit in with…and I don’t know how you could have made an effort to make it a little more democratic, because this isn’t a, hell this isn’t even a class. It isn’t a teacher trying to negotiate this discussion. I can’t say that I would suggest any major improvements or changes.

Dwana Waugh:

I like the fact that it is a small group, and I like the open-endedness of it because it gives everyone a chance to voice their opinion. I guess if there were anything that I would change it would be maybe a little more structure. That is just a system to prevent outside conversations from occurring… I like the icebreaker…it is useful to get to know other people and their personalities, but I think at times some peoples personalities are stronger than others and their voices are louder than others and in that regard I think having more focus to make sure that
conversations won’t go all over the place and it won’t be conversations dealing with personal matters and more so focused on the task at hand.

Paul Quigley:

…Most members of the group are so academic and like to talk and they like to debate things and think about the implications of things, which isn’t a bad thing in itself. I think that is why it has become a longer process than maybe it could have been, and I suspect the only way to make it shorter would be, and certain members of the group wouldn’t appreciate this, would be by maybe if you and Laura had sort of not taken more control because I think you’ve been in control of the process, but maybe…defined…this is difficult because I don’t want to say that you guys haven’t been in control because I think you have. I think maybe if as a group we would have decided that you know we could argue about these small points for weeks and weeks, why don’t we just settle on a rough outline of a constitution now and worry about details as they come up later. So, I suppose the only way that could have moved faster was by setting a deadline or limit.

Nancy Schoonmaker:

I don’t think I really would have changed anything, but I don’t know. The only thing I might have changed is I wonder if the expectations of the professional staff were in line with what we’ve ended up with all along. That’s not a criticism; it is just the only thing I can think of that would have made it better.

Most members of SASGAB seemed quite happy with the process, overall. All seem to agree that they were not expecting such an involved planning process, which included a constitution and bylaws, as Ms. Brown, Mr. West, and I also did not expect.

Has this process enhanced your knowledge of special collections and archives, and the way the department is run?

Nancy Schoonmaker:

I definitely know more about the collections, the archives, and how the department works. I have never been to the little North Carolina Collection museum before this semester, so there is a lot more there than even I appreciated.
Blaine Waide:

It maybe enhanced my knowledge of special collections and the archives in terms of giving me more specific ideas about what the collection had. I know the strength of it is Southern. I know about the relative historical periods and I always had a vague idea of what would have been here, but maybe it was nice to hear it articulated, hear Time or Steve give their selling points.

Dwana Waugh:

Yes. I feel like I have learned a lot more about the collections… I guess I was just focused on my particular area of research and that’s what I assumed was in the collections, and even though I took a tour of the collections and heard about what the collections had to offer… I see the broad expanse of what the collections have.

Aidan Smith:

The process has certainly expanded the way I think about the collections and the archives and the way the department is run, and not only the way in which the collections can be used but there were a lot of issues that other members of the group brought up that I just hadn’t thought about in the way the collections obtained and responsibilities for selecting collections and the ways in which different collections were used and by whom…

Paul Quigley:

Yeah, I definitely learned a lot more than I used to know about the way things work, but I am also looking forward to learning more and I think that that will happen too as the group continues. I you know you all have talked about giving a behind the scenes tour, which is very appealing. As we go on and work with programming and possibly collection development…I look forward to learning more and more about the way this business works.

Did you feel comfortable with the dynamic of the group?

Barbara Hahn:

Yes and no. Generally yes, obviously it has gotten somewhat worse in recent weeks and yet I feel that that has been a learning experience for me in terms of what people have said about learning how to deal with people in a meeting setting, about being more of a game strategist…I am trying to learn…the University committee is that and I guess… I didn’t think of it in those terms…. And people have the right to their opinion and to sit in a setting like this and make
their case and try and learn to not react with fury has been part of my education. It has been very valuable.

Blaine Waide:

I felt very comfortable with the dynamic of the group members before and after the meetings. Again there were some people...some people are going to have more to say and be more imposing in saying it than others. I did feel that given that I was the only folklorist, the only person from my major, that a lot of people knew each other and knew what research they were doing and knew each other from doing research in that room. I felt their level of familiarity lead to them forming a major group and others kinda being on the periphery, but that’s just how it goes.

Dwana:

Yeah I think, and I guess I go back to the structure, the more focus, I think it is helpful to veer off in times because it makes people more at ease to say things than they might if it were completely structured. So, I think things like the openers and just questioning different aspects for example the constitution and people feel that one word may make a difference and should we add this phrase, I think is helpful, useful, and it helped for members to get to know the other members.

Aidan Smith:

The dynamic of the group members was great. The attrition rate was higher was higher than I expected from our very first meeting. I was sort of disappointed that more people didn’t stay involved, but that said of the core group that has remained involved it was great and I think the process of getting people to know each other and doing icebreakers and bringing food, all the sort if mechanistic aspects of meeting were great.

Paul Quigley:

Yeah, again I’m not really dissatisfied at all with the way it has gone, the fact that it has taken a bit more time than I wished it would. I have not been frustrated. I would not use that word at all, and I enjoy most of the meetings. There are times, you know, like with the name thing it is useful to have an accurate name, as what I said about the advisory board. So it is definitely to certain degree talking about those things at length is useful, but at the same time it has gone a little bit too far. I don’t think we’ve used our time as effectively as we could have done, but again this is, I dunno how we really could have done that without shutting down conversation and alienating people and maybe making the end result less effective. I’ve enjoyed the meetings, but I think its true with any meeting there’s
always times you think you know I wish X or Y would leave this alone so we could move on, but that might be inevitable, especially to this kind of group.

Nancy Schoonmaker:

Yeah, I feel comfortable with the dynamic of the group members. There may be one or two members who are aggressive and have concerns with issues that are extraneous to the process, but you know we are a diverse group, and I think the people we are trying to reach are a diverse group, so it is all okay.

Almost everyone agreed that the atmosphere and dynamic of the meetings were comfortable, for the most part, although there were a few members that tended to be a bit more outgoing or aggressive with their opinions. However, I think that would have happened with any group or mix of people that were involved in the process. We all come from diverse backgrounds, so naturally personalities are going to differ and at times, sometimes clash. However, SASGAB wants to strive for diversity, so these clashes cannot be avoided, as I believe it is a product of diversity.

Are you optimistic about the future of the group? What factors, if any, are present that would either ensure a future for the group or instead result in the failure of the group?

Barbara Hahn:

I'm very optimistic about the future of the group, very much so, but I think what might result in failure in any fashion would be a lack of direction at this point. I think we are still in a situation where you and Laura and Tim kinda need to point and shoot and tell us what to do…To say have a meeting outreach group and decide what sort of outreach you need to do next year. Then again that may not be your job, it might be the job of the person that is the head of that committee…but I expect that person to come to you for some ideas or goals or something and I think that for a period there is going to be some overlap of who does the directing and after that I would imagine it will be self-sustaining because there will be precedence and people will know…oh well we put up that display and we had that meeting and it was a success, or we had that meeting and it was a failure…
Blaine Waide:

I am optimistic about the future of the group. I think those people like to get together and talk about that stuff. I just don’t know if their goals with ultimately be met. Failure of the group, like I said a couple seconds ago, if certain personalities do get out of hand, that could discourage people from coming back.

Dwana:

I think this group will be successful and I think probably that we are all invested in the group now having meetings twice a month and so now we feel, well at least I feel, I can’t speak for anyone else, but at least I feel that we are part of the collections, and I would like to see the collections achieve what we set out to do. Given that people are much more committed and if we can portray that commitment to other future members so they will buy into the collections and feel a sense of connection.

Aidan Smith:

I think the group that has remained; it seems to me is interested in making this work and because of that I do feel pretty optimistic about what the group can do and the sense I get from the organizers, Laura, Tim, and yourself, is that they are interested in the outcome and making sure this works also.

Paul Quigley:

I think I am optimistic about the future of the group, but I suspect it isn’t going to be on as large a scale that we have envisioned it would be. So, I dunno maybe it will work out exactly how we envisioned it…with several different standing committees and between 25 and 50 members, and I think it would be great if it does. I suspect that maybe after the first year or two that it may be scaled back slightly, and I think there will always be a core group of graduate students at UNC who will be interested in this enough to make it work and keep it going, but I think the core group may be smaller than 25-50. I wouldn’t be surprised if this group doesn’t evolve into a 10 to 12, 15 person group who still do the same kinds of things that we mapped out and still follows those goals, but obviously one semester they will concentrate on say one campus program and the next semester they’ll do some public outreach…I dunno. I am always surprised by the types of things people are willing to do.

Nancy Schoonmaker:

I do feel optimistic. I think the most important thing is to be sure that you have a core group on the board who really are committed to making it work, because if you get slacker in one of those positions it is going to torpedo everything.
Conclusions

The idea for this Board started as a suggestion in a meeting between Ms. Brown and Mr. West. I think they are both surprised to see what this idea has evolved into. Although, there are some places and steps of the process that could be improved, the planning process, from my opinion, has been a success. I, as I imagine all of us, have learned so much from this process, although I never would have imagined that the process would be so involved or taken so much time.

The biggest issue is to allow time for mistakes in planning. Nothing ever seems to go as we all plan, so we were fortunate that we all adjusted when the planning process took almost a full semester more than scheduled. I do not think anyone expected the drafting of the constitution and bylaws to be as tough, debate evoking, and detailed as it became. This is especially true since we only met every other week for about an hour and a half.

One must also take into account schedules. It is a chore in itself finding time for 9 people to meet every other week, let alone more. Graduate students and library staff members are very busy people. They often have many obligations, so one cannot have the expectation that they will be able to devote all of their free time to the group. That is why it is so important, in my opinion, to find individuals that are not just doing it for a line on their CV. It is perfectly normal to want experiences, but those individuals must also have genuine interests invested in the group. Once someone is a member and has his or her CV line, it does not necessarily mean that they will continue to pull their weight or participate. That is one reason Ms. Brown and SASGAB found it important to use the constitution and bylaws to describe the minimum that a member must give to the group.
Odds are you still will not have perfect attendance at every meeting and one or two meetings may have to be cancelled, but at least you will have individuals who are invested in the group for the long haul.

When you get a group of academics, or perhaps people in general, debates will occur. One can never plan for the personalities of all members, so one has to keep in mind that each has his or her own opinions, as well as, the right to express it, no matter how much you disagree. Many times, these debates are what made the planning process so long. However, SASGAB, or another group, could not be democratic and allow everyone to participate, if these debates did not take place, and if members were not encouraged to speak their minds. Although it did prolong the process, in the long run it is advantageous for us to hash out all of the issues before the SASGAB actually gets started. I would hate for an issue to arise down the road and cause delays or complications, when it should have been discussed and handled in the planning process. Often though, these debates will also cause more delays. Flexibility and maturity, in my opinion, are the keys.

I, like the other members of the Board, am also quite optimistic. I may be biased because I feel as if I have put so much time and effort into the success of this group, but if it should fail, I would be quite disappointed. It will be very hard for me to just leave SASGAB at the end of the semester, as I genuinely want to see how, and if, the group will function next semester and on into the future. If the Board can continue to recruit devoted individuals, this Board will succeed. I wish I had more time to comment on the beginnings of SASGAB, but alas my time has come to part. It will be quite interesting to look back in a year or two and see just what SASGAB has achieved.
Notes:

1 Southern Historical Collection [brochure], (Chapel Hill, NC: University Library, 2004).
4 University Archives and Record Service [brochure], (Chapel Hill, NC: University Library, 2004).
6 See Appendix A: Graduate Advisory Board Invitation
7 See Appendix F: Final Draft of Constitution
11 Ibid, 29, 30.
12 Ibid, 62.
13 Marianne Seiler, Pennsylvania, to Anne Skilton, North Carolina, 25 March 2005, transcript in hand of Anne Skilton, University of North Carolina at Chapel Hill, Chapel Hill.
Bibliography


*Southern Historical Collection* [brochure]. Chapel Hill: University Library, 2005.

*University Archives and Record Service* [brochure]. Chapel Hill: University Library, 2005.
Appendix A: Graduate Advisory Board Invitation

Dear,

Greetings! The Manuscripts Department at UNC Chapel Hill is planning a Southern Sources Graduate Advisory Board to help shape the future of our collections—the Southern Historical Collection, the Southern Folklife Collection and University Archives. We are searching for graduate scholars from the humanities and social sciences to participate in the creation of this advisory board. Accordingly, we would like to invite you to be a member of the initial planning group. Given your familiarity with our collections, experience as a researcher, and role within the academic community, we feel you are a vital part of this process.

As you know the Southern Historical Collection is widely recognized as the center of inquiry into the history and culture of the American South, offering strong documentation of all periods of southern history since the late eighteenth century. Subject strengths range widely, but especially prominent are early nineteenth-century plantation culture; the American Civil War; politics and political activism; religious experience; rural life; southern literature; African American life; journalism; business; and family relations.

The Southern Folklife Collection ranks as one of the nation’s foremost archival resources for the study of American folk music and popular culture. SFC holdings extensively document all forms of southern musical and oral traditions across the entire spectrum of individual and community expressive arts, as well as mainstream media production.

University Archives is the repository for the historically valuable, official, unpublished records of both the University of North Carolina at Chapel Hill and the major administrative offices of the UNC System, headquartered in Chapel Hill. Records date from the founding of the University in 1793.

We envision the Southern Sources Graduate Advisory Board playing a significant role in advancing the mission of the Manuscripts Department and its components. Potential responsibilities include assistance and advice in the following areas: selection of new acquisitions; setting priorities for collection processing and finding aid revision; public programming; outreach to undergraduates; classroom instruction; and public relations on campus.

We anticipate monthly/bi-monthly meetings as needed over the period of two semesters (fall 2004 and spring 2005). Ex-officio members of the board will include myself as the Curator of Manuscripts, the department’s Head of Public Services Laura Clark Brown, and Anne Skilton, a graduate student in the School of Information and Library Science.
Please join us on Thursday, August 19, 2004 from 1:00 to 2:30 p.m. for an informal gathering with light refreshments. We hope that this first meeting of the planning group will serve as a chance for us to learn more about your interests and ideas and to provide you with more information about the planning group as well as answer any questions you may have.

We would appreciate it if you contacted us by Wednesday, August 11, 2004 about your plans to attend the meeting on the 18th. You may reach Anne Skilton at 919.962.1345 or via email at skilton@email.unc.edu.

We hope that you will join us on the 18th and assist us with the creation of the Southern Sources Graduate Advisory Board. Thank you for your time and consideration.

Cordially,

Tim West
Curator of Manuscripts and
Director of the Southern Historical Collection
Appendix B: 1st Meeting Agenda

SOUTHERN SOURCES GRADUATE ADVISORY BOARD MEETING AGENDA

Welcome:
Laura (including brief introduction of her role in the department)

Board Introductions:
Allow each member to introduce his or herself.

Staff Introductions:
Annie: Intro and explanation of Master’s Paper
Steve: Brief introduction of his role in the SFC, and the SFC’s role in the department
Janis: Brief introduction of her role in UA, and UA’s role in the department
Tim: Introduction of his role, introduction of the purpose of the board, and brief introduction into the objectives of the board

Explanation of Our Objectives and Suggestion for the Board:
Laura and Annie: Including possibilities for the future and explanation of time commitment.
The following objectives and suggestions will be written on white board.

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Suggestions</th>
</tr>
</thead>
</table>
| Raise UNC campus awareness and increase collection usage | • Public programming  
• Liaison between department and faculty to raise awareness of institutional and research resources  
• Selection of undergraduate stipend recipients |
| Increase and improve our services | • Prioritizing processing and finding aid revisions  
• Contribute to creation and maintenance of citation database  
• Contribute to creation and maintenance of resource guides  
• Help us cross-reference collections in other repositories  
• Advise department on instruction projects and programs |
Collection Development

- Advise on collecting foci
- Ambassador to communities and individuals with potential collections
- Assist curator in donor relations and prospects

**Question and Answer/Brainstorming:**
Annie: Board member objectives and things to think about for next meeting (Size, organization and meeting frequency of group)
Appendix C: Second Meeting Notes

Southern Sources Graduate Advisory Board
Manuscripts Department Seminar Room
Thursday, September 2, 2004
3:30-5:00 pm

Attendees: Laura Clark Brown, Andy Flory, Barbara Hahn, David Holdzkom, Maura McKee, Nancy Schoonmaker, Anne Skilton (recorder), Aidan Smith, Blaine Waide, Dwana Waugh, and Tim West

The meeting began at 3:30 pm with a brief introduction from Laura, which was followed by group introductions.

Laura and Annie described the purpose of the planning group and its objectives. The main purpose of this initial planning group is to establish a structure and plan from which the Board can operate in January 2005. We hope that with this preparation the group will have set guidelines that future Board members can follow without imposing another planning group phase. Please see the following chart.

<table>
<thead>
<tr>
<th>Two main objective to accomplish prior to January 2005:</th>
<th>Questions to consider:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Establish a governing body for the Board.</td>
<td>1. Who else, if anyone, do we need to include in the planning group?</td>
</tr>
<tr>
<td>2. Establish a written plan of objectives for the Board to achieve (2yr., 5yr., ?)</td>
<td>2. How can the Board become self-sustaining?</td>
</tr>
<tr>
<td></td>
<td>3. How often should the planning group meet and when?</td>
</tr>
<tr>
<td></td>
<td>4. How should we organize the planning meetings?</td>
</tr>
<tr>
<td></td>
<td>5. How will we define success for the Board?</td>
</tr>
</tbody>
</table>

Laura and Annie’s description was followed by a brainstorming session. The following suggestions were made:

1. Meetings should not have a tight structure, but instead planning group meetings should be led by moderators. It was agreed that Annie and Laura would continue to moderate for the time being.
2. The group decided to meet every other Monday from 4-6 pm in the Manuscripts Department Seminar Room. Refreshment responsibilities will rotate. David Holdzkom will provide refreshments for the next meeting on Monday, September 13. Annie will circulate a sign-up sheet at that meeting.

3. The group should identify academic departments that are most in need of outreach. Annie agreed to compile a list of departments that grant masters degrees.

4. There should be a limit to the number of members from each department, so not as to have one department dominate membership. However, some departments will naturally need greater representation than others.

5. Membership should be made up of students at various levels in graduate degree programs. This will help stagger the membership loss.

6. A trial run of the Board’s structure may be appropriate.

7. Should Board membership be selective by invitation or volunteer? (Naïve v. knowledge of collection)

8. Can our department handle a big turnout from outreach? Perhaps this will help the Manuscripts Department with obtaining more resources and funding.

9. Group members should act as a facilitator for certain large classes. Certain times during the school year are more hectic for the Manuscripts Department than other times. Having a facilitator may ease the stress of large classes using the collections.

The group adjourned early, as many members had to leave early.

Respectfully submitted by Anne Skilton.
Appendix D: Initial Draft of Constitution

THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
MANUSCRIPTS DEPARTMENT, UNIVERSITY LIBRARY
SOUTHERN SOURCES GRADUATE ADVISORY BOARD
CONSTITUTION

I. NAME

The name of this organization is the Southern Sources Graduate Advisory Board.

II. OBJECTIVES

The purpose of the Southern Sources Advisory Board is to support and advance the mission of the Manuscripts Department by:

A. Promoting the department’s collections to the campus community and to the larger community;

B. Assisting the curator with collection development and collecting initiatives;

C. Advising the department on instructional and other public services;

D. Organizing interesting public programs related to the department’s collections.

III. MEMBERSHIP

Membership of the board is by application or invitation of the Executive Committee or the staff of the Manuscripts Department. Graduate and professional students at UNC-Chapel Hill, enrolled at the time of his/her appointment, are eligible. The Board will have an annual membership of no more than fifty students. Members serve at the discretion of the Executive Committee and the Manuscripts Department.

IV. OFFICERS & EXECUTIVE COMMITTEE

A. The Executive Committee will consist of seven officers: co-chairpersons, a secretary, a treasurer, and chairpersons for all standing committees. Elections for these offices will take place each fall at a general membership meeting. The chairpersons for the membership committee, the public outreach committee, and
the publicity and publications committee shall be elected for a term of two years. All other officers shall be elected for a term of one year.

B. No academic department shall hold more than 49% of the Executive Committee.

C. There is no limit to the number of terms an individual can serve in the general membership or executive committee.

D. The Curator of Manuscripts and the Head of Public Services will serve as Ex Officio members of the Executive Committee and the Board.

V. MEETINGS

A. There shall be at least one annual general membership meeting, and this meeting will take place during the fall semester. Annual elections will be held at this time.

B. The Executive Committee shall meet at least four times during the spring and fall semesters.

C. The chairperson of each standing committee shall determine the frequency of meetings for that committee.

VI. BYLAWS

(A SEPARATE DOCUMENT THAT WE NEED TO DISCUSS.)

VII. AMENDMENTS

(WE NEED TO DISCUSS A PLAN FOR THE ADDITION OF AMENDMENTS)

Southern Sources Advisory Board Bylaws

I. Duties of Officers & Executive Committee Members

A. The co-chairpersons will oversee the affairs of the Board, and shall preside over Executive Committee meetings. It is not required that both co-chairpersons be present to conduct executive meetings. Each co-chairperson will also chair one of the standing committees.

B. The secretary shall keep records of the meetings of the Executive Committee. The secretary is responsible for compiling an annual report using information compiled by each standing committee, as well as the Executive Committee. The
secretary is also required to manage communications for the Board and the Executive Committee, including memos and notifications of meetings.

C. The treasurer shall be responsible for the management of the Board’s budget, as well as keeping accurate records of the monetary transactions. The treasurer will also chair one of the standing committees.

D. Each standing committee chairperson is responsible for the affairs of his/her individual committee. The chairperson is responsible for appointing a scribe for that committee. The scribe will be charged with keeping the records of the committee and providing them to the secretary for inclusion in the annual report.

II. Election of Officers and Terms of Office

A. Standing committees shall be created or abolished by a vote of the Executive Committee.

B. Ad hoc committees shall be created terminated by a vote of the Executive Committee.

III. Parliamentary Procedure

DO WE WANT TO CONDUCT MEETINGS USING PARLIAMENTARY PROCEDURE?

IV. Access to Organizational Records

A. The records of the Southern Sources Graduate Advisory Board shall be archived in University Archives and shall be open for public inspection.
Appendix E: Evolution of the Constitution

THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
MANUSCRIPTS DEPARTMENT, UNIVERSITY LIBRARY
SOUTHERN SOURCES GRADUATE ADVISORY BOARD
CONSTITUTION

I. NAME

The name of this organization is the Southern Board Meeting Change Add: Archival Sources Graduate Advisory Board.

II. OBJECTIVES

The purpose of the Southern Sources Advisory Board is to support and advance the mission of the Manuscripts Department by:

A. Promoting the department’s collections to the campus community and to the larger community;

B. Assisting the curator with collection development and collecting initiatives;

C. Advising the department on instructional and other public services;

D. Organizing interesting public programs related to the department’s collections.

Board Meeting Change Add: The actions taken by SASGAB to accomplish these objectives are subject to final approval by the Head of Public Services and the Curator of Manuscripts.

III. MEMBERSHIP

Membership of the board is by application or invitation of the Executive Committee or the staff of the Manuscripts Department. Graduate and professional students at UNC-Chapel Hill, enrolled at the time of his/her appointment, are eligible. The Board will have an annual membership of no more than fifty students. Members serve at the discretion of the Executive Committee and the Manuscripts Department.
IV. OFFICERS & EXECUTIVE COMMITTEE

A. The Executive Committee will consist of seven officers: co-chairpersons, a secretary, a treasurer, and chairpersons for all standing committees. Elections for these offices will take place each fall at a general membership meeting. The chairpersons for the membership committee, the public outreach committee, and the publicity and publications committee shall be elected for a term of two years. All other officers shall be elected for a term of one year.

B. No academic department shall hold more than 49% of the Executive Committee. The committee will make an effort to encourage diversity of representation among academic departments within SASGAB’s committees and SASGAB as a whole.

C. There is no limit to the number of terms an individual can serve in the general membership or executive committee.

D. The Curator of Manuscripts and the Head of Public Services will serve as Ex Officio members of the Executive Committee and the Board.

V. MEETINGS

A. There shall be at least one annual general membership meeting, and this meeting will take place during the fall semester. Annual elections will be held at this time.

B. The Executive Committee shall meet at least four times during the spring and fall semesters.

C. The chairperson of each standing committee shall determine the frequency of meetings for that committee.

VI. BYLAWS

(A SEPARATE DOCUMENT THAT WE NEED TO DISCUSS.)

VII. AMENDMENTS

(WE NEED TO DISCUSS A PLAN FOR THE ADDITION OF AMENDMENTS)

Southern Add: Archival Sources Add: Graduate Advisory Board Bylaws

I. Duties of Officers & Executive Committee Members
A. The co-chairpersons will oversee the affairs of the Board, and shall preside over Executive Committee meetings. It is not required that both co-chairpersons be present to conduct executive meetings. Each co-chairperson will also chair one of the standing committees. **What about Quorum? Add: Members present at meeting will represent a quorum for the transaction of business.**

B. The secretary shall keep records of the meetings of the Executive Committee. The secretary is responsible for compiling an annual report using information compiled by each standing committee, as well as the Executive Committee. The secretary is also required to manage communications for the Board and the Executive Committee, including memos and notifications of meetings. **Add: The secretary shall manage records of SASGAB.**

C. The treasurer shall be responsible for the management of the Board’s budget, as well as keeping accurate records of the monetary transactions. The treasurer will also chair one of the standing committees.

D. Each standing committee chairperson is responsible for the affairs of his/her individual committee. The chairperson is responsible for appointing a scribe for that committee. The scribe will be charged with keeping the records of the committee and providing them to the secretary for inclusion in the annual report. **Add: The executive committee shall review and approve the charge of each standing committee. The executive committee shall periodically review the objectives of SASGAB and its standing committees.**

II. Election of Officers and Terms of Office

A. Standing committees shall be created or abolished by a vote of the Executive Committee.

B. Ad hoc committees shall be created terminated by a vote of the Executive Committee.

III. Parliamentary Procedure

**DO WE WANT TO CONDUCT MEETINGS USING PARLIAMENTARY PROCEDURE?**

David: No. I think that Robert’s Rules are too formal for this kind of organization and result in a lot of wasted motion. I’d simply eliminate this section. Perhaps a substitute with how decisions are made (by vote of the majority/consensus/whatever). Andy: Agreed. Entire Board agreed not to use parliamentary procedure, so cut entire section.

IV. Access to Organizational Records
A. The records of the Southern Sources Graduate Advisory Board shall be archived in University Archives and shall be open for public inspection.

**General Changes and Additions:** Change arrangement of sections, committees then officers and Executive Committee, and then Meetings
Appendix F: Final Draft of Constitution

THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
MANUSCRIPTS DEPARTMENT, UNIVERSITY LIBRARY
SOUTHERN ARCHIVAL SOURCES GRADUATE ADVISORY BOARD
CONSTITUTION

I. NAME

The name of this organization is the Southern Archival Sources Graduate Advisory Board, herein after referred to as SASGAB.

II. OBJECTIVES

The purpose of the SASGAB is to support and advance the missions of the Southern Historical Collection, Southern Folklife Collection, and University Archives, herein after referred to as the Collections, by:

A. Promoting use of the Collections;

B. Assisting the curators and archivists with collection development and collecting initiatives;

C. Advising on instructional and other public services;

D. Organizing public programs related to the Collections.

The actions taken by SASGAB to accomplish these objectives are subject to final approval by the Head of Public Services and the Curator of Manuscripts.

III. OFFICERS & EXECUTIVE COMMITTEE

A. The Executive Committee will consist of: co-chairpersons, a secretary, a treasurer, and chairpersons for all standing committees. Officers will be elected by the SASGAB general membership. The chairpersons for the membership committee, the public outreach committee, and the publicity and publications committee shall be elected for a term of two years. The co-chairs, secretary, treasurer, and chairpersons of the campus outreach, collection development, and instruction/education committees shall be elected for a term of one year.
B. The committee will make an effort to encourage diversity of representation among academic departments within SASGAB’s committees and SASGAB as a whole.

C. There is no limit to the number of terms an individual can serve in the general membership or executive committee.

D. The Curator of Manuscripts and the Head of Public Services will serve as Ex Officio members of the Executive Committee and the Board.

IV. MEMBERSHIP

A. SASGAB membership is by application or by invitation of the SASGAB Executive Committee or the staff of the Collections. Graduate and professional students at UNC-Chapel Hill, enrolled at the time of appointment, are eligible. SASGAB will have an annual membership of no more than fifty students. Members serve at the discretion of the SASGAB Executive Committee and the Curator of the Collections.

B. Membership in a standing committee is required for each of the general members of SASGAB.

V. MEETINGS

A. There shall be at least one annual general membership meeting, and this meeting will take place during the fall semester. Annual elections will be held at this time. Members present at the meeting shall constitute a quorum for the transaction of business.

B. The Executive Committee shall meet at least four times during the academic year.

C. The chairperson of each standing committee shall determine the frequency of meetings for that committee.

VII. BYLAWS

SASGAB is authorized and directed to prepare, adopt, or amend such Bylaws as may be desirable to carry out the administrative practices of SASGAB. An up-to-date copy of these Bylaws shall be available to any member upon request to the secretary. Any part of the Bylaws shall be subject to review by the membership at any meeting of SASGAB and
may be changed by a majority vote of the members present. The proposed bylaw must be presented to the secretary a week in advance, so he/she can distribute it to the entire membership.

VII. AMENDMENTS

Amendments to the Constitution can be proposed, in writing, by any member of SASGAB. Upon the approval of the Head of Public Services and Curator of Manuscripts, the proposed amendment must pass with two-thirds approval of the executive board before it is presented to the general membership of SASGAB. If a majority of the general membership approves the amendment, it shall be added to the Constitution.

Southern Archival Sources Graduate Advisory Board Bylaws

I. Duties of Officers & Executive Committee Members

A. The co-chairpersons shall oversee the affairs of the Board and preside over Executive Committee meetings. It is not required that both co-chairpersons be present to conduct executive meetings. Each co-chairperson shall also chair one of the standing committees.

B. The secretary shall keep records of the meetings of the Executive Committee. The secretary is responsible for compiling an annual report using information compiled by each standing committee, as well as the Executive Committee. The secretary shall manage official communications for the SASGAB and the Executive Committee, including memos and notifications of meetings. The secretary shall also manage the records of SASGAB.

C. The treasurer shall be responsible for the management of the Board’s budget, as well as keeping accurate records of the monetary transactions. The treasurer may chair one of the standing committees.

D. Each standing committee chairperson is responsible for the affairs of his/her individual committee. The chairperson is responsible for appointing a reporter for that committee. The reporter will be charged with keeping the records of the committee and providing them to the secretary for inclusion in the annual report.

E. The executive committee shall review and approve the charge of each standing committee.

F. The executive committee shall periodically review the objectives of SASGAB and its standing committees.
II. Meetings, Election of Officers, Terms of Office

A. Standing committees shall be created or abolished by a vote of the Executive Committee.

B. Ad hoc committees shall be created or terminated by a vote of the Executive Committee

III. Access to Organizational Records

A. The records of the Southern Sources Graduate Advisory Board shall be archived in University Archives and shall be open for public inspection.
Appendix G: Interview Questions

Tim West and Laura Clark Brown

- What factors led you to the decision to create the Advisory Board?
- Did you originally want graduate students, or did you consider other options (faculty, undergrads)?
- What were your initial goals for this group?
- Have the original goals changed any during the process? How and why?
- After participating in this initial planning group, do you feel confident about the longevity of the advisory board?
- Did the planning process proceed and accomplish what you envisioned? Did you envision a process?

Planning Group Members

- What about this group attracted you to participate?
- What were your initial expectations for the group? How have they changed over the process?
- Did you feel the planning process has evolved smoothly?
- What, if anything, would you have changed about the process?
- Has this process enhanced your knowledge of special collections and archives, and the way the department is run?
- Did you feel comfortable with the dynamic of the group members?
- Is there anything you would like to add about the group or the planning process?