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Business archives and Web 2.0: increasing archival access and making the archives and asset

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**Business Archives and Web 2.0:
Increasing Archival Access and Making the Archives an Asset**

By
Doug Mann

Accepted in Partial Completion
Of the Requirements for the Degree
Master of Arts

Kathleen Kitto, Acting Dean of the Graduate School

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Master's Thesis

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Doug Mann
December 2012

**Business Archives and Web 2.0:
Increasing Archival Access and Making the Archives an Asset**

A Thesis
Presented to
The Faculty of
Western Washington University

In Partial Fulfillment
Of the Requirements for the Degree
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Abstract

This thesis explores the ways business archives can use Web 2.0 applications for both internal and external archival processes. As corporate archives create websites and in some cases blogs and other Web 2.0 applications (Facebook and Flickr pages), they have the opportunity to increase access to their holdings, but they also risk becoming a potential liability to the corporation through privacy and copyright lawsuits, as well as accidental divulgence of company secrets or publication of materials that are then used to create a bad image of the corporation. This thesis questions whether business archives can utilize Web 2.0 applications to increase access to their holdings, reconcile archival and corporate values and add value to their parent company. Anecdotal evidence suggests that business archivists are not as actively involved with Web 2.0 technologies as their counterparts in non-business archive. To test this observation I surveyed business archivists, questioning them on the extent to which they use Web 2.0 tools in their archival practice, their opinions on the utility of Web 2.0 and the degree of openness their corporation's policies allow. I also analyzed current business archives' websites and Web 2.0 applications to explore ways that these tools can increase archival access and outreach. In an effort to encourage business archivists to implement Web 2.0 technologies, the final section distills my research into a Web 2.0 user guide for business archivists.

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Introduction

LinkedIn, Twitter and bloggers, oh my! The recent growth of interactive and collaborative elements on the internet has transformed the way people interact and organizations operate. Groups of likeminded individuals now form blogging communities instead of joining local clubs. Job seekers use Facebook and LinkedIn to search and apply for jobs, rather than scouring the Classifieds and help wanted ads. Micro-blogging has even played a role in recent democratic revolutions. And these changes have taken place in less than ten years!

The shift to collaboration, interactivity and openness in digital technology, encapsulated in the term Web 2.0, has shaken the archival world as well. Archivists are finding that users expect instant access to digitized archival records and the ability to communicate digitally with the archivist. Not only that, users now wish to take part in the arrangement and descriptive processes by commenting on items, suggesting connections between items and adding their own knowledge to the records' metadata. These changes in user behavior have also forced archivists to question traditional archival theory as they move from gatekeepers to records facilitators.

While much of the archival community has embraced Web 2.0 by joining social networking sites, publishing podcasts and blogs and adding interactive features to their websites, business archivists have been considerably slower to jump on the Web 2.0 bandwagon. This, I suggest, is a result of the growing rift between the business archives community and the mainstream archival profession. Since its development in the 1940s, the business archives community has faced the challenge of reconciling archival principles with the dictates of

corporate culture. As Mary Goldstein succinctly stated in “The Evolving Role of In-House Business Archives: From Tradition to Flexibility”: “The traditional mission for the archives was to document the origins, organization, and development of an institution,” but “Few companies today are interested in establishing a history program in order to produce a coffee-table book...Business archives need to advance the mission of the company and serve the current and future needs of the business.”¹ Business archivists have with varying degrees of success worked to safeguard the archives in a corporate realm that favors privacy over openness and internal client support over external researcher assistance. Treading the line between archival principles and corporate demands has produced a business archives community that operates considerably differently than most non-business archives.

The gulf in principles and practices that separates the mainstream archives and business archives communities appears to have produced differing responses to the development of Web 2.0 technology. My aim in this research project is twofold: to test my hypothesis that business archivists truly are less willing to embrace Web 2.0 technologies and to explore the potential these tools hold for increasing access to business records and promoting the archives as a corporate asset rather than potential liability. To this end I conducted a survey of business archivists, questioning them on the extent to which they use Web 2.0 tools in their archival practice, their opinions on the utility of these tools, and the degree of openness their corporations’ policies allow for engaging in the social web.

Recognizing the variety in types and sizes of business records repositories in existence, in the ensuing discussion I adopts the definition of business archives articulated by former Ford Motor Company Archives Director Douglas A. Bakken in 1982. He defined business archives as

¹ Mary G. Goldstein, “The Evolving Role of In-House Business Archives: From Tradition to Flexibility,” in *The Records of American Business*, ed. James M. O’Toole (Chicago: The Society of American Archivists, 1997), 47.

“a department specifically charged with the systematic acquisition, preservation, and servicing of corporate historical records and artifacts deemed to be of permanent value in documenting the company's founding and subsequent growth.” This definition shifts the focus away from any ad hoc or unofficial records collections to archival departments created and funded by an organization’s leadership specifically to preserve its vital records.²

In the first chapter I examine the origins and development of business archives in the United States as a way to consider the differences between the business and non-business archives communities. These characteristics including a profit-focus, internal orientation and emphasis on privacy, have forced business archives to meld archival theory with business principles in an unstable bond.

After exploring the differences between business archives and the mainstream archives community, in chapter 2 I analyze the ways in which Web 2.0’s development is transforming archival theory and practice. Collaborative and interactive technologies, I argue, have found a place in the mainstream archival community and the business world but have yet to catch on among business archivists.

Since little has been written on business archives and Web 2.0 and few have studied business archivists’ use of these new technologies, during the summer of 2012 I conducted a survey of business archivists, questioning them on their experience with and opinions of Web 2.0 technologies as archival tools. Chapter three details this study and its findings.

To add to the body of literature addressing business archives and Web 2.0, the final chapter serves as an introductory guide to developing a Web 2.0 presence for business archives. It includes a conceptual model for implementing Web 2.0 technologies as well as several case

² Douglas A. Bakken, “Corporate Archives Today,” *American Archivists* 45 (Summer 1982), 281.

studies illustrating some of the options business archives have when integrating Web 2.0 tools and functionality into their existing archival processes.

Chapter 1

Changing Times: A History of Business Archives and the Archival Divide

Business archives form a niche community within the Society of American Archivists and the archival profession at large. Since they operate in a corporate environment governed by privacy and profit-seeking, business archives face unique challenges and must therefore manage themselves differently than archives in universities, government or non-profit institutions. While all archives must abide by federal regulations regarding privacy and most archivists struggle with funding shortages, business archives feel the pressures of privacy and profit margins in a singular manner. By examining the history of business archives in the United States – as a subset of the history of the larger American archival profession – one can gain a greater understanding of business archivists' special concerns.

The following pages provide an outline of business archives history with the aim of illustrating how these institutions have evolved in a somewhat detached manner from the mainstream archives community. The ensuing history demonstrates business archives' tenuous existence in the corporate world as well as their ghettoization by the broader archival community. Indeed, the fact that there are relatively few business archives in comparison to their academic, governmental and non-profit counterparts is evidence of a lack of concern among both archivists and corporate managers for business records and business history in general; if the archives profession truly considered business records as integral to modern social history, business archives would receive more press in the scholarly literature than they currently do.

Similarly, were CEO's to recognize the present value of their historical business records, more emphasis would be placed on preserving the records of American business. Burdened by a general lack of support, business archives hold a unique place in the corporate world and archival community. As Cargill's Corporate Archives Director Bruce Bruemmer has vividly stated, business archivists "will remain brown shoes in the world of corporate tuxedos."¹

A Troubled Past

With roots in the Industrial Revolution and the concomitant rise of corporate culture, business archives have a long and colorful history. According to JoAnne Yates in *Control Through Communication*, the latter half of the nineteenth century saw businesses begin to adopt systematic management concepts as a way to cope with business expansion and to increase efficiency. Business managers replaced oral communication with policy manuals and compiled detailed reports to help them manage their companies. As these records became more refined and useful for reference, managers began to save business records in informally-organized archives. These records accumulations soon became unwieldy, however, especially for those businesses that had expanded production through government contracts during World War I. To manage the increasing bulk of business records, business owners recruited efficiency experts and records managers, who focused more on destroying than preserving records, often encouraging wholesale records destruction by businesses.²

¹ Bruce H. Bruemmer, "Brown Shoes in a World of Tuxedos: Corporate Archives and the Archival Profession," 2006, <http://www.mybestdocs.com/bruemmer-b-SAA082006-bizethics.htm>.

² JoAnne Yates, *Control Through Communication: The Rise of System in American Management* (Baltimore: The Johns Hopkins University Press, 1993); Elizabeth W. Adkins, "The Development of Business Archives in the United States: An Overview and a Personal Perspective," *American Archivist* 60 (Winter 1997), 9-11; William D. Overman, "The Pendulum Swings," *American Archivist* 22 (1959), 6.

Unless some change was made, much of America's early business records would have been lost. However, during the 1920s economic history began to form as a discipline due to the recognized importance of business to societal development. Observing the disarray and destruction of business records with growing concern, economic historians, coalescing around the newly-created Business History Society, became the first advocates for business archives. However, it wasn't until 1938 that archivists began to recognize the need for business archives.³ In that year Oliver W. Holmes published an article in *American Archivist* advocating for business archives, and the Society of American Archivists created the Business Archives Committee.⁴

Although it took two world wars and the efforts of over twenty years of advocacy, America's first business archives was created at Firestone Tire and Rubber in 1943, over forty years after the founding of the United States' first governmental archives and nearly ten years after the birth of the National Archives.⁵ The formation and development of the Firestone archives illustrates some of the unique traits shared by business archives. Recognizing the societal importance of Firestone's contributions to the war effort through its rubber productions for the US military, and to prepare for the company's fiftieth anniversary, Harvey S. Firestone, Jr. hired William D. Overman, former state archivist at the Ohio State Archeological and Historical Society, to organize and preserve the company's vital records. Much of Firestone's impetus for creating a business archives came from wartime concerns as well as preparations for the company's fiftieth anniversary celebration in 1950, but Firestone also saw the archives'

³ While business archives in America were a modern development, they have a long history in Europe, dating to as early as the Late Middle Ages. Randall Jimerson, *Archives Power: Memory, Accountability, and Social Justice* (Chicago: Society of American Archivists, 2009), 280.

⁴ Adkins, "Development of Business Archives," 9-10; Overman, "Pendulum Swings," 6; David R. Smith, "An Historical Look at Business Archives," *American Archivist* 45 (Summer 1982), 274.

⁵ The first modern business archives in the world was formed at Germany's Krupp Company in 1905 to prepare for the company's anniversary. Phillip F. Mooney, "The Practice of History in Corporate America: Business Archives in the United States," in *Corporate Archives and History: Making the Past Work*, ed. Arnita A. Jones and Philip L. Cantelon (Malabar, Florida: Krieger Publishing Company, 1993), 9.

usefulness as a research tool for shaping corporate policy: the archives “would be helpful not only in conducting the daily affairs of the business but also in charting its future course.”⁶ These various concerns – commemoration, documentation of societal contributions and policy development – are typical reasons that corporate managers form business archives.⁷

While the initial incitation to systematically preserve business records came from economic historians, most early business archives, like Firestone’s, formed at the behest of company founders and internal advocates. The larger archival profession developed much differently. With deep roots in the nineteenth century’s historical manuscripts tradition, the archival field found its earliest proponents in historians who sought to preserve the country’s history through publication. With the rise of scientific history in the late nineteenth century, however, the American Historical Association’s Public Archives Commission coalesced to advocate for the creation of public archives of governmental records. Their efforts led to the founding of Alabama’s Department of Archives and History in 1901 and the National Archives in 1934. In its early years, then, the archives field, led by the newly-formed Society of American Archivists, focused on governmental recordkeeping, paying little notice to the plight of America’s business records. Furthermore, the external pressure exerted to create governmental archives differed significantly from the largely internal support evidenced in the origins of America’s earliest business archives. Lacking significant assistance from SAA or the American Historical Association, business archives were relative latecomers to the larger archival universe.

⁶ Adkins, “Development of Business Archives,” 9-10; Mooney, “Practice of History,” 10; Smith, “Historical Look,” 274; Bakken, “Corporate Archives,” 284; William D. Overman, “The Firestone Archives and Library,” *American Archivist* 16 (1953), 307.

⁷ In addition to Firestone Tire and Rubber, other corporations which formed business archives to commemorate corporate anniversaries include Neiman Marcus, Ford Motor Company and Bosch. Of these four, only two are still in existence according to the 2008 edition of SAA’s Business Archives Directory. The two that remain have refashioned their programs to develop a long-term purpose, as will be observed. Bakken, “Corporate Archives,” 285; Adkins, “Development of Business Archives, 17; *The Business Archivist & Archives Newsletter* 28, no. 2 (August 2011), 2.

Indeed, it wasn't until the late 1940s and 1950s, once the archival profession stepped up its advocacy for business archives, that business archives programs really began to develop in America. Thus, from even this early period, the history of business archives evinces the lack of support endemic to the field.⁸

In spite of strong economic growth in the 1960s few major corporations created business archives during this decade,⁹ suggesting that CEOs still held to traditional views of archives as dusty, superannuated collections of records with little relevance for planning or profit-seeking; corporate leaders had still not come to see business archives as essential tools for business success. Following the stagnant 1960s, business archives took off in the 1970s for several reasons, including a renewed interest in history spurred by the nation's Bicentennial, a strong economic cycle and increasing worker transience and corporate restructuring that necessitated an archives to serve as a site of corporate memory. In the 1970s the Society of American Archivists also reinstated the Business Archives Section after having disbanded it in the languishing years of the 1960s, and a number of large corporations created business archives in this period, including Anheuser-Busch, Corning Glass, Walt Disney Productions and Wells Fargo Bank. In spite of these notable successes, however, the corporate world still did not consider archives as valuable corporate assets; the 1980 edition of SAA's business archives directory listed only 200 archives and 60 archivists. While this constituted a vast improvement from the 133 archives and 13 full-time archivists recognized in a 1969 survey conducted by SAA, the survey results also reflected archives' limited appeal to the corporate world. Indeed, only seventeen of the top 100 corporations listed in the 1982 edition of *Fortune 500* reported having an archivist on staff. Clearly, while business archives had grown, by the early 1980s and the publication of the first

⁸ Adkins, 11; Jimerson, *Archives Power*, 91-97.

⁹ Only four major corporations formed archives in the 1960s. These were IBM, Gulf Oil, Chicago Board of Trade and Educational Testing Service. Adkins, "Development of Business Archives," 12; Smith, "Historical Look," 275.

special issue of *American Archivist* dedicated to business archives in 1982, they had not yet achieved widespread reputation among corporate managers.¹⁰

However, all was not doom and gloom in the business archives community. The contributions to the 1982 special issue of *American Archivist* focusing on business archives evince business archivists' optimism after the booming 1970s even as they noted the challenges of marketing business archives to CEOs focused on profit-margins and with considerable misconceptions of business archives' utility. In the issue's opening essay former Wells Fargo Bank Archivist Harold P. Anderson exultantly likened business archives to a bunch of coconuts: while companies once saw them as "nice things to have around," but were not "quite sure what to do with them," now "they seem to have as many potential uses as the remarkably practical and profitable fruit of the coco palm."¹¹ Douglas Bakken and David Smith furthered this optimistic tone in their respective contributions reflecting on business archives history. Noting the continuing challenges business archives face, George Smith of the Winthrop Research Group provided a counterbalance to this exuberance in "Dusting off the Cobwebs: Turning Business Archives into a Managerial Tool," noting that in actuality "business archives are a hard sell," since "business managers are likely to view archives as little more than gloomy, spider-infested repositories of crumbling paper and rusty artifacts whose principal value comes but on the golden anniversary." His work as a consultant and historian for the likes of AT&T and Bell Laboratories undoubtedly informed his pessimistic view of business archives' position. After suggesting a number of ways business archives can contribute to corporate bottom lines, Smith concluded that archivists must "make an aggressive case" for the continuing value of business records as a "unique corporate asset." Clearly, then, by the 1980s business archives had come

¹⁰ Adkins, "Development of Business Archives," 12; Smith, "Historical Look," 275-76; Bakken, "Corporate Archives," 281-82.

¹¹ Harold P. Anderson, "Business Archives: A Corporate Asset," *American Archivist* 45 (Summer 1982), 264.

into their own but were still facing considerable obstacles, challenges that continue to plague business archivists.¹²

One of the greatest challenges that business archivists face is establishing a strong program that will weather recession, mergers and management changes. The 1980s and 1990s saw a considerable economic slowdown and concomitant flurry of corporate restructuring that led to the demise of several reputable business archives, including those at the J. Walter Thompson Company, ARCO and Eastman Kodak. Other business archives, including those at Bank of America and Phillips Petroleum, faced significant cutbacks. In this foreboding climate business archivists produced much less sanguine scholarship than in the early 1980s. Later literature in the 1990s focused on aiding archivists in advocating for business archives, reconciling archival values with corporate culture and coping with new types of records emerging in the digital age. In addition to the literature, the Minnesota Historical Society and the National Endowment for the Humanities funded the Records of American Business Project, which conducted research on appraisal and preservation of business records culminating in a symposium in April 1996. Together, the symposium and other outside scholarship aided business archives in improving their practice and advocating for their programs in difficult financial times and an era of transformation to digital recordkeeping.¹³

While the Records of American Business Project and related symposium may have provided needed resources to business archivists in the 1990s, recent trends in the archival literature point to business archives' ghettoization within the larger archival profession. Although some archivists addressed business archives concerns in the 1970s and 1980s, more recent shifts

¹² George David Smith, "Dusting Off the Cobwebs: Turning the Business Archives into a Managerial Tool," *American Archivists* 45 (Summer 1982), 287, 290.

¹³ Adkins, "Development of Business Archives," 15-17; James O'Toole, ed., *The Records of American Business* (Chicago: Society of American Archivists, 1997).

towards writing on social memory, postmodernism and Archives 2.0 have largely excluded business archives from the discussion, even though these broad issues directly affect business archives as well.¹⁴ Before these new topics gained the forefront of scholarly interest, the *American Archivist* produced two special issues focusing on business archives – in 1982 and 1997 – but the past decade has seen little scholarship with business archives in mind.¹⁵

Indeed, an examination of archival journals as well as a comprehensive web search netted only three scholarly articles¹⁶ and the proceedings of one international conference, much of which has little bearing on business archives in America.¹⁷ This lack of scholarship is troubling, especially considering the sea changes in archival theory and practice that we have witnessed since the turn of the century. Not only has theory progressed, but the types of records produced are rapidly evolving with the ubiquity of email correspondence, Web 2.0, text messaging and the like. While archivists have pondered these transformations with nonprofit and academic archives in mind, little has been written by or for business archives. As noted earlier, I suggest that the dearth of scholarship is symptomatic of the ghettoization of business archives by the larger archival profession. The latter, I argue, views business archives as an ‘other’ or ‘half-

¹⁴ Due to this trend away from business archives much of my research is inevitably dated.

¹⁵ Some notable exemptions to this trend include: Bekir Kemal Ataman, “Archives Mean Money: How to Make the Most of Archives For Public Relations Purposes – The Yapi Kredi Bank Example,” *American Archivist* 72 (Spring/Summer 2009), 197-213; A. Lerner, “Business archives and digital images: preservation issues versus getting the job out,” *Imaging Science Journal* 49, no. 3 (July 2001): 171-75; and Becky Tousey and Elizabeth Adkins, “Access to Business Archives: US Access Philosophies,” Japan-U.S. Archives Seminar, May 2007, <http://www2.archivists.org> (accessed October 20, 2011).

¹⁶ Bekir Kemal Ataman, “Archives Mean Money: How to Make the Most of Archives For Public Relations Purposes – The Yapi Kredi Bank Example,” *American Archivist* 72 (Spring/Summer 2009), 197-213; Bruce H. Bruemmer, “Brown Shoes in a World of Tuxedos: Corporate Archives and the Archival Profession.” In *Controlling the Past: Documenting Society and Institutions*, Terry Cook, ed. (Chicago: The Society of American Archivists, 2011) 151-70; A. Lerner, “Business archives and digital images: preservation issues versus getting the job out.” *Imaging Science Journal* 49, no. 3 (July 2001): 171-75.

¹⁷ The conference, *Access to Archives: The Japanese and American Practices* (Tokyo, Japan, April 2007), focused on archival access policies and practices in America and Japan and included one article discussing access in business archives: Becky Tousey and Elizabeth Adkins, “Access to Business Archives: U.S. Access Philosophies.”

breed' because corporate culture requires business archives to operate radically differently from similar institutions in the nonprofit, academic or governmental sectors.

This growing rift in the archival profession came to a head in the mid-2000s during the controversy over the *Sun Mad* poster printed on the cover of the Fall/Winter 2003 *American Archivist* issue. The poster, used to illustrate Susan Tschabrun's essay on managing poster collections, elicited a wave of criticism in ensuing issues of the publication by business archivists upset by the negative corporate depiction on the cover of SAA's trademark journal. These voices expressed concern that the *Sun Mad* poster would only worsen the already fragile position of business archivists in the corporate landscape. In reply, Richard Cox used the occasion to question the ethics of business archivists, writing, "What intrigues me is how the individual functioning as an archivist or records manager can work in the corporate environment in any realistic way, adhering to any sense of professional ethics or mission." With the battle lines clearly drawn, marketing professor and corporate marketing consultant Andrew Abela came to business archivists' defense in "Digesting the Raisins of Wrath: Business, Ethics, and the Archival Profession." Arguing that corporate culture isn't inherently unethical, Abela asserted that business ethics is "challenging not because business is controversial [but] because the field of ethics *itself* is challenging." After laying out the multiplicity of modern ethical theories and illustrating the ease at which ethical positions can reach cross points, he urged the profession to develop a more robust system in support of ethical decision making, including an Ethics Roundtable and mentoring programs. Although the controversy eventually subsided, the

Raisingate episode and ensuing ethical quarrels point to substantial rifts in the archival profession.¹⁸

A Special Breed: Business Archives

The foregoing history of business archives, illuminating their sui generis origins and developmental trajectory culminating in Raisingate and the ethical divide within SAA, suggests that business archives hold a unique position within the larger profession. While the archival profession at large encourages advocacy and public access to records in a not-for-profit environment, business archives operate in a sphere that often challenges these democratic tenets. In a corporate landscape driven by profit and emphasizing privacy rights, business archives often must take alternative approaches to archival practices in order to maintain their tenuous position on the corporate ladder. The ensuing discussion will highlight some of the idiosyncrasies of business archives, setting the stage for considerations of why they appear to be approaching Web 2.0 technologies differently than the mainstream archival profession.

In the business world profit margins are the driving force for policy and action, and as such the business archives, to maintain its position, must focus on improving the company's bottom line. Without emphasizing the profitability of archives, the business archivist can expect little support from corporate managers. As Adkins and Tousey enounced in their writings on business archives, "There is no government or grant support" for archival operations, so the "only source of support for a corporate archives is from the corporation itself." Whereas governmental archives, operating through the National Archives and Records Administration or state and local governments, receive financial allotments from Congress or state or local

¹⁸ Richard J. Cox, letter to the editor, *American Archivist* 68 (Spring/Summer 2005), 10; Andrew V. Abela, "Digesting the Raisins of Wrath: Business, Ethics, and the Archival Profession," *American Archivist* 71 (Spring/Summer 2008), 204.

governing bodies and academic archives and historical societies can petition for grant funding, business archives rely entirely on internal support, so “it is imperative that corporate archivists clearly communicate and consistently demonstrate their value to the business.” As Coca Cola Archivist and leading figure in business archives Phillip Mooney expounded, “Regardless of the initial impetus, successful programs are those that have clearly positioned their long-term functions as relevant contributors to stated corporate strategies.” Without full departmental status and companywide endorsement, business archives are “doomed to extinction” when management and corporate philosophy changes; company leadership must view the archives as a “vital, progressive, contributory information center.” If corporate leaders do not consider the archives as essential to business profitability its future is likely limited. That said, business archives can find ways to further the archival values of access and public service while creating a profit for their corporations.¹⁹

One major means by which business archives can turn a profit is through public relations, branding and advertising. Coca-Cola, for instance, thrives on the revenue generated from advertising and recognizes that building brand recognition is integral to success in the competitive beverage market. To capitalize on their heritage, the company created an archive in 1977 and a museum, the World of Coca-Cola, in 1990. The archives works closely with the museum, where nearly 1,200 of its items are on display. It also spreads the company’s heritage – and by doing so increases access to archives – through its use of technology. The archives’ website offers visitors a history of the company, in both textual and video form, as well as a blog through which Coca-Cola Archivist Philip Mooney shares archival content and public interest stories related to the company. Furthermore, in preparation for Coca-Cola’s 125th anniversary, the archive created an online virtual archive, The Very Best of Coca-Cola, which enables visitors

¹⁹ Mooney, “Practice of History,” 11.

to take a 360 degree look through the company's museum, search for particular items and even comment on their favorite pieces of Coke history. Through all these means, Coca-Cola's archives is contributing to the company's bottom line while engaging a diverse and increasingly digital public with the company's history and increasing access to its archival materials.²⁰

By engaging in business functions, the archive not only bolsters its position in the corporate hierarchy but also often is able to increase public access to records thereby, as has been illustrated. However, the business archivist will not succeed in advocating for archives by simply creating corporate profit through these means. The archivist must be able to quantify that profit and routinely remind managers of the archive's merits through annual reports. In short, the archives must function like any other department. As Mooney opined, "Every task and project undertaken should produce statistical data that justifies the activity," and the archivist must "develop more precise tools to measure bottom line contributions."²¹

One method for quantifying archival processes is to use the concept of *commercial equivalent*. In this public relations concept media coverage generated through external means is said to have a commercial equivalent value, measured by calculating the cost of purchasing the equivalent media time. Bekir Kemal Ataman, the archivist at Yapi Kredi Bank in Istanbul, Turkey, has used this method with much success to quantify the archive's profitability. The Bank, which has proven instrumental in the development of Turkish culture through its support of theatre, developing the country's printing industry and funding fine arts, capitalizes on its social impact by means of aggressive public relations campaigns. Through a partnership between the Bank's Archives and its Public Relations Department, the company supplies archival images

²⁰ John A. Fleckner, "'Reaching the Mass Audience: Business History as Popular History,'" In *The Records of American Business*, James O'Toole, ed. (Chicago: The Society of American Archivists, 1997), 333; <http://www.thecoca-colacompany.com/heritage/mooney.html>; [www. http://theverybestofcocacola.com](http://theverybestofcocacola.com).

²¹ Philip F. Mooney, "Archival Mythology and Corporate Reality: A Potential Powder Keg," In *The Records of American Business*, James O'Toole, ed. (Chicago: The Society of American Archivists, 1997), 60-61.

to journals, television networks and magazines, generating virtually free media coverage for the company. To underscore the archive's profitability, Ataman and his archival team calculated the cost of purchasing just the magazine coverage they had generated over the archives' first two years of existence and presented their report to the Bank's management. As a result, the company established the archives as a permanent department, "employed two members of the project team on a full-time basis and kept them on throughout the economic crisis that hit the country soon after their employment." While their method of calculating commercial equivalent values demanded considerable time and resources, it solidified the position of an archive that was originally only established on a temporary basis to prepare for the Bank's fiftieth anniversary celebration.²²

Another more common means of quantifying the business archives' contributions is the fee-for-service structure, also known as 'charge-backs.' In the financial hard times of the 1980s and early 1990s, several archives began to use this method for reporting purposes and as a way to generate funds. Canada's Royal Bank, for example, once operated one of the best business libraries in the country, providing materials for internal research requests as well as welcoming members of the public to use its wide collection of popular business literature. Cutbacks eliminated the library's book budget and forced it to limit its public services. To generate revenue, the library began to charge fees to the bank's departments for internal research requests. Cargill also adopted the fee-for-service structure, and in the 1990s AT&T's archives reportedly survived solely on revenue generated from 'charge-backs.' Although charging for reference services may seem egregious to archivists versed in traditional archival values, the dictates of

²² Bekir Kemal Ataman, "Archives Mean Money: How to Make the Most of Archives For Public Relations Purposes – The Yapi Kredi Bank Example," *American Archivist* 72 (Spring/Summer 2009), 200, 207.

corporate culture may demand it, and by doing so the archive can more easily quantify its services for the purpose of annual reporting.²³

In addition to their focus on improving the company's bottom line, business archivists must also contend with corporate demands for privacy and the protection of proprietary information. This requires them to operate differently than most public archives. As Jimerson notes in *Archives Power*, in public archives there are "usually stringent regulations providing open access to most public records," but "private archives do not have a legal obligation to do so." While business archivists generally attempt to serve the public and satisfy their requests for information, opening up the archives can entail risks to the company's image and profitability. Becky Haglund Tousey, Kraft Foods' senior archivist, explains that business archivists "do not apply the rules of access uniformly" in order to avoid "harming our company" by "act[ing] in a manner that is detrimental to our institution and its reputation." Therefore, in Kraft's archives, as well as other business archives, the archivist must "take into consideration the *intent* of the researcher when...mak[ing] a decision about whether to permit access to certain records." While this may spur ethical qualms among those of Richard Cox's mindset, Tousey asserts that she is generally able to accommodate most public research requests, as they usually pertain to product questions or company history rather than proprietary information.²⁴

However, in order to prevent the disclosure of private corporate records, many business archives either heavily vet their researchers or prohibit researchers from visiting the archives, requiring them instead to submit research requests online or by phone.²⁵ These major precautions evidence the resemblance between business archives and religious and tribal

²³ Gord Rabchuk, "Life After the 'Big Bang': Archives in an Era of Disorder," *American Archivist* 60 (Winter 1997), 38; Bruemmer, "Brown Shoes," 160.

²⁴ Jimerson, *Archives Power*, 283; Tousey, "Access to Business Archives."

²⁵ Examples of archives with limited public access include Kraft Foods and Wells Fargo Bank.

archives. As various archivists have expressed in the literature, both groups have “carefully delineated priorities for access and service” and also “raise the question of loyalties and allegiances.” These institutions are generally more internally oriented than public archives, existing to serve the organization’s needs rather than satisfy public demands for information, and in many instances this requires the archivist to weigh public requests against the good of the organization and its privacy requirements.²⁶

Business archivists’ corporate loyalties and internal focus place them in a unique organizational position. Due to their knowledge of corporate history, business archivists often work with their company’s public relations department to boost the company’s image when it becomes a target of public criticism. The archives can do this by providing historical material for advertising campaigns or through research and reporting to counter negative publicity. DuPont, for example, had to combat bad press after World War I stemming from its involvement as a supplier for the military. After a Senate investigative committee labeled DuPont a ‘merchant of death,’ the company in 1938 established a Public Relations Department and launched a promotional campaign. Coining the slogan ‘Better Living through Chemistry,’ they used historical photographs highlighting the company’s role in American defense and their past technological innovations as the centerpiece for a new company image. As a result of their success, DuPont established an archival department and a company museum.²⁷

In a similar instance, Ford Motor Company utilized its archives for research into wartime operations after allegations in the late 1990s that Ford’s German branch was complicit in subsidiary Ford-Werke’s use of slave labor in Nazi Germany. After three and one half years of research in Ford’s archives by forty-five archivists pouring over 98,000 pages of company

²⁶ Jimerson, *Archives Power*, 286; Bruemmer, “Brown Shoes.”

²⁷ Goldstein, “Evolving Role,” 49.

records, Ford was able to vindicate itself. In addition, the archive's operations are furthering access to these company records; to emphasize their commitment to transparency over the issue, Ford donated the compiled records, as well as a searchable database, to the Benson Ford Research Center, where they are available for public review. Therefore, while corporate dictates may compel archivists to prevent disclosure of archival records, business archivists can also find ways to reconcile privacy requirements and company loyalty with public demands for information.²⁸

One further aspect that sets business archives apart from many other bodies in the larger profession is the challenge they face in maintaining the records of increasingly globalized institutions. Whereas tribal archives usually collect from a geographically limited region and university archives rarely have to contend with the records of more than a handful of campuses, business archives often must maintain the records of diverse corporate branches spread across the globe. The general lack of internal support business archivists experience only exacerbates this challenge. However, the current transition to digital communication and recordkeeping is helping business archivists to manage the records of global businesses more effectively and to illustrate the archive's value to corporate profitability. As early as 1997 the HSBC Group's archivist Edwin Green extolled the benefits of using an "updatable Internet entry" to create awareness of a multinational corporation's records, and more recently, Becky Tousley, Kraft Foods' archivist, noted that the company's archives is "accustomed to servicing requests remotely" due to the company's international reach. For both multinational corporations, digital

²⁸ Bruemmer, "Brown Shoes," 167; "Ford Issues Report on Ford-Werke Under the Nazi Regime," Ford Motor Company (December 6, 2001), http://media.ford.com/article_display.cfm?article_id=10379.

technology has made the task of providing reference services to their geographically dispersed branches much simpler and faster.²⁹

However, the digital age has also birthed new challenges, forcing business archives to alter their recordkeeping strategies and engage in new forms of information management. The role of archives in corporations is changing, and as Royal Bank of Canada's Corporate Archivist Gord Rabchuk anticipated over ten years ago, the "best bet for [archives'] survival will be the ability to demonstrate our information management skills and familiarity with internal information networks." If archivists wish to maintain their position in the corporate structure they must take an active role in collecting and managing the increasingly digital records of their corporations. New Web 2.0 technologies, to be discussed in the next section, can aid business archivists in managing the records and assisting in the communication needs of their parent institutions. By participating in the Web 2.0 revolution, business archivists will be able to establish their importance in the corporate world and preserve valuable business records for both employees and external researchers.³⁰

²⁹ Edwin Green, "Multi-National, Multi-Archival: The Business Records of the HSBC Group," *American Archivist* 60 (Winter 1997): 109; Tousey, "Access to Business Archives."

³⁰ Rabchuk, "Big Bang," 39; Duncan McDowall, "'Wonderful Things': History, Business, and Archives Look to the Future," *American Archivists* 56 (Spring 1993), 351-52.

Chapter 2

Going Digital: The Web Revolution and the Archival Response

As elucidated in the previous chapter, the corporate world's internal orientation, emphasis on privacy and profit focus often challenge basic archival principles, forcing business archives to operate differently from most types of non-business archives in America. This has been true since the first business archives formed in the 1940s and continues to hold fast in today's Web 2.0 social revolution. Over the past several years academic, governmental and non-profit archives have jumped on the Web 2.0 bandwagon, joining social networking sites and adding interactive features to their websites. However, business archivists seem less eager to embrace these new communicative tools than their colleagues in the public sector. This chapter will explore the transition from Web 1.0 to Web 2.0 and consider how the archival world has responded to these changes. Through an analysis of the archival literature, case studies and surveys on Web 2.0 use I begin to probe the archival community's varied response to Web 2.0 technologies and the benefits these tools can bring to archival institutions.

Addressing the Web Revolution

In the Web 1.0 era the internet operated as a tool for the publication and dissemination of information, with little support for web-based interaction or collaboration. In this iteration, the web facilitated only one-way communication. However, in 2002 or 2003 web developers, conceptualizing new opportunities for the internet, created applications to facilitate online

community-building and information exchange. Tim O'Reilly, a leader of the open-source movement, is credited with coining the term Web 2.0 to describe the broad changes in the web following the dotcom collapse in the early 2000s. The internet startup companies that survived the collapse "seemed to have some things in common," traits that he united under the umbrella term Web 2.0. While the origins of the term Web 2.0 are debatable, the results of this conceptual shift are ever-present. Web 2.0 represents, in the words of Kate Theimer of ArchivesNext, a "confluence of changes in web design and functionality." As Duke University Archivist Mary Samouelian exposit, this new online environment "embraces collective intelligence and participation, and affords previously passive recipients of content the opportunity to engage with, combine, share, and 'mash up' information in new and imaginative ways."¹ Community-building applications such as social networking sites, blogs, microblogs, video-sharing sites and podcasts, all part of the Web 2.0 revolution, facilitate interaction with digital content and other users.

While the archival community began to discuss the possibilities of Web 2.0 for archival work by the mid-2000s, libraries initially proved more eager to experiment with this new technology, producing a greater body of literature on Web 2.0 than the archives field.² This is likely due to the reality that the library community has traditionally been more user-oriented than archives.³ Whereas archivists are often criticized for being too records-focused,⁴ librarians have

¹ Tim O'Reilly, "What is Web 2.0: Design Patterns and Business Models for the Next Generation of Software," *O'Reilly Network*, September 30, 2005, <http://oreilly.com/web2/archive/what-is-web-20.html>; Theimer claims that the "most prominent early use [of the term 'Web 2.0'] was by O'Reilly Media, a company that sponsored a conference titled 'Web 2.0' in 2004." Kate Theimer, "Building a Community of Supporter: The Role of New Technologies in Advocacy," in *Many Happy Returns: Advocacy and the Development of Archives*, ed. Larry J. Hackman (Chicago: Society of American Archivists, 2011), 340; Mary Samouelian, "Embracing Web 2.0: Archives and the Newest Generation of Web Applications," *The American Archivist* 72 (2009): 43.

² Samouelian provides examples of the library community's early forays into Web 2.0: Samouelian, "Embracing Web 2.0," 47.

³ Isto Huvila, "Participatory archive: towards decentralized curation, radical user orientation, and broader contextualization of records management," *Archival Science* 8, no. 1 (2008), 15.

long recognized that the library's survival depends on building a network of users. By 2006 or 2007 'Library 2.0' emerged as the library community began to integrate Web 2.0 technologies into their user services and adopt the ethos of collaboration, openness and sharing epitomized by Web 2.0.

Following these developments in the library field, archivists led notably by Kate Theimer coined Archives 2.0 as the archives community's response to the web revolution. As Theimer has expounded in print and on her blog, Archives 2.0 represents a "change in perspective," rather than just the adoption of new technologies. The "explosion of information available on the web" and the growth of Web 2.0 technologies have altered the "ways that people find, retrieve, and use information,...fundamentally chang[ing] the users of archives." Archives must respond. A number of voices in the archival literature have suggested means by which archives can evolve to meet users' needs in this new digital environment.⁵

In "Inviting the User into the Virtual Archives" Elizabeth Yakel offered one of the earliest archival responses to the Web 2.0 revolution. Examining the ways in which several institutions had integrated Web 2.0 features into their archival access systems, she asserted that archivists must alter their traditionally authoritative relationship with their users in favor of one built upon a collaborative framework. She suggested that archives introduce tagging, commenting and virtual reference tools into their archival access systems in order to give users more control. While her recommendations may not have been revolutionary, they did serve to widen the discussion of Archives 2.0 possibilities.⁶

⁴ The MPLP movement in archives is premised on assertions that archivists have been too records-focused.

⁵ Kate Theimer, "Archives 2.0?," *ArchivesNext* (blog), October 21, 2008. <http://www.archivesnext.com/?p=203>; Kate Theimer, "What is the Meaning of Archives 2.0?," *The American Archivist* 74 (2011), 66.

⁶ Elizabeth Yakel, "Inviting the User into the Virtual Archives," *OCLC Systems & Services* 22, no. 3 (2006): 159-63.

Following Yakel, Max J. Evans produced a more forward-looking piece, “Archives of the People, by the People, for the People,” in which he proposed digitization on demand and commons-based peer-production as ways to use Web 2.0 concepts to further archival work. Basing his model on a “view of archives as a common and public good rather than as the protected property of an institution,” he suggested that archives could use researcher demands to determine which records require digitization and online posting. Even further, Evans’ model would convert archival researchers into contributors in archival arrangement and description processes. By making minimally processed records available online, the archives “places these images before thousands of potential volunteers” who will use collaborative tools to provide extensible metadata in the form of “comments, controlled- or free-text indexing terms, abstracts, or full-text transcriptions.” Harnessing the power of the crowd in this way, Evans asserted, will enable resource-poor archives to increase access to their holdings and build a wider user base. As will later be seen, a number of public archival institutions have incorporated parts of Evans’ model into their processing and descriptive strategies.⁷

With Web 2.0 altering communication patterns and postmodernism challenging traditional views of archives, the archival community has recognized that the changed environment requires institutions to reevaluate their tools and archival processes instead of simply adding Web 2.0 features to their current systems. In “Colophons and Annotations: New Directions for the Finding Aid” Michelle Light and Tom Hyry offered insightful suggestions on how to remake the finding aid in a postmodern era. Recognizing that archivists are not “disinterested bystanders” but rather “active agents in creating [a] very specific view of historical

⁷ Max, J. Evans, “Archives of the People, by the People, for the People,” *American Archivist* 70 (2007), 394-95: Other archival literature has explored the challenges of crowdsourcing and sharing metadata beyond the institutional boundaries. See, for example, Jenn Riley and Kelcy Shepherd, “A Brave New World: Archivists and Sharable Descriptive Metadata,” *The American Archivist* 72 (2009): 91-112.

reality,” Light and Hyry suggest that archivists revise the traditional finding aid with its “stylistically neutral descriptions” hiding from users the “the subjective, mediating role we have on collections.” They suggest adding colophons and annotations to digitized finding aids. Colophons would be a place for the archivist to document her rationale for processing, arrangement and descriptive decisions as well as for recording “biographical information about a processor.” Annotations would offer archivists and researchers the opportunity to revise or add to the finding aid’s descriptive information, allowing it to “grow, respond, and increase in value for a community of users.” In sum, their suggestions for digitized finding aids, embodying the Web 2.0 ethos of sharing and collaboration, suggest a way forward for the archival community in the postmodern Web 2.0 world.⁸

Archives 2.0

Over the past several years the archival literature has increasingly addressed Archives 2.0, as exemplified above. Furthermore, survey data and examinations of archival websites suggest that the broader archival profession has embraced the Archives 2.0 initiative. In 2008 Mary Samouelian conducted a two part study, employing both content analysis of archival websites and interviews with archivists who have integrated Web 2.0 features into their digitization projects, in order to gauge the archival response to Web 2.0 demands. Of the eighty-five archival websites she analyzed that had digital collections, over 45% employed at least one Web 2.0 application, with bookmarking (56%) and blogging (21%) being the most frequently used tools. Furthermore, the archivists she interviewed were “overwhelmingly positive” about their experience implementing Web 2.0 features into their digital collections, and over three

⁸ Michelle Light and Tom Hyry, “Colophons and Annotations: New Directions for the Finding Aid,” *American Archivist* 65 (Fall/Winter 2002, 219, 221, 224, 226.

fourths of them indicated that they were considering adding more Web 2.0 features to their collections. Her study offers a positive outlook for archives' survival in the Web 2.0 world.⁹

In addition to Samouelian's study, other evidence suggests that non-business archives are utilizing Web 2.0 tools for a number of archival processes. An exploration of the ways in which academic archives have implemented blogging technologies for reference, access and outreach initiatives provides a case in point.

Blogging software has clear potential for improving archival reference services in the digital environment, and a few academic archives have experimented with reference blogs in order to better interact with the growing contingent of digital-only researchers. A reference blog, such as the one created by Dickinson College's Archives and Special Collections in 2007, allows the archivist to record reference requests in individual blog posts, which become searchable once indexed by search engines such as Google. As Dickinson College's reference blog's creator Malinda Triller attested, posting reference requests online makes the "resources easily visible on the web" and also helps the archivist "understand which resources are in highest demand," allowing him or her to prioritize future processing. Further, such a tool facilitates user comments, enabling researchers to interact with the archivist and each other through the blog, adding value to the collections. Triller's experience with the college's reference blog has been overwhelmingly positive; by creating additional access points to the archive's material and exposing the content to search engines, in multiple instances a blog post has generated additional reference requests.¹⁰

⁹ Samouelian, "Embracing Web 2.0," 58, 59, 60, 62.

¹⁰ Malinda Triller, "Double-Duty Blogging: A Reference Blog for Management and Outreach," in *A Different Kind of Web: New Connections Between Archives and Users*, ed. Kate Theimer (Chicago: Society of American Archivists, 2011), 209, 212.

With the shift away from in-house reference services and growing popular notions that ‘if it isn’t on the web it doesn’t exist,’ researchers are also now demanding digital access to archival material. Users’ studies in libraries and archives clearly illustrate that graduate students, faculty and administrators – many university archives’ major user groups – expect archival materials to be accessible on the web and also prefer digital to print versions in most instances.¹¹ Faced with these changing researcher demands, some archivists are utilizing blogging software to provide access to archival materials through catablogs. As Web 2.0 aficionado Kate Theimer explains, a catablog is an “interactive online catalog” that “takes advantage of blogging software’s inherent tools for easily publishing, tagging, and searching data to present short descriptions of the archives’ collections.”¹² Catablogs may be the answer to demands by archivists such as Richard Cox and Isto Huvila that finding aids must be radically reengineered in the digital environment, since simply digitizing the traditional finding aid does not take advantage of the web’s capabilities.¹³

Possibly the first and best-known archival catablog, the University of Massachusetts Amherst Libraries’ UMARMOT, allows users to search or browse finding aids for its collections.¹⁴ Each post in the catablog contains a brief finding aid, a link to that collection’s full finding aid, a comment tool, folksonomies and, when available, a link to digitized records. By

¹¹ Helen R. Tibbo, “The Impact of Information Technology on Academic Archives in the Twenty-First Century,” in *College and University Archives: Readings in Theory and Practice*, eds. Christopher J. Prom and Ellen D. Swain (Chicago: Society of American Archivists, 2008), 36-38; Duff, “Finding and Using Archival Resources,” 70-71.

¹² Kate Theimer, *Web 2.0 Tools and Strategies for Archives and Local History Collections* (New York: Neal-Schuman Publishers, 2010), 51.

¹³ Cox quotes approvingly from Peter Van Garderen’s speech on recreating the finding aid given at the 2006 SAA conference, and Huvila notes that the “computerisation of finding aids and especially the digitisation of archival materials have created new possibilities for reconsidering the notion of user orientation and for providing a multitude of entry points to the information.” Richard Cox, “Machines in the Archives: Technology and the coming transformation of archival reference,” *First Monday* 12, no. 5 (2007):

<http://firstmonday.org/htbin/cgiwrap/bin/ojs/index.php/fm/article/view/2029/1894>; Isto Huvila, “Participatory archive: towards decentralized curation, radical user orientation, and broader contextualization of records management,” *Archival Science* 8, no. 1 (2008): 18.

¹⁴ UMass Amherst Libraries, Special Collections & University Archives, “UMARMOT,” accessed January 21, 2012, <http://www.library.umass.edu/spcoll/umarmot/>.

presenting finding aids through blogging software instead of on static web pages the catablog facilitates researcher interaction with the records and with other users, while also exposing the finding aids to search engine indexing, making them more easily discoverable by remote researchers. In UMASS's case, the catablog helped them to reduce their processing backlog by posting brief finding aids on the blog, effectively providing increased access to their holdings. In fact, according to the creators Richard S. Cox and Danielle Kovacs, the catablog has had a "profound impact on workflow as well." Instead of allowing new accessions to wait in a processing queue, the archivists now assess each collection and prepare a finding aid on UMARMOT "within two or three days of the collection's arrival."¹⁵ As with the reference blog, catablogs require archivists to alter their traditional processes, but the time saved and the benefits incurred through this new technology make the catablog a useful tool for archivists.

Of the academic archives embracing the Web 2.0 environment through blogs, most have produced institutional blogs of various types. As Theimer explains, institutional blogs run the gamut from those used as "a forum for posting official communications," to others that "discuss new acquisitions or collections that have recently been made available," to those highlighting collections materials of public interest.¹⁶ In reality, though, most institutional blogs blend these functions. For example, Oregon State University's "Special Collections and Archives Research Center Blog" acts largely as an event-publicizing tool, although it also occasionally highlights collections materials.¹⁷ Posts in this blog vary from announcing a change in the archives' operating hours, to publicizing a film viewing for Oregon Archives Month, to discussing new

¹⁵ Richard S. Cox and Danielle Kovacs, "Alice in the Archives: The Evolution of the Catablog," in *A Different Kind of Web: New Connections Between Archives and Users*, ed. Kate Theimer (Chicago: Society of American Archivists, 2011), 210-11.

¹⁶ Theimer, *Web 2.0 Tools*, 36-37.

¹⁷ Oregon State University Special Collections & Archives, "Special Collections and Archives Research Center Blog," accessed January 21, 2012, http://wpmu.library.oregonstate.edu/osu_archives/.

finding aids recently made available. Most posts integrate text with an image from the archives and, when pertinent, a link to a finding aid, Wikipedia article or other website containing further information on the post's topic. Many posts also direct users to image collections the archives has digitized and uploaded to Flickr. Brandeis University Archives and Special Collections' "Brandeis Special Collections Spotlight" is another institutional blog with a much different design than OSU's.¹⁸ Instead of acting as an event-publicizing tool, this blog offers detailed monthly posts highlighting individual collections. Each post comprises a lengthy discussion of the collection, digitized images from the holdings, a link to the finding aid and a bibliography of sources consulted to create the blog post. Both archival blogs offer means for increasing the digital public's awareness of the archives and highlighting specific archival collections.

Beyond blogging software, non-business archives have implemented other Web 2.0 tools in their archival work. Sharing sites such as Flickr provide a case in point. In January 2008 Flickr and the Library of Congress collaborated on a pilot project, the Flickr Commons, aiming to "increase access to publically-held photography collections" and to "provide a way for the general public to contribute information and knowledge" through tagging and commenting. Currently over fifty libraries, archives and museums from across the globe are participating in the Flickr Commons, posting their digital image collections online for the public to view and comment on. In "Smithsonian Team Flickr: a library, archives, and museums collaboration in web 2.0 space," several members of the Smithsonian Institution's staff reflect on their decision to join the Commons and the lessons learned from participating. A Commons member since March 2008, the Smithsonian found the Commons to be a useful tool for providing comprehensive subject-based access to their photographic holdings, which are physically dispersed among their

¹⁸ Robert D. Farber University Archives & Special Collections, Brandeis University, "Brandeis Special Collections Spotlight," accessed January 21, 2012, <http://brandeisspecialcollections.blogspot.com/#uds-search-results>

fourteen museums. As early statistics suggest, their experience in the Commons has been positive so far. From June 16th through December 7th 2008 their collections registered 627,259 total views, and from June through October 2008 254 photographs had comments (22% of overall photostream), with an average of two comments per image. While their inclusion in the Commons did not boost traffic on the Smithsonian's own website, it has improved public access to their photographic collections and enabled user contributions in keeping with the Web 2.0 ethos. Although only one of many institutions participating in the Flickr Commons, their experience suggests that sharing sites are a fruitful way for the archives community to engage with users through collaborative technology.¹⁹

Non-business archives have clearly been engaging in the Web 2.0 revolution. In addition to blogs and sharing sites, archives have embraced the Web 2.0 ethos of sharing, openness and collaboration through such tools as social networking sites, wikis, micro-blogs and podcasts.²⁰ Their ease of use, low cost barrier and large audience makes them ideal tools for the archives community to experiment with. However, it remains unclear whether business archivists are engaging with Web 2.0 technology as readily as their colleagues in non-business settings. Comparatively less of the archival literature on Web 2.0 addresses business archives and their specific needs, which may simply be reflective of their minority position in the Society of American Archivists. Nonetheless, results of web searches suggest that few business archives are using Web 2.0 tools. In the next section I examine the place of Web 2.0 in the corporate

¹⁹ Flickr Commons, <http://www.flickr.com/commons>, accessed July 16, 2012; Martin R. Kalfatovic, et. al. "Smithsonian Team Flickr: a library, archives, and museums collaboration in web 2.0 space," *Archival Science* 8, no. 4 (2008), 274-75.

²⁰ The Archives 2.0 Wetpaint site managed by Theimer and ArchivesNext.com provides links to current Web 2.0 projects created by archives, historical societies and special collections. Few business archives are indexed on this site: Archives 2.0 (website), July 16, 2012, <http://archives2point0.wetpaint.com/>; *The Interactive Archivist* offers further case studies on archives implementing Web 2.0 technologies: Gordon J. Daines III and Cory L. Nimer, *The Interactive Archivist: Case studies in Utilizing Web 2.0 to Improve the Archival Experience* (website), July 16, 2012, <http://interactivearchivist.archivists.org/>.

world and in light of that consider the business archives community's depth of engagement with Web 2.0 technology.

Web 2.0 and the Corporate World

As evidenced by a number of recent studies, the corporate world has recognized the benefits of Web 2.0 technology and is integrating these tools into their internal and external business processes. Surveys conducted by two separate Australian state archives gauging the level of Web 2.0 technology use among state government sectors are illustrative of the move to Web 2.0 in business. Both studies categorized responses by type of governmental agency, and in each case the majority of respondents employed by government-owned corporations stated that their organizations use Web 2.0 tools to conduct business.²¹ Further, the study produced by the State Records Authority of New South Wales found that every government-owned corporation employing Web 2.0 technology integrated multiple forms of social media into their business processes, and that two of these tools – Yammer and Wikis – are replacing established business systems. Both of these surveys indicate that business use of Web 2.0 technology is growing apace with non-business sectors.²²

Beyond these two Australian studies, other indicators suggest that the corporate world is rapidly amalgamating Web 2.0 features into its business processes. A 2007 survey conducted by *The McKinsey Quarterly* found that over three-fourths of the nearly 3,000 corporate executives responding to the study say they “plan to maintain or increase their investments in technology trends that encourage user collaboration.” Furthermore, the study found that in most cases

²¹ Five of seven responding New South Wales government-owned corporations and six of nine Queensland government-owned corporations used Web 2.0 tools: Cummings, Kate. State Records Authority of New South Wales, email, June 20, 2012; Queensland State Archives “Recordkeeping and Web 2.0 Survey Report,” October 2010, <http://www.archives.qld.gov.au/>.

²² Cummings, Kate. State Records Authority of New South Wales, email, June 20, 2012.

corporations use these tools “to communicate with customers and business partners and to encourage collaboration inside the company,” with over 75% of respondents employing Web 2.0 tools to foster employee collaboration within the company.²³

With the recent increase in corporate Web 2.0 use, the tools themselves are now changing. Whereas several years ago Web 2.0 technology proved most beneficial for small businesses and consumers, as large corporations now find uses for these tools major software developers of the likes of Microsoft, IBM and Oracle are designing a new class of enterprise-grade Web 2.0 tools. IBM’s LotusLive, for example, offers a suite of Web 2.0 features including a social networking tool designed to facilitate internal collaboration among a corporation’s employees.²⁴ One component of the software package, LotusLive Engage includes tools for storing and sharing documents; instant messaging; conducting web conferences; and creating web forms to share with employees across a company.²⁵ Another Web 2.0 tool marketed to large corporations, HootSuite, enables users to manage their company’s multiple social networking campaigns from a single location through a dashboard tool. The software allows users to create teams to manage the company’s social networking initiatives and to produce reports for analyzing the effectiveness of those initiatives. Software products such as LotusLive and HootSuite are exemplary of large corporations’ growing engagement with Web 2.0 tools to facilitate multiple business processes.²⁶

²³ Jacques Bughin and James Manyika, “How Businesses are Using Web 2.0: A McKinsey Global Survey.” *The McKinsey Quarterly*, 2007, <http://www.finextra.com/Finextra-downloads/featuredocs/hobu07.pdf>, 1, 6.

²⁴ Joe Lennon, “Utilizing Web 2.0 in Business: Harnessing consumer tools to benefit the organization,” *IBM developerWorks*, March 31, 2009, <http://www.ibm.com/developerworks/web/library/wa-web20business/>; Joshua Levine, “Business Gets Social: Corporate Web 2.0 Usage is Booming,” *Seeking Alpha*, January 8, 2008, <http://seekingalpha.com/article/59369-business-gets-social-corporate-web-2-0-usage-is-booming>.

²⁵ Amit M. Surana, et. Al., “Introducing IBM LotusLive Engage,” *IBM developerWorks*, September 21, 2009, <http://www.ibm.com/developerworks/lotus/library/lotuslive-engage/>.

²⁶ HootSuite (website), July 17, 2012, <http://hootsuite.com/>.

While corporations rapidly integrate Web 2.0 technology into existing business processes, it remains unclear whether business archivists are as eagerly following their employers into the Web 2.0 environment. According to a 2011 survey of business archivists conducted by professor Patricia Franks of San Jose State University, only 49% of respondents indicated that they or someone within the archives uses social media on behalf of the organization.²⁷ That is a much smaller percentage than the 75% of corporate executives who, according to *The McKinsey Quarterly*'s survey referenced above, employ collaborative technologies in their companies' business processes. Furthermore, although a number of business archivists have produced successful external-facing Web 2.0 initiatives for their companies,²⁸ web searches and non-scientific analyses of business archives' websites suggest that relatively few business archivists are following their parent companies into the Web 2.0 realm.

Over the past decade the internet has clearly transformed from a static content-posting space to a dynamic framework for interaction and collaboration. The library and archives communities have embraced the new Web 2.0 environment. Through blogs, micro-blogs, social network sites and podcasts, to name a few, cultural institutions have harnessed the power of crowdsourcing and found new ways to interact with the digital public. These initiatives have increased access to archival records and helped broadcast the nature and importance of archives. Yet, in spite of the proven benefits Web 2.0 tools can offer archival programs, preliminary evidence suggests that business archives are lagging behind their not-for-profit counterparts in

²⁷ Patricia C. Franks, "Meaningful Use of Social Media by Corporate Archivists," *The Business Archivist & Archives Newsletter* 29, no. 1 (Spring/Summer 2012).

²⁸ Noteworthy examples of business archives using Web 2.0 include: The Coca Cola Company, "Coca Cola Conversations," July 17, 2012, <https://www.coca-colaconversations.com/>; Universal Studios, "Universal 100," July 17, 2012, <http://universal100.tumblr.com/>; and Wells Fargo, "Guided By History," July 17, 2012, <http://blog.wellsfargo.com/guidedbyhistory/>.

the Web 2.0 revolution. As of yet there is no clear reason for this discrepancy. Could it be that business archivists have focused their efforts more on internal collaborative tools similar to IBM's LotusLive rather than on external or third-party sites such as Facebook and YouTube? Or, are business archivists abstaining from Web 2.0 tools in order to avoid potential lawsuits in the privacy-oriented corporate sector? Alternatively, are business archivists avoiding Web 2.0 technology due to lack of time or resources allocated to their understaffed departments?

The library community quickly embraced collaborative and interactive technologies when Web 2.0 first emerged in the mid-2000s. While archivists were more hesitant to join the collaborative web, they too followed when it became clear that the Web 2.0 revolution had transformed archives patrons' expectations. With collaborative and interactive technologies altering corporate business processes as well as public communication practices, it is now essential that archivists participate in these digital spaces. Yet business archivists seem reluctant to do so. This reluctance within the business archives community is intriguing and demands further study.

Chapter 3

Business Archives Survey

In order to determine why business archivists appear to be ignoring the Web 2.0 revolution, I conducted a survey of business archivists in July 2012. In this survey I polled respondents on their current level of use of Web 2.0 technology, their experiences with these tools and their opinions of Web 2.0's utility in the corporate world. During the summer of 2012 I used Snap Surveys' Snap 10 Professional survey software to design a forty question survey combining short answer, multiple choice and yes or no questions. My goal was to gain a greater understanding of the possibilities for Web 2.0 in business archives. Once constructed, I distributed the online survey through several channels. First, I solicited the aid of Sue Watson, current chair of the Society of American Archivists' Business Archives Section, to assist me in advertising the questionnaire. She kindly posted a survey announcement with a link to the survey itself on the Business Archives Section listserv. In addition, when the survey became active I posted a similar announcement with URL link to SAA's main Archives & Archivists listserv, as well as another reminder message midway through the three week period during which the survey was open. Reflecting on the minimal response level, I should have used social media to assist me in advertising and distributing the survey, but the method I chose was nonetheless moderately successful. It garnered enough responses to shed light on Web 2.0's potential among business archives.

The survey, active for three weeks from July 12th through August 3rd 2012, netted eighteen responses. Although the number of respondents was rather low, I believe my

findings are trustworthy and valid as they correspond to the results of other surveys on similar issues, as discussed in the following pages. The eighteen respondents to my survey represent a cross-section of the business archives community; they are employed in a variety of sectors and have been working in the archives of their current institution for varying lengths. The business sectors most heavily represented included consumer goods, financial and service, but multiple other sectors garnered responses. While several respondents were new hires, three-fourths of them had been employed as an archivist at their institution for more than five years. Staff size at represented institutions likewise varied from one to eight (full time equivalent). The median staff size was two and the average was 2.35. Therefore, the majority of respondents were career archivists working in business archives with minimal staffing. Presumably, then, they would be eager to leverage labor- and cost-saving Web 2.0 tools to assist them in their archival work.

What industry label best represents your organization?

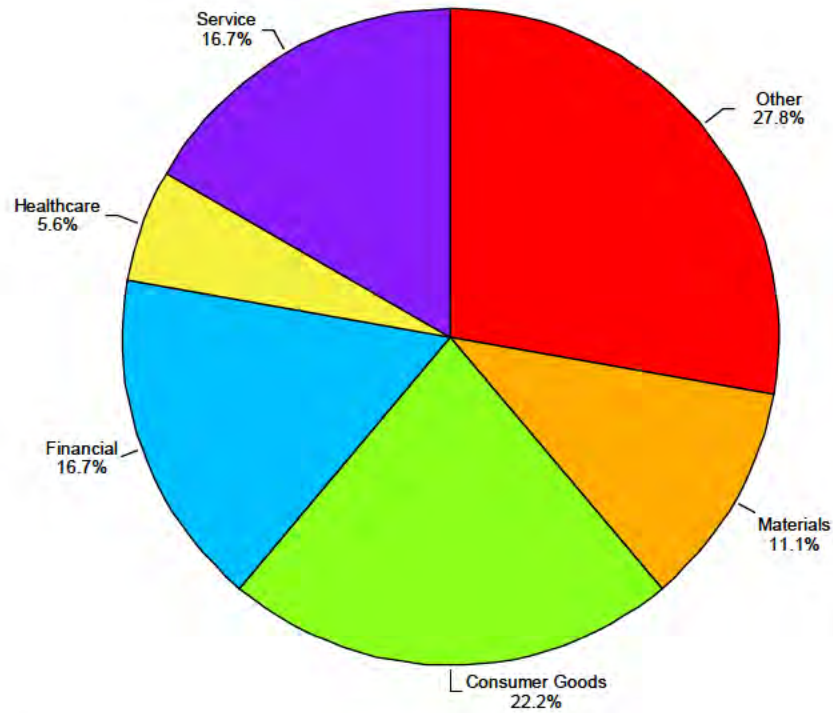


Figure 1. Respondents categorized by industry

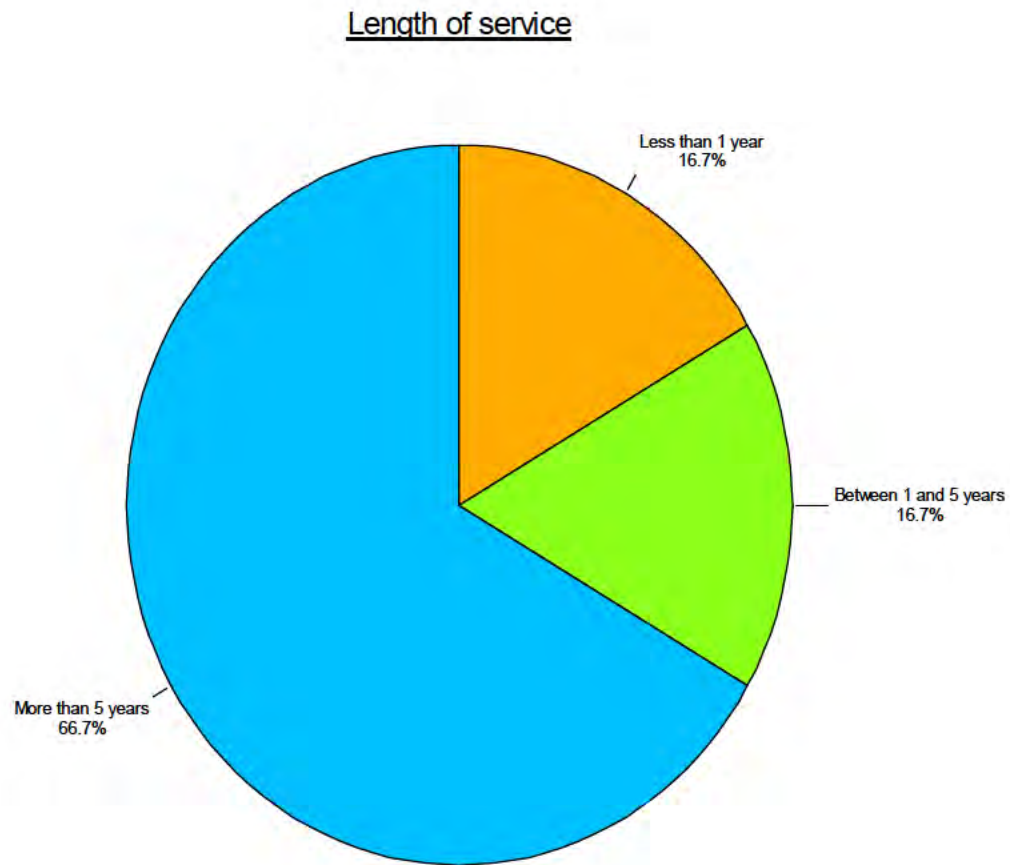


Figure 2. Respondents categorized by length of employment

Of the eighteen respondents to my survey, eight of them – 44% – affirmed that they have integrated Web 2.0 tools into their archives-related work processes. Furthermore, the majority of those that employ Web 2.0 tools have done so for less than five years, with half of them beginning their Web 2.0 initiatives less than three years ago. This is notable, given that three-fourths of respondents had been employed by their current company for over five years; regardless of length of employment, the introduction of Web 2.0 tools to archival-work processes appears to be a recent trend. Taken together, the data suggests that Web 2.0 use among business archivists, while not widespread, has certainly been growing over the

past several years. Furthermore, these findings are consistent with those of Dr. Franks in her survey of social media use among business archivists in America,¹ as well as those of Mark Vajcner, University Archivist at the University of Regina, in his study of social media use among Canadian archivists employed in a variety of institutions.² Both aforementioned studies conclude that social media use – a major component of the Web 2.0 revolution – is becoming more prevalent in the archives community.

Length of Time Using Web 2.0 Tools for Archives-Related Work

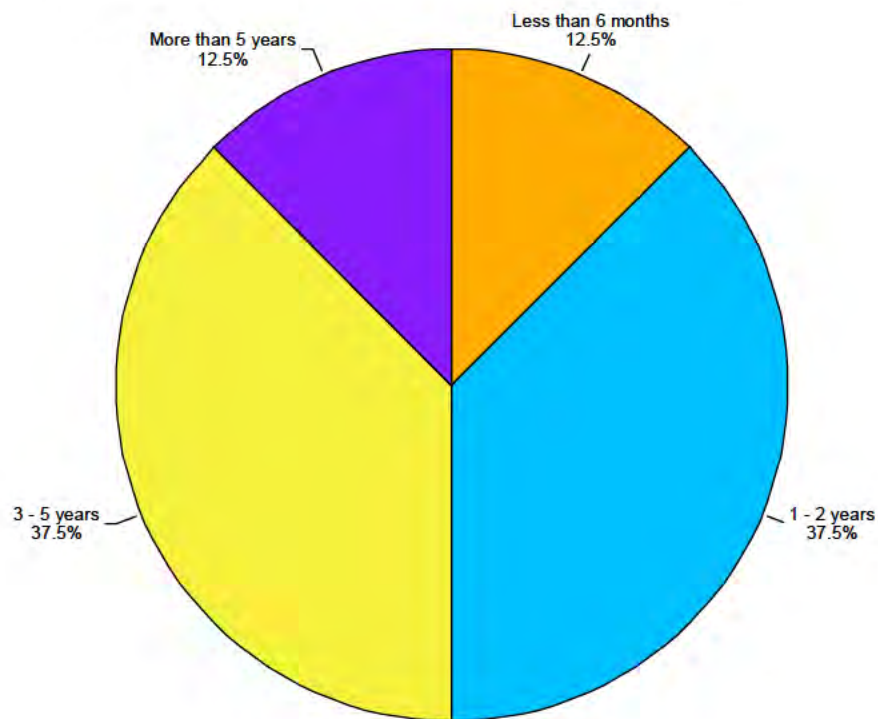


Figure 3. Length of time using Web 2.0 tools for archives-related work

¹ As stated previously, of Dr. Franks' respondents, 49% (17 of 35) use social media in the performance of archives-related work processes. Fanks, "Meaningful Use of Social Media."

² After polling "various Canadian archives and archivists" through an "informal online questionnaire" during the summer of 2011, Vajcner concluded that "the use of social media among archives and archivists is growing." Vajcner, Mark, "Archives and Social Media," *University of Regina*, July 2011, <http://hdl.handle.net/10294/3455>, 1, 8.

Use patterns among respondents who employ Web 2.0 tools in their archival work suggest that Web 2.0 is becoming a regular component of the archivist's activities. First, business archivists typically use more than one Web 2.0 tool; the eight respondents used twenty-eight Web 2.0 tools between them, for an average of 3.5 Web 2.0 tools used per respondent.³ Similarly, in a study conducted by the State Records Authority of New South Wales, of the government-owned corporations that use social media for business processes, all of them integrate multiple social media applications.⁴ Furthermore, when questioned about the amount of staff time allocated to the use or development of Web 2.0 tools, respondents to my survey indicated that Web 2.0 work processes constitute a moderate amount of their workweek. While three respondents allocated zero to two hours to Web 2.0 tools weekly, two respondents indicated that they spent three to five hours on Web 2.0, and two others allocated an average of six to eight hours weekly for using these tools.⁵ Clearly at least some business archivists are finding Web 2.0 tools to be valuable additions to their arsenal if they are willing to allocate nearly a full workday per week to managing their Web 2.0 presence. The most popular Web 2.0 tools among business archivists were third-party sites, namely Facebook, YouTube and Twitter. These Web 2.0 applications may be the most prevalent because they require minimal time or technical facility to initiate and maintain. Responses to question thirty-seven support this hypothesis, as no respondent claimed that lack of time was the main challenge for employing Web 2.0 tools in the archives. When considered together, the above statistics suggest that business archivists who do use Web 2.0 tools in the archives consider them worthwhile enough to incorporate multiple applications and allocate a moderate amount of time to maintaining their Web 2.0 presence.

³ Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, question 11.

⁴ Kate Cummings, e-mail message to author, June 20, 2012.

⁵ Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, question 21

What web 2.0 tools do you currently use? (select all that...)								
YouTube	Facebook	Twitter	Wiki	LinkedIn	Flickr	Yammer	Blog	Instagram
4	5	4	3	3	3	-	3	-
50.0%	62.5%	50.0%	37.5%	37.5%	37.5%	-	37.5%	-

Figure 4. What Web 2.0 tools do you currently use?

In addition to using multiple tools, business archivists found that Web 2.0 tools support a multiplicity of work processes. As illustrated in Figure 5, respondents implemented Web 2.0 applications most often to provide information or conduct awareness campaigns, but they were also regularly leveraged to promote the use of archival materials; engage and interact with stakeholders; and to provide services, advice, or answer questions. Responses to this question suggest that business archivists use Web 2.0 tools as a way to post content more often than to interact with others, a trend that somewhat diverges from the Web 2.0 ethos of virtual collaboration. Nonetheless, by using Web 2.0 for a variety of purposes, business archivists have found a way to increase their digital presence and cultivate a larger user base. As this survey reveals, business archivists are increasingly utilizing Web 2.0 tools to raise awareness of their repositories and increase access to their holdings.

For what archives-related work processes do you currently...	
<i>Awareness campaign; promoting the organization</i>	6 75.0%
<i>Promote the use of archival materials</i>	3 37.5%
<i>General information; publicizing events</i>	7 87.5%
<i>Engage and interact with stakeholders (both within and outside the corporation)</i>	3 37.5%
<i>Provide services, advice, or answer questions</i>	4 50.0%
<i>Communicate with other archivists</i>	2 25.0%

Figure 5. For what archives-related work processes do you currently use Web 2.0 tools?

Turning from how business archivists use Web 2.0 tools to the policies and procedures set in place for managing digital content, however, the situation becomes less sanguine. As a number of studies have found, while use of Web 2.0 tools and social media is increasing among archivists, many institutions lack recordkeeping policies and procedures for their Web 2.0 records.⁶ When asked if the archives had a recordkeeping policy incorporating Web 2.0 records two responded yes, five responded no and one indicated that a policy was under development.⁷ Further, when asked if the archives has a strategy for the

⁶ Franks, "Meaningful Use of Social Media"; Samouelian, "Embracing Web 2.0," Queensland State Archives, "Recordkeeping and Web 2.0 Survey Report." October 2010, 18.

⁷ Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, question 30.

use of Web 2.0 tools three selected yes and five selected no.⁸ Lack of a recordkeeping policy cannot be attributed to a brief span of time that the tools have been implemented, funding shortages, or a lack of employee time maintaining the tools on a weekly basis, as no correlation could be found with these variables.⁹ Rather, as Figures 6 and 7 illustrate, the absence of a recordkeeping policy is reflective of either insufficient tools or skills, or a single individual dominating or solely managing the archive's Web 2.0 initiatives.

⁸ Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, question 33.

⁹ This conclusion is drawn from a comparison of questions 10 (length of time), 25 (level of funding) and 21 (amount of staff hours) with question 30 (Does the archives have a recordkeeping policy that incorporates Web 2.0 records?). No correlation could be found. Contrary to expectations, the three institutions that allocate the most staff time to Web 2.0 work processes and the two that receive funding specifically for Web 2.0 use do not have Web 2.0 recordkeeping policies. Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, questions 10, 25, 21 and 30.

	Total	Does your archives have a strategy for the use of web 2.0...		
		Yes	No	One is being drafted
Base	8	3 37.5%	5 62.5%	- -
Which best characterizes your archives' use of web 2.0 to...				
<i>Multiple staff members participate regularly in web 2.0 work-related processes</i>	3 37.5%	2 25.0%	1 12.5%	- -
<i>One staff member leads web 2.0 initiatives but others contribute</i>	3 37.5%	1 12.5%	2 25.0%	- -
<i>One staff member is responsible for all web 2.0 work-related processes</i>	2 25.0%	- -	2 25.0%	- -
<i>I am the only archivist on staff</i>	- -	- -	- -	- -

Figure 6. Comparison of level of staff involvement with the presence or absence of a Web 2.0 use strategy

If you do not capture Web 2.0 records, why?

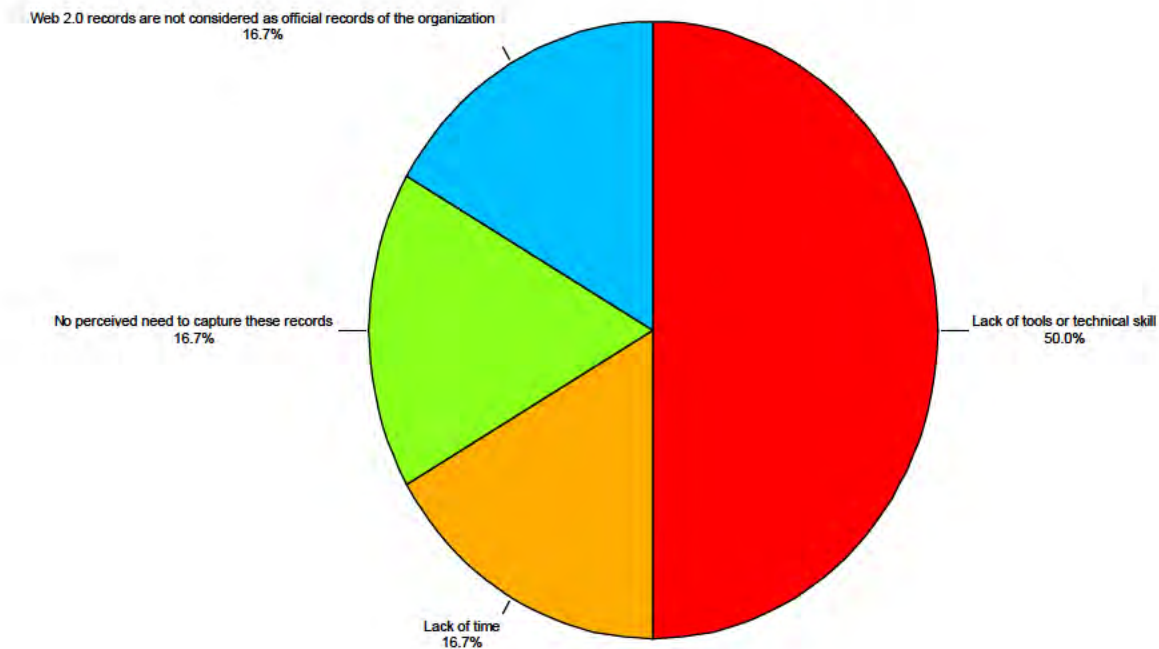


Figure 7. Reasons for not capturing Web 2.0 records

These findings suggest that business archivists must learn more about the Web 2.0 tools they currently use and the recordkeeping requirements necessitated by their use. Further, it reflects a need to be more methodical in the implementation of Web 2.0 tools; as Figure 8 shows, while all respondents indicated that they were at least somewhat satisfied with their Web 2.0 initiatives, those that employed recordkeeping policies reported the highest levels of satisfaction. Therefore, the results of my survey affirm that business archivists need to develop more detailed policies for the use and preservation of their Web 2.0 initiatives. With adequate policies in place business archivists are more likely to gain the satisfaction of a worthwhile Web 2.0 experience that increases access to the archives and improves the corporation's public image.



Figure 8. Comparison of level of satisfaction with Web 2.0 tools with presence or absence of a Web 2.0 recordkeeping policy

While all respondents who utilized Web 2.0 tools in the archives indicated that they had a positive experience with this technology, over half of my respondents indicated that they do not use Web 2.0 for archives-related work. Reasons for this vary. When given the option to select multiple statements from a list of hypothesized major reasons business archivists might not use Web 2.0 tools, five of the ten respondents stated that Web 2.0 tools are not viewed as a priority and four each indicated that company policy prohibits the use of social media or they lack the technical expertise required to engage with Web 2.0 applications. Three also indicated that they lack funding, and two gave insufficient staff time as a reason for not implementing Web 2.0 in the archives.¹⁰ The statistics above total eighteen responses, suggesting that most business archivists had multiple reasons – both

¹⁰ Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, question 6.

resource- and policy-related – for not using Web 2.0 tools. This represents a significant barrier to Web 2.0 implementation among business archivists. Indeed, of those who do not currently use Web 2.0 in the archives, only one has plans to introduce these tools within a year, suggesting that the barriers preventing business archivists from entering the Web 2.0 environment are significant enough that many who have not implemented Web 2.0 tools thus far will not in the foreseeable future.¹¹

Reasons for not using Web 2.0 tools

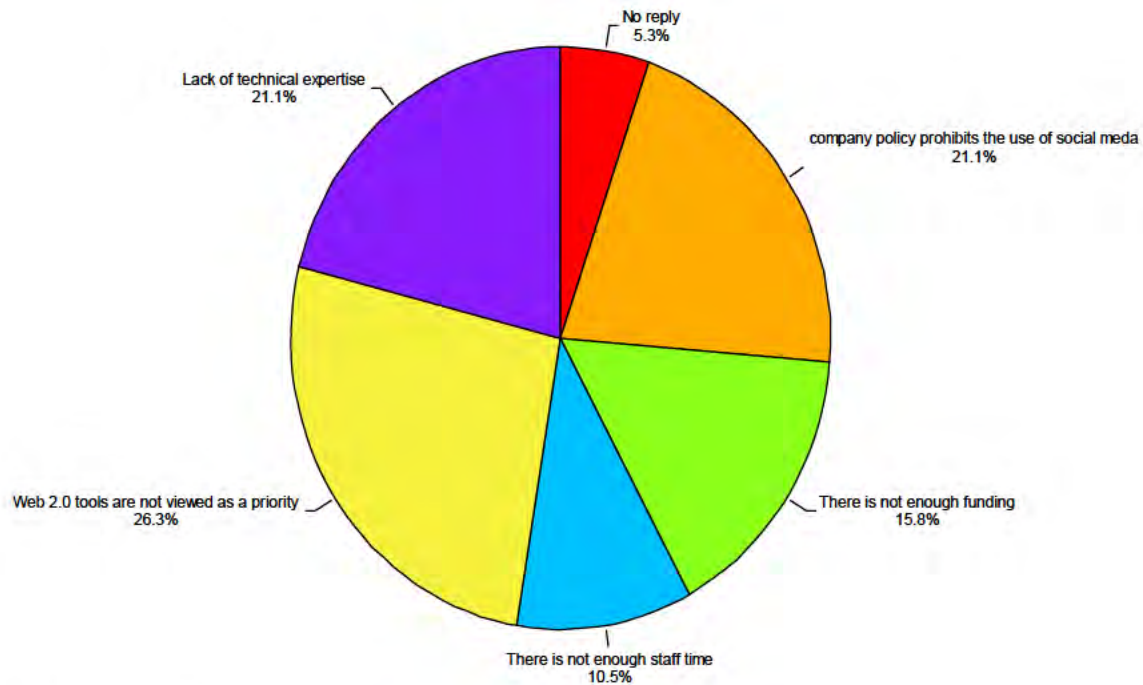


Figure 9. Reasons for not using Web 2.0 tools

Taken as a whole, the findings of my survey on Web 2.0 use among business archivists support a number of conclusions. First, while not yet predominant, Web 2.0 use among business archivists is growing, even though implementers face multiple barriers –

¹¹ Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, question 7.

both resource- and policy-related – when leveraging these tools. Secondly, Web 2.0 tools can be effectively mobilized in archives with limited funding, staff and time. Even though the respondents’ average staff size was small, and less than half allocated even five staff hours to Web 2.0 tools per week, all respondents who currently use Web 2.0 in the archives remain satisfied with their initiatives. Further, they uniformly indicated that they would encourage other business archivists to incorporate Web 2.0 tools into their archival work processes. Such a positive experience with Web 2.0 among business archivists with minimal resources suggests that Web 2.0 tools truly are a time- and resource-effective way to engage with the digital public.¹²

In spite of such ringing endorsements of Web 2.0 in the archives, survey results indicate that business archivists, as with the mainstream archives community, generally lack adequate strategies for Web 2.0 use and records retention. This is a significant concern in the corporate world, where business archives are often considered a liability since business records in the wrong hands could lead to lawsuits or tarnish a company’s image. Without comprehensive policies for Web 2.0 use or records retention business archivists cannot assure company management that their digital records are being safeguarded, especially when the most predominantly used Web 2.0 tools are externally-hosted third-party sites offering little protection for posted material.¹³

Lastly, the survey results also support the conclusion that Web 2.0 use in the archives may not yet be beneficial or accepted in some industries. Indeed, half of the non-implementers in my study do not view Web 2.0 as a priority and nearly half face companywide bans on social media use. In contrast, all those who currently use Web 2.0

¹² Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, question 38.

¹³ Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, question 11.

tools in the archives noted managerial support for their digital initiatives.¹⁴ While not directly affirmed from the survey, the above statistics support the conclusion that some companies place demands on their archives that either devalue Web 2.0 use or prevent the archives from engaging with Web 2.0 due to inadequate resources. Thus, business policies and managerial demands may bar a large portion of business archivists from using Web 2.0 tools in the performance of archival work.

Nevertheless, survey results suggest that Web 2.0 implementation among business archivists is becoming more prevalent and has largely been a positive experience. In light of this, the next section will consider some current Web 2.0 initiatives created and managed by business archives. These will provide illustration for a best practices guide on developing a Web 2.0 presence for the business archives. The hope is that several positive examples will encourage more business archives to successfully integrate these resource- and labor-saving tools into their archival work.

¹⁴ Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, question 26.

Chapter 4

Putting it all Together: Using Web 2.0 Effectively

According to a 2011 social media use study conducted by UMass Dartmouth researchers, 74% of private companies polled maintain a Facebook presence.¹ Further, a 2011 Pew internet survey found that 65% of adult internet users are active on at least one social networking site.² Clearly, Web 2.0, social media, and social networking have taken the digital world by storm, and business archives should consider implementing some of these new technologies in order to remain engaged with their evolving user base. Although my survey found that Web 2.0 technology suits certain business sectors better than others, business archivists in many corporations may find Web 2.0 technologies beneficial additions to their archival toolbox. The following pages offer a simple guide to effectively implementing Web 2.0 technologies. Selected case studies will then be presented as illustrations.

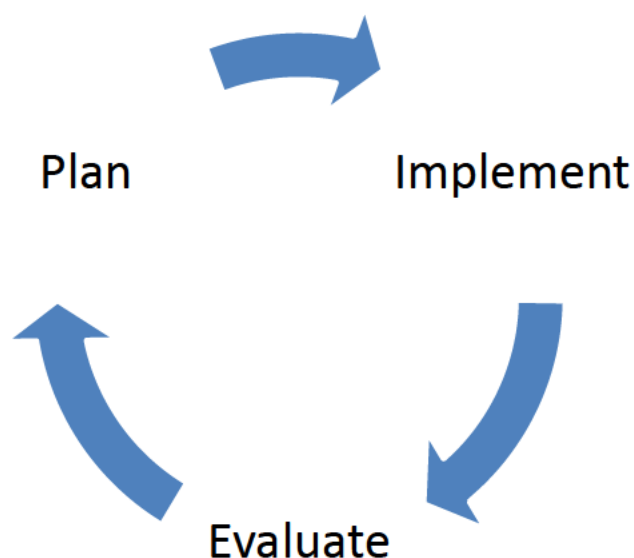
Implementing Web 2.0 Tools

Since Web 2.0 relies on open source, user-friendly applications, creating a Web 2.0 presence is certainly not challenging. The difficult part, however, is designing an effective Web 2.0 program, one that complies with corporate policies, reaches the archives' target audience and can successfully showcase the company's archives. A number of publications, including two texts

¹ Nora Ganim Barnes and Ava M. Lescault, "The 2012 Inc. 500 Social Media Update: Blogging Declines As Newer Tools Rule," UMass Dartmouth, <http://www.umassd.edu/cmr/socialmedia/2012inc500socialmediaupdate/>.

² Mary Madden and Kathryn Zickuhr, "65% of Online Adults Use Social Networking Sites," Pew Internet & American Life Project, August 26, 2011, <http://www.pewinternet.org/Reports/2011/Social-Networking-Sites.aspx>.

by Kate Theimer and multiple case studies published in the archival literature, exist to aid archivists in crafting an effective Web 2.0 presence, and the following guide echoes some of their suggestions and experiences.³ At its most basic, integrating Web 2.0 in the archives is a three-step cyclical process comprised of planning, implementation and evaluation.



As with most endeavors, planning is both the most crucial and most time-consuming part of the process. The archivist must assess her current level of resources to determine whether she has the staff, finances and technical expertise to develop a Web 2.0 presence. With adequate resources in place, she should, considering the types of materials in her collection, their suitability for digital presentation and her target audience's interests, develop detailed goals for the implementation project. As Gordon Daines and Cory Nimer affirm in "The Interactive Archivist," one should not "use technology just for the sake of technology," but ought to instead

³ Theimer's texts are: *A Different Kind of Web: New connections between archives and our users*, (Chicago: Society of American Archivists, 2011), and *Web 2.0 Tools and Strategies for Archives and Local History Collections*, (New York: Neal-Schuman Publishers, Inc., 2010). Other examples can be found in Daines and Nimer's "Interactive Archivist"; Kalfatovic's report on the Smithsonian's use of Flickr ; Vajcner's study on archives and social media ; and Yakel's report: "Inviting the User into the Virtual Archives," *OCLC Systems & Services* 22, no. 3 (2006): 159-63.

“carefully consider how selected technologies can enhance their ability to engage in conversations with their users.”⁴ To successfully engage the target audience while adding value to her parent company, the archivist must be sure that the materials selected for Web 2.0 publishing support the parent company’s mission, present a positive image of the company and do not constitute a legal risk. Furthermore, the archivist should carefully evaluate the various Web 2.0 media available and select the specific applications that can most effectively showcase the archive’s collections and meet the project’s goals. For instance, social networking accounts are ideal for outreach activities, while internal researcher needs may best be satisfied with wiki technology.

An oft overlooked aspect of the planning process is preparing a preservation plan that includes Web 2.0 records. While many respondents to my survey did not have a recordkeeping policy that incorporated Web 2.0 records, those that did have such a policy generally reported higher levels of satisfaction with their Web 2.0 initiatives than those that did not.⁵ Thus, creating a preservation plan is very important. There are a number of ways to capture Web 2.0 records, including manual screenshots and RSS feeds, as well as third-party services like HootSuite that help companies manage their social media accounts. Regardless of the option chosen, before engaging with Web 2.0 the archivist should have a plan for preserving records published through those tools.

With a clear set of goals, specific technologies selected and a recordkeeping plan developed the archivist is now ready to make a case to company management for using Web 2.0 tools in the archives. As my survey results determined, regardless of the archivist’s goals for a Web 2.0 presence, some corporations restrict the use of these applications; nearly half of respondents who

⁴ Daines and Nimer, “The Interactive Archivist.”

⁵ See Figure 8.

do not use Web 2.0 tools in the archives indicated that their company bans these tools.⁶

Therefore, the archivist should present a detailed implementation plan in writing to company management before proceeding, and once granted permission to engage with the social web the archivist can begin the implementation process.

Since each Web 2.0 technology is unique and because Web 2.0 tools are constantly being updated and revised, it is not feasible to detail the design and implementation process for an archive's Web 2.0 initiative. However, a number of lessons can be learned from case studies in the archival literature. First, it is wise to personally experiment with a Web 2.0 application before creating an active account for the archives. Create a personal Facebook account, experiment with open-source blogging software or post your own videos to YouTube before going live with the archive's material. This provides one the opportunity to learn the platform and become familiar with the way that other archives are using it. In addition to personally experimenting with the chosen Web 2.0 application, one should conduct a test phase before fully implementing the archive's Web 2.0 presence. This gives the archives staff the opportunity to work through any design problems before going live with the selected application.

Beyond testing and experimenting with the chosen medium, archivists who have successfully implemented Web 2.0 tools stress the importance of actively engaging with the digital community. One of the major tenets of Web 2.0 is interactivity; these tools are designed to facilitate community-building, so the archivist using Web 2.0 tools should respond to users' comments and join other groups active on the chosen platform. Stephen Fletcher of *A View to Hugh*, the University of North Carolina at Chapel Hill Library's processing blog, recommends that archivists "follow up on blog comments...and say thanks" because doing so "creates an atmosphere of dialog and encourages future readership and participation." On a related note, Joy

⁶ Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, questions 5 and 6.

Palmer asserts in "Archives 2.0: If We Build It, Will They Come?" that Web 2.0 works best in a lightly mediated environment, where users can have the “instant gratification of seeing their contributions.” With any public-facing Web 2.0 initiative the archivist should actively engage with others through the medium to facilitate a flow of communication as open as institutional requirements allow.⁷

One final recommendation for the implementation stage is to create and post a Terms of Use statement. Such a statement should provide guidelines for acceptable commenting and reuse of materials posted to the site. Further it should explain the site’s purpose and, if a third-party site, refer users to the platform creator’s Terms of Use statement. It may be wise for the business archivist to consult with her company’s legal department when crafting a Terms of Use statement in order to avoid potential liability issues.

Once the business archivist has fully developed her Web 2.0 presence, it is imperative that she periodically evaluate the initiative’s effectiveness. Doing so ensures that the project is successfully meeting the archive’s goals for increasing access to materials and contributing to the company’s bottom line. To support effective evaluation, the archivist should develop clear evaluative criteria, determine what ‘successful’ would look like for her Web 2.0 initiative and develop benchmarks for assessing the initiative’s results through both quantitative and qualitative methods.⁸ Findings from periodic evaluations will enable the archivist to tweak her Web 2.0 initiative as users’ needs change and technologies evolve.

By following a cyclical process of planning, implementing and evaluating the business archivist can create an effective Web 2.0 presence that engages users in their own environment,

⁷ Joy Palmer, "Archives 2.0: If We Build It, Will They Come?" *Ariadne* Issue 60 (July 2009) <http://www.ariadne.ac.uk/issue60/palmer/>; Stephen J. Fletcher, “A View to *A View to Hugh*: Reflections on the Creation of a Processing Blog,” in *A Different Kind of Web*, ed. Kate Thiemer (Chicago: Society of American Archivists, 2011), 31.

⁸ Thiemer, *Web 2.0 Tools and Strategies*, 200-03.

further the company's mission and supports its bottom line. While developing a Web 2.0 presence is not difficult, it can be a challenge to design a program that complies with corporate policies, reaches the archives' target audience and can successfully showcase the company's archives. Learning from the successes and mistakes of others can make the process easier. The following case studies will illustrate successful Web 2.0 initiatives by several business archives, offering business archivists multiple models for creating a Web 2.0 presence.

Coca-Cola

The Coca-Cola Archives is widely recognized among business archivists as a leader in digital outreach. Capitalizing on its powerful influence over consumer culture, Coca-Cola's Archives created a virtual museum, "The Very Best of Coca-Cola," to celebrate the company's 125th anniversary in 2011. This Web 2.0-inspired website enables visitors to both explore the Coca-Cola Archives and upload their own Coke-related items to the virtual archives. The project, a collaboration between the Coca-Cola Archives team and the Coca-Cola Spain Marketing team, took eighteen full weeks to prepare, and the hours of hard work clearly show.⁹

In the Web 2.0 spirit of collaboration, "The Very Best of Coca-Cola" supports community-building and interaction by allowing site visitors to 'like' and comment on pieces in the Coca-Cola Archives as well as items uploaded to the public-created virtual archives.¹⁰ Further, the website incorporates Facebook and Twitter share buttons for each item in the archives, enabling users to broadcast their favorite Coke memorabilia. Exploring the virtual archives allows site visitors to browse the dozens of user-contributed Coke-related ephemera

⁹ Jamal Booker, "'The Very Best of Coca-Cola' Virtual Museum Launches," *The Business Archivist & Archives Newsletter* 28, no. 2 (August 2011), 4.

¹⁰ Coca-Cola Archives, "The Very Best of Coca-Cola," September 21, 2012, <http://theverybestofcocacola.com/home/>.

ranging from designer contour bottles to a Coca-Cola barbeque grill, and while many of the comments on these items aren't substantial, they do provide evidence that the public values Coca-Cola's heritage and is participating in this online space. This archival initiative has clearly reached a vast audience.

In addition to "The Very Best of Coca-Cola," the Coca-Cola Archives has found other ways to participate in the evolution of the web. Their full range of Web 2.0 applications, including Facebook, Twitter, YouTube and Philip Mooney's blog, "Coca-Cola Conversations," provide a positive illustration of how to leverage Web 2.0 to both further the archive's reach and bolster the company's bottom line. Business archivists can take note from several things they do well. First, to reduce the burden of posting in multiple locations and to further build a community of virtual followers, the Coca-Cola Archives team has linked postings from several of its Web 2.0 applications. When the archivist publishes a blog post, for instance, a notification and short description appear on the archive's Facebook timeline and Twitter feed. This alerts followers in each virtual space of new material from the archives, enabling the archives to exponentially increase its reach with each posting.

In addition to cross-posting, Coca-Cola's Web 2.0 offerings successfully engage users and encourage interaction. Starting in 2008 and continuing for a number of months, for instance, each Friday the Coca-Cola Archives team posted a photograph or advertisement to "Coca-Cola Conversations," asking readers to suggest clever captions for the image. In another example of user engagement, the archive's Twitter feed frequently solicits followers' comments, as with a string of postings in mid-September 2012 encouraging followers to guess the prices that individual items would sell for at a current auction of Coca-Cola memorabilia.

One final strength exhibited through Coca-Cola's Web 2.0 initiative is their skill at tying their brand image to current events. During the 2012 Olympics, for example, the Coca-Cola Archives team published a number of blog posts highlighting Coke's long involvement with the Olympics. Rather than just publicizing the tie, these posts digitally broadcast archival content as well. A post on July 30th, for example, contains an excerpt from a 1929 magazine article recounting Coke's advertising presence at the most recent Olympics, and July 12th's post consists of a gallery of Olympics-related photographs from the archives. These posts, and others like them, take advantage of current events to build awareness of the archive's holdings and the company's rich history.

With its interactive virtual archives, as well as its blog, Facebook, Twitter and YouTube accounts, the Coca-Cola Archives has developed a powerful Web 2.0 presence. By engaging the public, encouraging users' contributions and tying brand history to current events, their Web 2.0 applications further archival access and help strengthen the company's brand image.

Admittedly, the Coca-Cola Archives enjoys a high level of resources and managerial support, as is evident in the painstaking work required to build "The Very Best of Coca-Cola," but smaller archives with fewer resources can learn much from Coca-Cola's example. Furthermore, several of their Web 2.0 initiatives, such as their Facebook and Twitter pages, do not require a lot of staff time or technical expertise to maintain. As will be seen with the next case study, however, Coca-Cola's digital presence is only one of many ways business archives can engage with users in the Web 2.0 era.

Marks & Spencer

Founded in 1884, Marks & Spencer is a major British retailer with a strong public presence across the United Kingdom. To showcase their rich heritage the Marks & Spencer Archives has engaged with Web 2.0 technology differently than Coca-Cola has. While some of Coca-Cola's Web 2.0 content is hosted on third-party sites, such as Facebook and Twitter, Marks and Spencer's Archives has largely eschewed third-party platforms in favor of incorporating interactive applications into its own website. This offers the archives a number of benefits, including a simplification of its Web 2.0 records management process and increased control over user comments and manipulation of digital content. However, these benefits come at the cost of reducing site visitors' freedom to interact with the archives' content. In addition to challenging the Web 2.0 ethos of interactivity and collaboration, it has been argued that strongly mediated environments like the Marks and Spencer Archives' website reduce users' willingness to engage with and contribute to the material.¹¹ Nonetheless, Marks and Spencer's Archives website, "Marks in Time," provides business archivists another illustration of how to meaningfully incorporate Web 2.0 content into their archival web presence.¹²

To enable site visitors to explore the archives' contents, "Marks in Time" includes an interactive Archive Catalog accessed from the Collections page of the site. Using this tool, the public can browse or search the archive's holdings for specific items. Each catalog entry includes a reference number, date, short description, copyright note and access status. An image is also included when available. Another catalog tool, the Pinboard, allows users to select individual catalog items of interest by clicking on a pin-shaped icon. Doing so places the selected item on the users' Pinboard, a type of saved-item folder. Users can then send the Marks

¹¹ Palmer, "Archives 2.0: If We Build It, Will They Come?"

¹² Marks and Spencer, "Marks in Time," September 24, 2012, <http://marksintime.marksandspencer.com/>.

& Spencer Archive team a message in reference to the selected items or, alternatively, email the Pinboard's contents to themselves or others.

By incorporating Web 2.0 concepts, the Archive Catalog and Pinboard tools allow site visitors to interact with the archive's contents more meaningfully than is possible through the traditional textual finding aids that many archives post on their websites. Whereas digitized finding aids are normally text-heavy, static documents, the Archive Catalog includes images and enables users to mark items for future reference. Furthermore, by including some of the descriptive fields found on DACS-compliant finding aids, the Marks and Spencer Archive Catalog proves to be a more research-friendly tool than the Coca-Cola Archives in "The Very Best of Coca Cola," which lacks detailed descriptive fields. However, some improvements could make the Marks & Spencer Archive Catalog a more valuable tool for researchers in the Web 2.0 era. Useful additions to the Archive Catalog would include a commenting option similar to the functionality of blogging software and Facebook and Twitter share buttons for each archival item, as offered in the Coca-Cola Archive Catalog. Further, the Marks & Spencer Archive would benefit from including some of its video and audio content in the digital Archive Catalog. Doing so would increase access to their holdings and allow researchers to engage with a greater variety of materials. Nonetheless, the Marks & Spencer Archive team has made a valuable foray into Web 2.0 functionality with their Archive Catalog.

Another strong use of Web 2.0 technology on the "Marks in Time" website is their Store History tool, a mashup combining Google maps with archival images and short historical statements. Using this tool, site visitors can either enter a postal code or browse the map to select a specific store location. Once a map location is selected, users are presented with three historical photographs of the storefront and a short history of the Marks & Spencer store at that

site. This mashup tool is a great model for any business archives with multiple company branches and a strong public presence, as it forges a connection between the company and the landscape, as well as local communities and customers. However, a few modifications and additions could make this an even more valuable Web 2.0 tool. First, the store descriptions would be more engaging if they included more than photos of the storefront. Pictures of prominent store managers or group portraits of store employees would more deeply personalize the company's connection with place. Further, the archive could make the store histories more useful for research purposes by including links to items in the Archive Catalog. Doing so would create a web of information connecting archival materials with locations for researchers as well as casual site visitors interested in the company's heritage.

Beyond the Archive Catalog and Store History tools, other features on the "Marks in Time" website would benefit from the added interactivity that Web 2.0 concepts encourage. Reviewing some of these can aid business archivists in redesigning their own websites to incorporate Web 2.0 functionality. First, like many other major corporations with a strong public presence, Marks & Spencer's website includes a company timeline that showcases the company's influence on cultural development over the years. As with other company timelines, Marks & Spencer's uses both text and archival images to recount the company's history. It goes a step further than most, though, by including videos of old television advertisements from the period. While the timeline gains strength from incorporating multiple media, at present it is not very interactive. Unlike company timelines on Facebook or old advertising videos on YouTube, Marks & Spencer's timeline does not provide users the opportunity to 'like' or comment on pages or items on the timeline. Including this functionality would give users more freedom with the website's contents and encourage their use and support of the archive.

Another feature on the “Marks in Time” site that would benefit from added Web 2.0 functionality is its Memories page. This tool allows the public to share company-related memories and associated images with the archive by submitting them to the archive staff via an online form. Once reviewed by staff members, memories may be posted on the Memories page, where users can browse others’ reminiscences by location or subject matter. At present, this process is heavily mediated by the archive staff. While vetting users’ contributions in some fashion is necessary to prevent negative content from being posted on the company website, the archive might gather more individuals’ stories if the process was more open. Further, the archive could expand the program by allowing users to contribute video and audio as well. By incorporating multiple media into its Memories page, the archive would likely attract greater public interest.

Nonetheless, the Marks and Spencer Archive’s “Marks in Time” website has made meaningful inroads into the Web 2.0 era, engaging users in new ways. By incorporating interactive functionality into its existing website rather than focusing its outreach efforts on third-party sites, “Marks in Time” serves as another example of how a business archive can build a Web 2.0 presence. The Archive Catalog and Store History tools are both a research aid and a useful way to connect the company’s heritage with British culture. While some modifications of these and other features on the “Marks in Time” website could better leverage Web 2.0 technology to engage users and build a support base, the Marks & Spencer Archive has done a commendable job of reaching out to the public and anticipating their changing needs.

The Royal Bank of Scotland Group

With a rich history that stretches over 350 years, the Royal Bank of Scotland Group (RBS) is world’s largest international banking and finance company. Its archive acts as an

information center for the Group's more than 200 constituent businesses and also encourages the public to engage with the company's heritage. The RBS Group Archives' skillful use of Web 2.0 tools helps them attain these goals. Whereas the Marks and Spencer Archive's Web 2.0 initiatives centered on its own website, "Marks in Time," the RBS Group's Archives' website merely serves as the hub in a network of Web 2.0 tools. Thus, the Archives' two main Web 2.0 tools, a corporate history wiki and its Twitter accounts, can offer business archivists another model of how to create a successful Web 2.0 presence that increases access to their records and bolsters the company's balance sheet.

The RBS Group Archives' corporate history wiki, "RBS Heritage Online," is a powerful resource for company employees and curious members of the public.¹³ First created in 1994 by Ward Cunningham as a collaborative tool for software developers, wiki technology gained widespread attention after Wikipedia's founding in 2001.¹⁴ As Theimer succinctly explains, "A wiki is essentially a Web site – complete with a hierarchical structure, navigation, and multiple pages and links – but one that can be built without any technical expertise."¹⁵ Users only need to understand simple HTML codes in order to get started, and as with other Web 2.0 technologies a number of commercial sites allow individuals to create accounts free of charge. To build a wiki, the site administrator populates the site by creating pages and adding content before opening up the wiki to public viewing and, if enabled, web editing. Designed for easy editing, wiki sites offer administrators the freedom to quickly add or removed content without the assistance of an IT department. A further benefit of wiki technology is that it allows for granularity of access

¹³ RBS Group Archives, "RBS Heritage Online," September 25, 2012, http://heritagearchives.rbs.com/wiki/Welcome_to_RBS_Heritage_Online.

¹⁴ Ilana Davidi, "Web 2.0 Wiki Technology: Enabling Technologies, Community Behaviors, and Successful Business Techniques and Models" (master's thesis, Massachusetts Institute of Technology, 2007), 19-20, <http://dspace.mit.edu/bitstream/handle/1721.1/42355/234192566.pdf>.

¹⁵ Theimer, *Web 2.0 Tools*, 137-38.

provisions. Some wikis enable and encourage users to contribute information or edit pages.

These sites often allow registered users to view page histories and flag pages for editing as well.¹⁶ Taking a more restricted approach, other wikis, like “RBS Heritage Online,” are locked down by site administrators, preventing public viewers from editing or flagging pages.

Alternatively, some organizations create wikis on their company intranet exclusively for internal use.¹⁷ Each type of wiki can prove beneficial for business archivists depending on their goals and the types of materials they wish to post on their wiki site.

While a number of academic archives have created wiki sites as reference tools, business archivists have largely eschewed this technology. This dearth of corporate wikis is lamentable because wiki technology can serve as a vital resource for both internal and external users by creating a network of information arranged by subject in a catalog format. Linked from the archives’ main page, “RBS Heritage Online” serves as the most comprehensive public resource for company-related historical information as well as the main channel for interacting with the archives staff. Visitors to the site have multiple search options. They can perform a text search, browse by geographic location or browse a list of banks and businesses under the RBS Group umbrella. Each page in the wiki operates as a cross between an encyclopedia entry and a finding aid, containing both a historical note and a list of related materials in the RBS Group Archives or at another location. Most pages showcase a related archival image as well. By offering comprehensive information in this way, “RBS Heritage Online” can be a valuable resource for anyone with a particular company-related research query. Further, by allowing researchers to

¹⁶ A good example of open-access wikis is “Chinese-Canadians: Profile From a Community,” a collaborative wiki-based project that solicits public assistance in documenting the histories of Chinese-Canadians born before 1901: Vancouver Public Library and Library and Archives Canada, “Chinese-Canadians: Profile From a Community,” September 25, 2012, http://ccgwiki.vpl.ca/index.php/ccg_wiki/.

¹⁷ IBM Connections and Microsoft’s SharePoint both operate on this design model.

explore the company's history on their own, "RBS Heritage Online" arguably saves the Group's archives staff time by reducing the burden of research requests.

While the wiki does not allow public editing, it nonetheless adheres to Web 2.0 concepts of openness and collaboration. Recognizing that their "level of knowledge about past banks and businesses varies a great deal," the RBS Group Archives' staff encourages users to contact the archives via the wiki to supplement their information about "the smaller or shorter-lived banks" under the corporate umbrella.¹⁸ Since the archives does not grant public access to wiki page histories it is unclear how much information has been publicly-provided. However, the archives actively encourages user contributions, such as in its most recent addition to the wiki, the "140 Characters" project. Begun in January 2012, this yearlong project's aim is to create wiki pages for 140 "interesting people" who worked for the company over the years. The archives is working to engage the public through this endeavor by periodically posting announcements of new pages on their Twitter feed and encouraging members of the public to contact them with further information about the people included in the project.¹⁹ By providing a venue for the archives to digitally broadcast company-related history and describe the archives' holdings in detail, "RBS Heritage Online" is a strong example of how business archivists can leverage wiki technology to increase access to their holdings and boost the company's reputation.

In addition to the wiki, the RBS Group Archives staff has engaged with Web 2.0 technology through their skillful use of Twitter. Launched in 2006 and famous for limiting users to 140-character posts, Twitter has rapidly grown from an obscure microblogging site into a

¹⁸ RBS Group Archives, "Contact Us," September 25, 2012, http://heritagearchives.rbs.com/wiki/How_to_make_an_enquiry.

¹⁹ RBS Group Archives, "140 Characters," September 25, 2012, http://heritagearchives.rbs.com/wiki/140_Characters.

major communication tool and information resource.²⁰ Indeed, Twitter's role in the 2011 revolutions during the Middle East's Arab Spring illustrates its power and prominence as a public communication tool. To engage with the growing microblogging community, the RBS Group Archives staff operates two Twitter feeds, "@RBS_Archives" and "@JohnoftheBank," both of which are advertised on the main page of "RBS Heritage Online."²¹ The archive's two Twitter accounts both increase public awareness of the RBS Group's rich history, but they take different approaches in doing this.

The RBS Group Archives' main Twitter account, "@RBS_Archives," exists to supply general news and information about the archives and the Group's history. Its posts are quite varied, although many aim to draw connections between the RBS Group's history and current events. During the Queen's Diamond Jubilee in early June 2012, for instance, the archives published a number of tweets showcasing royal treasures from the archives, including a miniature passbook made in 1926 by National Provincial Bank for the Queen's dollhouse and an eighteenth century banknote bearing King George II's portrait. Each tweet contained a short description and a link to a digital image of the item. Other posts, such as those connected to the "140 Characters" project, simply share interesting bits of company history. Overall, tweets on "@RBS_Archives" increase public awareness of the Group's long history and the archives' holdings.

The RBS Group Archives' other Twitter account, "@JohnoftheBank," works towards those goals from a different direction. Operating as the digital diary of John Campbell, an

²⁰ According to a February 2012 study by the Pew Internet and American Life Project, the proportion of American adults who use Twitter on a 'typical day' has quadrupled since late 2010: Aaron Smith and Joanna Brenner, "Twitter Use 2012," Pew Research Center, May 31, 2012, <http://www.pewinternet.org/Reports/2012/Twitter-Use-2012.aspx>.

²¹ RBS Group Archives, "@RBS_Group," September 25, 2012, https://twitter.com/RBS_Archives; RBS Group Archives, "@JohnoftheBank," September 25, 2012, <https://twitter.com/JohnoftheBank>.

eighteenth century cashier of The Royal Bank of Scotland, “@JohnoftheBank” publishes adapted entries from the banker’s diary in real time. Beginning in September 2012, for instance, “@JohnoftheBank” has been chronicling the 1745 Jacobite siege of Edinburgh, Scotland through Campbell’s diary entries. This popular project has already garnered over four hundred followers. Furthermore, it provides the Group’s archives staff an opportunity to share excerpts from a unique item in their collection that would otherwise be seeing much less use.

While many likely do not have such iconic holdings to tweet about as two hundred and fifty year old diaries and trinkets from the Queen’s dollhouse, business archivists can find a number of ways to incorporate Twitter into their outreach programs. Indeed, my survey results illustrate Twitter’s popularity among business archivists; half of respondents who use Web 2.0 tools indicated that they are active on Twitter.²² Microblogging sites are a great way to spread awareness of a group’s archives. Because posts are brief and the interface is intuitively designed, they require little time to set up and manage. Further, microblogging technology is easily adaptable to multiple purposes, as illustrated in the RBS Group Archives’ two very different Twitter accounts.

Through their innovative use of Twitter and informative corporate history wiki, the RBS Group Archives is actively engaging with the digital public. Whereas the Marks & Spencer Archive focused its efforts on incorporating Web 2.0 functionality into its existing website, the RBS Groups Archives illustrates another successful model of Web 2.0 outreach. By linking its Twitter accounts, corporate history wiki and Facebook pages from the main website, the archives has constructed an information network useful for both research and outreach. By further spreading awareness of corporate heritage these Web 2.0 technologies also emphasize the archive’s value as a business asset. As can be seen in the examples of Coca-Cola, Marks &

²² Doug Mann. Web 2.0 Use in Business Archives Survey. See Appendix 1, question 11.

Spencer and the RBS Group, there are multiple ways for business archives to develop a Web 2.0 presence. While some initiatives, such as “RBS Heritage Online” and “The Very Best of Coca-Cola,” require a level of resources that is beyond many institutions, other Web 2.0 outreach efforts take little time and expertise to create and maintain. By considering the archive’s level of resources, planning the implementation and recordkeeping processes associated with a Web 2.0 initiative and testing before implementing, business archivists can find a number of ways to remain engaged with the growing digital public. As the case studies examined above illustrate, business archives have many options for meaningfully leveraging Web 2.0 technology to increase access to their holdings, conduct outreach and support their corporation’s public image.

Conclusion

The future is bright for business archives. Emerging Web 2.0 technologies from blogs and social networking sites to wikis and mashups offer business archivists new ways to remain engaged with their evolving user base. As has been illustrated, these interactive and collaborative tools are enabling archivists to both increase access to their holdings and bolster their company's image. Doing so helps profit-focused CEO's conceive of the archives as a business asset rather than potential liability. In light of this, business archivists need to become more willing to experiment with and implement Web 2.0 technologies.

As illustrated in the first chapter, business archives in the United States have a troubled past due to the challenges archivists face in reconciling archival principles with the dictates of corporate culture. Developing later than the mainstream archival profession, the business archives community since the 1940s has struggled to convince corporate leaders that the archives can be a valuable business asset. Instead, corporations have historically cut back or eliminated business archives during economic downturns and times of corporate restructuring. Due to business' profit-focus, emphasis on corporate privacy, and internal orientation, archivists have been forced to tread carefully as they attempt to promote the archives and increase access to its holdings. This reconciling of corporate demands with archival principles led business archives to develop differently from the wider archival profession, producing to ill feelings and disagreements over archival theory, as most recently evidenced in the Raisingate episode in the mid-2000s.

However, while the archival community was quibbling over Sun Mad and the finer points of archival ethics, the world was quietly changing. The emergence of Web 2.0 concepts and technologies in the early 2000s has revolutionized the way people communicate and the demands they place on archives and archivists. Archives patrons now expect not only to find archival holdings online but also to be able to interact with them by commenting, sharing them with friends, or adding metadata to them. In short, the public now demands the opportunity to assist in the archival process. Realizing this, archivists have quickly worked to integrate new Web 2.0 technologies into their existing practices. Within a few years, academic, governmental and non-profit archives were joining Facebook, publishing blogs and producing podcasts. New ideas for Archives 2.0 likewise abounded in the literature. Business archives, however, appeared less eager to embrace these changes. Few business archives were joining social networking sites or even renovating their own websites to add the interactive or collaborative features that non-business archives were implementing. From an outsider's perspective it appeared that business archivists were ignoring the Web 2.0 revolution and choosing to bury their heads in the sand.

In order to test this hypothesis, in the summer of 2012 I conducted a survey of business archivists, polling them on their current level of use of Web 2.0 technology, their experiences with these tools and their opinions of Web 2.0's utility in the corporate world. While only garnering eighteen responses, my survey shed some light on business archivists' experiences with Web 2.0. In line with results from similar studies, my survey found that less than half of business archivists polled currently use Web 2.0 technologies. Nonetheless, evidence suggests that many business archivists who are actively engaging with Web 2.0 consider these tools a valuable component of their archival work processes; many use multiple Web 2.0 tools and some allocate nearly one workday per week to Web 2.0-related activities. Most often business

archivists use Web 2.0 technology to promote the archives and publicize events, but they are finding other uses for these tools as well.

Business archivists' current engagement with Web 2.0 is not all positive, however. As with the mainstream archival profession, many business archivists fail to create Web 2.0 use policies or develop recordkeeping plans incorporating Web 2.0-generated records. This often results in a less satisfying experience with Web 2.0, according to my survey results. Further, over half of the business archives community is not even engaging with Web 2.0 technologies for various reasons, including personal disinterest, resource shortages or companywide bans. This reality is troubling, as Web 2.0 technologies have transformed the way businesses operate and individuals communicate. If business archivists don't engage with these emerging technologies, I argue, they will rapidly lose their place in the corporate hierarchy.

In an effort to encourage business archivists to embrace Web 2.0, I designed the final chapter as a resource guide for business archivists interested in creating a Web 2.0 presence. I first outlined at a conceptual level the process of planning, implementing and evaluating one's Web 2.0 presence before concluding with three case studies illustrating multiple ways business archives can successfully implement Web 2.0 technologies. As seen in the case studies, Web 2.0 tools have much to offer business archivists in all types of institutions. Archives with large budgets can use these technologies and concepts to create interactive virtual archives, as Coca-Cola has done. Those wishing to restrict the public's ability to manipulate archival materials but still engage with Web 2.0 can incorporate collaborative and interactive features into their existing websites, as Marks and Spencer has done with "Marks in Time." Alternatively, business archives willing to be more open to the public can take cue from the RBS Group Archives' corporate history wiki and social networking initiatives. Furthermore, with continuing advances

in technology and a multiplicity of tools on the market, business archivists can find many other ways to integrate Web 2.0 into their existing practices. The opportunities are nearly endless.

However business archivists wish to address it, Web 2.0 has transformed both user demands and archival practices. These new technologies can prove a valuable asset for business archives of all types, and if business archives are willing to implement them the future can indeed be bright.

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Appendix I: Survey Questions and Summary Results¹

Web 2.0 Use in Business Archives

2. **What industry label best represents your organization?**
 - 2 (11.1%) Materials
 - 4 (22.2%) Consumer Goods
 - 3 (16.7%) Financial
 - 1 (5.6%) Healthcare
 - 3 (16.7%) Service
 - 0 (0.0%) Technology
 - 0 (0.0%) Utilities
 - Other (please specify)
 - 7 (38.9%)
3. **How many staff are employed in the archives? (please use FTE)**
 - 17 total (2.35 FTE average staff size)
4. **How long have you worked for your current company?**
 - 3 (16.7%) Less than 1 year
 - 3 (16.7%) Between 1 and 5 years
 - 12 (66.7%) More than 5 years
5. **Do you or any member of your staff use web 2.0 tools for archives-related work?**
 - 8 (44.4%) Yes
 - 10 (55.6%) No
6. **Why don't you or your archives staff use web 2.0 tools for archives-related work? (select all that apply)**
 - 4 (40.0%) company policy prohibits the use of social media
 - 3 (30.0%) There is not enough funding
 - 2 (20.0%) There is not enough staff time
 - 5 (50.0%) Web 2.0 tools are not viewed as a priority
 - 4 (40.0%) Lack of technical expertise
 - Other (please specify)
 - 0 (0.0%)
7. **Are there plans to utilize web 2.0 tools within the next 12 months to perform archives-related work?**
 - 1 (10.0%) Yes
 - 9 (90.0%) No

¹ For clarity of presentation I left out several of the survey questions here. Question one was actually a consent form, and questions thirty-six, thirty-seven and thirty-nine were short-answer questions that did not display clearly in a summary results view. I also omitted the final question, which simply asked for comments on the survey itself.

8. **If there are plans to use web 2.0 tools in the future, how do you plan to use it? (select all that apply)**
- 0 (0.0%) Awareness campaign; promoting the organization
 - 0 (0.0%) Promote the use of archival materials
 - 0 (0.0%) General information; publicizing events
 - 0 (0.0%) Engage and interact with stakeholders (both within and outside the corporation)
 - 0 (0.0%) Provide services, advice, or answer questions
 - 1 (100.0%) Communicate with other archivists
- Other (please specify)
- 0 (0.0%)
9. **If there are plans to use web 2.0 tools in the future, which of the following does your archives plan to use? (select all that apply)**
- 0 (0.0%) YouTube
 - 1 (100.0%) Facebook
 - 1 (100.0%) Twitter
 - 0 (0.0%) Wiki
 - 0 (0.0%) LinkedIn
 - 1 (100.0%) Flickr
 - 0 (0.0%) Yammer
 - 1 (100.0%) Blog
- Other (please specify)
- 0 (0.0%)
10. **How long have you been using web 2.0 tools for archives-related work?**
- 1 (12.5%) Less than 6 months
 - 0 (0.0%) 6 months - 1 year
 - 3 (37.5%) 1 - 2 years
 - 3 (37.5%) 3 - 5 years
 - 1 (12.5%) More than 5 years
11. **What web 2.0 tools do you currently use? (select all that apply)**
- 4 (50.0%) YouTube
 - 5 (62.5%) Facebook
 - 4 (50.0%) Twitter
 - 3 (37.5%) Wiki
 - 3 (37.5%) LinkedIn
 - 3 (37.5%) Flickr
 - 0 (0.0%) Yammer
 - 3 (37.5%) Blog
 - 0 (0.0%) Instagram
- Other (please specify)
- 3 (37.5%)

12. **For what archives-related work processes do you currently use web 2.0 tools? (select all that apply)**
- 6 (75.0%) Awareness campaign; promoting the organization
 - 3 (37.5%) Promote the use of archival materials
 - 7 (87.5%) General information; publicizing events
 - 3 (37.5%) Engage and interact with stakeholders (both within and outside the corporation)
 - 4 (50.0%) Provide services, advice, or answer questions
 - 2 (25.0%) Communicate with other archivists
 - Other (please specify)
3 (37.5%)

How often do you use the following web 2.0 tools for archives-related work?

13. **How often do you use YouTube?**

- 3 (37.5%) Never
- 2 (25.0%) Rarely
- 1 (12.5%) Monthly
- 0 (0.0%) Once a week
- 0 (0.0%) Two to six days a week
- 2 (25.0%) Daily

14. **How often do you use Facebook?**

- 4 (50.0%) Never
- 0 (0.0%) Rarely
- 0 (0.0%) Monthly
- 2 (25.0%) Once a week
- 0 (0.0%) Two to six days a week
- 2 (25.0%) Daily

15. **How often do you use Twitter?**

- 4 (50.0%) Never
- 0 (0.0%) Rarely
- 0 (0.0%) Monthly
- 1 (12.5%) Once a week
- 2 (25.0%) Two to six days a week
- 1 (12.5%) Daily

16. **How often do you use wikis?**

- 3 (37.5%) Never
- 3 (37.5%) Rarely
- 1 (12.5%) Monthly
- 0 (0.0%) Once a week
- 1 (12.5%) Two to six days a week
- 0 (0.0%) Daily

17. How often do you use LinkedIn?

4 (50.0%) Never
1 (12.5%) Rarely
0 (0.0%) Monthly
2 (25.0%) Once a week
0 (0.0%) Two to six days a week
0 (0.0%) Daily

18. How often do you use Flickr?

4 (50.0%) Never
2 (25.0%) Rarely
0 (0.0%) Monthly
2 (25.0%) Once a week
0 (0.0%) Two to six days a week
0 (0.0%) Daily

19. How often do you use Yammer?

8 (100.0%) Never
0 (0.0%) Rarely
0 (0.0%) Monthly
0 (0.0%) Once a week
0 (0.0%) Two to six days a week
0 (0.0%) Daily

20. How often do you use blogs?

3 (37.5%) Never
2 (25.0%) Rarely
0 (0.0%) Monthly
2 (25.0%) Once a week
0 (0.0%) Two to six days a week
1 (12.5%) Daily

21. How many staff hours are allocated to use or develop web 2.0 tools each week?

3 (37.5%) 0 - 2
2 (25.0%) 3 - 5
2 (25.0%) 6 - 8
0 (0.0%) 9 - 10
1 (12.5%) Over 10

22. Which best characterizes your archives' use of web 2.0 tools?

3 (37.5%) Multiple staff members participate regularly in web 2.0 work-related processes
3 (37.5%) One staff member leads web 2.0 initiatives but others contribute
2 (25.0%) One staff member is responsible for all web 2.0 work-related processes
0 (0.0%) I am the only archivist on staff

23. **Which of your corporation's departments or business divisions do you interact with or assist through web 2.0 tools? (select all that apply)**
 1 (12.5%) Human Resources
 4 (50.0%) Public Relations/Advertising
 1 (12.5%) Customer Service
 1 (12.5%) Legal
 0 (0.0%) Accounting
 0 (0.0%) Sales
 2 (25.0%) IT
 Other (please specify)
 4 (50.0%)
24. **Where are the web 2.0 tools you use located?**
 2 (25.0%) On the organization's intranet
 0 (0.0%) On the organization's website
 1 (12.5%) On externally hosted sites (ex: Facebook, Twitter)
 2 (25.0%) On both the organization's intranet and externally hosted sites
 3 (37.5%) On both the organization's website and externally hosted sites
 0 (0.0%) Don't know
 Other (please specify)
 1 (12.5%)
25. **Does your archives have funds allocated specifically for web 2.0 use?**
 3 (37.5%) Yes
 5 (62.5%) No
26. **Do you have managerial support for your use of web 2.0 tools?**
 8 Yes
 (100.0%)
 0 (0.0%) No
27. **Were other departments within your organization using web 2.0 tools before the archives began to use them?**
 7 (87.5%) Yes
 1 (12.5%) No
 0 (0.0%) Don't know
28. **Which best characterizes your parent organization's social media policy?**
 2 (25.0%) Broad policy that includes web 2.0 use
 5 (62.5%) Specific policy governing web 2.0 use
 0 (0.0%) No policy, but one is being drafted
 0 (0.0%) No policy and no plan to create one
 0 (0.0%) Don't know
 0 (0.0%) Decline to respond
 Other (please specify)

- 1 (12.5%)
29. **Was the archives staff involved in drafting your parent organization's social media policy?**
 1 (12.5%) Yes
 7 (87.5%) No
 0 (0.0%) We do not have a social media policy.
30. **Does the archives have a recordkeeping policy that incorporates web 2.0 records?**
 2 (25.0%) Yes
 5 (62.5%) No
 1 (12.5%) Under development
31. **What procedures are used to capture records created through the use of web 2.0 tools? (select all that apply)**
 1 (12.5%) Manual screenshots
 3 (37.5%) Third-party services (e.g. Hootsuite)
 0 (0.0%) Plug-ins
 0 (0.0%) Custom-built applications
 0 (0.0%) RSS feed capture
 1 (12.5%) Don't know
 4 (50.0%) Don't capture any web 2.0 records
 Other (please specify)
 3 (37.5%)
32. **If you do not capture web 2.0 records, why? (select all that apply)**
 3 (37.5%) Lack of tools or technical skill
 1 (12.5%) Lack of time
 1 (12.5%) No perceived need to capture these records
 1 (12.5%) Web 2.0 records are not considered as official records of the organization
 Other (please specify)
 1 (12.5%)
33. **Does your archives have a strategy for the use of web 2.0 tools?**
 3 (37.5%) Yes
 5 (62.5%) No
 0 (0.0%) One is being drafted
34. **In your opinion, which are web 2.0 tools more useful for?**
 0 (0.0%) Internal-facing processes (ex: circulating announcements or providing services to those within the organization)
 4 (50.0%) External-facing processes (ex: contributing to corporate branding strategies or promoting the use of archival materials by the general public)
 4 (50.0%) Equally useful for both internal- and external-facing processes
 0 (0.0%) Don't know

35. Which best describes your level of satisfaction with web 2.0 tools?

2 (25.0%) Very satisfied
4 (50.0%) Satisfied
2 (25.0%) Neither satisfied nor dissatisfied
0 (0.0%) Dissatisfied
0 (0.0%) Very dissatisfied
0 (0.0%) Don't know

38. Would you encourage other business archivists to incorporate web 2.0 tools into their archival work processes?

8 Yes
(100.0%)
0 (0.0%) No