



COUNCIL OF NOVA SCOTIA ARCHIVES

**Annual General Meeting
2009/2010
Agenda Package**

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Archives Advisor Annual Report

April 2009 – March 2010

Education

Core Curriculum:

This year five of the suite of six Core Curriculum workshops were offered to 44 participants, all in the same location in Tatamagouche, NS: *Acquisition, Appraisal and Accessioning* in May 2009 given by guest lecturer Patti Bannister (Sisters of Charity Halifax Congregational Archives) to 10 participants, *Arrangement & Description* in June 2009 to 9 participants, *Introduction to Preservation* in Sep 2009 given by Paula French (Heritage Solutions, NF) with 13 participants attending, *Introduction to the Rules for Archival Description (RAD)* in Oct 2009 to 5 participants, and *Access & Reference* given in Nov 2009 with 7 people attending. Most participants were enrolled in the program and 6 people received their certificate of completion, having attended all six workshops and successfully completed all six assignments. Congratulations to Jennifer Copage (Treaty & Aboriginal Rights Research Centre), Sébastien Dol (Centre acadien, Université Ste-Anne), Susan Hill (Cumberland Co. Genealogical Society), Sr. Florence Kennedy (Bethany Archives, Sisters of St. Martha), Linda MacAdams (Provincial Archives of New Brunswick), and Kim Truchan (Shelburne Co. Museum Complex).

Conferences:

As an ex-officio member of the Education Committee, I participated in the planning and delivery of the annual CNSA Spring Conference in May 2009. Members responded favourably to the sessions presented, and participated in the Member Show & Tell. At the national level, I was involved in preparations for the ACA 2010 Conference (coming to Halifax in June 2010) serving on the Host Committee as Sponsorships and Donations Coordinator. This gave me the opportunity to introduce CNSA to local and regional businesses in the Halifax area. In Feb 2010, I was able to attend the Information Without Borders Conference organized by students and faculty of Dalhousie University's School of Information Management which featured guest speaker Dr. Daniel Carron, new Librarian and Archivist of Canada.

Other Workshops:

In November 2009, I coordinated the delivery of a two day workshop on Copyright law and its effects on archives, a topic identified as important to CNSA members in the *Building on Strengths: Membership Needs Assessment & Planning Study 2007*. It was presented in Halifax to 40 participants, including 6 members of Council of Archives New Brunswick, and 2 members of Archives Council of Prince Edward Island. Feedback from attendees was very positive. Financial assistance to bring two national experts to Halifax was provided by Library and Archives Canada through the National Archival Development Program. In lieu of a formal workshop on funding applications, a one day *NADP Writing Session* was held in Halifax on November 30 with one member attending.

Throughout the year I promoted the Professional Development and Training Assistance Bursary to members, and assisted the Education Committee with planning educational events.

Advisory Service

As Archives Advisor, I made 31 site visits to general and institutional members throughout Nova Scotia and 1 visit to a non-member during the 2009-10 year. The regional break down was: 10 members in South West Region in June, 7 members in North East Region in July, 5 members in Central (HRM) Region in May, July and August, and 9 members in Cape Breton Region in August. Members had questions about global preservation assessments, the arrangement of records within a fonds, entering records in ArchWay and best storage practices for preservation. Together with Susan Gilson, I provided members with Routes to Your Roots project information, distributed Fonds Description worksheets to anyone interested, and distributed the genealogy map brochure to 22 community Visitor Information Centres around the province.

In addition to face-to-face consultations, I responded to 193 from-a-distance requests for information, including 128 via email. I assisted members with their NADP and PADP applications and acted as recording secretary for the NADP adjudication committee.

I administered the Preservation Equipment Loans Program, lending out 2 data loggers to members and printing off results for 6 other members, providing information for members' global preservation assessments. I also responded to 2 members' requests to borrow the Laptop of Demos, the supplement to the Archival Software Review report supporting research into archival management software.

Outreach

In the spring I coordinated CNSA's participation at Saltscapes Expo 2009 on April 24, 25, and 26, 2009 in Halifax, to promote our network of archives for family history research. Pauline MacLean (Highland Village Cape Breton), Joanne McCarthy (Halifax Public Library), Kim Walker (Shelburne Co. Archives & Genealogy Centre) and I talked with 382 people over the 3 day event which attracted over 19,000 people from the Maritimes.

The main focus in 2009-10 was the development of Routes to Your Roots website application, a trip planning site for genealogy tourists. With the funding agreement from Tourism Division in place, I led the search for two project staff people (Susan Gilson and Philip Neville) and set up workstations for them in the CNSA office. I made a presentation on Routes to Your Roots for members at the AGM 2009. I participated in the planning and development of the website application, attended meetings with the website developer Colour/Internet Solutions Ltd. and our partner Tourism, Culture and Heritage Department, and assisted with the selection of a logo. I also assisted with recruiting writers for the Settlement Patterns section and provided insights on genealogy research and CNSA members.

In September, I attended the Association of Nova Scotia Museums Open House reception to welcome Anita Price as their new manager and sat on the adjudication committee for Heritage Division's Strategic Development Initiative funding program (SDI). In October, I was invited to present a conference session on workshop tips to the Nova Scotia Association of Library Technicians in Kentville, and took the opportunity to promote our Core Curriculum. I also represented the CNSA at the Canadian Council of Archives (CCA) General Assembly in Ottawa on Oct 24 and 25 and on the CCA Advisors Working Group, which met by phone each month and held a face-to-face meeting in Ottawa on October 26. And in November, I represented archivists in Nova Scotia at a consultation session of the Cultural Human Resources Council, who were researching the human resource issues facing workers in the arts, culture and heritage sector.

Network

As Archives Advisor, I assisted members with data entry of descriptions into ArchWay, the online union catalogue of descriptions for Nova Scotia, and issued user accounts and provided training to 3 more members. I worked to maintain the listserv CNSA-L and updated the website with latest news articles, volunteer committee members, list of members, and conference and workshop information. I also assisted with recruiting new members to the ArchWay Committee.

Other

I worked with the Vice President (Catherine Arseneau, Beaton Institute, Cape Breton University) to organize a regional roundtable discussion in Tusket, Yarmouth County on the Cooperative Acquisition Strategy on October 2 and acted as facilitator for the discussion. I continued to work with the Member-at-large: Memberships/Nominations (Kim Walker, Shelburne Co. Archives & Genealogy Centre) to keep the membership database up-to-date. As ex officio, the Archives Advisor attended all Executive Board meetings, as well as meetings of the following CNSA standing committees: the Education Committee, the Preservation Committee, and the ArchWay Committee.

Respectfully submitted by

Karen White,
Archives Advisor

**Council of Nova Scotia Archives
Archway Committee – Annual Report
2009-2010**

The CNSA ArchWay Committee is responsible for providing members support, maintenance, and review of the CNSA database ArchWay. In addition to those activities, the following goals have been identified by the committee with guidance from the CNSA executive:

- Increase membership usage of ArchWay
- Increase accessibility to ArchWay via member websites
- Facilitate record uploads to the National catalogue

Committee Members

Hansel Cook stepped down as Chair in 2009. The current 2009/2010 Archway Committee Members are:

Jane Arnold - Beaton Institute, Cape Breton University (Chair)
Terry Eyland – Cole Harbour Rural Heritage Society
Paul Maxner – NSARM (ex officio)
Karen White – CNSA Advisor (ex officio)
Thea Wilson-Hammond – Eastern Shore Archives

Meetings/Activity

The Archway Committee held three meetings / teleconferences between 1 April 2009 and 31 March 2010.

The initial meeting in November 2009 focused on discussion around the level of member activity with the ArchWay database, and subsequently what actions could be taken to increase member usage of the database. Expanding on the prior needs assessment document, the idea of a tailored members survey detailing their usage or barriers to usage was put forward. This will be developed by the committee most likely for release in the Fall/Winter. The question of batch upload and export to LAC was also discussed.

A teleconference in February took place to determine the ArchWay Committee 2010-2011 budget requirements. Supplies and travel were the only budget lines determined for this year. During this meeting the committee also discussed the need to ‘clean’ the current data which includes duplicate entries as well as some inaccurate data.

The third meeting agenda included a number of member questions about ArchWay that had been posed to Karen White and forwarded to the committee. This included questions around the inclusion of discrete items, duplicate entries, and batch upload to LAC.

Jane has agreed to follow-up with LAC and Paul Maxner to probe about the potential for renewing upload activity to the National Catalogue. Jane will also develop a draft survey for the committee to review at the next meeting about membership usage. The committee also spent a major portion of the meeting exploring and getting re-acquainted with the functions of ArchWay. During this time the committee found a method to export and sort authority records. This will assist with ‘cleaning’ the data. It was agreed that Thea and Jane would begin the process and split the records, with Karen reviewing the recommendations. No deletion or editing would be done without review to avoid

inadvertently creating any concerns for members. A discussion around a potential refresher workshop or online ArchWay tutorial for members also took place.

With one member out of country for a period, the next meeting is scheduled for the Fall. Thanks to all of the committee members for their welcome and work during the past few months. I look forward to continued work with the committee. Thanks also to the Executive for their continued support.

Respectfully submitted,

Jane Arnold
CNSA Archway Committee Chair
May 3, 2010

Awards Committee

Awards Committee

The Awards Committee is responsible for judging nominations for the three CNSA Awards presented annually. Information about each of the awards, including judgment criteria, is available via the CNSA website:

<http://www.councilofnsarchives.ca/members/awards.htm>. The 2009 committee consisted of Sheryl Stanton from the Admiral Digby Museum as a representative of the 2008 award winners; Rosemary Barbour, Chair of the Preservation Committee; Bethany Jost, Chair of the Education Committee; with Dorothy Outhouse, CNSA Member-at-large (Awards) as Committee Chair. The Committee reviewed six nominations in total and presented the following awards:

The **Cumberland County Genealogical Society** in Amherst received the **Dr. Phyllis R. Blakeley Award** honouring archival excellence for their oral history project "Down Memory Lane."

The **Eastern Shore Archives** (part of Memory Lane Heritage Village) located in Lake Charlotte, Halifax County, received the **Carman V. Carroll Award** honouring outstanding achievement in preservation. Their emergency preparedness project included, among other things, a generator to maintain environmental controls and security during power outages.

Fiona Day from St. Paul's Anglican Church in Halifax received the **Anna Hamilton Memorial Award** honouring outstanding voluntary service for her commitment to preserving the church's archival records and making them accessible to the public.

The 2010 Awards Committee consists of Fiona Day from St. Paul's Anglican Church in Halifax, representing the 2009 Anna Hamilton Award winner; Susan Hill of the Cumberland County Genealogical Society representing the 2009 Phyllis Blakeley Award winner; Rosemary Barbour, Chair of the Preservation Committee; David Mawhinney, Chair of the Education Committee; with Laurena Fredette, CNSA Member-at-large (Awards) as Committee Chair. The committee will meet via teleconference in May to review nominations. Winners will be announced during the CNSA's annual general meeting (AGM) in June and will be reported in next year's CNSA Annual Report.

**Council of Nova Scotia Archives
Education Committee – Annual Report
2009-2010**

The Education Committee held seven meetings / teleconferences between 1 April 2009 and 31 March 2010. This year, the committee welcomed one new member: Jane Arnold from the Beaton Institute at Cape Breton University. In June 2009, Bethany Jost stepped down as Chair of the Education Committee and the position was succeeded by David Mawhinney of NSARM. Margrete Kristiansen, King's Historical Society, stepped down from the committee in the spring of 2009.

The 2009-2010 Education Committee membership was as follows:

- Jane Arnold, Beaton Institute – Cape Breton University
- Rosemary Barbour, Nova Scotia Archives and Records Management (Chair – Preservation Cmtte.)
- Bethany Jost, Acadia University Archives
- Jamie Serran, Yarmouth County Museum and Archives
- David Mawhinney, Nova Scotia Archives and Records Management (Chair)
- Karen White (CNSA Archives Advisor) ex officio

The Education Committee coordinates and administers the education and professional training activities of the Council in addition to supporting the work of the CNSA Archives Advisor, whose activities will be described in a separate report.

The CNSA Spring Conference in May 2009 was a success. There were 38 attendees and half a dozen tables and presentations at the Member's Hall and Show and Tell. The Awards Banquet held at the Anglican Diocesan Centre was also well attended and well received. The conference generated revenue in excess of \$3500.00 so it was a resounding success for the CNSA. The Committee would like to thank all those who assisted us with this important event as well as those who attended.

In 2009-2010, the CNSA Education Committee received five CNSA Professional Development and Training Assistance Program bursary applications. They were awarded to the following individuals:

- a. Catherine Arseneau (Beaton Institute – Cape Breton University)
- b. Jennifer Copage (Treaty and Aboriginal Rights Research Centre of Nova Scotia)
- c. Christine Dunphy (Shearwater Aviation Museum Archives)
- d. David Mawhinney (NSARM)
- e. Michael Moosberger (Dalhousie University Archives)

This year we have continued to work on providing meaningful educational opportunities to our membership. We held a copyright workshop in November which was well attended with representation from the three Maritime Provinces. Nancy Marrelli and Wanda Noel conducted a very informative two day session. The annual conference idea was shelved for 2010 because the Association of Canadian Archivists Annual Conference is being held in Halifax. Instead we have made a funding request to the National Archival Development Program to hold a workshop on audio-visual records identification and preservation to tentatively take place in November 2010 pending receipt of funding.

I would like to take this opportunity to extend my gratitude to my fellow members of the Education Committee for all of their hard work and contributions over the past year. I would also like to thank the Executive for their ongoing support and assistance with the work of this committee.

Respectfully submitted,

David Mawhinney
CNSA Education Committee Chair
April 13, 2010

Membership Report

As of 31 March 2010 the CNSA has a total of 89 paid Members:

Institutional Members – 44
General Members – 38
Individual Members – 4
Student Members – 3
Unpaid (since year end 2008) – 7

During the year we received 6 new members:

1. 2 General members – Glooscap Heritage Society, Sydney & Louisburg Railway Historical Society.
2. 2 Individual members – Laurena Fredette, Lisa Wan
3. 2 student members – Nathaniel Smith, Jodi McDavid

Respectfully Submitted,
Kim Walker
Membership Committee

2009-2010 NADP Adjudication Committee Report

Library and Archives Canada provides \$83,475 annually in financial assistance to Nova Scotia archival projects to support the five objectives of the National Archival Development Program (NADP). The five objectives are:

1. Increase access to Canada's archival heritage through the national catalogue.
2. Increase awareness and broaden use of Canada's archival heritage.
3. Increase the representation of Aboriginal peoples and under-represented ethno-cultural groups in Canada's archival heritage.
4. Increase the capacity of archival networks to undertake strategic and development activities.
5. Increase the capacity of archival institutions to preserve Canada's archival heritage.

Each province/territory adjudicates its own NADP applications, and makes recommendations to the Canadian Council of Archives (CCA) which administers a national level of adjudication before making final recommendations to Library and Archives Canada (LAC). For the CNSA, the NADP Adjudication Committee is chaired by the Vice-President with members appointed by the CNSA Executive. Committee Chairs participated in a national teleconference on November 18th, 2009. A teleconference training session was held for the CNSA Adjudication Committee on December 16th.

The 2009-2010 NADP Adjudication Committee received a total of 6 applications from 5 member institutions requesting a total of \$63,993. In addition the CNSA submitted 3 applications: Archives Advisor Services, Preservation and Care of Audio-Visual Records and Emergency and Disaster Response Training and Supplies. The Adjudication Committee meeting was held January 8th in Halifax while the Council's applications were forwarded directly for national adjudication. Of the 6 member applications received 5 were approved. The Adjudication Committee's recommendation report and minutes were forwarded to CCA on January 22nd, 2010 for National Adjudication Committee review. In total the forwarded applications totalled a request for funding of \$83,475, the full provincial allotment.

The forwarded applications were under the following NADP Objectives:

Objective 1 (description) – 3	Objective 4 (archival networks) - 1
Objective 3 (under-represented) – 1	Objective 5 (preservation) – 3

I wish to extend a sincere thank you to the 2009-2010 NADP Committee members: Patti Bannister (Sisters of Charity Halifax Archives), Jamie Serran (Yarmouth County Museum and Archives), Anita Price (Association of Nova Scotia Museums) and Thea Wilson-Hammond (Eastern Shore Archives).

Respectfully submitted,
Catherine Arseneau, NADP Adjudication Committee Chair

Report of the CNSA Preservation Committee
to the Annual General Meeting, 11 June 2010

Committee Membership

Preservation Committee membership comprises:

- Patti Bannister (Sisters of Charity)
- Rosemary Barbour (NSARM and Committee chair).
- Doug Kirby (CBC)
- Jamie Serran (Yarmouth County Museum and Archives)
- Rebecca Young (NSCAD)
- W Brian Speirs (Provincial Archivist - *ex-officio*; to October 2009)
- Karen White (CNSA Archives Advisor, *ex-officio*)

Four meetings were held during the past year on 14 May 2009, 3 September 2009, 17 November 2009 and 26 January 2010)

Canadian Conservation Institute's Regional Workshop, 2009-2010

The CNSA was awarded the Canadian Conservation Institute (CCI) subsidized regional workshop for 2009-2010. The workshop, "Care of Photographic Materials" was presented on 22-23 October by Greg Hill. Nineteen people attended.

Canadian Conservation Institute's Regional Workshop, 2010-2011

We have been awarded the 2010-2011 CCI subsidized regional workshop. The topic will be "Emergency and Disaster Preparedness for Cultural Institutions".

SAMMA System

Over the past year and a half, the Committee has discussed with Nova Scotia Archives and Records Management a possible co-operative project to acquire the equipment required for the migration of analogue videotapes held by CNSA members including NSARM and the CBC. The equipment under consideration is the SAMMA system which is being used by the Library of Congress to migrate its holding of 600,000 videotapes to digital files.

Analogue video is now considered to be an endangered carrier and there is some urgency to reformat these holdings. The SAMMA system cleans and inspects the videotape and produces several simultaneous files of varying formats (for preservation and access) in one playback pass.

Due to other demands, NSARM is unable to purchase the SAMMA platform this year. The CNSA Preservation Committee will defer further plans surrounding the purchase of the SAMMA platform and peripherals and the development of co-operative projects until next fiscal year.

CNSA Emergency Response

The Committee is looking at the feasibility and desirability of developing an Archives Emergency Response Network for the province using a simplified version of the model developed by the Archives Association of Ontario. To assist archives following serious water leaks or flooding, the CNSA has purchased an industrial de-humidifier which can be borrowed by member archives. Member archives will be responsible for the pick up and return of the unit.

Also, the Preservation Committee has submitted a NADP grant application for disaster response supplies to be stored at three archives within the province. Supply depots will be located at the Beaton Institute, the Yarmouth County Museum and Archives and the Public Archives of Nova Scotia. These supplies will be made available to CNSA members in an emergency on the condition that any supplies used are replaced. Each depot of supplies will cost approximately \$1000.

Film Cold Vault

Moving image film from Dalhousie University Archives and Admiral Digby Library and Historical Society has been deposited in the film cold storage vault.

CNSA-Education Committee

As the Preservation Committee chair, I attended CNSA Education Committee meetings throughout the year as an *ex-officio* member.

New Initiatives

The Preservation Committee welcomes suggestions for new initiatives.

Respectfully submitted

Rosemary V Barbour
Chair, CNSA-Preservation Committee

April 2010

President's Report 2009-2010

At the AGM I will give a verbal overview of the Council's activities, but in this report I want to mention some areas not covered in other reports, and formally acknowledge the work of CNSA volunteers and staff.

ACA and CCA reports

I reported on the CNSA's activities to the Council of Presidents' meeting at last May's Association of Canadian Archivists' conference in Calgary, and again at the Canadian Council of Archives' General Assembly in Ottawa in October. The CCA invited me and former CNSA president Michael Moosberger to share our experience with needs assessment surveys, during a national meeting in March, as they prepare to develop a National Needs Assessment.

PANS Board of Trustees

I represent the CNSA on the Provincial Archives Board of Trustees, and have taken the opportunity this past year to write letters of welcome to Percy Paris, the new Minister of Tourism, Culture and Heritage, and Laura Lee Langley, acting Deputy Minister. I have also offered to the Deputy Minister, CNSA participation in the selection process for a new Provincial Archivist. Currently there is no progress in that process.

Co-operative Acquisition Strategy

The CNSA continued to encourage members to use our Co-operative Acquisition Strategy. Continuing the model of the 2008 Cape Breton Regional Round-table, the Executive hosted a round-table discussion on co-operative acquisition in the SouthWest Region in October. The regional members who attended, as well as representatives of Nova Scotia Archives and Records Management gained a better understanding of their respective acquisition mandates and mechanisms to refer donors and transfer reappraised holdings. Thanks to Peter Crowell and the Argyle Township Archives for hosting us.

There is national interest in Nova Scotia's model for co-operative acquisition, as Library and Archives Canada is seeking to re-define its relationship with the Canadian archival community. Newly appointed Librarian and Archivist of Canada, Daniel Caron, met with me to ask about the creation and track record of the CNSA's Co-operative Acquisition Strategy. Thanks to NSARM for facilitating that meeting.

Changes to Financial procedures

To clarify our procedures, the Executive passed an Expense Reimbursement Policy that will guide consistent reimbursement of authorized expenses for staff and members conducting CNSA business. Rates of reimbursement have not changed, but eligible expenses have been defined and procedures laid out. If any members would like to see the new Policy, I can make it available.

A long-standing staff request for a purchasing card to facilitate payments was finally realized, with cards issued for the Archives Advisor and the Routes to your Roots Project Co-ordinator. Purchasing Card Procedures were developed, and can also be viewed by members.

With the increased financial activity of the CNSA and the accompanying increased risks, the Executive has been exploring Director's Liability Insurance, and will arrange coverage for next year.

The Executive has decided to return to the practice of using bookkeeper services and has hired someone to start to help us with our books in June. Bookkeeper and Treasurer job descriptions were updated and procedures established.

Provincial Archival Development Program

This important funding program continues for its third year, though slightly delayed and still reduced to \$50,000 from the original \$85,000. The program is administered by NSARM, with input from the CNSA. The CNSA is very appreciative of that and of the opportunities this program provides for our members to accomplish much-needed projects. The CNSA itself used PADP funding last year to subsidize member's travel costs to attend educational workshops.

Provincial Heritage Fair

For the first time, the CNSA is offering a prize for the student project that makes best use of primary sources at the Provincial Heritage Fair in May. The erstwhile Historical Fairs are going through a period of transition, but we hope the CNSA prize will continue and encourage more students to visit archives and use primary sources for their Nova Scotia history projects.

Routes to Your Roots

The Routes to Your Roots website will be featured at the AGM, and I draw your attention to its annual report, but because it has been such a huge undertaking for CNSA, I want to thank the Project Management Team and the Tourism staff at the Ministry of Tourism, Culture and Heritage for their hard work and expertise. The site profiles participating CNSA members and I encourage other members with genealogical resources to take advantage of the site in this final year of the site's development. It is a unique tool on the internet that helps people anywhere interested in their family history find out where in Nova Scotia they need to go to pursue their interest, and lets them plan their trip on-line.

This project has required a lot of time and energy from CNSA staff and volunteers, perhaps beyond our capacity at times, but it will leave a valuable tool that will draw attention to our members, and will require minimal maintenance beyond the 2011 end to project funding.

Financial Situation

The Treasurer's Report gives more detail, however, the CNSA's financial situation is worse than the projected deficit in last year's budget. Our income expectations in the areas of membership and workshop registration were unrealistic, and the demands of the Treasurer's position did not allow time to submit four years of HST rebates, which was expected to generate additional revenue. At least spending was below budget, but we should have paid more attention to the income shortfalls through the year.

For next year an application to the National Archival Development Program for funding for the Archives Advisor position will put us in a much better situation, and the Executive has learned to be more realistic about income expectations in the 2010/11 budget. Having a book-keeper on contract will assist the Treasurer in keeping abreast of our financial situation through the year. The increased financial activity with the Routes to Your Roots projects really stretched the demands on our volunteer Treasurer Dorothy Outhouse. Among her many other volunteer contributions, Dorothy put in countless hours on CNSA books as well as contributing to the development of the policies and procedures we've put in place this year. I thank Dorothy for her commitment to the CNSA.

Acknowledgments

I would like to thank each of the Executive members and the Committee Chairs and members for their work and contributions this past year. Your dedication has allowed the CNSA to maintain its core activities in the midst of a huge new project.

The CNSA acknowledges the support provided by NSARM – financial, in-kind, staff-time and advice; much is achieved because of that support. I especially want to thank Lois Yorke for her commitment to the Routes to Your Roots project and for being CNSA's liaison in the absence of a Provincial Archivist.

For the holiday season I sent out a thank you card to the institutions (and in some cases the families!) whose staff volunteer on CNSA's Executive and Committees. Their institutional support is very much appreciated.

The Executive and I thank the CNSA staff – our lynchpin Karen White, and the new whizzes Susan Gilson and Phil Neville. It's been a demanding year for everyone; we've achieved a lot.

And lastly, thank you to CNSA members, for participating in the Council, for your dedication to archives in Nova Scotia, and for your patience through this stretched-thin year.

Respectfully submitted,
Susan McClure

**Report from the Office of the Provincial Archivist
Nova Scotia Archives and Records Management
to
CNSA - AGM**

**Summary of NSARM Involvement in and Assistance
to the Archival Community, 2009/2010**

- The Provincial Archivist (and after his retirement in Oct 2009, the Senior Management Team at NSARM) remains committed to offering as much support to and collaboration with the CNSA as possible, in its ongoing mandate to develop and improve the archival community and system in Nova Scotia.
- The Provincial Archivist and the Senior Management Team continued advocacy for and support of renewed and improved cost-shared federal funding programs for the archival community, including at a high-level meeting in Halifax with Dr. Daniel Caron, Archivist and Librarian of Canada (12 Feb 2010) at which meeting CNSA was also represented.
- CNSA, as the recognized archival stakeholder organization in Nova Scotia, continues to participate in and contribute to the deliberations and decisions of the PANS Board of Trustees through its representation on the Board.
- NSARM provided \$60,000 in financial assistance to the CNSA to support education, outreach and network programs and services offered to archivists and archives around the province.
- The Provincial Archivist, in close consultation with CNSA, secured continued financial support from NS Tourism, Culture and Heritage for the Provincial Archival Development Program (PADP); \$50,000 in cost-shared project funding was available for the CNSA and its institutional members in 2009/2010.
- The Provincial Archivist and the Senior Management Team, working closely with the CNSA to facilitate Year II of 'Routes to Your Roots,' a three-year project funded by the Community Development Trust, within NS Tourism's Niche Marketing Initiative.

- NSARM facilitated and assisted with CNSA participation at the Boston Globe Travel Show, and promoted CNSA through NSARM participation in the AAA Travel Show (Foxborough, MA), both events in Feb. 2010.
- NSARM continues to provide office space at the Public Archives Site to the CNSA at no cost.
- NSARM continues to support and promote the CNSA Cooperative Acquisition Strategy by referring prospective donors to more suitable repositories, and by offering and/or considering requests to deaccession and transfer records from its holdings to other archives in the province.
- NSARM continues to partially subsidize the ArchWay online descriptive catalogue by absorbing a significant portion of the operational and systematic upgrade costs for WebGENCAT software and network.
- Time is made available for NSARM staff to contribute to CNSA activities (e.g. Chair of CNSA Preservation Committee; 'Routes to Your Roots' Project Management Team).
- NSARM continues to value the collaborative relationship and partnership which has been built with the CNSA; the extent and level of NSARM support for the CNSA remains greater than what any other provincial archives (except Quebec) provides to the archives council in its jurisdiction.

Respectfully submitted as an information item.

original signed by

 Lois K. Yorke
 Director, Public Services
 NS Archives and Records Management

07 May 2010
 Date



**Final Report Phase II, 2009-2010
Routes to Your Roots Niche Market Project**

Time Frames / Milestones	Proposed Date	Completion Date
1. Advertise, screen and interview candidates	April, 2009	May 2009
2. Hire a Project Coordinator & Technical Assistant	May, 2009	June, 2009
3. Communicate to Membership via email, web, AGM	May, 2009	May, 2009
4. Website design and structure complete	Aug, 2009	Nov, 2009
5. Gather and create database of surnames, place names and market ready members	April, 2009	Feb, 2010
6. Website functions tested	March, 2010	March, 2010
7. Launch and ready to promote	Feb, 2010	April, 2010
8. Video Vignettes (x4)	Jan, 2010	Feb, 2010

Management Meetings

All 12 of the Phase II Management meetings enjoyed strong attendance, initially the Management Team met on a monthly basis moving to a biweekly schedule during the development phase. At each meeting the Management Team reviewed the work plan and ongoing progress of the application against the Project Timeline and Status Reports supplied by Colour and Internet Solutions Ltd. (ISL), our website developers.

Technical Specification

The groundwork for the project came to fruition with the approval of the Technical Specification in September. All members of the Management Team

were involved in the approval process to ensure that the application would meet the expectations of the Stakeholders and remain on budget.

Logo

The development of the Routes to Your Roots logo began in earnest in June and remained firmly on the agenda until November. The completion of the logo was a key milestone as the application finally had a tangible identity to market.

Colour/ISL

After the approval of the Technical Specification in September, ISL began the development and building of the site. A beta version of the application and the working CNSA Directory was presented to the Management Team in December. During the development stage several key deadlines were missed and a bi-weekly Status Report was introduced. This report included the period accomplishments, the plan for the upcoming week, issues, risks and areas of concern. The report was transparent and reviewed at the Management Team meetings.

Novascotia.com and the Routes to Your Roots application were intrinsically linked and both encountered, at different stages of development, different technical issues resulting in delay. Subsequently the launch was moved from Phase II to Phase III (April 9, 2010).

Births, Deaths & Marriages Database

Phil Neville, the Technical Assistant, began work on the database in June and continued to work on it throughout the year. In February the Management Team requested the inclusion of the marriage records in Phase II. Although this was not in the original project scope the Technical Assistant was able to include the records by specifying the county seat rather than the individual communities of record. It was agreed that the database would be amended, in Phase III, to be consistent with the model set by the previous records. The inclusion of the marriages to the database in Phase II resulted in an additional 400,000 records bringing the total of available records, at launch, to 1,051,083.

Founding Family Names

Early on in the project it became apparent that our members required less assistance than expected in compiling this information, this spend was allocated to finance other initiatives where there was little or no resource such as videos and stakeholder marketing.

Archives Directory

The Archives Directory was based on the Heritage Directory with a few additional mandatory fields pertaining to archival holdings. The Technical Specification proposed that the Heritage Directory application would be modified to include these fields, however, at some point in the process, the developers separated the two listings and created a new CNSA Directory. The Team was advised of this at a stage when it was too late to rectify, we agreed to launch as separate directories and review the approach in Phase III. As specified the CNSA Directory will merge into the Heritage Directory and overall improvements will be made in Phase III to update the entire Heritage Directory application.

Archivist's Welcome Videos

The videos were not initially included in the original project plan but were discussed as an exciting way to engage the viewer and bring the detail page to life. The Project Coordinator explored the option to outsource this activity but this proved too costly. The Project Coordinator and Technical Assistant put together a proposal to produce the videos in-house, including a budget for equipment, training, and travel to the archives locations. The proposal received the unanimous support of the Management Team and production for the first 4 videos began in September, were completed and loaded on the website on February, 2010.

Phase II Participants

During the summer site visits the Project Coordinator and the Archives Advisor presented Routes to Your Roots to members and a call to action was posted via the listserv,. Several members expressed an interest in participating and a very brave member volunteered for the video. Throughout the summer and fall the list of participants grew and eventually exceeded our expectations by an additional four, for a total of 22.

Settlement Patterns

In September it was agreed that the team would commission experts to write articles on Settlement Patterns. The team defined the scope & content of the articles and commissioned the following articles on settlement patterns:

1. Mi'Kmaq, by Don Julien
2. Acadians, by Ronnie-Gilles LeBlanc

3. African NS, by David States
4. Scottish, by Jim St. Clair
5. Industrial CB, by Bob Morgan
6. UK, by Terry Punch (to include Yorkshire, Ulster, etc.)
7. German, by Terry Punch
8. Irish, by Terry Punch
9. 20th century immigration, by Terry Punch
10. American, by Terry Punch

URL

The URL, novascotiaroots.com & novascotiaroots.ca, was purchased in August and the domain transfer was finalized in September.

Communications Plan

It was agreed in December that Tourism Division would manage the consumer marketing, to ensure a consistent look in the marketing plan and compliance with the Nova Scotia Tourism brand. Tourism proposed that they would work directly with Color on the creation of ads, promotional shows, postcard/rack card, and other promotional items for Routes to Your Roots.

Communications Plan – Consumer Marketing

This recommendation and generous offer on behalf of Tourism maximized our creative response and marketing potential. The Phase II consumer marketing initiatives included:

- **TIANs**

Darlene MacDonald included R2R in the overall 2010 Tourism Plan

- **Doers' & Dreamers' Guide**

Tourism, produced an advertorial to promote the Routes to Your Roots application in both the English & French Doers' & Dreamers' guides. This half page ad was featured in a prime position and was a generous in kind offer from Tourism.

- **Routes to Your Roots Rack Card**

Tourism, produced a rack card to promote the application at the Boston Globe and AAA Travel shows. This was an essential marketing tool given the absence of a beta model or live site. The card promoted the URL & all of the Phase II

participants.

- **Boston Globe Travel Show**

This is the largest consumer attended consumer show in the U.S., Routes to Your Roots was promoted alongside NSARM and Tourism, Culture and Heritage under the theme of genealogy. Kim Walker (Shelburne Co. Archives & Genealogical Society) and Virginia MacIsaac (Celtic Music Interpretive Centre) responded to our call for volunteers and attended on behalf of the CNSA to promote genealogy tourism.

- **AAA Travel Show**

Although CNSA did not have a direct presence at this show, the Routes to Your Roots application was promoted under the theme of genealogy by Nova Scotia Archives and Records Management's capable staff.

Communications Plan – Stakeholder Marketing

The decoupling of the marketing roles allowed the team to focus their energies on the application development, working with the participating members and communicating the project to key Stakeholders. The Phase II Stakeholder Marketing initiatives included:

- **Site Visits**

The Project Coordinator accompanied the Archives Advisor on several of the site visits to introduce the Routes to Your Roots application to the CNSA members. This face to face discussion was useful in the infancy of the project as there was no visual tool to demonstrate the application to the members.

- **Listserv**

CNSA-L Listserv was used throughout the process as an effective means to communicate with members.

- **Pre-launch Workshop**

Participating members were invited to a pre-launch workshop on March 22nd, the purpose of the workshop was to introduce the Routes to Your Roots application and to discuss Partnership opportunities with community tourist service providers.

The Team continues to work on Phase III of the project and the application will grow to include new participants, more welcome videos and experience ongoing improvements to functionality of the site and directory.

Respectfully Submitted,

Susan Gilson
Routes to Your Roots
Project Coordinator