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Painless Portal Partnerships: Collaboration and Its Challenges for Small Organizations

By *Christine McEvilly*

ABSTRACT: This article addresses challenges inherent in collaborative archival projects involving both large institutions and small historical societies. It identifies these unique problems and outlines potential solutions to overcome these issues. Examples are drawn from the Portal to American Jewish History project and contextualized within the professional literature on ethnic or community archives and archival collaboration. This project collected metadata from a wide range of Jewish history archives and aggregated the records in a single searchable website.

Introduction

Researchers often look for archival records in academic settings overseen by professionally trained archivists and librarians. In contrast, community centers, churches, town halls, library storage rooms, and even basements are not usually the first places people look for archival records. But many archival materials live in such locations, in the care of local historical societies, religious organizations, charities, or interest groups. Volunteers and part-timers with little formal training in information science often manage these archives. In contrast, some of these organizations may be large, have professional staffs, or even be associated with universities. Yet all these institutions share an important role helping communities define themselves by preserving and connecting to their histories. The Jews in America: The Portal to American Jewish History (the Portal) project brings local historical societies' collections to nonlocal audiences while recognizing the value of major collections to researchers.¹

Although the Portal continues to thrive, with 11 current partners, under the management of the American Jewish Historical Society (AJHS), this case study reflects upon the challenges faced during its early phases and the solutions implemented to make the project a success.²

Many of the challenges the project faced stemmed from the small, less formally professionalized nature of some partners, meaning that few staff members had traditional archival or library science degrees. Others had training but lacked extensive experience with specifically *archival* professional standards and practices. However, all of AJHS's partners were professional, knowledgeable, and enthusiastic. Hopefully, the strategies and techniques used to overcome the project's barriers will help others who are considering collaborative projects with small organizations. This article argues that collaborative projects in an archives setting present unique challenges when they involve participant institutions of different sizes and with different practices. Challenges faced in projects with large and small partners differ significantly from those faced in projects with only very large participants. Therefore, this project's solutions had to be innovative.

Often technological work is a major burden for smaller organizations and must be done directly by the larger organizing institutions.³ However, the largest challenge the Portal faced was the management of relationships and power dynamics, both interpersonal and interorganizational. The project overcame these hurdles by relying on the goodwill and ingenuity of all its participants, but preemptive action was often taken to ensure that seemingly minor choices were made in ways that did not provoke problematic dynamics. No matter the amount of records or resources a partner “brought to the table,” every effort was made to ensure everyone felt secure in the ownership and management of their own records; every partner’s value to the project lay in its choice to participate and in its unique materials, not in its size or experience. As a case study, the Portal project illustrates that working with small organizations, which rightly have unique concerns about their potential marginalization in a project managed by larger organizations, magnifies these types of challenges, even when all participants share missions and aims (and organizational ethnic identities, when significant). Not only does this project present a model for other local or subject-based data aggregation websites, it raises unique issues in the professional discussion on project management, community and ethnic archives, and interorganizational cooperation.

Literature and Discussion

Ethnicity, Identity, and Communities

The idea that projects involving smaller, community, or ethnic archives present unique challenges for collaboration is not completely novel in the professional literature, but most of the discussion focuses on cultural heritage practices, not archival science. The histories of these archives are often recorded, but “literature on applying the findings to archival practice is limited.”⁴ Furthermore, when collaboration is explicitly discussed, authors generally focus on how governmental organizations interact with ethnic archives; these partnerships often struggle with politically divergent viewpoints and the different ethnic identities of the participating organizations.⁵

As UK archivists Andrew Flinn et al. discussed, many community archives projects “are not politically neutral but frequently arise from and are part of social movements”⁶ While the Portal project partners would not generally define themselves as activists, their work springs from the same desire to protect the history that is “ours,” regardless of what histories others may or may not value. AJHS, an ethnic archives itself, shared many of the same concerns as its partners, making this project different from many of those in the literature. However, despite AJHS’s similarities to the other Portal partners, the project did face some of the same hurdles that government and university archives have described in their collaborative projects with community or ethnic archives. This contradiction suggests that the challenges of working with community archives transcend certain types of “distrust” based on politics and ethnicity and may instead be rooted primarily on large-small or local-national variations. The project also identified challenges that may be unique to projects within an archival (rather than a physical culture-museum) setting.

Diana K. Wakimoto, Debra L. Hansen, and Christine Bruce recently presented a case study on LLACE (Lavender Library, Archives, and Cultural Exchange), an American community archives. They described the concerns of this archives and its unique practices, but they did not focus on collaboration.⁷ They illustrated how local archives are acutely aware that they must meet a need in their communities and maintain some level of visibility, because they rely on funding and volunteer work from these communities.⁸ Smaller partners in the Portal project also similarly prioritized local goals. They were often more concerned than the larger partners that the Portal project would draw attention and resources away from their primary missions.

The theory of ethnic and community archives influenced AJHS's decision to leave the job of choosing what records to contribute to each partner, regardless of any preconceived notions about the archival value of particular collections.⁹ AJHS asked each partner to provide records for its unique materials on "American Jewish history." This decision reflected the collaborative nature of the project and was a first step toward creating a project in which the managing organization and the contributing partners shared meaningful control and decision-making power. It also reflected AJHS's recognition of the importance of archives and their appraisal in community identity-building, particularly for minority or ethnic communities.

Since the 1970s, the archival community has recognized the importance of documenting a wide variety of groups in archival collections.¹⁰ Archivists "announce a commitment to documenting the lives of 'ordinary people' . . . but alone [such statements] are insufficient as guidelines" for archival acquisition decisions.¹¹ Allowing communities to make appraisal choices provides a solution. As Elisabeth Kaplan wrote, AJHS was founded out of a desire in the Jewish community to fill a perceived gap in mainstream archival collections, and to assert the existence of an American Jewish identity. What the AJHS founders chose to collect reflected this viewpoint, as Kaplan found when she studied the minutes of their first meeting.¹² Their choices did not stem from archival theory, but from their self-definition. Choices were not "neutral," but the decisions themselves illuminate. As the Portal project continued, AJHS staff wished to protect a similar right to select records for local historical societies and communities. If a partner felt materials were valuable enough to store, conserve, and describe, the Portal's purpose was to get that information out to researchers.

Local societies' collections are closer to representing the perspectives of their communities than are many of the collections of larger organizations with large archivally trained staff and many funding sources. The profession often struggles to systematically evaluate records, but methodologies cannot create neutrality (which might not even be a worthwhile goal).¹³ But, if professionalism cannot eliminate bias in selection, accepting the bias of the community provides an important counterpoint to what professionals collect. Local staff are often less concerned about (or unaware of) professional collecting theories on value, uniqueness, and objectivity. They must collect materials in which the local community is invested, or their work will not get funding and support. Moreover,

local staff are also members of the community. The collection might end up omitting items that reflect negatively on the identity of the local community, but the materials preserved are likely to reflect how the community wants to present itself (or at least different views of how different parts of the community self-identify).

Furthermore, community archives do not have to prioritize collections to meet the needs of researchers. They can, in aggregate, provide a place for materials that might have relatively low “informational” and “evidential” value in the view of most researchers. However, the act of saving and maintaining the materials can be an important part of identity formation; identities within a community can be built around materials duplicated in every similar community in the country. If archives are understood not just as repositories of historical “truths” but as part of “communities of records,” then these materials should be respected.¹⁴

This perspective raises the question of how to define and differentiate community and ethnic archives. Language within the literature is unclear. British usage of “community archives” includes both ethnic and nonethnic archives, where “community participation, control and ownership of the project is essential,” and it encompasses both physical and virtual projects.¹⁵ American usage tends to exclusively reference archives with a political, ethnic, or activist focus.¹⁶ Both usages face standard struggles over the exclusionary use of the term “community” and the complexity of multiple identities for any community or individual.

Jewish archives tend to come out of both traditions. The tradition of local American historical societies (regional, town, local) dates back to the beginning of the nineteenth century, and in 1892 the AJHS founders tried to emulate that tradition.¹⁷ These historical societies aimed to preserve historical truths and express pride in local identity. But the AJHS founders were also working in the more modern context of protecting and legitimizing the history of a marginalized social group. Related to the social history movement of the 1960s and 1970s, this approach emphasized the preservation of underdocumented, marginalized histories.¹⁸ Many ethnic and activist archives work to protect materials from histories they fear others will not value properly. Jewish historical societies are often motivated by both these traditions, or have developed over time from protecting marginalized histories to protecting more mainstream histories.

Both types of local archiving develop when people take pride in the labels (local, ethnic, or based on membership in an activity or group) they accept for themselves and come to define these identities through the ownership of archival materials.¹⁹ The major difference may lie in the history of marginalization. Most ethnic minorities have good reason to distrust the mainstream culture and a history of activism, which would normally affect collaborations, but in the Portal project, AJHS’s Jewish mission hopefully minimized such effects. While influenced by ideas about ethnic archiving, the Portal project may in some ways be more similar to projects involving nonethnic community archives (which are rarely addressed, particularly in the American literature). Yet the Portal faced many of the same challenges described in the ethnic archives literature. This experience

suggests that some of the discussion on ethnic archives may illustrate differences in small versus large or community versus professional archives rather than ethnic differences.

The Portal project team not only espoused in theory the belief that communities should select their own archives, it also took expensive steps to prepare for the future growth of the project as a resource for ethnic archiving. A CollectiveAccess-Drupal system provided the technical back-end for the Portal and was selected, although more costly than other options, because it positioned the Portal as a hub where users might be able to interact directly with collections in the future, or share their own family documents under the guidance of local partners.²⁰ While the project initially focused on researcher needs, the future of the project planned for the direct involvement of the members of the communities documented.

Collaboration between Institutions

While the Portal project may be viewed through the lens of a community archives project, it must also be examined as an example of archival collaboration among nonpolitically divergent organizations. As far back as 1976, John Fleckner argued that archives must follow the lead of libraries in using strategic collaborations.²¹ However, surprisingly few articles describe projects with size and power imbalances among participants, and fewer address the specific needs of these projects.

The Portal project involved collaborations in which partners with very different levels of technological ability, archival professional knowledge, and archival funding worked together: “large” working with “small.” The relatively “small” archives within the project tended to have a small archives staff (generally one or fewer full-time professional archivists), lacked extensive technical support, had no archivists with technical metadata encoding skills, housed small collections (50 to 500 linear feet), or hosted a relatively small number of researchers. The relatively “large” institutions generally had multiple archivists on staff (even if only one archivist managed the Jewish collections), had technical support staff, focused on serving a large population of academic researchers, or were integrated into a university or research center. Most available case studies in the American collaboration literature (that do not better fit in the ethnic archives literature) discuss library rather than archival projects and tend to describe projects in which all the partners have at least a basic level of technological, archival, and professional knowledge. If partners lack this basic knowledge, different practices are needed.

Collaboration case studies abound, but few deal with truly small organizations. For example, Jennifer Johnson and Edward Mandity recounted a digital archival project between, ostensibly, a small organization and a big one (Marian College Library and the Library of Indiana University–Purdue University Indianapolis).²² However, the “small” organization has four professional librarians, “numerous” work-study students, and access to CONTENTdm; resources far outside the current financial capacity of many Portal partners. Johnson and Mandity’s partnership and its description provide valuable information on how to manage projects with limited resources, but the project does not directly address the experiences of most Portal partners.

Many case studies discuss collaboration among large partners, but these studies only serve to highlight the uniqueness of the Portal collaboration.²³ One such discussion involves the CIC consortium's Metadata Portal project, which aimed to aggregate data like the Portal.²⁴ In this project, all partners were academic, and therefore negotiations included debate on rather obtuse technical issues, for example, proper Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH) collection set structures. In contrast, Portal partners struggled with fundamentally different negotiations on how to select or define titles from existing records.

Numerous articles discuss collaborations between different-sized colleges and universities developed to provide access to scholarly materials such as theses and faculty publications.²⁵ But not only are participants generally large, the studies often focus on the particular issues relevant to management of these types of digital documents. Similarly, some articles discuss size disparities among partners in library-specific collaborations (like shared user privileges arrangements), but they focus on library management issues, and even small library partners often have a history of collaboration within regional systems (for metadata and interlibrary loans).²⁶

Some collaboration-focused articles do discuss partner size disparities and very small partners, but they generally involve ethnically disparate organizations. For example, Elizabeth Joffrion and Natalia Fernández have written a collaboration-focused article, but it is based on a project between tribal and nontribal organizations.²⁷ This discussion of collaboration does describe a situation very similar to that of the Portal. The size disparities were similar to those the Portal project faced, as were some of the hurdles. But in this case study, organizations had “different traditions and perspectives relating to specific rights and customs, such as those associated with access and use of cultural documentation.” Therefore, despite a focus on collaboration, this article and others like it cannot differentiate between challenges caused by ethnic differences and those caused by size and professionalized practices.²⁸

One notable exception to this tendency to discuss nonethnic collaboration among only large organizations is Thomas Caswell's article on St. Augustine historical societies.²⁹ This article discusses a project extremely similar to the Portal project, in which the University of Florida–Gainesville helped four local historical societies in St. Augustine digitize their materials, create metadata, and provide online access. However, the only discussion of challenges specifically related to collaboration, negotiation, and compromise is a single paragraph mentioning monthly meetings and the use of e-mail and phone calls for communication. Some discussion of item selection criteria is included, but with little explanation of how the advisory board developed those criteria. The case study provides a great model, but it does not address collaboration itself as a topic and does not place the project in the context of scholarly literature. It suggests that a need for such projects exists; this AJHS Portal case study aims to present a model for how to implement such projects.

A second article that involves smaller historical societies and discusses project

challenges similar to those of the Portal is a case study of a 1988 Salem, Massachusetts, project. This collaboration involved the Peabody Museum and the Essex Institute (now merged, but separate at the time of the article), both relatively small historical-society-type organizations when they undertook the described collaboration. They produced unified registers for collections that were split between their holdings.³⁰ However, the article does not describe or address significant power imbalances; both organizations were local historical societies and each had vital portions of collections included in the project. Nevertheless, the article does describe some problems similar to those the Portal had to face. While nondigital, the format or design of the registers needed to be carefully negotiated, as each organization strongly argued for its own conventions. Likewise, issues of conventions and (web) design needed careful considerations in the Portal project. These difficulties suggest that the size of the small partners, rather than any power imbalance, may have caused some of the issues the Portal faced. However, the case study has lost some of its relevancy to the modern discussion because of the major changes in archival technology and the information science profession between 1988 and today.

The lack of projects with size disparities (and without ethnic disparities) covered in the literature has led to other omissions. Differing amounts of experience with interorganizational collaborations also proved a relevant factor in the Portal project. When the idea of professional collaboration itself is new to an organization, relationships are challenging but vital.³¹ Yet, again, much of the nonethnic collaboration discussion suggests that “simple” resource-sharing projects are “low barrier,” despite how difficult they can be for organizations unused to archival collaboration.³² Portal partners built successful relationships, providing the justification and proof of concept for investment in future, more speculative projects.

Identifying the needs of some small repositories was challenging, and without that knowledge, collaboration would have been impossible. Surveying and understanding the needs of minimally processed collections can be challenging for any institution, but sometimes prohibitively challenging for community organizations. When a group of Arizona archivists attempted to simply survey records throughout the state, they received few replies from smaller institutions. They believed their survey could have “alienate[d] communities and subjects that do not fit neatly into prescribed categories.”³³ Furthermore they identified barriers to participation in the survey at the smaller historical societies, museums, and churches such as insufficiencies in staffing or struggles for basic financing. Participants reviewing the survey results suggested that professionals from the larger institutions work with these nonparticipants to assist them in interpreting the survey in light of local archival practices.³⁴

The Portal project was innovative, actually implementing some of the suggestions of the Arizona survey reviewers in a similar, albeit more focused, survey. In a sister project to the Portal, the Center for Jewish History (CJH) carried out a survey in which CJH professional archivists personally worked with archival organizations, some of which might have had difficulty finding the time or the expertise to complete it.³⁵ This survey

of East Coast Jewish collections sent archivists to visit locations in person, where they could collect not only basic holdings information, but also gather less structured information on the sites, their needs, and their goals where possible.³⁶ This survey directly led several organizations to contribute their data to the Portal, and others expressed interest in future participation. The Portal project demonstrates successful archival collaboration in action.

Strategies for Standardizing Data and Negotiating Technical Issues

As the project's technical procedures developed, AJHS regularly adjusted its methods to meet the needs of each new partner, creating dynamic, practical guidelines that were modified each time a partner with a different data practice joined.

Data Transfer and Transformation Solutions

Throughout the project, many smaller partners preferred to rely on manual procedures to transfer their data to AJHS, rather than on the automated solutions preferred by organizations more conversant with existing tech-savvy systems. Even when promised support and automatic updates, solutions based on simple procedures and periodic manual intervention appealed to partners and proved easier to implement.

AJHS developed tentative plans at the start of the project in 2011 that called for use of the Open Archives Initiative Protocol for Metadata Harvesting.³⁷ OAI became a ubiquitous transfer method for traditional library and archives metadata in the early 2000s.³⁸ As initially conceived, this plan would have required each partner to transform its data to meet Portal guidelines, and AJHS would have worked with each partner to develop its own customized transformation procedure. This plan would have maximized automation on the back-end of the Portal at AJHS and allowed rapid growth (DPLA, the Digital Public Library of America, currently uses a very similar set-up). However, the OAI plan ran into major difficulties and quickly became unrealistic.

OAI plans were dropped due to both data contributor concerns and the level of technical support that AJHS and CJH would have had to provide. One prospective partner expressed concern about the magnitude of the technical work involved after reading this OAI plan. But AJHS was able to negotiate issues and develop a technical plan that met this potential partner's needs. The staffs agreed to a simpler transfer system that would not involve staff training (a file transfer protocol, or FTP). This partner staff's desire to avoid any reformatting of records was also addressed; rather than developing transformation procedures for the partner to implement, AJHS would carry out the transformations. This agreement helped the partner see the project as an opportunity to find a new use for its existing catalog system instead of seeing the work as a burden. By exploring how it could leverage its existing work, the project became far more attractive to this potential data contributor.

This experience in planning the manual transfer and correction of records was valuable when the Jewish Historical Society of Greater Washington (JHSGW) joined the

Portal. JHSGW is a museum and archives that documents the Jewish experience in Washington, DC.³⁹ While larger than some other project partners, JHSGW focuses on its museum materials rather than its archival items, so its archives program is comparatively small. While some larger partners provided OAI records, JHSGW's catalog did not have support for OAI. As with the partner above, FTP was used to transfer files instead. Its staff was enthusiastic about participating, but did not have extensive experience with transitioning data between systems. So Portal staff ran JHSGW's data through a custom script at AJHS after it was transferred, but before uploading the records into the website system. CJH assisted by helping manage the records' encoding. In return, the partner agreed to somewhat infrequent updates to minimize the amount of work needed at AJHS. This agreement created manageable workloads at all three organizations.

Flexibility was AJHS's primary solution for technical challenges throughout the project. Careful documentation provided repeatability for updates and extensibility when the project needed new templates for further work. AJHS harvested HTML from the Jewish Buffalo Archives Project, manipulated e-mailed EAD from the Jewish Historical Society of Greater Hartford, and worked with MaRC from the Berkeley Bancroft library.⁴⁰ All the partners showed ingenuity and a willingness to work things out when technological solutions were not straightforward. These efforts produced smoothly working protocols that were effective, manageable, and satisfactory for everyone involved.

Blending Metadata Content Conventions

Similarly, AJHS devised successful compromises between the initial plan to use Dublin Core content guidelines and the needs of smaller partners, to accommodate descriptive practice variations. Engaging with larger partners, who had relatively standard data that followed archival conventions yet did not totally match preexisting Portal records, provided experience to handle the issues encountered later with smaller partners. Working with and respecting the technological choices of partners are universal strategies for any collaboration. For example, Temple University Libraries, an initial partner, agreed to contribute records for its recently cataloged Philadelphia Jewish Archives Photograph Collection. Temple's data followed Dublin Core content standards, but had slightly different conventions than AJHS's. Most of its photographs have long descriptions in the title fields, while AJHS records have shorter titles. Eventually, AJHS and its partners decided to allow the variation in the data themselves and used display settings to truncate long titles. This type of data compromise, accepting variation, would be invaluable as the project progressed.

The choice to allow data variation served several purposes. The photos were a valuable collection for researchers and had recently been moved to Temple, so increasing their visibility was important. Temple's data were rich, professionally created, and would provide excellent discovery for researchers relying on the Portal's keyword searching. Data consistency was not a priority in the Portal system since it did not use faceted

search. Project staff agreed that well-described objects should be included in the Portal even if data controls did not match; individual archives have very different conventions even when using the same standards. Finally, allowing variation set a good precedent of respecting organizational data choices. If AJHS and early partners dictated strict data rules, other partners would be discouraged from joining and would not be able to contribute their voices to the project. Ultimately, variations in the content of titles, date formats, and standard vocabularies would all exist in the Portal. The only data rules adopted were those required for the Portal technology to function with clear object identification.

Practice in these implicit “data compromises” was valuable in working with JHSGW. Its record catalog includes objects, photographs, and archive records at both the folder and item levels. The Portal’s beta site accepted all types of records, allowing for diversity in partner descriptive practices, but one serious data mismatch arose. Many of the museum objects had identical titles based on their material types as is common in museum records, where items are often differentiated by other fields.⁴¹ While these titles display well in the JHSGW catalog system, initial tests in the Portal display led to strings of repeated results that, for example, all simply said “pin”; results that would have confused users. The “data compromise” was to create repeated title fields with batch editing, producing a second title for each record composed of the collection and type fields. This new title took priority in the search results display, and the records still retained the original titles in an undisplayed alternate field. Happily, JHSGW reviewed its data in the site and was satisfied with how the records appeared. This solution overcame data inconsistencies and worked effectively for the initial beta site.

The Jewish Heritage Collection (JHC) records at the College of Charleston featured another “data compromise” made in back-end data. The JHC documents the “Jewish experience in South Carolina from colonial times to the present day.”⁴² Not all of its records had a public-facing unique identifier, nor did all the original records have an internal ID or exportable system number. A unique, easy to replicate ID was necessary not only for record management in the database, but also to allow future record updates and batch edits. Instead of such an ID, JHC collections were identified by a combination of title, type, and, in some cases, by a manuscript number. However, each record did have a unique URL. So URLs became the unique identifiers the systems required. This choice created records with URLs for two fields, the URL linking field and the identifier field, but the display only showed one. The manuscript number, where available, became a description element so it would appear to users. The duplicate URLs created messy data, but the user was not affected and the data worked in a system where most other partners had different URL and ID content.

Balancing Workloads through Interpersonal Relationships

Staff Availability, Training, and Local Knowledge

All collaborative projects must address how to apportion the necessary work. Larger staffs often have the flexibility to reallocate responsibilities as needed. But an

organization with only one staffer and several volunteers, all with limited training, cannot shift regular assignments. Therefore, as the aggregating partners of the Portal, AJHS and CJH took on responsibilities, such as manual work on individual records, which would not have been common in more traditional, larger-partner initiatives.⁴³ All nonuniversity partners asked about the project's time commitment before agreeing to join. The AJHS staff needed to develop trusting relationships to convince smaller partners that AJHS understood and respected their wants and needs. Each individual AJHS Portal staff member committed to spending whatever time was needed with each partner, even if this choice resulted in a slow pace for the project. The Portal project staff accepted the limited availability of many partners and successfully worked within the resource constraints of the small-staffed organizations.

As the Portal developed, this familiarization process was formalized with an initiative in which CJH archivists personally visited a number of East Coast Jewish historical societies, museums, and special collections.⁴⁴ The participants appreciated these personal visits, as they showed the willingness of the project's lead organizations to commit time and resources to learning about their work and collections. Each in-person visit included time for the partner organizations to discuss their needs and their future plans as CJH staff discussed archival topics and the Portal. At some organizations, all-volunteer staffs were so small that even managing a daytime meeting was difficult. Carefully crafted memoranda of understanding let the organizations know what to expect and assured them that they were only committing to meeting with CJH archivists to provide basic data about themselves and their collections; any further collaboration would be their choice after further telephone discussion with AJHS and CJH data specialist staff.

The close relationships Portal and survey staff developed with the partners reveal how different types of knowledge interacted to enable or limit redistribution of workloads. The partners had local knowledge of their collections and their own data practices, while AJHS had stronger technical knowledge, a different professional perspective, and project-specific insight. The Jewish Historical Society of Fairfield County (JHSFC) record set, in particular, forced AJHS to deal very directly with this division in types of knowledge.

The JHSFC was founded in 1983 to "be a resource for the Jewish communities in Fairfield County, Connecticut, . . . in Jewish heritage and history."⁴⁵ The society kept archival records in spreadsheets, which were technically compatible with Portal systems; however, when AJHS staff reviewed JHSFC's data, they realized the records did not have formal parent collections, and many records described items without hierarchies or "intellectual arrangement," unlike most other Portal records. Records were not arranged into collections, series, and intellectual folders; they just represented an inventory of physical folders, numbered consecutively across all collections (over 800 folder ID numbers). Each record of a physical folder included a clear narrative description with dates, donors, and subjects, so that full-text searching of the records would identify items, but a lack of standardization meant that sorting records could not be done automatically.

Many of the physical folder titles relied on implicit intellectual arrangement information from the description (similar to standard archival practice, where titles should not repeat information from higher arrangement levels), but without formal series or collections, these titles would not be useful in a database. A title such as “Article in the *Advocate*” usually relies on a series title for context; a human browsing a record list can gather needed context from a description, but in a database without formal collection, series, and folder titles, the records would have been hard to parse.

Records from a single donation or collection were often only linked by similar descriptions or titles. Donations were not linked to previously accessioned parts of what would traditionally be considered the same collection. Records were essentially a physical folder inventory, but with multiple collections and with sections of different collections and series interspersed with one another. These issues did not stem from different technologies or conventions, but from professional best practices versus nonstandard concepts of how to define collections created in-house. As a smaller repository, the JHSFC simply didn’t have the staff time or training to organize records differently or to change its system for new acquisitions.

While organizations of all sizes struggle with problematic legacy description, small organizations are more likely to have such descriptions and to describe new collections in the same way to avoid the costs of implementing a new descriptive system. Larger archives often acquire large collections from organizations with a clear original order that can be used until formal processing. Perhaps the most significant reason that smaller archival organizations are likely to use nonstandard descriptions is that they do not need standard descriptions to do their work because a smaller collection is more manageable. Smaller organizations often do not have a continuous stream of researchers and can afford to rely on one staffer with a good knowledge of the entire archives. Staff rarely have to provide reference from collections they have not personally worked with. Long-term, dedicated volunteers with a knowledge of the community and institutional history can help to find a particular donation or useful item when needed. Most organizations, large and small, tend to put off upgrades until current systems are unworkable, however proactive they may try to be, so why would a small organization expend limited resources to overhaul a system that works? JHSFC relies on staff knowledge of the collections and a small number of researchers to make its description system work, but such a system would have been unwieldy for a larger collection.

To manage this unique challenge, AJHS manually worked with JHSFC’s spreadsheet to create records for “collections” based on creators and subjects. JHSFC staff did not have the additional time (and the project didn’t have sufficient funding) to collaborate in-person on this work, and the data issues did not become apparent until after the in-person visit had been completed. Questions were exchanged via phone and e-mail to obtain the needed local knowledge, but ultimately, AJHS staff focused on completing a set of sample collections in the hope that JHSFC could, in the future, refine and expand the list. Each collection was associated with a list of folders selected based on their titles and descriptions, which ignored physical location and acquisition date. Simply using find

and filter options in Excel, an AJHS staff member was able to identify potential collections, but a lack of local collection knowledge significantly hampered the work. The JHSFC staff would have likely been able to identify potential collections even before examining the records. They would have been better able to determine the provenance of particular sets of folders and to identify connections between local organizations. UK archivist Corinne Perkin has stressed the importance of a genuine appreciation of this local knowledge, and organizing the data without this knowledge was in fact a struggle.⁴⁶ Hopefully this work demonstrated a different way for the JHSFC to think about its materials, and the AJHS staff member was gratified to hear that JHSFC staff believed the collections identified would be useful for its on-site research and work.⁴⁷

Organizational Representation and Respect

Many case studies in the professional literature illustrate how vulnerable projects are to issues surrounding representation and credit. But for historical societies, or any organizations, that do not regularly collaborate with other archival institutions, such issues are not just complicated but also novel. Many smaller institutions were unsure if the significant benefits of providing online metadata access through shared services outweighed the potential issues around hidden costs, control, and representation. AJHS diligently addressed all reasonable concerns, recognized and discussed any project weaknesses, and sold the project's benefits as more valuable than potential costs, successfully working through these issues with nearly every potential partner. AJHS staff tried to be upfront about the benefits of the project to AJHS, allaying fears of any unstated agenda. Understanding the vested interest of all parties was vital to ensuring progress and the sustainability of the project.⁴⁸ The Portal helped satisfy AJHS researchers' needs by connecting them to small local collections and newsletters that AJHS did not extensively collect.

Addressing Concerns about Potential Hidden Costs or Unexpected Consequences

Several data-contributing partners expressed concerns about unexpected or hidden costs such as the possibility of losing income from digitization and use charges if they released any rights on the web. Other worries included reduced value of the collections for fund-raising, losing control of digital information or even of the physical archives themselves, and record creator privacy. Generally, AJHS successfully relied on positive and strong interpersonal relationships to help the partners manage and evaluate these concerns. AJHS's status as a fellow historical society was essential as well, as AJHS staff regularly deals with similar problems. Just like the partners, AJHS depends on the goodwill of individual donors, organizations, and researchers within a particular community. Historical societies and nonprofits with similar funding structures have particular concerns about reputation and use that differ from those of academic or public institutions. AJHS experienced these realities.

A major concern for many organizations involved ceding legal rights to materials. All data contributors had to informally grant the Portal project, at minimum, the rights to copy their metadata and use it to build the Portal. As the project grew, and goals of

future reaggregation developed, AJHS and CJH staff decided to ask new contributors to consider releasing their data to the public domain via a Creative Commons Zero (CC0) license. The use of this license is considered a best practice for shared metadata and is required for many shared web repositories, such as the DPLA.⁴⁹ Some aggregators, such as ArchiveGrid, do not ask for these rights but they cannot freely reshare data.⁵⁰ The ability to reshare data would make a significant difference to the future impact of the Portal, as a smaller topical project. However, recognizing that much time and effort went into producing the requested finding aids and records, AJHS attempted to demystify the legalese involved and reminded partners that income would not be affected unless they were charging researchers to answer basic questions about their holdings. Finally, AJHS promised not to reshare any data without consulting each partner.

These issues developed, in part, because many smaller societies did not have the established policies for aggregation common among larger organizations. For example, the Bancroft Library of UC Berkeley asked outright whether the Portal would use just metadata or images as well. When AJHS only needed metadata, Bancroft was glad to collaborate, as its staff had already discussed metadata rights internally when they contributed data sets to the DPLA and the Online Archive of California (OAC). While AJHS and CJH did not ask partners to create formal data-sharing policies, the project's memoranda of understanding described what data rights would need to be granted for Portal management (copying, editing our copies, online distribution, etc.). The discussions leading to these memos helped outline the decisions that would shape any future formalization of data-sharing policies. Many larger institutions had already shared records (even if only with WorldCat) and were familiar with both the terminology and the concepts involved.

In contrast, the public domain record request initially concerned the smaller Jewish Historical Society of Greater Hartford (JHSGH) in Connecticut. The JHSGH collects and preserves materials relating to the Jewish community of Greater Hartford and is committed to reaching a large "audience through exhibitions, publications, educational and community outreach programs."⁵¹ When AJHS staff explained that releasing the metadata would not affect its rights to digital objects or image use, JHSGH not only joined the project but also allowed the CC0 designation for its metadata. JHSGH staff, despite their concerns, were willing to talk about the issue because a relationship of trust already existed.

Even when issues of rights and legalities were settled, realistic concerns existed about online metadata privacy and misuse. Would community members object to finding their names associated with collections online? Would online access lead to unpaid misuse of images, or to use of materials that was not congruent with the organization's mission (for example, could materials be put to anti-Semitic use)? Portal staff could respond to these questions using personal experiences from AJHS, because, as a fellow Jewish historical society, AJHS might have faced similar issues. Despite the large number of both metadata and digital objects AJHS has online, the institution has few privacy complaints and usually manages them by restricting access to the actual materials when

necessary. AJHS does not suffer much misuse of metadata and uses a variety of technological solutions to minimize unauthorized use of images. Some of these concerns could not be completely eliminated; instead, AJHS argued that benefits outweigh any minor risks. AJHS used its experiences to address the worries of similar societies to whom responses offered by non-Jewish, non-historical-society, or massive aggregators might not have been as satisfying.

Another possible hidden downside that might have triggered concerns at some partner organizations was that online information on or access to materials might diminish the opportunity for curatorial interpretation.⁵² Similar concerns have been particularly acute within in the museum sector in relation to digitization, although calls for digitization and public access have generally won out in the profession.⁵³ Among smaller, more local societies, online access to metadata elicited a similar worry, even without digitization. In a small shop where the archivist or museum manager might know not only users' research topics, but likely the users themselves from within the community, a high level of "curatorial" and reference guidance is a regular part of document access and a sense of control over the interpretation and use of materials is strong. Making metadata available online can reduce an organization's active involvement in selecting materials for users, which leads to a more impersonal system, as users can request what they want to see without explaining their needs. Again, AJHS could not dismiss such concerns, but instead tried to balance them with expectations of increased usage. Many museums have found that "a virtual visit may precede or follow a physical tour."⁵⁴ People want to see in person what they see online. Researchers who want assistance will still value reference and curatorial expertise.

Autonomy and Power

The project was designed, from its very inception, to allow all partners to help determine its details and its future. Yet many of the smaller societies were concerned about losing their identities by associating with a collaborative project managed by a large organization with strong ties to the library, archives, and museum (LAM) professional community. These reservations seemed to play a more vital and central role in the Portal project than in other projects profiled in much of the collaboration literature. Because that literature rarely examines projects with size and power or knowledge disparities between partners, these disparities may have caused the high level of concern about autonomy. Partner discussions about losing funding, controlling access, receiving credit within the community, and retaining ownership of materials in reality seemed to speak to the larger issue of autonomy. AJHS overcame this issue successfully throughout the project with honesty and respect for such concerns.

Some partners expressed similar concerns about maintaining their autonomy as those described in the ethnic community archives literature. While framing it differently, Flinn et al. attributed autonomy concerns to historically marginalized ethnic and community groups' justifiable distrust of mainstream cultural institutions.⁵⁵ In the Portal project, AJHS still needed to address these concerns, although they stemmed from

resource and networking inequalities. AJHS did, in fact, have access to technological, financial, and professional resources that not all partners had (although the biggest partners had more support). However, AJHS did not want to use these strengths to threaten partner independence and hoped instead to strengthen the work and autonomy of all partners. AJHS acknowledged how the project would benefit itself, not just the partners, and admitted that, as an organizing partner, the LAM community and funders would probably recognize it for this work, while partner participation was necessary for any such recognition. Yet AJHS strived to hear partner voices throughout the project. Staff believed that the amount of work involved would far outweigh any benefits to AJHS, if not for a commitment to the ideology and value of sharing collections. By increasing overall interest in any collection, the potential resources and opportunities available to work with those materials increase; neither library science nor nonprofit fund-raising is a zero sum game. AJHS honestly felt that the benefits were as great to the partners as to itself.

All the compromises described above were made with the goal of addressing partner concerns, but AJHS also wanted to illustrate respect for its partners, even before they voiced any concerns. Site design choices provided this opportunity. Efforts ensured that “home repositories [were] clearly and properly identified” in the Portal.⁵⁶ One of the most basic, but influential, decisions was including every partner logo in equal size, alphabetically, at the bottom of the homepage. While initially a simple goal handled by the original web-design consultants, the choice proved so popular among the partners that AJHS chose to continue adding new partner logos despite design scalability difficulties. Partners regularly asked if their logos would appear on the homepage. However, after the increasing number of partner logos “broke” the original design, archival staff devoted many hours to learning and implementing website coding, ensuring partner logos were retained and new ones could be added. Most partners were eager to send logos or sample images to increase their visibility. For smaller institutions, representation was less about endorsing the project (as larger organizations might perceive their logos’ use) than about making sure site visitors recognized their contributions. When AJHS expressed care over partners’ logos and “About Page” paragraphs on the site, it demonstrated commitment to a collaborative venture.

Benefits to Partners

After addressing these concerns about AJHS’s goals, focus shifted to “selling” the benefits of the Portal. A central project goal was to drive usage back to partner websites, a valuable benefit that most partners appreciated. Each record linked directly back to the partner site’s record, or to another URL of the partner’s choice, such as its homepage, when a stable, individual record link was not available. On their own sites, partners had the option of providing additional data about the materials and their accessibility. AJHS explained that it offered both technical expertise and cost savings through this shared technological system. Driving traffic to partner sites allowed each partner to control user interaction after the initial Portal “introduction.”

While other archival metadata repositories exist on the web, AJHS argued that the Portal provides unique value to the smaller partners by both bridging technological gaps and serving as a topical repository. For instance, ArchiveGrid similarly gathers together data from archives, but it usually works with collection-level records already posted online in a machine-harvestable format.⁵⁷ AJHS's smaller partners often did not have records online or had them in nonharvestable databases. Partners probably would have needed technical support to contribute to ArchiveGrid and similar sites, whereas the Portal provided the opportunity to get their records on the web quickly. The topical, rather than general subject, nature of the project also appealed to many data contributors. By contributing their records, local Jewish historical societies became part of a larger community of Jewish organizations similar to themselves and to a project that would not exist without their particular contributions.

Work on the Portal can be repurposed by partners as an important first step toward future digitization. Many archives might have ultimately wanted to digitize materials, but digitization would have been prohibitively expensive, or posed copyright and privacy issues for which organizations might have been unprepared. The metadata-focused project standardized partners' descriptive data, which is a prerequisite for proper digitization. While not a digital repository itself, the Portal can provide the data needed for future partner repositories.

Another benefit of the Portal for partners became evident because of AJHS's position as a fellow historical society—AJHS shared how online metadata could help improve funding and donor support for an organization. As Stevens et al. state in their study of UK community archives, many organizing institutions may “lack an understanding of the challenging conditions in which community archivists operate. . . . Community archives rely heavily or even exclusively on project funding”⁵⁸ AJHS had a similar funding structure. AJHS's online metadata and finding aids helped improve its name recognition among individual supporters, record-donor organizations, and grant-making organizations, all of whom appreciate evidence of high-use and successful online projects. AJHS could therefore assure partners that accessible online information would create a beneficial, not a taxing, increase in use. Furthermore, this increase in use came in part from remote users who were willing to pay for photocopies, digitization, or licensing fees.

Finally, the unified nature of the Portal was a major selling point. Combining both local and national collections in one search provides valuable context for records. Particularly for collections split between multiple archives, the Portal acted as a recommendation system, pointing out connections to researchers. For example, AJHS houses the Baron de Hirsch settlement collection that contains information and photographs of a number of Jewish agricultural communities, including Woodbine, New Jersey. Temple University's collection, focused on the Philadelphia area, contains similar photographs of the Woodbine settlement and includes more recent materials that AJHS lacks. One search in the Portal brought up records from both repositories. Similarly, AJHS holds significant collections on the national B'nai B'rith, while the JHSFC has information on a

local chapter. These records could provide an important local snapshot for researchers. Users of the Portal could discover these two collections even if they were initially aware of only the AJHS collections. Local records gain value when viewed within a national context.

Conclusion

This article not only outlines the particular challenges that collaborative projects with smaller archives face, but also provides solutions that worked for the Portal project. Synthesizing elements from the literature on ethnic archiving, community archives, and library and archives collaboration, it pinpoints some little-discussed challenges. The challenges AJHS faced while negotiating interpersonal relationships, organizational identity concerns, informational inequalities, and technological management issues were somewhat similar to those described in the literature, but sprang from unique roots and therefore required novel solutions.

The Portal relied on many interrelated strategies to reach these solutions. Many of these strategies were uniquely devised or carefully tailored to the needs of small repositories; others would have been valuable on any collaborative project. Learning to sell the genuine benefits of a project is a vital skill, particularly when partners are not familiar with similar projects and are therefore unfamiliar with how the work will benefit them. Project organizers should learn to accept that each smaller partner may need somewhat unique technological solutions, and many might prefer manual techniques over automated ones. Any project with participants of different sizes will need to take proactive steps to illustrate mutual respect before problems arise; small issues can spiral into big disagreements, particularly when partners lack formal preexisting policies. Finally, project organizers must take the time to build rapport with smaller partners by listening to their needs. Understanding a partner is vital to building trust and to shared, meaningful decision making. While some of these strategies differ from those used with larger partners, most are just variations of strategies that are useful for all collaborations. Strategies that might be essential for small partners can be very useful, although not necessary, for collaborations between larger organizations.

The Portal project was unique because it involved a collaborative project with very different partner organizations (“large” working with “very small”), but without strongly divergent ethnic, social, or political motivations (similar missions). AJHS shared an ethnic identity and funding structure with many of the partners, but challenges still arose, caused by the disparities of large versus small and national versus local. Archivists and librarians have already realized the importance of representation for a wide range of cultural groups, and we have begun to recognize the need for authentic voices, not just in the records we keep, but in their selection, management, and presentation. We cannot preserve those voices without creating true partnerships with the local organizations that can solicit input from their constituencies. Unfortunately, without collaborative support, many of these organizations may be unable to ensure access to and preservation of the testimonies they collect. As a profession, we need to move forward to produce

new frameworks and practical guidelines that will empower institutions to embark on such projects.

ABOUT THE AUTHOR

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NOTES

1. I was the digital archivist on the project from 2011 to 2015 and am writing about my experiences with the permission of the project's current managers. I wish to thank Susan Malbin, Laura Leone, Kevin Schlottman, Jason Carlin, Rachel Harrison, Sara Ponichtera, Whirl-i-Gig, AJHS, CJH, and all the Portal partners and their staffs, not only for doing the work that made this project happen, but also for allowing me to write about their experiences. I also wish to acknowledge the generous support of the Righteous Persons Foundation which funded the creation of the initial Portal and its migration to its current platform. I would also like to thank the Council on Library and Information Resources (CLIR), which funded the associated survey project that helped guide the future of the Portal.
2. The Portal resides at <http://jewsinamerica.org>, where you can search for records from AJHS and all the partners.
3. Mary Stevens, Andrew Flinn, and Elizabeth Shepherd, "New Frameworks for Community Engagement in the Archive Sector: From Handing Over to Handing On," *International Journal of Heritage Studies* 16, nos. 1–2 (2010): 71, doi:10.1080/13527250903441770.
4. Diana K. Wakimoto, Debra L. Hansen, and Christine Bruce, "The Case of LLACE: Challenges, Triumphs, and Lessons of a Community Archives," *The American Archivist* 76, no. 2 (2013): 444.
5. Corinne Perkin, "Beyond the Rhetoric: Negotiating the Politics and Realising the Potential of Community-driven Heritage Engagement," *International Journal of Heritage Studies* 16, nos. 1–2 (2010): 107–22, doi:10.1080/13527250903441812; and Stevens, Flinn, and Shepherd, "New Frameworks," 69.
6. Andrew Flinn, Mary Stevens, and Elizabeth Shepherd, "Whose Memories, Whose Archives? Independent Community Archives, Autonomy and the Mainstream," *Archival Science* 9, no. 1 (2009): 84.
7. Wakimoto, Hansen, and Bruce, "The Case of LLACE," 442.
8. *Ibid.*, 451.
9. Dominique Daniel, "Documenting the Immigrant and Ethnic Experience in American Archives," *The American Archivist* 73, no. 26 (2010): 82–104; Elisabeth Kaplan, "We Are What We Collect, We Collect What We Are: Archives and the Construction of Identity," *The American Archivist* 63 no. 1 (2000): 126–51, <http://www.jstor.org/stable/40283823>; and Elizabeth Yakel and Deborah

- A. Torres, "Genealogists as a 'Community of Records,'" *The American Archivist* 70, no. 1 (2007): 93–113, <http://www.jstor.org/stable/40294451>. These three articles most strongly influenced development of the ethnic archiving aims of the Portal. Model aggregating projects and ethnic archiving websites included the Online Archive of California (OAC), <http://www.oac.cdlib.org>; the New Jersey Digital Highway (NJDH), <http://www.njdigitalhighway.org/index.php>; Moving Here: 200 Years of Migration in England, <http://www.movinghere.org.uk>; and Creating Communities, <http://creatingcommunities.denverlibrary.org>.
10. Daniel, "Documenting the Immigrant," 82–87.
 11. Timothy L. Ericson, "At the 'Rim of Creative Dissatisfaction': Archivists and Acquisition Development," *Archivaria* 33 (Winter 1991–1992): 71, quoted in Daniel, "Documenting the Immigrant," 89.
 12. Kaplan, "We Are What We Collect," 142–43.
 13. A thorough discussion of objectivity, agency, and postmodern views on archival appraisal is best found in other articles; this claim simply refers to the fact that professional theory provides many ways to practically evaluate archives, but suggests that no method can avoid the biases of the archivist and of society in selection. Consider Mark Greene: "We select because we affirm the necessity of such appraisal and our professional ability to do it thoughtfully and defensibly (though not objectively and scientifically)," in "The Power of Archives: Archivists' Values and Value in the Postmodern Age," *The American Archivist* 73 (Spring/Summer 2009): 27. Likewise, Hans Boom discussed selection saying, "Methods for limiting the effects of subjectivity must be employed, but these will never achieve a state of absolute objectivity—an impossible goal," in "Society and the Formation of a Documentary Heritage: Issues in the Appraisal of Archival Sources," *Archivaria* 24 (Summer 1987): 106. Considering what records a community chooses to value can be used as a method of selection. For further reading on bias and theory in professional appraisal, see Mark Greene, "The Power of Meaning: The Archival Mission in the Postmodern Age," *The American Archivist* 65 (Spring/Summer 2002): 42–55; Paige Hohmann, "On Impartiality and Interrelatedness: Reactions to Jenkinsonian Appraisal in the Twentieth Century," *The American Archivist* 79 (Spring/Summer 2016): 14–25; and Richard J. Cox, "The Documentation Strategy and Archival Appraisal Principles: A Different Perspective," *Archivaria* 38 (Fall 1994): 11–36; among many others.
 14. Yakel and Torres, "Genealogists." Yakel and Torres discuss how a "community of records" users can develop narratives of self-identity when they interact organically with a set of records and with each other.
 15. Andrew Flinn, "Community Histories, Community Archives: Some Opportunities and Challenges," *Journal of the Society of Archivists* 28 (October 2007): 153.
 16. Stevens, Flinn, and Shepherd, "New Frameworks," 60.
 17. Kaplan, "We Are What We Collect," 134–35.
 18. Daniel, "Documenting the Immigrant," 85–86.
 19. Stevens, Flinn, and Shepherd, "New Frameworks," 60. These authors also chose to focus on the idea of a class of archives that focus on identity and community engagement rather than on a distinction between activist and ethnic or other type of group.
 20. CollectiveAccess and Drupal are the software programs that, respectively, serve as the collection management system for the Portal bibliographic data and as the website content management system. They work together to allow users to search the Portal database from the website.
 21. John A. Fleckner, "Cooperation as a Strategy for Archival Institutions," *The American Archivist* 39 (October 1976): 447, <http://www.jstor.org/stable/40291917>.
 22. Jennifer Johnson and Edward Mandity, "From Real Challenges to Virtual Reality: Realizing Your Collection through Digital Partnership," *Computers in Libraries* 30 (November 2010): 18–22.
 23. Roger Guard, "Musings on Collaboration and Vested Interest," *The Journal of Academic Librarianship* 31 (March 2005): 89–91, doi:10.1016/j.acalib.2005.01.007. This commentary article mentions three projects involving organizations of different types: NetWellness, a website by three "fierce competitors," but all were universities; the Association of Academic Health Sciences Libraries, composed of major professional organizations, the National Library of Medicine, and medical school libraries; and OhioLINK, a partnership of all academic, research-level libraries (at the time of Guard's article).

While some of these collaborations are disparate in size, none include truly “small” organizations. Several more collaborations are described in Fleckner, “Cooperation as a Strategy,” 447–59. This early article urges archives to learn how to cooperate as libraries do. Projects discussed are mostly state-level networks.

24. Muriel Foulonneau, Timothy W. Cole, Charles Blair, Peter C. Gorman, Kat Hagedorn, and Jenn Riley, “The CIC Metadata Portal,” *Science & Technology Libraries* 26, nos. 3–4 (2007): 111–35, doi:10.1300/J122v26n03_08. The Committee on Institutional Cooperation (CIC) is a consortium of 12 midwestern universities.
25. Mary G. Early and Anne Marie Taber, “Evolving in Collaboration: Electronic Thesis and Dissertation Workflows in North Carolina,” *Collaborative Librarianship* 2, no. 1 (2010): 4–18; Yale Fineman, “Electronic Theses and Dissertations,” *Libraries and the Academy* 3, no. 2 (2003): 219–27, doi:10.1353/pla.2003.0032; Bethany Sewell, “Course-Related Materials at the University of Denver,” *College & Research Libraries News* 68 (September 2007): 514–17.
26. Suzanne van den Hoogen and Denise Parrott, “Communication, Collaboration and Cooperation: An Evaluation of Nova Scotia’s Borrow Anywhere, Return Anywhere (BARA) Multi-Type Library Initiative,” *Journal of Academic Librarianship* 38 (November 2012): 321–25, doi:10.1016/j.acalib.2012.08.004. This case study provides an example of such library collaboration. While size disparities did cause some concerns, each partner was already in a collaborative system within its library “type.” The article also focuses on library-specific management concerns.
27. Elizabeth Joffrion and Natalia Fernández, “Collaborations between Tribal and Nontribal Organizations: Suggested Best Practices for Sharing Expertise, Cultural Resources, and Knowledge,” *The American Archivist* 78 (Spring/Summer 2015): 192–237, doi:10.17723/0360-9081.78.1.192.
28. A variety of European case studies, referenced for their theoretical discussions throughout this article, similarly address ethnic archives collaborations. While much of the non-American, English-language literature refers to “community archives,” this term describes archives that US literature would often treat as ethnic or activist. Challenges are largely posed as results of the ethnic differences between the participants, not size or identity formation roles.
29. Thomas R. Caswell, “Unearthing Strategic Partnership: Collaborating with Archives to Build a Local History Collection,” *Information Today* 35 (January/February 2015): 4–10.
30. Robert P. Spindler, Gregor Trinkaus-Randall, and Prudence Backman, “Format for Cooperation: Cooperative Collection Registers at the Peabody Museum of Salem and the Essex Institute,” *The American Archivist* 51, nos. 1–2 (1988): 115–19, <http://www.jstor.org/stable/40293204>.
31. Joffrion and Fernández, “Collaborations between Tribal,” 193.
32. Zinaida Manžuch, “Collaborative Networks of Memory Institutions in Digitization Initiatives,” *The Electronic Library* 29, no. 3 (2011): 337, doi:10.1108/026404711111141070. This article classifies metadata-sharing projects as nonstrategic, low-barrier archival collaborations.
33. Libby Coyner and Jonathan Pringle, “Metrics and Matrices: Surveying the Past to Create a Better Future,” *The American Archivist* 77, no. 2 (2013): 461.
34. *Ibid.*, 472.
35. While AJHS is physically housed in a building owned by CJH and relies upon CJH for a variety of support services, it is independent and relies on these types of funding. AJHS and CJH are independent 501(c)(3) charities. AJHS financially contributes to CJH in exchange for many services and for space. CJH, in turn, seeks funding that allows it to provide low-cost and free services to AJHS and the other independent organizations that are its in-house partners. Like many historical societies (but unlike most university archives) AJHS relies on project grants and individual donors; no larger organization grants a regular, annual allocation or budget.
36. This project was made possible by the support of the Council on Library and Information Resources (CLIR). A project summary can be found on the Portal website, <http://www.jewsinamerica.org/projects>. An associated conference paper was presented by Susan Malbin, Laura Leone, et al., “All History Is Local: Expanding Access to American Jewish Archival Collections,” in *Innovation, Collaboration and Models: Proceedings of the CLIR Cataloging Hidden Special Collections and Archives Symposium*, ed. Cheryl Oestreicher (Washington, DC: Council on Library and Information Resources, 2015), 18–25, <http://www.clir.org/pubs/reports/pub169>.

37. "The Open Archives Initiative Protocol for Metadata Harvesting: Protocol Version 2.0 of 2002-06-14," The Open Archives Initiative, Document Version January 8, 2015, <http://www.openarchives.org/OAI/2.0/openarchivesprotocol.htm>.
38. Foulonneau et al., "The CIC Metadata Portal," 114.
39. "About Us: Mission and History," Jewish Historical Society of Greater Washington, <https://www.jhsgw.org/about-us/mission-and-history>.
40. A heartfelt thank you to Kevin Schlottman of CJH for engineering many of these strategies. See "Data Transfer Strategies," Jews in America, <http://jewsinamerica.org/content/data-transfer-strategies>, for the code used in some of these transformations.
41. "Decorative works, non-Western art, archaeological works, or groups of works are often known by a name that includes or is identical to the Work Type (for example, Chandelier, Rolltop Desk, Mask, or Portfolio of Sketches)." Murtha Baca et al., eds., *Cataloging Cultural Objects: A Guide to Describing Cultural Works and Their Images* (Chicago: American Library Association, 2006), 50, http://cco.vrafoundation.org/downloads/PartTwo_1-ObjectNaming.pdf.
42. "Home," Jewish Heritage Collection at the College of Charleston Addlestone Library, <http://jhc.cofc.edu>.
43. Foulonneau et al., "The CIC Metadata Portal," 114. Here, each partner completely handled its own data.
44. Malbin and Leone, et al., "All History Is Local."
45. "About Us: Our Mission," Jewish Historical Society of Fairfield County, <http://jhsfc-ct.org/mission.html>.
46. Perkin, "Beyond the Rhetoric," 119; Stevens, Flinn, and Shepherd, "New Frameworks," 69.
47. JHSFC staff member, informal conversation with Portal staff, 2015.
48. Guard, "Musings on Collaboration," 89.
49. Dan Cohen, "CC0 (+BY)," *News & Blog*, Digital Public Library of America, December 4, 2013, <https://dp.la/info/2013/12/04/cc0-by/>. Originally posted on Dan Cohen's personal blog, dancohen.org, November 2013.
50. Bruce Washburn, e-mail message to author, April 11, 2016.
51. "About: Our Mission," Jewish Historical Society of Greater Hartford, <http://jhsgh.org/mission.html>.
52. Eve Tam, "The Point: Digital Museums: Necessary Evil or Blessing in Disguise?," *ArtAsiaPacific* (November/December 2015): 34.
53. James Morrison, "Interaction Stations," *Museums Journal* 109 (March, 2009): 32.
54. Tam, "Digital Museums."
55. Flinn, Stevens, and Shepherd, "Whose Memories," 82.
56. Kristin R. Eschenfelder, *Controlling Access to and Use of Online Cultural Collections: A Survey of US Archives, Libraries and Museums for IMLS* (Institute of Museum and Library Services, 2009), 26–30, 55–65, <http://digital.library.wisc.edu/1793/38251>. While Eschenfelder's study focuses on digitization at larger organizations, some of the concerns he describes were echoed by the Portal partners, even though the Portal project did not involve digitizing images. AJHS applied this aggregated digitization collaboration strategy to the online metadata the Portal displayed.
57. Washburn, e-mail. Message mentioned the importance of regional intermediaries for ArchiveGrid's work.
58. Stevens, Flinn, and Shepherd, "New Frameworks," 70–71.