



Montana SHRAB STRATEGIC PLAN

The Montana State Historical Records Advisory Board (SHRAB) exists to promote and support the preservation of and public access to Montana's historical records and the stories that they tell.





Introduction

Historic records are non-current records of an organization or person preserved because of their enduring value. They may have been generated by a government agency, a business or nonprofit, or an individual. These records may take many forms and have many potential uses. They may be written words, photographs, films, sound recordings, electronic mail, databases, or other forms. The records may be located in a large government repository, a research university, a small public library, a local government building, a church, a community organization, or a local historical society. They provide irreplaceable documentation of Montana, its peoples, and its place within the cultural heritage of the United States.

Historical records serve a number of important purposes. Among their functions are:

- Preserving cultural knowledge and memory;
- Documenting the rights of citizens, including rights relating to property, family relationships, and types of government support;



Lewis and Clark County Records Department Staff, October 2007.

PHOTOGRAPHER TOM FERRIS

- Defining the parameters of community, whether a family, a neighborhood, a city, a state, or a nation;
- Sustaining democracy by allowing citizens access to information about decisions made by national, state, and local government;
- Educating students;
- Supporting information needs in business and legal affairs
- Supplying information to make reasoned decisions about the nation's future direction; and
- Furnishing primary documentary evidence of heritage and culture through succeeding generations.

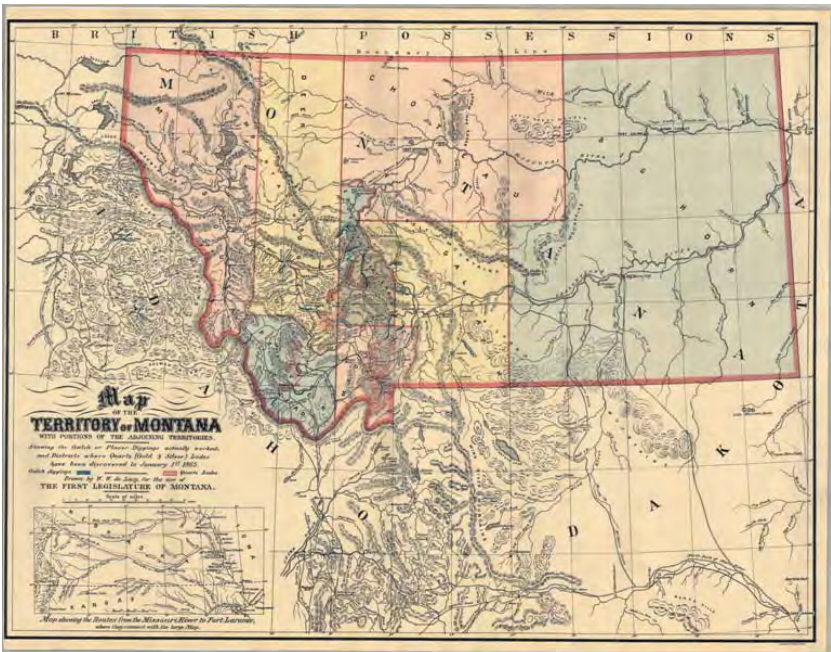
Custodians of historic records face complex problems that surround the acquisition, long-term preservation, research availability, and public promotion of those records.

Whether dedicated volunteers or paid professionals, historic records custodians can support and learn from one another and make their efforts more effective. It is the goal of the Montana SHRAB to facilitate and encourage such support.

Challenges

Montana archivists and records managers face a wide variety of challenges including:

- Low funding;
- Great geographic distances to travel for training and support;
- A limited number of individuals with in-depth training and expertise in the field;
- Continuing battles to meet the basic needs of researchers and collections;
- Challenge of balancing current services with future public needs;
- A wide variety of records-based organizations, with diverse needs, missions and goals; and
- Competition over government and private funding.



Map of the Territory of Montana, 1865, W.W. De Lacy, MHS

Who We Are

The Montana SHRAB is one of over fifty SHRABs established in the United States, its territories, and the District of Columbia. The National Historical Publications and Records Commission (NHPRC), the granting arm of the National Archives and Records Administration, created the SHRABs in 1975. Each SHRAB must have an active board in order to participate in NHPRC grant programs.

The Montana SHRAB is active through a board appointed by the Governor and composed of stakeholders in Montana's documentary heritage. Members must have experience with and interest in the collection, administration, and use of historical records. The state archivist serves as coordinator and chair of the board, and the Montana Historical Society provides staff support.

The Montana SHRAB works toward improved preservation and use of historic documentary sources so that records will be available to all people who need them in the new millennium and beyond. The SHRAB is likewise dedicated to preserving records being created currently through computer systems, electronic mail, and on the Internet that will need to be available in the future. The SHRAB desires and facilitates collaboration with and among entities and organizations at state, regional, and national levels that are concerned with historic records.

What We Have Done

In the last decade, with NHPRC and other support, the Montana SHRAB has accomplished a number of projects in pursuit of its goals:

- Sponsored a professional traveling archivist who supported the work of ten institutions across Montana;
- Sponsored or provided workshops on all aspects of archival administration across the state;
- Awarded scholarships for individuals and organizations to gain new skills at national and regional workshops;



MHS staff members processing collections, September 2007.

PHOTOGRAPHER TOM FERRIS

- Created and revised the Preferred Practices Manual;
- Shared news, information and resources through a regular newsletter;
- Supported regional collaboration;
- Evaluated grant proposals to NHPRC from Montana;
- Promoted the Montana Union List Project with the National Union Catalog of Manuscript Collections (NUCMC); and
- Completed the Montana Heritage Resources Directory in cooperation with the Montana Association of Museums.

Strategic Planning Process

The Montana SHRAB established strategic plans in 1978, 1982, and 1995. In 2006-2007, the SHRAB conducted a needs assessment survey across the state to determine the effectiveness of its current communications and training programs and to ask custodians of historical records what they most needed. In 2007, the SHRAB used this data to construct the present strategic plan.

In order to preserve and make accessible the documentary heritage of the state, we envision a future for Montana in which:

- The state's historical records are protected, preserved, and accessible.
- Citizens value historical records and support their preservation and appropriate use.
- Government and community leaders recognize historical records as a public trust and help secure sufficient resources for their proper management and care.
- There is a visible, comprehensive network in which archival and manuscript repositories and the public collaborate for the good of historical records.

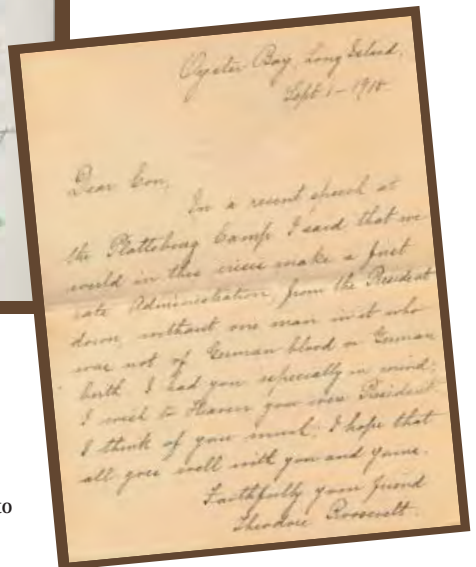
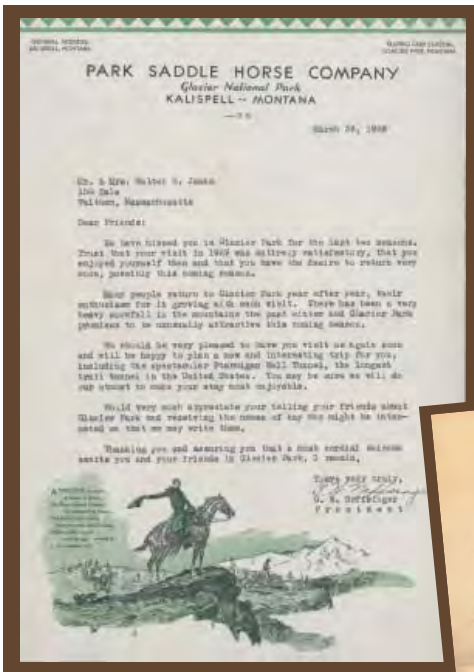


Travel journal page, Hester Ferguson Henshall Journal, 1903, MHS

Mission

The Montana State Historical Records Advisory Board:

- Serves the public as a central advisory body for historical records planning and preservation in Montana;
- Promotes the identification, preservation, availability, and use of Montana's diverse historical records, both public and private; and
- Encourages and reviews grant applications from Montana submitted to the NHPRC which address the basic needs of the state's historical records.



(top) Letter, Walter H. James Papers, 1932, Montana Historical Society; (lower) Letter, to Con Warren from Teddy Roosevelt, 1915, Grant-Kohrs Ranch Archives

Collaboration

We believe that communication and collaboration are fundamental to preserving and providing access to historical records. By working together in a cooperative spirit, we can help ensure the preservation of historical records that reflect the diversity of Montana's people and communities.



Stewardship

We believe that historical records repositories must operate in conformity to the highest legal, ethical, and professional standards in order to fulfill their long-term responsibility to preserve records for future generations.

Access

We believe that archival collections should be widely available and accessible, through a variety of traditional and non-traditional avenues, at minimal cost to the user.

NAME: Steinbrueck, Anthony J.	RESIDENCE: Billings, Montana	OCCUPATION: Switchman	
RANK: Private	ENLISTED: May 13, 1898 for 2 yrs.	PLACE: Billings, Montana	
AGE: 26	PLACE OF BIRTH: Canada	HEIGHT: 5' 6 1/2"	SKIN: dark
Single		EYES: brown	HAIR: dark brown
ORGANIZATION: Troop M, 3rd U.S. Volunteer Cavalry, Capt. John Bond, commanding.			
RESIDENTIAL COMMANDER: Colonel Melvin Grigsby.			
DISCHARGED: Camp Thomas, Georgia.		Mustered-out September 8, 1898	
R E M A R K S			

(top) V-mail, John C. Harrison Family Papers, 1944; (lower) draft registration, Montana Adjutant General's Office records, 1898, MHS Archives

Outreach and Advocacy

We believe that the quality of historical records programs is directly related to the quality of public and institutional support. Historical records custodians should build and maintain strong lines of communication with the general public and should provide on-going education and public awareness programs.

Embracing New Ideas

We value the opportunities for continuous improvement in the management of historical records and documentary evidence provided by emerging technology, systematic organizational review, and new initiatives.

Goals

Issue I: Montana's documentary heritage custodians cover a wide range of repositories and responsibilities and they should view SHRAB as a clearinghouse for information on their common concerns.

Montana State Historic Records Advisory Board (SHRAB) will expand the board to twelve members. The SHRAB recognizes that we must serve a large geographic area and a wide spectrum of record repositories varying in size from federal and state government entities to the records of local governments and local historical societies. Each member of the board will be assigned liaison responsibilities with a specific portion of the Montana records community, facilitating the board's efforts to effectively communicate with and serve its constituents in Montana

Recommendation: Expand the board to broaden involvement and recognize concerns across a wider spectrum of records custodians.

Objective 1: Increase the number of members on the board from eight to twelve.

Involve pertinent constituent groups in the nomination of board members.



“Party of bicyclists climbing the terrace at Mammoth Hot Springs, Yellowstone National Park. James A. Moss party, Fort Missoula, Mont.” October 1896. PHOTOGRAPH BY F. JAY HAYNES, MHS PHOTOGRAPH ARCHIVES

Objective 2: Define composition and liaison responsibilities for board members.

Assign each board member to serve as a liaison to a specific constituent group.

Constituent Groups:

- **State Archivist** – Chair of Board
- **Libraries** – A librarian who interacts with library community, primarily through the Montana Library Association
- **Tribal** – A representative from one of the tribes or tribal colleges who interacts with the seven tribal entities in Montana.
- **Higher Education**
 - **University of Montana** – A representative from UM who interacts with archives and records managers at the flagship and branch campuses of UM.

Montana State University - A representative from MSU who interacts with archives and records managers at the flagship and branch campuses of MSU.

- **Federal** – A representative from a federal entity who interacts with federal entities in Montana, particularly the National Park Service sites.
- **At-large** – A representative who may be called on to interact with any entity in the state or the region.
- **Local Government** – A representative from one of the cities or counties who interacts with city and county record keepers, primarily through the Montana Association of Counties.
- **Genealogists** – A representative from the genealogical community who interacts with the state’s genealogists, primarily through the Montana State Genealogical Society.
- **Museums** – A representative from the museum community who interacts with the state’s museums, primarily through the Museum Association of Montana.
- **Legislators** – A representative who is a current member of the Montana House or Senate with an active interest in records issues who could serve in an advisory capacity.
- **Records Managers** – A representative from the records management community who interacts with the state’s record managers, primarily through Big Sky ARMA.
- **Historian** – A representative from the history enthusiast community or a professional historian.

Issue II: Communication with resource allocators, user groups, and taxpayers is an essential responsibility of any public service entity, especially those charged with the preservation of societal memory. A concerted outreach effort is needed to meet this challenge.

In an effort to become more visible within Montana’s historical records community, the Montana SHRAB is adopting new and more effective ways to communicate with its various stakeholders. The SHRAB will publicize its mission and its activities in appropriate venues, including The Montana Archivist newsletter and on the listservs of related organizations. In 2008 the SHRAB will launch its own website featuring information about SHRAB and NHPRC scholarship opportunities; relevant educational offerings including conferences and workshops; links to the websites of related organizations; and the Montana SHRAB newsletter. Starting in Spring 2008, The Montana

Archivist will be produced semi-annually (Spring and Fall). SHRAB newsletter recipients will be given the option of receiving either a print or an electronic copy via e-mail of the Spring newsletter; Postcards announcing special events such as workshops will be mailed to SHRAB members on an as needed basis.

Recommendation: Improve communication to stakeholders and constituents.

Objective 1: Publicize our purpose and activities in appropriate forums. Identify appropriate newsletters, conferences and other venues to publicize the mission and activities of the SHRAB.

Objective 2: Improve our online presence. Create a subcommittee to determine the appropriate form and elements for SHRAB online presence to include, but not limited to; continuing education opportunities, announcements for conferences of cultural heritage intuitions, SHRAB scholarship info, NHPRC grant info, and SHRAB meetings. To achieve this, the SHRAB will create a website or wiki, as appropriate; add SHRAB newsletter to website; maintain an online calendar listing relevant deadlines and events; and develop relative links with other websites and online information.

Objective 3: Maintain accurate and complete mailing list, to include e-mail lists, for distribution of SHRAB mailings. Use relevant listservs to invite new mailing list members and update current members. Encourage members to request electronic distribution of mailings.

Objective 4: Improve newsletter. Distribute editorial responsibilities among board members for a greater variety of content. Create and distribute two electronic newsletters a year with one being available in hard copy.

Objective 5: Improve notification of special events, continuing education, and other activities. Send out postcards announcing special events and activities when appropriate.

Objective 6: Improve notification of SHRAB scholarships. Post scholarship information on wiki/website. Distribute announcements in relevant non-SHRAB forums.

Objective 7: Promote NHPRC grant opportunities. Announce grant opportunities in SHRAB newsletter and other related forums.

Issue III: Continuing education is a hallmark of any professional practice, and for the custodians of historic records such education is critical to staying abreast of current developments

One of the main priorities of the Montana SHRAB is to facilitate opportunities for continued learning among the members of Montana's historical records community. To assist this community to better acquire, preserve, and provide access to their materials, the SHRAB will sponsor or co-sponsor at least two workshops each year, including an "Archival Basics" course to be offered at sites around the state. These courses will help address some of the state's priority training needs as identified in 2007 SHRAB survey. Collaboration opportunities will be sought with other organizations and allied professions to offer specialized education. The SHRAB will also update its Preferred Practices Manual as needed and make it available electronically.

Recommendation: Improve the capacity of the historic records community to acquire, preserve, and provide access to materials.

Objective 1: Hold at least two SHRAB sponsored workshops per year.

Objective 2: Address priority training needs identified in 2007 needs assessment survey, such as improved intellectual access to collections; preservation techniques; improved physical access to collections; collection management issues related to digitized and born digital materials; and digitization project planning.

Preamble.

We, the people of Montana
grateful to Almighty God
for the blessings of liberty,
in order to secure the advantages
of a State Government, do, in
accordance with the provisions
of the Enabling Act of Congress
approved the 22^d of February
A.D. 1889, ordain and establish
this Constitution.

Filed for record in the Office of
the Secretary of Montana. Aug
... 17... 1972
E. A. D. 1972
L. A. D. 1972
Secretary of Montana

PREAMBLE

We the people of Montana grateful to God for the
quiet beauty of our state, the grandeur of our mountains,
the vastness of our rolling plains, and desiring to im-
prove the quality of life, equality of opportunity and to
secure the blessings of liberty for this and future gen-
erations do ordain and establish this constitution.

Preambles of 1889 and 1972 Constitutions, Montana
Secretary of State's records. MHS Archives

Objective 3: Seek out opportunities to collaborate with allied professions to sponsor and co-sponsor workshops and training.

Objective 4: Coordinate with allied professions to promote and participate in disaster preparedness.

Objective 5: Update and maintain The Preferred Practices Manual.

Issue IV: There is a perception that modern American society often discounts historical study and preservation as largely irrelevant in our increasingly automated culture. Records custodians must be effective advocates of historical study and preservation of historical records

Custodians of historical records can play an important role in guaranteeing present-day property and social rights. The Montana SHRAB can help the historical records community by providing a forum for advocacy information. The SHRAB may use its website as a clearinghouse by linking to other sites that have useful advocacy resources.

The SHRAB may also include its own resources and ideas for institutions and organizations in Montana, including information about Archives Week activities and promotional materials.



“The Cash Grocery Store, Main Street, Deer Lodge.” 1907.
Photographer unidentified. MHS Photograph Archives

Recommendation: Help Montana's historic records community promote the relevancy of archives.

Objective 1: Provide cultural heritage institutions with a source for information, to advocate for the relevancy and value of historical records.

Objective 2: Promote participation in regional and national historical records advocacy efforts.

Priorities for NHPRC funding

The Montana SHRAB encourages grant applications to the NHPRC that support the SHRAB's mission, vision, and goals. These will include, but are not limited to:

- **Promoting improved access to and preservation of records of historic significance in Montana institutions**
- **Providing education and training to individuals or groups that manage historical records**
- **Increasing awareness of the significance and need to preserve historical records**
- **Promoting collaborative projects that address the goals of the Montana SHRAB**

Montana State Historical Records Advisory Board

Jodie Foley, Montana Historical Society

Jodi L. Allison-Bunnell, Northwest Digital Archives,
Orbis Cascade Alliance

Faith G. Bad Bear-Bartlett, Little Big Horn College Library

Peggy Gow, Grant-Kohrs Ranch National Historic Site

Donna McCrea, Mansfield Library, The University of Montana

Sami Pierson, Lincoln County Libraries

Kim Allen Scott, Merrill G. Burlingame Special Collections,
Montana State University

Produced in 2008 with grant funding provided by



(left) “Curley, Crow Indian Scout” 1883.

PHOTOGRAPH BY F. JAY HAYNES.

MHS PHOTOGRAPH ARCHIVES

Front Cover Photo: “Along the Yellowstone
River.” 1916

PHOTOGRAPH BY JACK ELLIS HAYNES.

COURTESY OF MONTANA HISTORICAL SOCIETY
PHOTOGRAPH ARCHIVES

APPENDIX A

NHPRC Grants to Montana 1979-2007

1979

- Montana Historical Society, to arrange, describe, and preserve the F. Jay Haynes and Jack E. Haynes collection of photographs (1876-1960) of several northwest and north-central states, Alaska, and two Canadian provinces.

1981

- Montana State Historical Records Advisory Board, to conduct an historical records assessment and state plan

1983

- Montana Historical Society to review and evaluate technological information in the Anaconda Copper Mining Company Records

1984

- Montana Historical Society to initial a local public records program

1988

- City of Great Falls to survey, appraise and establish retention schedules and to develop a records manual.

1990

- Little Big Horn College to survey records of the Crow Tribal Government

1992

- Little Big Horn College to develop a records program for the Crow Tribe
- Montana State Historical Records Advisory Board to conduct phase 1 of strategic plan

1996-1997

- Montana State Historical Records Advisory Board to conduct phase II of the planning project and publish state plan

2000

- Montana Historical Records Advisory Board, for the board's Local Records Regrant Project to help local historical societies, museums, counties, or other historical records repositories identify and preserve historically valuable records and make them accessible to Montana citizens and other researchers.

2003-2007

- Montana State Historical Records Advisory Board support grants for Board sponsored publications, training and workshops, and publication of the Montana Archivist newsletter.

2005

- Montana Historical Society, to support Montana's Electronic Records strategic plan for the creation, management, and preservation of the state's electronic records.

APPENDIX B

Local, Regional and National Archives, Library, and Museum Organizations

Montana Organizations

(Montana) State Historical Records
Advisory Board (SHRAB)
Jodie Foley, Coordinator
Montana Historical Society
PO Box 201201
Helena, MT 59620-1201
(406) 444-7482
Email: jofoley@mt.gov
Website: [http://mhs.mt.gov/research/
library/rc_brdscoms.asp](http://mhs.mt.gov/research/library/rc_brdscoms.asp)

Montana Art Gallery Directors
Association (MAGDA)
2112 First Avenue North
Great Falls, MT 59401
Phone: (406) 761-1797
Email: montanaart@hotmail.com
Website: <http://www.mt-magda.org/>

Montana Library Association (MLA)
Email: debkmla@hotmail.com
Website: <http://www.mtlib.org/>
Newsletter: Focus (quarterly)

Museums Association of Montana
(MAM)
Website: <http://montanamuseums.org/>
Newsletter: MAM Newsletter (quarterly)

Regional Organizations

Council of Intermountain Archivists
(CIMA)
PO Box 2048
Salt Lake City, UT 84110
Website: <http://www.lib.utah.edu/cima/>

Mountain-Plains Museums Association
(MPMA)
7110 West David Drive
Littleton, Colorado
80128-5405
Phone: (303) 979-9358
Fax: (303) 979-3553 fax
Website: [http://
www.mountplainsmuseums.org/](http://www.mountplainsmuseums.org/)

Northwest Archivists, Inc. (NWA)
Website: [http://www.lib.washington.edu/
nwa/](http://www.lib.washington.edu/nwa/)

Northwest Oral History Association
(NOHA)
Website: [http://www.his.state.mt.us/
finduse/noha.asp](http://www.his.state.mt.us/finduse/noha.asp)

Society of Rocky Mountain Archivists
Website: <http://www.srmarchivists.org/>

Western Museums Association
2960 San Pablo Avenue
Berkeley, CA 94702⁰⁰⁰
Phone: (510) 665-0700
Fax: (510) 665-9701^o
Website: <http://www.westmuse.org/>

CDP@BCR (formerly Collaborative
Digitization Project)
14394 E. Evans
Aurora, CO 80014
Phone: 303-751-6277
Fax: 303-751-9787
Website: <http://www.cdpheritage.org/>

National Organizations

Academy of Certified Archivists (ACA)
48 Howard Street
Albany, NY 12207
Phone: 518/463-8644
Fax: 518/463-8656
Website: www.certifiedarchivists.org

American Association for State and Local History (AASLH)
1717 Church St.
Nashville, TN 37203-2991
Phone: 615/320-3203
Fax: 615/327-9013
Website: www.aaslh.org

American Association of Museums (AAM)
1575 Eye Street NW, Suite 400
Washington, DC 20005
Phone: 202/289-1818
Fax: 202/289-6578
Website: www.aam-us.org

Association of Moving Image Archivists (AMIA)
1313 N. Vine Street
Hollywood, CA 90028
Phone: (323) 463-1500
Fax: (323) 463-1506
Website: <http://www.amianet.org>

Association of Records Managers and Administrators (ARMA International)
13725 W. 109th St., Suite 101
Lenexa, KS⁰ 66215⁰⁰⁰
Phone:⁰ (913) 341-3808
Fax:⁰ (913) 341-3472
Website: <http://www.arma.org/>

Council on Library and Information Resources
1755 Massachusetts Avenue, N.W.
Suite 500
Washington, DC 20036-2124
Phone: 202-939-4750
Fax: 202-939-4765
Website: <http://www.clir.org/>

Council of State Archivists (CoSA)
308 East Burlington Street, PMB 189
Iowa City, IA 52240
Phone: 319-338-0248
Fax: 319-354-2526
Website: <http://www.statearchivists.org/>

National Association of Government Archives and Records Administrators (NAGARA)
90 State Street, Suite 1009 (Albany, NY 12207)
Phone:⁰ (518) 463-8644
Fax:⁰ (518) 463-8656
Website: <http://www.nagara.org/>

National Conference of State Historic Preservation Officers (NCSHPO)
Suite 342 Hall of the States
444 North Capitol Street, NW,
Washington, DC 20001-7572
Phone: 202-624-5465⁰⁰⁰⁰
Fax: 202-624-5419
Website: <http://www.ncshpo.org/>

Oral History Association (OHA)
Website: <http://www.dickinson.edu/organizations/oha/>

PRISM International (Professional Records & Information Services Management)
131 US 70 West
Garner, NC 27529
Tel: (800) 336-9793 National Archives and Records
Fax: (919) 771-0457 Administration (NARA)
Website: <http://www.prismintl.org/>
Website: <http://www.archives.gov/>

Society of American Archivists (SAA)
17 North State Street, Suite 1425
Chicago, IL 60602,
Phone: (866) SAA-7858
Fax: (312) 606-0728

American Institute for Conservation of
Historic and Artistic Works (AIC)
1156 15th Street NW Suite 320
Washington DC 20005-1714
Phone: (202) 452-9545
Fax: (202) 452-9328
Website: <http://aic.stanford.edu>

Northeast Document Conservation
Center (NEDCC)
100 Brickstone Square
Andover, MA 01810-1494
Phone: (978) 470-1010
Website: <http://www.nedcc.org/>

Southeastern Library Network
(SOLINET)
1438 West Peachtree Street NW, Suite
200
Atlanta, GA 30309-2955
Phone: 1-800-999-8558
Fax: (404) 892-7879
Website: <http://www.solinet.net/>

Federal Agencies

Library of Congress
website: <http://www.loc.gov>

National Archives and Records
Administration (NARA)
website: <http://www.archives.gov/>

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