

## New England Archivists

### Fall 2009 Meeting:

### *Appraisal: New Ideas, New Media, and Old Successes*

November 6-7, 2009  
University of Massachusetts Boston

#### Friday, November 6, 2009:

**8:00 am – 5:00 pm – Registration: Healey Library, UMass Boston**

**9:00 am – 5:00 pm – Workshops: Healey Library, UMass Boston**

- **Advanced Appraisal.** Mark Greene (University of Wyoming). Full Day, 9-5. SAA workshop, co-sponsored by NEA. Attendance limited to 40. To register, please visit: <http://archivists.org>. Registration deadline is October 6, 2009. NEA members may receive a \$25 discount off the non-member rate by entering the code "NEAAAA09" when registering online.
- **Arrangement and Description.** Bruce Stark (Connecticut State Library). Full Day, 9-5. Attendance limited to 25. NEA members \$65; non-members \$95. ACA Certified; Certified Archivists can receive 5 Archival Recertification Credits.
- **Living to Fight Another Day: Basic Stabilization Techniques for Digital Accessions.** Anne Sauer, Jennifer Phillips, Veronica Martzahl (Tufts University). Half Day, 9-1. Attendance limited to 35. NEA members \$25; non-members \$55. ACA Certified; Certified Archivists can receive 2 Archival Recertification Credits.

For further information on these workshops, please visit:

<http://newenglandarchivists.org/workshops/workshops.html>

**1:00 – 5:00 pm -- NEA Executive Board Meeting, Healey Library, UMass Boston**

#### **Tours:**

**1:30 & 3:30 pm – Massachusetts State Archives & Commonwealth Museum**

[\(http://www.sec.state.ma.us/arc/\)](http://www.sec.state.ma.us/arc/)

**2:00 & 4:00 pm – John F. Kennedy Library**

[\(http://www.jfklibrary.org/\)](http://www.jfklibrary.org/)

**5:00 – 7:00 pm – Opening Reception, JFK Library**

**Saturday, November 7, 2009: UMass-Boston**

**Schedule in brief:**

8:00 am - Noon Registration  
 9:15 am -10:30 am Keynote (Richard Cox)  
 10:30 am -11:00 am Coffee Break/Vendors  
 11:00 am - Noon Concurrent Sessions  
 Noon - 1:00 pm Lunch  
 1:00 pm - 1:30 pm Business Meeting (NEA Strategic Planning)  
 1:45 pm - 2:45 pm Concurrent Sessions  
 3:00 pm - 4:00 pm Concurrent Sessions  
 4:15 pm - 5:00 pm Closing Reception

**New Members:**  
 Please join the membership committee and NEA officers for a New Member Breakfast from 8:00-9:00 in Ballroom C, and look for the New Member tables at lunch.

**Concurrent Sessions in brief:**

Time	Session	Session	Session	Session
11:00 am – Noon	Appraising State Forests and Parks Records: The Work of a Massachusetts Field Survey	Take Your Lumps: Appraising Physical Objects	Appraising Electronic Records: One State's Methods	New Skills for a Digital Era: A Discussion
1:45 pm - 2:45 pm	Appraise Now or Later?	Appraisal Outreach: Archivists and Records Managers Talk!	Media Neutral Schedules and Big Buckets: What That Means for Archivists!	"Primary" vs. "Secondary" Appraisal: The Role of Archivists in Digital Environments
3:00 pm - 4:00 pm	Wearing Two Hats: When Archivists Get Records Management Duties: A Discussion	Reappraisal and De-accessioning	Monetary Appraisal	

**8:00 am -- Noon: Registration, UMass Boston Campus Center, 3<sup>rd</sup> floor**

**8:00 am – 3:00 pm: Vendor Exhibition, UMass Boston Campus Center, 3<sup>rd</sup> floor**

**8:00 am – 9:00 am: New Member Breakfast, UMass Boston Campus Center, Ballroom Section “C”**

**8:00 am – 4:00 pm: Resume review table in vendor exhibition area (please bring a copy of your resume with you)**

**9:15 am - 10:30 am: Keynote Address, UMass Boston Campus Center, Ballroom Sections “A & B”**

**Speaker: Richard J. Cox: “Arguing About Appraisal: From Hilary to Helen and Beyond”**

**Keynote Description:**

A quarter of a century ago, archivists discovered that appraisal was both essential and challenging. After decades of having been comforted by Jenkinson's notion that archivists don't appraise and Schellenberg's easily

stated (but not necessarily easily used) template of informational and evidential values, archivists awakened to realize that they really did not understand whether they were acquiring the right stuff or if they possessed the appropriate tools and techniques to make such decisions. This started discussion about documentation strategies, macro-appraisal, functional analysis, and other methodologies, a conversation that has not led to any final resolution. Rather than rehearse what archivists have debated about appraisal, this presentation will focus on the new societal variables emerging to affect and challenge how archivists conduct appraisal; matters such as personal information technologies, the emergence of new concepts such as digital curation and cyber scholarship, the demands of community activism and memory, the morass of intellectual property, and the ethical dimensions of archival practice all threaten to transform the archivist's role in society. In effect, archivists, in order to have a role in the future, need to both appraise their own appraisal practices and understand that there are potentially transformative notions residing in the knowledge of other disciplines and the citizens. This places appraisal squarely into a new form of archival ethics, not the approach of ticking off a list of attributes in a code but a commitment to understand the responsibility of the archivist in society (a responsibility demanding a new sense of appraisal).

### **Biography:**

Richard J. Cox is Professor in Library and Information Science at the University of Pittsburgh, School of Information Sciences where he is responsible for the archives concentration in the Master's in Library Science degree and the Ph.D. degree. He has been a member of the Society of American Archivists Council from 1986 through 1989. Dr. Cox also served as Editor of the *American Archivist* from 1991 through 1995 and Editor of the *Records & Information Management Report* from 2001 through 2007. He has written extensively on archival and records management topics and has published fourteen books in this area: *American Archival Analysis: The Recent Development of the Archival Profession in the United States* (1990) -- winner of the Waldo Gifford Leland Award given by the Society of American Archivists; *Managing Institutional Archives: Foundational Principles and Practices* (1992); *The First Generation of Electronic Records Archivists in the United States: A Study in Professionalization* (1994); *Documenting Localities* (1996); *Closing an Era: Historical Perspectives on Modern Archives and Records Management* (2000); *Managing Records as Evidence and Information* (2001), winner of the Waldo Gifford Leland Award in 2002; co-editor, *Archives & the Public Good: Records and Accountability in Modern Society* (2002); *Vandals in the Stacks? A Response to Nicholson Baker's Assault on Libraries* (2002); *Flowers After the Funeral: Reflections on the Post-9/11 Digital Age* (2003); *No Innocent Deposits: Forming Archives by Rethinking Appraisal* (2004), winner of the Waldo Gifford Leland Award in 2005; *Lester J. Cappon and Historical Scholarship in the Golden Age of Archival Theory* (2004); *Archives and Archivists in the Information Age* (2005); *Understanding Archives & Manuscripts* (2006) with James M. O'Toole; *Ethics, Accountability, and Recordkeeping in a Dangerous World* (2006); and *Personal Archives and a New Archival Calling: Readings, Reflections and Ruminations* (2008). Dr. Cox was elected a Fellow of the Society in 1989.

### **10:30 - 11:00 am: Coffee Break/ Vendors, UMass Boston Campus Center, 3<sup>rd</sup> floor**

This is a great opportunity to meet and talk with vendors to learn more about services and products for your archives. Coffee and snacks will be available.

### **11:00 am - Noon: Concurrent Sessions**

#### **Session 1: Appraising State Forests and Parks Records: The Work of a Massachusetts Field Survey**

**Session Description:** This session will describe a project to appraise records at five Regional Offices which involved many components, including a two-year test of an appraisal methodology and three phases of an appraisal and survey project. The presenter will provide an overview of the relationship of this agency-initiated survey with the work of the Massachusetts State Archives and include a few examples of the use of salvaged archival records by staff.

The main focus of the session will be on how to conduct records interviews with staff; how computer technology and the decline of professional clerical staff has impacted files management; taking a conservative and detailed approach on-site to appraise administrative and program subject files; how to document the survey, and have staff input to records appraisal; show common existing conditions, and describe the "labor" aspects of records surveys; and review appraisal issues for obsolete organizational reference libraries of books, reports, and pamphlets.

**Panel members:**

**Liz Banks (Chair):** National Park Service

**Sean Fisher (Presenter):** Sean Fisher served as the Archivist for one of DCR's predecessor state agencies, the Metropolitan District Commission, between 1993 and 2003, and has served as DCR's Archivist since 2003, when the new state forests and parks agency was created. At previous NEA and SAA meetings, Sean has made presentations regarding his innovative methodology and use of volunteers to archivally clean and re-house large collections of glass plate negatives. Sean is a graduate of the Archives Management Program at Simmons College Graduate School for Library and Information Science, and the Historical Administration Program at Northeastern University, Department of History Graduate Program.

**Session 2: Take Your Lumps: Appraising Physical Objects**

**Session Description:** What is an archivist to do with all the non-flat stuff? "Lumps," widgets, artifacts... whatever you call them, archivists must make appraisal decisions about objects. The three archivists on the panel each manage object-heavy collections. Each will briefly describe their repository's collecting policy and present an example of objects accepted into the collection and why. Following will be a facilitated conversation about the triumphs and challenges of making appraisal decisions about objects.

**Panel members:**

**Amy Braitsch (Co-Chair):** Boston College

**Juliana Kuipers (Co-Chair):** Harvard University Archives

**Anthony Reed (Presenter):** Anthony Reed is an archivist with the National Park Service at the Frederick Law Olmsted National Historic Site in Brookline, Mass. Mr. Reed, who grew up in southern California, received a B.A. in Sociology and Women's Studies from UC Santa Barbara before relocating to Boston to attend Simmons College's GSLIS, with a concentration in Archives Management. Prior to joining the NPS, Mr. Reed has worked on archival collections with various organizations including the Pilgrim Monument in Provincetown, Massachusetts, the Chancery of the Catholic Archdiocese of Seattle, Microsoft Corporate Archives, the town of Burlington, Massachusetts, the Boston Public Library Rare Books & Manuscripts division and the Peabody Museum of Archaeology and Ethnography at Harvard University.

**Susan von Salis (Presenter):** Susan von Salis is the curator of the Harvard Art Museum Archives, where she is responsible for appraising, accessioning and cataloging records and personal papers; strategic planning; preservation of archival collections across the museums; and reference and archives technology. She previously served as Archivist and Information Systems Administrator at the Schlesinger Library at Radcliffe College. She currently serves as co-chair of the Museum and Archives professional Affinity Group of the New England Museum Association. Von Salis holds a B.A. in Religion and Afro-American Studies and an M.A. in History/Public History.

**Kristin Parker (Presenter):** Kristen Parker is an archivist at the Isabella Stewart Gardner Museum in Boston where she has worked for over ten years. With a background in museum registration and contemporary art, she has managed a wide variety of artifacts and documents in a variety of settings. Eager to hear and share the stories of other museum archivists, she and colleague Anthony Reed began the New England Museum Archivists Working Group in 2005.

### **Session 3: Appraising Electronic Records: One State's Methods**

**Session Description:** Along with preservation, the appraisal of electronic records continues to challenge the practicing archivist. Although the standard practices of archival appraisal still apply, with electronic records one also needs to examine the set of records in question with an eye towards understanding them as digital objects. Technical details about the format or structure of certain electronic records can have a significant effect on final appraisal decisions, as appraisal has to be governed by both historical necessity and the real-life issues of affordability and institutional capacity. This session will discuss the appraisal practices of the New York State Archives with respect to electronic records, examining the challenges of electronic records appraisal and the methods used to manage those challenges.

#### **Panel members:**

**Paige Roberts (Chair):** Independent Archival Consultant

**Geof Huth (Presenter):** With nearly two decades' experience in the field, Geof Huth is an authority on best practices in records management in government. He currently serves as the Director of the New York State Archives' Government Records Services, ensuring the development and delivery of quality records management and archives services to local governments and state agencies across the state. These include direct advisory services, records center services, retention scheduling, and publication and workshop development. He speaks frequently around the country and the state about records management and archives.

### **Session 4: New Skills for a Digital Era: A Discussion**

**Session Description:** It has been three years since the New Skills for a Digital Era colloquium met to consider the practical and technical skills librarians, archivists and records managers need to successfully work with digital materials. Where are we now? Have we succeeded in managing digital information? Are more skills needed? How are you dealing with digital materials in this digital age? This discussion will be based on the proceedings of the New Skills for a Digital Era colloquium:

<http://www.archivists.org/publications/proceedings/NewSkillsForADigitalEra.pdf>

#### **Panel members:**

**Nova Seals (Chair):** Connecticut College

**Eliot Wilczek (Discussion leader):** Eliot Wilczek is the University Records Manager in the Digital Collections and Archives at Tufts University. Eliot is presently serving as the project director of a NHPRC electronic records program expansion grant and was a co-principal investigator on a NHPRC electronic records research project that Tufts completed with Yale University in 2006.

Eliot has taught archives and records management courses as an adjunct instructor at the Graduate School of Library and Information Science at Simmons College. Eliot has an M.S. in Library and Information Science and an M.A. in History from Simmons College.

**Noon – 1:00 pm: Lunch, UMass Boston Campus Center, Ballroom Sections “A & B”**

New member tables will be available at lunch.

**1:00 -- 1:30 pm: NEA Business Meeting (Strategic Planning), UMass Boston Campus Center, Ballroom Sections “A & B”**

At the Spring 2009 meeting NEA members were encouraged to share their vision for an NEA strategic plan. This was followed up with a call to members to share their ideas by emailing an NEA strategic planning email account. In June the NEA board got together to review your ideas and map out the next steps. Members of the NEA board would like to share the results of the June meeting and get your feedback on the strategic plan and the future of NEA. A mailing will go out to NEA membership prior to the meeting. This mailing will include a list of goals and objectives with a brief description and will go out via the listserv, Facebook, and the NEA website. Be on the lookout and be prepared to share your thoughts!

**1:45 -- 2:45 pm: Concurrent Sessions**

**Session 5: Appraise Now or Later?**

**Session Description:** Do you appraise before you accession a collection, or do you do appraisal later? Two archivists discuss methods they have developed for appraisal as well a variety of issues that have led to the development of their appraisal strategies. One example includes a project to appraise architectural records with the records' creator/architect.

**Panel members:**

**Margaret Welch (Chair):** National Park Service

**Lorna Condon (Presenter):** Lorna Condon has been the Curator of Library and Archives at Historic New England since 1990. She oversees a collection of more than one million documents including architectural drawings, photographs, books, manuscripts, and ephemera.

**Leslie Perrin Wilson (Presenter):** Leslie Perrin Wilson has been Curator of the William Munroe Special Collections at the Concord (Massachusetts) Free Public Library since 1996. A 1975 graduate of Wellesley College, she earned master's degrees in Library and Information Science and in English at Simmons College. She writes on local historical, literary, and other topics, and currently serves as editor of the *Thoreau Society Bulletin*. Her book *In History's Embrace* appeared in 2007. She is currently working on a guidebook to Concord and Lexington, to be published by the Friends of the Concord Free Public Library in 2010.

**Session 6: Appraisal Outreach: Archivists and Records Managers Talk!**

**Session Description:** As we enter the twenty-first century, archivists and records managers have seen the volume and variety of records created in our institutions increase geometrically. In order to cope with the massive amount of records that we need to effectively appraise and hope to preserve, we must find creative ways to improve our appraisal strategies.

The staff of the Harvard University Archives is attempting to meet this challenge by strategically building appraisal of potential archival records into each of its department's workflows. Records Management Services (RMS) is responsible for appraising and bringing in university records, while the Collection Development department (CD) acquires and appraises personal papers and manuscript collections, as well as other materials

relating to the history of the institution. Elizabeth Copenhagen of RMS and Virginia Hunt of CD will discuss how the two departments work together on appraising records brought into the Archives. Topics they will discuss include perspectives on appraisal, educating offices and donors about archives and records management, building appraisal into documentation planning, including robust historical appraisals in the General Records Schedule, pro-active collecting and front-end appraisal, and attempts to streamline the appraisal process to cope with a large volume of incoming records and papers collections. Chair Jennifer Pelose, the member of Collections Services staff at the Harvard University Archives responsible for liaising with the Collection Development and Records Management departments, will also provide her perspective on how the partnership between these two departments affects the processing of records.

**Panel members:**

**Jennifer Pelose (Facilitator):** Jennifer Pelose is currently Processing Archivist/Project Manager at the Harvard University Archives in Cambridge, Mass., where she coordinates the processing of new acquisitions, develops policies for the description of personal papers and university records, and oversees the production of the University Archives' online finding aids. Jennifer has previously worked as Assistant Archivist for Manuscripts, Processing Archivist and later as Collection Services Archivist at the Center for the History of Medicine at the Countway Library at Harvard Medical School where she coordinated processing and descriptive practices for archival and manuscript collections. Jennifer received B.A. degrees in History and French from Union College in Schenectady, New York, and holds an M.S. in Library and Information Science with an archives concentration and an M.A. in History from Simmons College.

**Liz Copenhagen (Presenter):** Liz Copenhagen, CRM, joined the Harvard University Archives in 2008 as the Records Manager. Liz previously directed the Information Life Cycle Management Program at Knowledge and Library Services, Harvard Business School. She has also worked as the assistant records manager at the Countway Library of Medicine, Harvard Medical School, the records manager/assistant archivist at Simmons, and as a publications processor and reference assistant at the Institute Archives and Special Collections at MIT. She has a B.A. in Religious Studies from Rhodes College in Memphis, a Master of Theological Studies from Harvard, and an M.S. in Library and Information Science from Simmons, as well as a CRM (certified records manager) designation.

**Virginia Hunt (Presenter):** Virginia Hunt is the Associate University Archivist for Collection Development at the Harvard University Archives. Prior to this appointment, Ms. Hunt was assistant archivist and curator for the Warren Anatomical Museum at the Center for the History of Medicine at Harvard Medical School's Countway Library. Previously, she worked as an archivist and preservation specialist at the Congregational Library in Boston, and was a consultant for the Massachusetts Historic Records Advisory Board. She holds an M.S. in Library and Information Science from Simmons and an ALM in Museum Studies at the Harvard Extension School. Ms. Hunt is currently on the SAA working group for guidelines for reappraisal and deaccessioning.

**Session 7: Media Neutral Schedules and Big Buckets: What That Means for Archivists!**

**Session Description:**

Functional records appraisal and media neutral schedules are on the minds of records managers, but what does this mean for archivists? What are “big buckets,” will appraising records at a higher level of aggregation make it easier or more difficult for archivists, how will having records in both paper and electronic formats impact our work? This session will explore these issues and answer some of the big questions.

**Panel member:**

**Jill Snyder (Presenter):** Jill Snyder is a Senior Records Analyst in NARA's Northeast Region where she provides records management training and guidance to federal agencies, as well as records appraisal and scheduling. Ms. Snyder has also been a lecturer on Archives Management at Salve Regina University and teaches Managing Records in Electronic Environments at Simmons College. She is active in both the New England Archivists and the Boston Knowledge Management Forum. Ms. Snyder has a B.A. in Human Services from Northeastern University and an M.S. in Library and Information Science from Simmons College.

**Session 8: "Primary" vs. "Secondary" Appraisal: The Role of Archivists in Digital Environments**

**Session Description:** Archivists use a variety of approaches when doing traditional appraisal. But when archivists select collections, parts of collections, or individual items to digitize for websites or online exhibits, do the traditional appraisal theories still apply? How does appraisal for digitization and access compare to appraisal for retention? Does the archivist become, in a sense, a secondary creator, and if so, what are the implications of this role? In this session, Jeannette Bastian and Joan Krizack will discuss theory and practice as it applies to this secondary level of appraisal and, using examples compare the role of the archivist in digital environments to more traditional appraisal responsibilities.

**Panel members:**

**Patrick M. Yott (Chair):** Brown University Library

**Jeannette Bastian (Presenter):** Jeannette A. Bastian is Associate Professor at the Graduate School of Library and Information Science, Simmons College, Boston, Massachusetts, where she directs the archives education program. She was the Territorial Librarian and Archivist of the United States Virgin Islands from 1987 to 1998 and received her Ph.D. from the University of Pittsburgh in 1999. Her research interests and writings are in the areas of post-colonialism, collective memory, and archival education. Her publications include *West Indian Literature: An Index to Criticism, 1930-1975* (under Jeannette Allis, 1981), *Owning Memory: How a Caribbean Community Lost Its Archives and Found Its History* (2003), and (with Donna Webber) *Archival Internships: A Guide for Faculty, Supervisors, and Students* (2008), and most recently, a collection of edited essays, *Community Archives: The Shaping of Memory* (Facet, 2009).

**Joan Krizack (Presenter):** Joan D. Krizack has been University Archivist and Head, Special Collections Department at Northeastern University since 1994, where her focus has been documenting community organizations working for social justice in Boston's African American, Chinese, Latino, and gay and lesbian communities. She received an M.A. in English/Education from Connecticut College and an M.S. in Library and Information Science from Simmons College. Previous to her position at Northeastern, she worked for nine years in hospital archives, founding archival programs at the Massachusetts Eye and Ear Infirmary and at Children's Hospital (Boston). She co-authored and edited *Documentation Planning for the U.S. Health Care System* (Baltimore: Johns Hopkins, 1994), which won the Society of American Archivists Leland Prize. She is a past president of New England Archivists, a winner of that organization's Distinguished Service Award, a Fellow of the Society of American Archivists, and a fellow of the Massachusetts Historical Society.



### 3:00 -- 4:00 pm: Concurrent Sessions

#### Session 9: Wearing Two Hats: When Archivists Get Records Management Duties: A Discussion

**Session Description:** As institutional budgets shrink, many archivists may be asked to assume records management responsibilities as well. This discussion group will focus on tools you can use to incorporate your archival skill set with the demands of records management. Areas to be discussed will include:

- The differences between archival and records management appraisal techniques
- Records management laws
- Records retention schedules
- Records management resources such as ARMA and the Records Management Listserv
- Talking to a new audience

#### Panel members:

**Victoria Andrienas (Chair):** National Park Service

**Sally Fellows (Discussion leader):** Sally Fellows has been the archivist and records management officer for the city of Manchester, New Hampshire, since 1999. She is the first permanent archivist and records manager in Manchester's history. Sally is a member of the Electronic Document Management Work Team and Web Site Developer for the City Clerk's office. Prior to her tenure in Manchester, she worked as an archivist in the Special Collections Department of the Haverhill Public Library, Haverhill, Massachusetts. Sally teaches a records management course for the New Hampshire City and Town Clerk's certification program each year. She holds a B.A. in History from the University of Oregon and a M.A. in History and Archival Methods from the University of Massachusetts, Boston. In 2007, Sally became a Certified Records Manager. She is currently serving as a member of the NEDCC Advisory Council.

**Dan McCormack (Discussion leader):** Dan McCormack is the Archivist/Records Manager for the town of Burlington, Mass.,

#### Session 10: Reappraisal and Deaccessioning

**Session Description:** What approaches are institutions using to reappraise and deaccession materials from their collections? When are reappraisal and deaccessioning activities appropriate, and what are the implications of these decisions for the institution? Marvin Kabakoff will talk about his work on the court records reappraisal project at the National Archives and Records Administration. Robin McElheny will discuss the challenges of appraising extensive under-documented legacy holdings and the perils vs. virtues of deaccessioning.

#### Panel members:

**Marvin Kabakoff (Presenter):** Marvin Kabakoff has worked for the National Archives & Records Administration for almost 32 years. He began his NARA career as an appraisal archivist at the National Personnel Records Center in St. Louis, assessing the value of thousands of cubic feet of military organizational records. In 1987, he was named Appraisal & Disposition Branch Chief at the Federal Records Center in Waltham, Mass., overseeing incoming and outgoing records, and transfers to the Regional Archives. For the past ten years, he has been a senior records analyst in the Records Management Division, working with a variety of federal agencies to ensure proper administration of records, identify permanent materials, and assist in the transition from paper to electronic recordkeeping. Marvin's educational background is in history, and he has worked on the other side of the archives as a researcher. He has a Ph.D. in French history, and taught part-time for several years.

**Robin McElheny (Presenter):** Robin McElheny has worked in the Harvard University Archives for the past 27 years. In her current position as Associate University Archivist for Collections and Public Services, she grapples with the appraisal of legacy holdings every day. This past year, she and her staff initiated a comprehensive shelf read of the Archives' on-site storage area, where they confronted dusty, decaying collections of university records, many of which have never been consulted since they arrived at the Archives. The Archives is currently considering its definition of appraisal, as well as guidelines for appraisal and deaccessioning.

## **Session 11: Monetary Appraisal: What You Need to Know about Value Appraisals**

### **Session Description:**

Have you been asked to value your collections for insurance purposes? Have you received items from donors who need appraisals for tax purposes? This session will offer insights from the appraisers' perspective: what factors affect value, how value is determined, and what special problems arise in appraising manuscripts and other archival properties. We'll also look at value appraisals from the donor's perspective: what motivates the donor, how tax deductions work, and how tax regulations are driving current practices. We will examine in particular the evolving qualification requirements for appraisers, and the challenge this poses to appraisers, collectors, and cultural institutions.

**Paige Roberts (Chair):** Independent Archival Consultant

### **Panel members:**

**Russell Freedman (Presenter):** Russell Glenn Freedman, was born in Springfield, Mass., and has an A.B. from Boston University where he majored in English literature and history. After a couple of years working in the theater he started Second Life Books in 1972. Second Life Books is a member of the Antiquarian Booksellers Assoc. of America (ABAA), the International League of Antiquarian Booksellers (ILAB) and the Massachusetts and Rhode Island Antiquarian Booksellers (MRIAB). Since that time he has produced over 170 catalogues listing used and rare books from the fifteenth century to the present and has exhibited at book fairs in Boston, New York, San Francisco and Los Angeles. Second Life Books specializes in books by and about women, English and Continental Literature, Americana, Reform Movements, autograph material and allied subjects. Russell has been doing appraisals for tax and insurance purposes since 1980. He has appraised gifts at Amherst, Williams, Smith, Mt. Holyoke, Massachusetts College of Liberal Arts and Elms College in Massachusetts; Bennington, Middlebury, and Marlborough Colleges in Vermont as well as a number of private clients.

**Avi Lev (Presenter):** Avi Lev is a Senior Tax Attorney with the Boston law firm of Davis, Malm & D'Agostine, P.C. He assists clients with tax planning and transactional analysis at the federal, state, and international levels, and represents taxpayers in disputes with the Internal Revenue Service and other tax authorities.

Mr. Lev is an energetic participant in Davis Malm's Nonprofit Organizations group, which adopts a pragmatic approach to resolving the regulatory, tax, and governance problems that uniquely challenge tax-exempt organizations in today's environment. He advises numerous churches, temples, and other religious organizations; schools; museums and art associations; housing cooperatives; quasi-public financing agencies; and other public charities dedicated to relieving poverty, helping children, and achieving other social goals. Mr. Lev is also an active member of the firm's Business Law, Compensation and Benefits, Litigation, Real Estate, and Trusts and Estates practice groups.

Mr. Lev has been active in working for better tax policy and regulation. He has contributed to the development of the current Massachusetts apportionment regulations, and has provided testimony on proposed tax legislation on several occasions.

Prior to joining Davis Malm, Mr. Lev worked as a tax associate at Sullivan & Worcester and as a senior tax associate at PricewaterhouseCoopers. He writes and lectures frequently on tax topics, and has taught classes at Boston University School of Law (LL.M. Taxation program) and at Northeastern University (M.A. Taxation program). Mr. Lev earned a B.A. from the University of California, Los Angeles *magna cum laude* in 1977 and a J.D. from the University of Oregon Law School in 1980. He also earned an LL.M. from the Boston University School of Law in 2002, graduating as class valedictorian.

#### **4:15 pm - 5:00 pm: Closing reception**

Join your colleagues for an ice cream sundae bar, reflect on the great sessions you attended and start thinking of ideas for future NEA meetings!

Questions about your registration? Contact Dale Freeman at [Dale.Freeman@umb.edu](mailto:Dale.Freeman@umb.edu)

Other questions? Contact Jane Ward at [jane.ward@comcast.net](mailto:jane.ward@comcast.net)

**Accommodations:** NEA has blocked rooms at the Doubletree Club Hotel Boston Bayside, minutes away from UMass, at the rate of \$119 per night, single or double occupancy. You can reserve a room at: <http://doubletree.hilton.com/en/dt/groups/personalize/BOSCHDT-NEA-20091106/index.jhtml> or by calling the hotel at 1-800-222-TREE (8733). Be sure to ask for the NEA rate. Rooms at this rate will be available until October 2, 2009.

UMass Boston is easily accessible by car from the Southeast Expressway or by MBTA via the Red Line (shuttle buses run almost continuously from the UMass/JFK subway stop).

Links:

UMass Boston Campus Map:

[http://www.umb.edu/parking\\_transport/images/campus\\_map.gif](http://www.umb.edu/parking_transport/images/campus_map.gif)

Directions to Umass Boston Campus:

[http://www.umb.edu/parking\\_transport/directions.html](http://www.umb.edu/parking_transport/directions.html)

Directions to JFK Library:

<http://www.jfklibrary.org/JFK+Library+and+Museum/General+Information/Visit+Directions+and+Public+Accessibility.htm>

**NEA Fall 2009 Meeting, November 6-7, 2009**

**UMass Boston**

Your check must be **postmarked** no later than **October 23, 2009** to avoid the \$15 late fee. If your check is mailed **AFTER October 23**, please add the \$15 late fee to your registration. Walk-ins the day of the meeting will be charged the \$15 late fee.

Name (for name badge): \_\_\_\_\_

Institution (for name badge): \_\_\_\_\_

Address: \_\_\_\_\_

Telephone (circle one: home work) \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Workshops: Friday, November 6, 2009, Healey Library, UMass Boston  
(Snacks will be provided. Lunch is on your own)

*Advanced Appraisal* – SAA workshop, you must register online at <http://archivists.org>  
Registration for this workshop *only* due by October 6, 2009

*Arrangement and Description* (9:00 a.m. to 5:00 p.m.)

NEA member \$65.00 \_\_\_\_\_  
\*Non-NEA member \$95.00 \_\_\_\_\_

*Living to Fight Another Day: Basic Stabilization Techniques for Digital Accessions* (9:00 a.m. to 1:00 p.m.)

NEA member \$25.00 \_\_\_\_\_  
\*Non-NEA member \$55.00 \_\_\_\_\_

(\*Includes NEA membership for one year)

Fall 2009 Meeting: Saturday, November 7, 2009 – Registration includes Friday evening reception, Saturday morning continental breakfast, lunch, and closing reception. Please indicate session preferences on next page.

NEA member registration	\$65.00 _____
Non-NEA member registration (includes one-year membership through Dec. 31, 2010)	\$95.00 _____
Student registration	\$32.50 _____
Late fee (postmarked <u>after</u> October 23, 2009)	\$15.00 _____
NEA membership renewal fee (for calendar year 2010)	\$30.00 _____
NEA student membership fee (for calendar year 2010)	\$15.00 _____
Donation to Hale Award fund	_____
Donation to Haas Award fund	_____
Donation to NEA	_____

**TOTAL ENCLOSED** \_\_\_\_\_

**Payment must be made by cash, check, or money order, payable to “New England Archivists.” No credit cards or purchase orders are accepted. No refunds after October 23, 2009.**

To assist us with planning, please check the sessions and activities you plan to attend:

Friday, November 6, 2009

- 1:30 pm – Tour, Massachusetts State Archives (Maximum 20)
- 2:00 pm – Tour, John F. Kennedy Library (Maximum 15)
- 3:30 pm – Tour, Massachusetts State Archives (Maximum 20)
- 4:00 pm – Tour, John F. Kennedy Library (FULL)

5:00 – 7:00 pm – Reception, John F. Kennedy Library

Saturday, November 7, 2009 - All events on Saturday take place at the UMass Boston Campus Center

- 8:00 – 9:00 am – Continental Breakfast
- New Member Breakfast
- 9:15 – 10:30 am – Keynote Speaker

11:00 am - Noon – Concurrent Sessions

- Appraising State Forests and Park Records: The Work of a Massachusetts Field Survey
- Take Your Lumps: Appraising Physical Objects
- Appraising Electronic Records: One State’s Methods
- New Skills for a Digital Era: A Discussion

Noon – 1:00 pm – Lunch

New Member Table

1:45 – 2:45 pm – Concurrent Sessions

- Appraise Now or Later?
- Appraisal Outreach: Archivists and Records Managers Talk!
- Media Neutral Schedules and Big Buckets: What That Means for Archivists!
- “Primary” vs. “Secondary” Appraisal: The Role of Archivists in Digital Environments

3:00 – 4:00 pm – Concurrent Sessions

- Wearing Two Hats: When Archivists Get Records Management Duties: A Discussion
- Reappraisal and Deaccessioning
- Monetary Appraisal

4:15-5:00 pm – Closing Reception

Send registration form and payment (made payable to “New England Archivists”) to:

**NEA Registration**  
**Attn.: Dale Freeman**  
**Healey Library**  
**UMass Boston**  
**100 Morrissey Boulevard**  
**Boston, MA 02125**

Check here  if you would like a receipt in your packet

Check here  if you do NOT want your contact information published in the Meeting Directory

Check here  if you have special needs (e.g., someone to sign) and we will contact you