

DATE: August 31, 2024
TO: Cathy Lee Gierke, OCC Co-Chair
Julia Wallace, UMRA Archivist
FROM: Julia Wallace, UMRA Archivist
RE: Annual Report 2022-24, UMRA Archivist

Title and duties

The UMRA Archivist works with the Webmaster and Secretary to print or gather hard copies of materials and deposit them in the U Archives. The Archivist is a member of the Organizational Continuity Committee (OCC).

Background

The University of Minnesota Retirees Association has been depositing its records in the University of Minnesota Archives since 1988. In addition to UMRA, early deposits also include the papers of the University Retirees Volunteer Program. While most of the material is in hard copy, it also includes documents on DVD, flash drive, and cassette tape. Deposits were made every few years by John and Judy Howe and then Archivist/Historian Gloria Williams, who retired from the position at the end of the FY 2020-21. Until the archival function was merged into the new Organizational Continuity Committee (OCC) in 2021, the Archivist had collected materials at board meetings (when documents were still distributed in paper) and through direct contact with individual officers and chairs.

Activities and accomplishments

1. Collecting materials

The OCC goal is to combine the solicitation for reports for the UMRA website and the University Archives at the same time, to make procedures more efficient and to clarify reporting guidelines for all officers and leaders. As the new procedures were being developed, little was collected for the archives. The Operating Manual included conflicting instructions about where to send materials for the Archives. Reports and documents posted on the web were to be printed for the archives, but no person was identified with that responsibility, and it did not happen for 2021-22. In 2023, I began the process of identifying all appropriate documents on the UMRA web and downloading them to create printed copies for the archives.

Downloading documents from the web and then organizing them for printing was quite time-consuming. For the first effort, covering 2021-22 and 2022-23, 101 documents were

printed for a total cost of \$93.04. An additional 12 documents were printed by Webmaster Cathy Lee Gierke.

Refinement of the guidelines for submission of end-of-year reports is now making the process much more efficient. The OCC identifies the “owner” or responsible party for each part of the organization and each document category, and requests for submission ask that documents be submitted both to the Webmaster and to the Archivist. This means that the Archivist can organize and print documents more efficiently. The Operating Manual has been revised to include a consistent statement for each position. A new one-page document entitled *UMRA Archives Guidelines* was developed to clarify the role of the University Archives in preserving the organization’s history; this document was distributed with the call for web updates. It reminds members that there are many documents not posted to the web that may be appropriate for the permanent archives.

2. Working with University Archives

In the winter of 2024, I met with our University Archives librarian, Rebecca Toov, to discuss deposit procedures, the extent of our collection, and future plans. I worked with her to update the UMRA collection’s *Finding Aid* and to develop for the first time a *Records Management Guide* for the collection (ua00251). We also discussed the potential for UMRA to submit some of its materials, starting with *UMRA News* and its predecessors, to the University’s Digital Conservancy.

Challenges and problems

Despite the improvements that the OCC has made in the procedures for the annual call for reports and other documents, it remains difficult to get all of the necessary materials submitted in a timely manner, and to uncover all materials that are appropriate for the archives even if not placed on the UMRA website.

Downloading and printing documents is time-consuming. (In earlier years, each officer or chair was asked to provide paper copies of their reports and documents for the archives; minutes and other official documents were routinely printed and distributed to board members so they could be collected easily for the archives.)

Large spreadsheets do not convert well to print. Each should be evaluated for its long-term historical value. If appropriate for the archives, the options are to work with the author for a hard copy solution, or submit to the University Archives in electronic form.

The responsibility for collection of copies of *UMRA News* for the archives has been unclear. I am working with the News Editor and the Membership and Communications Committee to be sure that there is a process in place to collect current copies for the archives

Suggestions for future projects and tasks

- Continue to work with the OCC and individual leaders to obtain appropriate materials for the archives, in order to preserve UMRA's history
- Suggest that the annual call for reports, other documents, and web updates should be on the annual Operating Calendar
- Consult with University Archives and UMRA leadership about the appropriate mix of paper and electronic records in our archives
- Encourage UMRA leadership to pursue a relationship with the University Digital Conservancy, beginning with a full collection of *UMRA News* and its predecessors
- Get on the monthly mailing lists for UMRA Board packets and approved minutes