First Things First: Reengineering Finding Aids for Implementation of EAD

DENNIS MEISSNER

Abstract: Although it is tempting for a repository to begin its work with EAD by marking up its existing finding aids as they are, more satisfying results will ensue if the repository invests some time up front in assessing, and perhaps revising, its finding aid model. The Minnesota Historical Society recently completed such a project to evaluate the effectiveness of its finding aids and to reengineer their look, feel, and structure in order to make them more effective tools for delivering information about archival materials to distance users via the World Wide Web, as well as to in-house users. The author describes the process and the results of that intensive project.

About the author: *Dennis Meissner supervises the arrangement and description of manuscript collections at the Minnesota Historical Society and has been closely involved with the repository's EAD planning and experiments. He directed the internal task force that reengineered the MHS model for archival finding aids. A preliminary version of this paper was presented on 30 August 1996 at the annual meeting of the Society of American Archivists held in San Diego.*

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Introduction

IT IS SAID THAT GOD protects drunkards and fools, and we certainly do seem to be granted a few shots at stupidity without it necessarily ruining our lives...but that does not mean that we should go around making a habit of it. An important case in point is that before we try to convert our finding aids into EAD-encoded documents we ought to make certain that those finding aids are as well thought out as possible in terms of both their structure and their content.

When the Minnesota Historical Society (MHS) began attempting to implement EAD, we started at what seemed the obvious jumping off point: we took a couple of existing finding aids and started marking them up with SGML codes. The results were not good. As we marched through a finding aid, coding each data element we came to, we found numerous situations in which the relevant EAD element could not appropriately be used at that point in the structure of the finding aid. For example, we have always positioned the accession numbers associated with a collection as a string of numbers immediately following the end of the biographical or historical sketch. The EAD structure did not want them there, which made coding these numbers awkward, if not impossible. Similar situations abounded throughout the inventories. The EAD Document Type Definition (DTD) seemed to expect particular packets of information to be associated with other packets, and to find them at particular points in the finding aid.

Our initial reaction was largely anger at what we self-righteously believed to be the wrongheaded, inflexible, and poorly conceived structure and rules of EAD. We *knew* our finding aids to be lucid and well-organized tools that had served our users well for years. Therefore, the problems we were having had to be the fault of EAD; clearly, this was a DTD that had left the drawing board a little early and was not likely to serve the needs of any repository.

After we cooled down a little and started discussing our experiences in a calmer frame of mind, however, we began opening our minds to a novel idea. What if EAD *had* been carefully conceived and its data elements organized for a purpose? What if, instead, problems with the traditional structure and presentation of our finding aids were causing our encoding difficulties? This possibility launched us into a several-month-long task of picking apart the informational elements and presentation structure of our finding aids and comparing them with other institutions' finding aids, especially those that had already been successfully converted into EAD-encoded documents.

The Reengineering Process

We realized almost from the start that we were not interested in doing minor tinkering simply for the purpose of making our finding aids fit more comfortably into the structure imposed by EAD; that might have been accomplished by simply changing the order of a few elements. We were, in fact, interested in seriously rethinking the structure and presentation of the information in our finding aids to turn them into more valuable and intuitive tools for all of our customers. We were interested not in minor revising, but in complete reengineering.

Technology consultant Michael Hammer has written that "at the heart of reengineering is the notion of discontinuous thinking—of recognizing and breaking away from

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the outdated rules and fundamental assumptions that underlie operations.''[1] This was our strategy as our task group began reconsidering the composition of our finding aids. We made every attempt to start with a blank piece of paper—to forget as much as possible the comfortable look and feel of our collection descriptions and to try to think from scratch about the purpose of each information element in the finding aid, and whether each, in fact, succeeded in its purpose. As we tore apart the existing finding aid model, we simultaneously began to build a new model that would more optimally structure and present the descriptive information.

It is important to note that while we were trying not to be influenced by our existing practices, we also were making an attempt not to be swayed by EAD. We were not trying to reshape our practices simply to accommodate the predilections of the EAD designers. Our desire was, rather, to engineer a new finding aid model (or models) that would be easier for our customers to navigate and to interpret, thereby making our collection materials more accessible. The one new wrinkle here was that we were broadening the definition of our customer base to include distance users who would be led to our finding aids over the World Wide Web, rather than in our reading rooms and with the ready assistance of our reference staff.

Since all of us in the reengineering task group also serve two hours each week on MHS reference desks, we came to the table with some fairly good impressions of the more typical sorts of problems that our customers have with our finding aids. In the past, we had tended to see customer education as the way to deal with these problems; in other words, we had not perceived a need to change the finding aids, but rather a need to provide better education to users in understanding and navigating archival finding aids. Furthermore, we saw this customer education as a normal part of the process of working with our users, especially novice users, in the reference rooms. But we now began to see this constant process of explaining the structure and content of the finding aids as a drain on our reference resources that was probably unnecessary to a large degree. Even more significant was the fact that in delivering these finding aids to users over the Internet, we would not be able to bundle this reference support into the delivered product. It therefore became quite obvious early on in our sessions that we had to redesign the finding aid model to create a document whose purpose, structure, and content would be as transparent to the user as we could possibly make it.

In order to make this happen, our task group[2] began meeting regularly to critique our current finding aid model. We looked at each discrete informational element that we could identify, considered its particular role in informing the user about the collection or series, assessed how well it performed that function (without explanation by an archivist), and also evaluated the relative juxtaposition of these elements in the finding aid. Our methodology was to meet several times as a self-contained group, bringing an increasingly revised model to the table with each consecutive meeting. When we felt that we had developed a new model that dealt with the problems we had identified, we opened it up to a feedback group consisting of all the processing archivists at MHS. We revised the model again, based on their critique, and then expanded the feedback group to include

[1]Michael Hammer, ''Reengineering Work: Don't Automate, Obliterate,'' *Harvard Business Review* 68 (July/August 1990): 107.

[2]The other members—Frank Hennessy, Monica Ralston, and Cheri Thies, all of whom are very experienced with archival description—brought a strong commitment to the redesign process and were thoughtful analysts of customer feedback.

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non-processing archivists, all of MHS's reference professionals, and both internal and external customers. It was only after our model had survived all this criticism that we considered how well it would work as an EAD document. That evaluation brought some further fine-tuning, resulting in what is now the reengineered and accepted model for archival finding aids at MHS.

Problems with Existing Finding Aids

As noted already, the problems we found can be summarized by stating that our previous finding aids did not explain themselves, their purpose, or their contents well enough to permit a reasonably intelligent customer to understand and use them effectively without the intercession of an archivist. This is not to say that they were poorly written, or inaccurate, or that their descriptions of collections were incomplete. Rather, the problems lay in the way that they structured, ordered, and presented information. The effect of these problems in frustrating access to collections would be magnified tremendously when the finding aids were delivered over the Web, with no hope of explanation by a staff member. In evaluating our finding aids, we found that the problems they presented fell into four groups.

Information Elements Not Clearly Identified

This first area presented perhaps the most ubiquitous set of problems. Once we started examining the individual pieces of information in a typical finding aid, we found many instances of information not sufficiently identified to be understood by most users. Consider the first page of a traditional finding aid (Figure 1). The first informational units the user encounters are several cryptic statements at the upper left corner. This is actually structured bibliographic information about the collection that has been lifted from its MARC record and which is presented in a form that imitates the organization of information found on a traditional library catalog card. For librarians, archivists, and customers experienced in using library systems, these information elements may not require much identification, but many of our users find this information to be quite opaque. The first piece of information encountered is a catalog number, or in this case, the word ''ALPHA,'' which simply identifies this as a collection that has no discrete catalog number. It tells the staff that the containers comprising the collection are shelved according to individual numbers identifying a particular stack shelf location rather than by a collection-based call number, and that the paper finding aid for the collection is filed alphabetically by name element along with those of the hundreds of other collections that also bear the ALPHA catalog designation. There is no way that this information can be inferred from the finding aid; it requires experience or explanation.

The next three pieces of information do a similarly poor job of identifying themselves. The first, ''Franey, Edward Marx,'' is the name element identifying the creator and, most likely, the preeminent subject of the collection. This is followed by the title element, in this case the rather nondescript ''Papers,'' which is in turn followed by the date element, indicating the inclusive dates of the materials, as well as the narrower range into which the bulk of them fall. The third line expresses the extent of the collection in both cubic feet and number of containers. All of this data is reasonably transparent to librarians and archivists, but most users would probably have a much more difficult time deciphering it. Would less experienced users, especially distance users, interpret the name element as being the entity around which the collection materials coalesce? Would they

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ALPHA Franey, Edward Marx, 1899-1988.
Papers, 1940-1986 (bulk 1950-1970).
2.0 cu. ft. (2 boxes, including 1 v.).

BIOGRAPHICAL SKETCH

Edward Franey was born Aug. 10, 1899, in Eau Claire, Wisconsin. He attended both Wisconsin and Minnesota universities and began his journalism career in 1918 with the *Eau Claire Leader-Telegram*. Edward later worked as a roto editor, copy desk chief, and outdoor editor for the *Minneapolis Tribune* and *Minneapolis Daily Times*. He continued as a copy editor with the *Minneapolis Tribune* in May, 1948. He later wrote an outdoor column for the *Minneapolis Sunday Tribune* and retired in 1966. Beginning in 1947, and concurrent with his newspaper work, Edward participated as one of the original members, "Uncle Ed," of the WLOL radio and WTCN television show, "The Sportsmen's Roundtable."

Franey was a member of the Izaak Walton League for 35 years and held several offices including secretary of the South Minneapolis Chapter, Minnesota state secretary, and national director. He also edited the monthly bulletin of the South Minneapolis Chapter, *South Wind*, the official publication of the Minnesota Division, *Minnesota Waltonian*, and the *Minnesota Izaak Walton League Quarterly*. Franey worked on a number of conservation programs, most notably the "Save the Minnesota Wetlands" campaign and the Richard J. Dorer Memorial Hardwood Forest. He served as a member of the Governor's Conservation Advisory Committee during the late 1940s and early 1950s. Edward Franey died in December, 1988.

Biographical data was taken from the collection.

Frank Hennessy
July 1992

14,477
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Figure 1. First page of an inventory based upon the previous MHS finding aid model, depicting the presentation of bibliographic data, biographical sketch, accession numbers, processor's name, and the date of creation.

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Franey, Edward Marx
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CONTAINER LIST

Box 1. **152.F.7.5B**

National IWLA, 1958-1987. (6 folders)
National IWLA Convention, 1955, 1958, 1964-1965, 1968-1970, 1972-1974. (4 folders)
IWLA. Minnesota Division, 1946-1980, 1986. (5 folders)
IWLA. South Minneapolis Chapter, 1940, 1957-1970, 1972, 1975-1976.
South Wind, 1955-1962.
Save Minnesota Wetlands, undated and 1953-1961. (3 folders)

Box 2. **152.F.7.6F**

Fox Bounties, Tagged Fish Ban, Canadian Geese Project, and Reorganization Bill.
Boundary Waters Canoe Area, 1946-1972. (2 folders)
Memorial Hardwood Forest, 1960-1986. (3 folders)
William Voigt Correspondence, 1976-1984.
Governor's Conservation Advisory Committee, 1947-1951.
Sportsmen's Roundtable, 1947-1959.
Awards, 1963, 1983-1985.
Photographs.
Personal Correspondence, 1943, 1952-1986. (2 folders)
OWAA, Gridiron, *Minneapolis Daily Times* and *Minneapolis Tribune*.
Fishing Articles. (2 folders)
Pheasant and Cougar Articles.
Duck Hunting Articles.
Deer Hunting Articles.
Miscellaneous Articles. (2 folders)

Figure 2. Second page of an inventory based upon the previous MHS finding aid model, depicting the presentation of a container list.

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Franey, Edward Marx
p. 3

DESCRIPTION OF THE PAPERS

The collection falls into two major categories: that involving Franey's career as a journalist and that dealing with his activities as a conservationist and member of the Izaak Walton League (IWLA).

Izaak Walton League and Conservation Activities. 28 folders.

National IWLA, 1958-1987. (6 folders)

Administrative records generated by the league make up the bulk of these six folders. Included are reports to the national board of directors from the executive director and various committees; minutes of national board of directors meetings (1968-1987); budget statements (1968-1973); membership reports (1964-1965, 1972); dues structure (1972, 1974); articles of incorporation and bylaws (1971) and national directors policy (1972-1973); news releases; various resolutions considered for adoption (1964-1965, 1969); and announcements of league-sponsored activities. Also included are correspondence and newspaper clippings related to the activities outlined above and issues of the League's *Activities Bulletin* (1964-1965, 1971), *National Bulletin* (1972), and *League Leaders' Digest* (undated).

National IWLA Conventions, 1955, 1958, 1964-1965, 1969-1970, 1972-1974. (4 folders)

The bulk of the material dates from 1969-1972 and consists of convention programs; reports of national officers and committees; addresses presented, including a talk delivered by Sigurd F. Olson (May 13, 1958); IWLA endowment minutes and officers' reports (1969); biographical sketches of panel members and national officers (1969-1970); copies of a daily convention newspaper titled Ham-O-Gram (1970); resolutions considered for adoption; and Edward Franey's correspondence concerning the election of national officers (1968, 1970, 1972, 1974).

Figure 3. Third page of an inventory based upon the previous MHS finding aid model, depicting the presentation of narrative descriptive information.

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understand that these materials are the collected personal papers of this individual, or that the time span represents the dates of the materials in the collection? Would they necessarily infer that these are mixed materials stored in two boxes aggregating two cubic feet in volume? We archivists are so used to looking at this standard catalog-based set of expressions that we don't realize how little commonly interpretable information is being conveyed in these very stylized statements. We express a great deal of fairly standardized information about the content of our collections in what is essentially coded form, and we are not providing our current users—or a much larger number of potential users—with anything resembling a code book. The reasons for these stylized expressions are, of course, perfectly understandable and have to do with limitations imposed by tools like the catalog card, the MARC record, and the typewritten page, all of which have rewarded specific sorts of brevity in our descriptive practices. But we are now delivering finding aids as electronic documents, and brevity may certainly be sacrificed in favor of easier interpretation.

The finding aid pages in Figures 1-3 are rife with additional examples. Following the bibliographic information is a biographical sketch, but the user would probably have to read it through to understand that it is a narrative about the creator of the collection, and that its purpose is to supply context to the descriptive information that follows. The sketch is followed by the name of the archivist who processed the collection and the date the finding aid was written; the significance of these items to the uninitiated must be anything but clear. Even less intelligible are the accession numbers associated with the collection, which are printed along the lower left margin. We know how confusing this piece of information can be, since researchers in our reference room have with some frequency tried to request materials using only this number as an identifier. Finally, the container list page (Figure 2) includes the shelf locations of the containers at flush right in boldface. Nothing informs the customer that this is the single piece of information that is absolutely necessary in order to retrieve that container of manuscripts.

Just as problematic are the identification problems that we found on a much larger scale. For example, nowhere in the finding aid does it clearly identify the producing institution as the Minnesota Historical Society; a user could read every word in the document without learning this essential fact. Furthermore, the finding aid does not identify the collection as being part of the manuscript collections of MHS, an important piece of context for the user. Lastly, it does not identify the document itself as being a finding aid to the collection of materials that it describes. These missing identifiers cause occasional problems with in-house users; they would be vastly more troublesome in serving customers at a distance.

Information Elements Not Optimally Arranged

Another set of problems had to do with the arrangement of information elements throughout the finding aid. It was the difficulty of "shoehorning" some of the pieces of information in our inventories into the structure established by EAD that started us looking at whether we had arranged them sensibly. In considering the matter, it seemed to us that the units of information ought to appear in the order that would be most useful to the customer. In other words, the person studying the finding aid ought to be given bits of information in a sequence that will help determine—and quickly—whether the collection is relevant to his/her search, which parts of it he/she wants to see, and how to gain access.

In general, we decided that the finding aid should take the reader from higher levels of information to more particular levels. It would make sense to first identify the repository

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and the collection, then to proceed through units of information pertaining to the collection as a whole, then to administrative information about the collection, and then on to the information that describes the particular materials comprising the collection. We decided that our existing finding aid model did not follow that progression very well. Looking again at Figure 1, several such instances can be noted. First of all, had there been access or use restrictions imposed upon this collection, the word "restricted" would have appeared in bold upper-case characters at the very top of the initial page. While this is important information, it is not the first thing the user needs to see and is actually rather confusing when placed there; it really belongs with other administrative information. The same is true for the processor's name, processing date, and accession number; they are unhelpful at this point, they interrupt the flow of information about the collection, and they ought to be ported off to a later section composed of similar administrative information.

Alternating Levels of Description

This problem is similar to the preceding one in the sense that it involves information that is poorly arranged, as well as the failure of the finding aid to take the user in a predictable manner through information levels running from general to specific. This problem was highlighted early in our first experiment with encoding a couple of finding aids. It became obvious that our lengthy narrative descriptions of collection materials contained information pitched at several different levels. Some of the text described materials at the collection level, some at a series level, and some at a file level. The progression of levels sometimes changed directions several times within a narrative of several pages. This same progression of levels was then repeated in the container list that followed the narrative description. The effect of this, we came to realize, was more serious than the simple frustrations it caused in applying SGML codes. We were, in effect, forcing the reader to deal with narrative information about content at a lot of different hierarchical levels, and then to hold that information—and the hierarchical relationships—in mind while moving through similarly ordered information in the container list. This could be very frustrating indeed. It made a great deal more sense to have all information—narrative description and file listings—merge together at common levels so as to provide a single progression of information within one hierarchical structure.

User Instructions Lacking

This set of problems is closely related to those posed by poorly identified pieces of information, but the solution requires something more than improved identification. Our existing model was clearly predicated on the assumption that each user would receive an in-person orientation from an archivist before beginning research. The purpose, content, and use of the finding aids would therefore have been explained before the customer had any occasion to use one. That delivery mechanism for user instruction no longer works well, however; even in the reference rooms, the ratio of patrons to reference staff is too large to make sure that every user obtains sufficient orientation. Furthermore, it is a waste of precious time to repeat the same information about the finding aids to every customer. With distance users finding MHS collections via the Web, instruction not contained within the finding aid itself is a virtual impossibility. It therefore makes sense to build a user manual into the finding aid.

Perhaps the most notable—and egregious—example of lack of user instructions is that the inventories have not done a satisfactory job of telling customers how to request

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materials. The finding aids provide a lot of information about the collection materials, but they do not tell a person how to obtain them. How does a researcher request a box of collection materials? This level of information cannot be accommodated with better labeling; it necessitates putting instructions to the customer into the finding aid as standard pieces of information.

Many of the specific problems identified during our analysis are probably peculiar to the Minnesota Historical Society. There are enough similarities in finding aid construction from repository to repository, however, to suggest that while the specifics may change, the problems that other repositories can expect to encounter will fall into these four broad categories. These problem areas must be rectified if we are to produce descriptive products that are understandable and meaningful to our customers, especially the growing body of customers who find our descriptive materials from remote locations and have no immediate access to explanation by an archivist.

Revising the Model

As we deconstructed our previous finding aid model, we began building a new one that attempted to correct these problems. As I described earlier, we went through many revisions on the way to the current reengineered model. We have gone back and forth on some of the changes a number of times already, so I would expect that the new model is still to some extent a work in progress and may very well look a little different in another year. Some of the changes are significant, while others are very minor. Overall, however, the new model does represent some rather major departures from its predecessor in both look and feel, as well as in the assumptions it makes about how our customers will be using it and what sort of guidance they need. We have tried primarily to build into the model a set of wayfinding devices that we hope will help users better understand what they are viewing, the purpose the finding aid serves, how to navigate through it, and how to use it to locate collections materials relevant to their research interests.

The reengineered model is depicted in Figures 4-6, comprising three pages from the revised version of the same finding aid depicted in Figures 1-3. These pages give a fairly clear picture of how the problems were resolved.

First, let us consider the problem of poorly identified information elements. It is in this category that some of the most visually arresting changes were made, all the result of improved labeling. Figure 4 contains a logo and several headers that identify the finding aid and place it into a useful informational context. The user, especially the distance user, sees right away that this document comes from the Minnesota Historical Society, that it deals with one of MHS's manuscript collections, and that it is specifically an inventory to the papers of Edward Marx Franey. This gives the customer, especially one who stumbled onto this finding aid during a Web search, a head start in figuring out the relevance of what has been retrieved. Similarly, the group of bibliographic fields that before mimicked a catalog card are now arranged under an explanatory heading, and each element is clearly labeled. Similarly, in Figure 5, labels explain the significance of Frank Hennessy's name and the date that follows it, as well as the meaning of the disassociated accession numbers formerly positioned on page one. Perhaps a more important example is found in Figure 6: a new columnar container list layout features column headings that explain the significance of the location identifier, as well as the information found in the other columns. Furthermore, the container list has been renamed "Detailed Description of the Collection," which we think is more meaningful to a lay user than "container list."

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MINNESOTA HISTORICAL SOCIETY
Manuscript Collections

EDWARD MARX FRANEY

An Inventory of His Papers

OVERVIEW OF THE COLLECTION

Creator:	Franey, Edward Marx, 1899-1988.
Title:	Papers.
Date:	1940-1986 (bulk 1950-1970).
Quantity:	2.0 cu. ft. (2 boxes, including 1 volume).
Location:	See Detailed Description section for box locations.

BIOGRAPHY OF EDWARD MARX FRANEY

Edward Franey was born August 10, 1899, in Eau Claire, Wisconsin. He attended both Wisconsin and Minnesota universities and began his journalism career in 1918 with the *Eau Claire Leader-Telegram*. Edward later worked as a roto editor, copy desk chief, and outdoor editor for the *Minneapolis Tribune* and *Minneapolis Daily Times*. He continued as a copy editor with the *Minneapolis Tribune* in May, 1948. He later wrote an outdoor column for the *Minneapolis Sunday Tribune* and retired in 1966. Beginning in 1947, and concurrent with his newspaper work, Edward participated as one of the original members, "Uncle Ed," of the WLOL radio and WTCN television show, "The Sportsmen's Roundtable."

Franey was a member of the Izaak Walton League for 35 years and held several offices including secretary of the South Minneapolis Chapter, Minnesota state secretary, and national director. He also edited the monthly bulletin of the South Minneapolis Chapter, *South Wind*, the official publication of the Minnesota Division, *Minnesota Waltonian*, and the *Minnesota Izaak Walton League Quarterly*. Franey worked on a number of conservation programs, most notably the "Save the Minnesota Wetlands" campaign and the Richard J. Dorer Memorial Hardwood Forest. He served as a member of the Governor's Conservation Advisory Committee during the late 1940s and early 1950s. Edward Franey died in December, 1988.

Biographical data was taken from the collection.

Figure 4. First page of the same inventory using the reengineered finding aid model.

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SCOPE AND CONTENTS OF THE COLLECTION

Photographs, correspondence, telegrams, news releases, newspaper clippings, reports minutes, financial records, convention files (1955-1972), and printed material documenting Franey's career as a journalist and his activities as a conservationist and leader of the Izaak Walton League of America (IWLA).

Papers relating to Franey's journalism career describe his involvement with the WLOL Radio and WTCN Television Show "Sportmen's Roundtable" (1947-1959); the Ed Franey Outdoor Writer Award (1983-1985); his membership in the Outdoor Writers Association of America and the Twin Cities Newspaper Guild; and his work at the *Minneapolis Daily Times* and *Minneapolis Tribune*. A large number of articles written by Franey in the late 1940s are also included.

The larger portion of the collection documents Franey's 35 years as a member of the Izaak Walton League. Franey held various offices in the League and a good deal of the material relates to the South Minneapolis Chapter (1940, 1957-1969), the Minnesota Division (1946-1973), and the national IWLA (1955-1973).

The papers also document the League's and Franey's involvement in a number of conservation issues including the discontinuance of fox bounties, enactment of a ban on tagged fishing contests, the "Save Minnesota Wetlands" campaign, creation of the Richard J. Dorer Memorial Hardwood Forest, preservation of the Boundary Waters Canoe Area, and creation of the Voyageurs National Park. Correspondents related to these topics include Sigurd F. Olson, Orville Freeman, James W. Kimball and Charles Horn.

ORGANIZATION OF THE COLLECTION

The collection falls into two major categories: that involving Franey's career as a journalist and that dealing with his activities as a conservationist and member of the Izaak Walton League (IWLA).

RELATED MATERIALS

Records of the Izaak Walton League. Minnesota Division are in the Minnesota Historical Society manuscript collections.

ADMINISTRATIVE INFORMATION

Preferred Citation:

[Indicate the cited item and/or series here]. Minnesota Historical Society. See the Chicago Manual of Style for additional examples.

Accession Information:

Accession numbers: 14,477; 14,607

Processing Information:

Processed by: Frank Hennessy, July 1992

Figure 5. Second page of the same inventory using the reengineered finding aid model.

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DETAILED DESCRIPTION OF THE COLLECTION

Note to Researchers: To request materials, please note both the location and box numbers shown below.

Izaak Walton League and Conservation Activities:

Location	Box	Contents
152.F.7.5B	1	National IWLA, 1958-1987. 6 folders. Included are reports to the national board of directors from the executive director and various committees; minutes of national board of directors meetings (1968-1987); budget statements (1968-1973); membership reports (1964-1965, 1972); dues structure (1972, 1974); articles of incorporation and bylaws (1971) and national directors policy (1972-1973); news releases; various resolutions considered for adoption (1964-1965, 1969); and announcements of league-sponsored activities. Also included are correspondence and newspaper clippings related to the activities outlined above and issues of the League's Activities Bulletin (1964-1965, 1971), National Bulletin (1972), and League Leaders' Digest (undated).
		National IWLA Convention, 1955, 1958, 1964-1965, 1968-1970, 1972-1974. 4 folders. The bulk of the material dates from 1969-1972 and consists of convention programs; reports of national officers and committees; addresses presented, including a talk delivered by Sigurd F. Olson (May 13, 1958); IWLA endowment minutes and officers' reports (1969); biographical sketches of panel members and national officers (1969-1970); copies of a daily convention newspaper titled "Ham-O-Gram" (1970); resolutions considered for adoption; and Edward Franey's correspondence concerning the election of national officers (1968, 1970, 1972, 1974).
		IWLA. Minnesota Division, 1946-1980, 1986. 5 folders. Included are state executive committee and board of directors minutes (1948, 1964-1973); financial statements (1957, 1968-1969); membership records (1959, 1964-1964); lists of local chapter and state officers; state officers and committee reports (1961, 1966, 1969, 1972-1973); texts of addresses given at Minnesota IWLA state conventions, including one presented by Minnesota governor Karl Rolvaag (Sept. 25, 1964); resolutions considered at state conventions (1969-1973); and newspaper clippings covering

Figure 6. Third page of the same inventory using the reengineered finding aid model.

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The revised model makes several changes in the order of information elements that formerly were poorly arranged. The accession numbers, the processor's name, and the processing date all have been moved from the initial page (Figure 1) to a section created to hold administrative information about the collection (Figure 5). This has the effect of creating a more consistent and understandable arrangement of information throughout the inventory. As users progress through the finding aid, they see the following in succession: information relating to the repository, information about the collection as a whole (title, overview, biography, scope and contents, organization, related materials, and administrative information), and information about the parts of the collection (detailed description). The flow of information is more logical than had been the case with the older model, helping to make the finding aid more understandable at first glance. The several categories of data that comprise collection-level information are also more consistently ordered. First appears a terse, skeletal overview that establishes the collection's boundaries, then contextual information about the creator, a very general content summary, and finally information describing the collection's organization and arrangement. Next comes information of a purely administrative nature that *may* be useful, but probably not at this stage in the customer's perusal. The nature and content of the collection is thus presented in well-ordered stages that make it easier for users to interpret the finding aid, as well as to decide whether the collection is relevant to their needs, without having to read through the entire finding aid.

The problem of alternating levels of description was addressed partly through the changes in arrangement of elements described above, which create a smoother progression of information elements from the overarching to the particular. The principal improvement was accomplished, however, by merging most of the content narrative into the container list. As Figure 5 shows, only the narrative text that provides information at the collection level remains as a separate scope and content note. All of the more detailed narrative—those pieces that describe content at a subgroup, series, file, or even finer level—is pasted into the appropriate places in the Detailed Description section. The user is no longer forced to pull together different informational views about a particular component of the collection from multiple places in the finding aid. All information about a particular file, for example, is together in one place. The collection described in this inventory has a very flat arrangement structure; the benefits of bringing together all descriptive information about a given collection component is even more apparent in a collection that is more hierarchically complex.

Our final problem area was the lack of user instructions. While better labeling throughout the new model helps customers to understand the finding aid and navigate it more easily, the insertion of user instructions lets them know how to act on the information that they find. For local customers in our reference rooms, we anticipate that this will eliminate some unnecessary explanatory work for our reference staff, freeing them for more meaningful interactions with researchers. Distance users of the electronic finding aids will better know which components of the collection they want to use before they call or visit. The revised finding aid depicted here gives a few examples of such user instructions. Figure 4 contains a ''Location'' note pointing the user to the place in the inventory where the location of the collection materials is given. Figure 5 contains a ''Preferred Citation'' note that explains how to cite materials located in the collection. Figure 6 prefaces the container list with a note explaining the information needed to request particular containers of collection materials. These user instructions are small, few, and simple—and perhaps they seem too obvious to make a point of—but they represent an important type of way-

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finding information that had been missing from our preceding finding aid model. They fairly unobtrusively convey necessary information that customers previously had to request from a reference person, and eliminating that little necessity in each finding aid adds enormous value in the aggregate. I expect that, as this new model shakes down in actual practice, we will be modifying these instructions and perhaps adding others, thereby building a reliable user manual into the finding aid itself.

Implementing the Revised Model

The reengineered finding aid model described above carries some significant overhead. All of the additional labels, boilerplate text, and formatting structures impose an additional burden on either clerical or professional staff in producing each finding aid. In fact, it seems likely that the absence of some of the wayfinding information from traditional finding aids has to do with the creation of the model during an era when the typewriter was the principal recording tool; the relative laboriousness of that method placed a justifiable premium on brevity, and we are still breaking loose from that mindset. Performing EAD coding seems to add an additional burden of labor to each inventory, but we have found ways to more fully exploit the software tools we use to produce the finding aids in the first place to actually simplify the production of these products rather than making it more complicated.

We are producing our finding aids in Microsoft Word for Windows 95 and have created a set of three templates to accommodate our basic finding aid types.[3] The archivist writing the finding aid enters text into a skeleton document, associating the various finding aid components with particular text and formatting styles. The styles comprising each template correspond to EAD tags. The word-processed document produces hard copies of the finding aid and also serves as the basis for enhanced versions of the electronic document; it is then converted automatically into an EAD document by processing through an SGML parser that is available as a plug-in for Word. The style codes already embedded in the electronic finding aid are translated into their SGML analogs, and an EAD document results. Since the lack of SGML browsers currently makes it is more effective to deliver the electronic finding aids as HTML documents, another parser converts the EAD document into a hypertext document for easy delivery over the Web.

Time is saved in creating the finding aid in the first place because the archivist can enter text without worrying about fonts or formatting, and without having to input many of the boilerplate elements that are found in all MHS finding aids. Creating the documents in these style sheets also saves substantial editing and clerical time farther down the production chain. The EAD document is created largely automatically, with only a small amount of manual cleanup required, as is also true with the HTML document. It therefore seems likely that we will be able to produce all three products without necessitating much additional labor.

Conclusion

Shifting to a finding aid format that facilitates use of EAD is a major step. It is therefore important to make sure that the repository's finding aids are as effective as they

[3]The templates were created by MHS head of processing, Michael Fox. One template is used to create finding aids for collections of a single series, one for collections comprising multiple series within a single group or subgroup, and one for collections containing multiple series within more than one subgroup. The models accommodate varying degrees of hierarchical complexity within the container list.

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can be at enabling customer access to the collection materials that they describe; this is as necessary for finding aids delivered by traditional means as it is for those delivered as electronic documents. In order to ensure such effectiveness, a finding aid reengineering project is a necessary precursor to any large-scale plan for implementation of EAD. In particular, it is important to create finding aids that contain sufficient wayfinding tools to enable users to understand them and the materials they describe without the mediation of archivists. SGML markup is not the first step in delivering effective collection information to our customers; finding aid reengineering is the true first step.

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