

# Indian Lake Watershed Association: Modernizing Archival Management

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Submitted By:  
Martin Carrau  
Hushmand Esmaeili  
David Gibson  
Tyler Riggs

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Report Submitted to:  
Ruth McKeogh and Aaron Sakulich  
Worcester Polytechnic Institute

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# Abstract

The Indian Lake Watershed Association (ILWA), having organizational issues, tasked us with creating an Archive. Our objectives included gathering information on the best archiving practices, deciding the historical relevance of the documents, and creating an archiving manual. We created an Archiving structure, reorganized, and scanned all physical documents, and implemented the structure in both Preservica and Google Drive. These platforms will serve as the ILWA's Archives. We recommend the ILWA utilize the manual to keep the Archives organized and updated.

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After each section was written, we all read through the document to ensure grammatical correctness and flow. We also left comments and feedback on how the sections could be improved, which were addressed by each author in their corresponding sections.

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# Executive Summary

When we started this IQP, the Indian Lake Watershed Association (ILWA) held most of its records in storage boxes and they were looking to create an organized digital archive that they could use to easily access historical documents that deal with the Association. The storage boxes that acted as an archive were inaccessible to anyone besides the ILWA board member who held them. The files inside the storage boxes were also disorganized and this made it more difficult to locate specific documents.

The goal of our project was to create a digital Archive for the ILWA. For our first objective, we gathered information on what the best archiving practices are. For our second objective, we decided on the historical relevance of the documents. Lastly, for our third objective, we created an archiving manual to help document our archiving processes, as well as conventions and standards.

To gather information on the best archiving practices, we conducted multiple interviews with Amy Smid at the WPI Gordon Library's Archives & Special Collections. She guided us to the resources that she uses to conduct her archiving process as well as shared her expertise in her physical archive practices. Two resources she pointed us to include an archiving manual named *Archiving and Describing Archives and Manuscripts* by Kathleen D. Roe, and Preservica.org, which is an online archiving site.

To decide on the historical relevance of the documents we had to sort through the five banker's boxes and a Google Drive containing files we received from Aaron Sakulich, our sponsor at the ILWA. As we explored the contents of the boxes, we organized the documents based on what we believed was necessary to be included in the Archive, and what could be excluded. This included organizing the documents into similar categories including Projects, Lake Management, Finances, and History. The excluded documents were primarily papers that did not appear to fit into a category or scrap paper with an illegible scribble. This also allowed us to be able to organize our thoughts for our interview with Aaron, so we could further conclude what information was unnecessary and historically irrelevant based on our needs.

To create the archiving manual that documented our archiving processes, we used the information we learned from Amy Smid as well as our own archiving experience on this project. As we worked towards organizing the Archive, we noted down the steps we took to ensure that every document was easy to locate. The purpose of the archiving manual is to set standards for the Archive so that it can stay organized as the ILWA continues to populate the Archive once we hand it over to them.

Throughout our interviews with Amy Smid, we learned about different archiving

practices and methods that could be adopted into the Archive for the ILWA. These practices spanned multiple areas such as series and subseries, how to maintain a physical archive, and what should be preserved.

In our interview with Amy Smid, one main topic that came up was how to utilize series and subseries and sub-subseries to organize the Archive. “A series is defined as a group of records based on a file system or maintained as a unit because the records result from the same function or activity” (Roe 2008, p. 61). One key to our organization is standardizing the sub-subseries that can be contained within the series. The subseries and sub-subseries are the smaller levels of organization that the Archive structure follows. For our standardization of the Project series, we looked at all the documents that were given to us and decided upon thirteen sub-subseries that could be contained. Each series has different sub-subseries that documents can fall under.

When maintaining the physical Archive, we must make it mirror the digital Archive exactly. These ideas and rules were a direct result of our interviews with Amy Smid. So, if the digital Archive contains four sub-subseries for a specific subseries, we must create a folder for each sub-subseries in the physical Archive as well. This also includes the naming conventions used for the folders and the documents. Having uniform folder names allows us to organize the folders in alphabetical order. This makes it much easier to locate documents and folders when you know the name of the file.

One key discovery we made while interviewing Amy Smid was the subject of active vs. inactive files. We had not thought about this before she mentioned it to us during our second interview with her. In our archive, we should only have inactive records, where the term inactive is used to describe a file that is either two years old, or no longer in use. The inactive Archive needed to be stored in a location that would be accessible for future use without concerns of losing access to any data or files. After careful consideration and comparing Preservica with Google Docs and Archive.org, we found the features available in the Preservica software would best meet our needs.

Preservica’s features go beyond data storage and include data transfer into encrypted files. These files are also able to be translated to different file formats as needed regarding technological advances, which will offer protection from the risk of losing access to these files. Preservica also offers protection against file corruption, if your file gets corrupted while changing file types, it will revert the file to its original state. In comparison, Google Drive does not do this as it is mainly used for quick access to edit documents.

Through our interview with Aaron Sakulich, we gained a better insight into what documents should be included in the Archive. This was decided as our main way of figuring out what documents would be considered for the Archive as Dr. Sakulich had knowledge of the documentation we were handling as well as an idea of what is expected from us as a



product. In the meeting, we learned that most of the documentation presented to us initially would be relevant to the Archive. One example of documentation we found to be useful through our interview was the ILWA's annual reports. Dr. Sakulich brought up the point that this type of information and documentation can be extremely useful in an Archive for the ILWA board members, to be able to look back on.

When it came to ensuring the Archives' easy implementation and future updates from the ILWA, we decided it would be best to create a manual. The thinking behind creating an archiving manual was that it would allow us to share all our experiences and know-how from creating the Archive for the ILWA. The first step in the manual is to identify a file worth uploading to the Archive; physical files should be scanned and digitized, while making sure the file is in PDF format. The next step is to decide whether the file belongs in Google Drive or Preservica. The guideline set is that any files that are more than two years old and are no longer in active use should go to Preservica Archive; all other files should go to Google Drive. The next step is to determine where the file should go within the two Archives, with both platforms utilizing identical organizations. The structure comes in three layers including series, then subseries, and finally followed by sub-subseries. The Archiving Manual provides the subjects behind each series, subseries, and sub-subseries. Once the correct sub-subseries for a file is located, the file may be dragged and dropped into it or inserted via the "Add" button. Finally, the file should be renamed according to the Archiving Manual's specifications.

After organizing the documents, creating the Archive structure, and creating the Archive manual, we were able to populate the online Archive with scanned documents. We found that using the flatbed document scanner for the newspaper clippings as well as the larger maps, and scrapbooks was the easiest option and that the letter-size document scanned much better and faster on the feeder scanner. This process is done by us first allowed for us to review our manual, as well as our structure to ensure that it was easy to follow and easy to populate for the ILWA members that will need to complete this in the future.

Our results were found by addressing our different objectives to accomplish our overarching goal: to establish a partially-populated Archive for the ILWA. These findings can impact the preservation of the history of both the ILWA and the Indian Lake community. We established an archiving structure and methodology that we recommend that the ILWA follow in their future work of preserving their institutional memory and the heritage of the neighborhood.

Donations of physical records and artifacts will naturally be given to the ILWA for preservation purposes. We recommend that the ILWA should have donor's agreements (or deeds of gift), as found in Appendix A, that set legal backing that the donated items are now the property of the ILWA.

Once the ILWA has in their possession a box of records related to a project, for example, they should arrange them according to the archiving structure that we established. Any intellectual relationships between documents should be identified when arranging the documents. For example, when the ILWA gets a box full of random documents, in one case they may find many records related to a project, like a Lake Cleanup. In this scenario, all the documents related to that cleanup project should be grouped. Further organizing of those documents should follow the organizational structure for a Project folder, as found in the Archiving Manual in Appendix B. Any preservation needs should also be identified, including deteriorating folders that need replacement or the removal of metal bars in hanging file folders. One major aspect of our work was to rehouse the records in the five boxes given to us. We recommend that new manilla, acid-free folders with the proper naming conventions, as per the Archiving Manual in Appendix B, are given to the records going into the physical Archive.

Once the physical records are arranged in the right folders according to their groupings, we recommend that the ILWA digitize the documents and add them to the digital repository. For the digital repository, we recommend that the ILWA utilizes the Preservica account that we created as an inactive Archive. We then recommend that Google Drive serves as the active Archive. This will allow the ILWA to keep their records more organized with less clutter from older documents while allowing them to maintain a level of privacy in current activities. Once documents and assets enter the inactive Archive, we recommend they be kept unchanged, to not alter the ILWA's history. We recommend that both Archives, the Preservica and the Google Drive, maintain the structure we have provided.

The next recommendation that we believe is very important to the ILWA is regarding the printing of unnecessary documents. Emails, Word documents, and PDFs that are electronically generated do not need to be printed out to be kept for future reference. For example, any online articles, journals, or newspapers about a project could be saved as a PDF and then saved in the active Archive. Moreover, the addition of handwritten scribbles to the Archive is another consideration. Many documents sorted through were handwritten notes of meetings or other events, as these accounts are good to have on record for the person who wrote them; from an outside perspective, they are illegible and hard to understand. We recommend taking these notes and then transferring them to a Word document with their meaning written out.

We aimed to give the Indian Lake Watershed Association broader access to their history and the documents they had stored away. Before the Archive existed, access to the documents was limited to the owner of the boxes; now every ILWA member can easily view the archived documents from anywhere. Through the physical and digital Archives that we created, the ILWA can view all their documents without the hassle of riffling through banker's boxes trying to find one specific document. With the help of Amy Smid at the WPI Gordon Library's Archives & Special Collections, we created an organizational

system that makes this all possible.

This project has potential implications for and impacts on the Indian Lake neighborhood, the ILWA, and the City of Worcester. First, through the preservation of its history and heritage, the neighborhood can document its learnings and set precedence for its development, for example, its urban development as in the case of the history of Route 52. Moreover, the preservation of the heritage of the neighborhood can become a community project that brings the neighborhood closer together. Narratives and stories have the power of establishing patterns and identity, as well as empowering their community members. Second, having created an Archive for the ILWA, the project has implications for strengthening its institutional memory and could allow it to grow by allowing its members to easily draw from archived information. Lastly, this project could lead to a wave of neighborhoods in Worcester establishing local community-based Archives, and a movement to preserve the heritage of the City.

# Introduction

In our IQP we worked alongside the Indian Lake Watershed Association (ILWA) to help preserve their institutional history and the history of their neighborhood. The ILWA is a neighborhood association that works to organize social events for its residents and preserve Indian Lake. To preserve the heritage and history of Indian Lake we created an Archive of their documents that can be made accessible to the residents of the Indian Lake neighborhood.

The focus of our research was centered on establishing an organizational structure that the ILWA can use to preserve its documents and institutional records. The challenge exists in forming a sorting system that can identify each document while also being easy to use when trying to place future documents in the repository. This organizational structure should allow every document to be easily located based on its intellectual structure (Roe, 2008).

Currently, the ILWA has many physical documents that make up its institutional records. These physical records are decentralized, vaguely organized, and not easily accessible. These documents need to be organized into specific, well-documented categories and sub-categories, as well as digitized and added to a digital repository. This medium needs to be easily accessible by ILWA members. There also needs to be a way for the public eventually to also access the older, historical documents.

The scope of this project included five semi-organized boxes filled with varying records and documents saved by the ILWA. We created a structure based on the existing institutional records and documents, both in physical and digital format. Moreover, we kept in mind the future applications and uses for the Archive when designing this architecture. Finally, we researched the principles and best archiving practices that will inform the design of our Archive.

# Literature Review

Indian Lake is a 204-acre lake set in northern Worcester, Massachusetts. This area also includes the surrounding neighborhood and Sears Island, which lies within the lake. The history of the ILWA goes back to the time that the Association protected the lake from being paved over to make way for Route 52 (nowadays I-190). This never ended up happening in part because of the work of the local Indian Lake residents. The history behind this event is still preserved in newspaper clippings and documents that the Association has in its possession. Since then, the Association has played a role in maintaining the lake, both historically and recreationally (“Indian Lake History”, n.d.).

The ILWA is a local neighborhood nonprofit association that is involved in organizing events in the community while also maintaining the lake and the surrounding community. Since its establishment in May of 1986, the ILWA has overseen the lake and the surrounding neighborhood, hosting various events like yearly ice fishing days as well as various clean-up days. All members of the ILWA are residents in the neighborhood so they hold a large responsibility for keeping their neighborhood clean (“Indian Lake Watershed”, n.d.).

The major stakeholders of the project are the ILWA and the people who live around the watershed. According to niche.com, the Lake community has approximately 1,696 residents, of whom 61% are white and 26 % are Hispanic. Those living along the lake's shores tend to be young professionals, with the average age of the area being between 25 and 34 years old. These young professionals on average tend to have at least some college education, however, this is not a very affluent area with the median family income in the area at approximately \$40,000 which is shy of the national average of \$62,843. Of all these residents, only 31% own their homes. It is expected that these 31% and anyone who hopes to own their own home or raise a family in the area are the major stakeholders as many of these residents would like to see the history of the Watershed preserved. This would ensure that the expansive history is not lost in time using an online resource that can be accessed by anyone around the world (“Living in Indian Lake”, n.d.).

The Association has had many projects since its inception, from a handful of projects involving WPI’s IQP program to erecting and maintaining two memorials around the lake. The ILWA’s main projects have been the restoration and upkeep of the Frostholm Memorial as well as the upkeep of the Hapgood-Brooks Memorial. The ILWA hosts biannual lake clean-ups to maintain the environmental quality of the lake. The ILWA also spearheads treatments for invasive aquatic plants to keep the lake free of milfoil and other dangerous plants. This treatment was the resulting recommendation of a project sponsored by the ILWA in cooperation with WPI’s IQP Program. Other Projects have been done through WPI including the “Lake Loop”, the Little Indian Diagnostic Study, and a project on the history of the lake.

The research we conducted will help us learn how to properly archive historical information, documents, and photos for the ILWA. Working to preserve community knowledge such as this is crucial to informing heritage movements. Smith (2010) found that:

“Not only must concepts of intangible heritage be developed, but also concepts of heritage must usefully incorporate an understanding of the nature of intangible experiences and values that are associated with the physical aspects of heritage. Moreover, it is important to understand that these experiences and values are themselves open to management and regulation.”

Last year, one student started to take on this task with his IQP, in which he proposed a way to distribute the Archive digitally to many people around the neighborhood; however, this came more like a proposal rather than a completed product. This project relates to that other project through the shared end goal of creating an Archive for the IWLA and its community. We will build off that project by researching and proposing the best organizational methodology for the Archive to follow.

The main issues we aim to solve stem from the ILWA’s predominantly decentralized and paper-based record-keeping system. For example, there were five boxes of physical information given to us. These boxes contain documents relating to community projects, board meetings, Indian Lake history, and ILWA financial statements and bills. Some issues that arise due to the physical format of the documents include limitations in accessibility, storage space, document degradation, and organization.

When dealing with accessibility, having all the files only exist in one place at any given moment limits the number of people who can access the stored information. This is even more true when the files are stored inside the home of an individual. When the information is needed, the only person who has access to it on demand is the individual holding all five boxes in their home. One possible approach to this solution is to find a shared space where the information can be available to those given access.

Another issue with the physical documents is the amount of space they take up. All in all, the documents are contained inside five banker’s boxes. Storing this many boxes can become a burden when trying to put them all in the same location. An approach that can be taken to solve this includes a digital platform. Having all the documents digitized allows for easy storage in the cloud instead of taking up closet space.

One major issue with physical documents is that even the maximum potential for the physical organizational structure has its limitations. One key to having a good organizational structure within an Archive is to identify the intellectual relationships of the documents (Roe, 2008). Having the documents in a physical format makes it much harder to organize documents by multi-level relationships such as the date and content type. For the documents that we are dealing with, categorizing the documents into folders makes sense when trying to locate a file,

but physical folders take up a lot of space and there might only be one document in a folder. This causes the Archive to take up much more space than what is needed. A potential solution to this problem could be to have a digital folder system, which organizes without needing more physical storage space.

Another major issue with physical documents is document degradation. This is when the stored documents begin to fall apart over time due to how they are stored. In the boxes of documents given to us, we have seen older documents have tears along edges and fold lines. This is caused when the documents were originally stored and folded to fit into folders that are not appropriately sized. An approach to this issue would be to have digital copies made for each document so that the information is preserved. Keeping the originals out of use also helps preserve the documents over time (“What is the best way to preserve”, 2021); the less use they see, the longer they will last. Therefore, digitization is key for looking back at old information. For the physical copies, they must be stored in new folders and carefully placed to avoid fold marks on the surface of the pages.

To understand the major points of consensus and debate about the preservation of heritage and institutional memory, we will explore some of the theoretical frameworks surrounding heritage and of where its value lies. Value is the main reason for heritage preservation. “It is self-evident that no society makes an effort to conserve what it does not value” (De la Torre, 2002). As it is both tangible and intangible, value is difficult to quantify. What framework, then, can be used to assess value? There are multiple studies that present frameworks that attempt to assess this question of value (Monteiro, Painho & Vaz, 2015; Xu, Rollo, Estaban, Tong & Yin, 2021). The intrinsic value of cultural heritage is an important consideration in this discussion. Intrinsic value “reflects the importance of place for community, particularly the collectively sustained sentiments attached to and created around it” and it is “produced in the process of collective meaning-making, spanning overtime”; moreover, the “meaning of cultural heritage is constructed and agreed upon by the members of the community, enacted in the conversations, narratives, stories that are shared, witnessed and retold” (Roszczyńska-Kurasinska, Domaradzka, Wnuk, & Oleksy, 2021). Based on these criteria, the heritage of the Indian Lake contains much intrinsic value, and its meaning is held and created by the members of its community. Apart from the intrinsic value of heritage, there are multiple ways in which the value behind the preservation of heritage can be framed.

First, the conservation and preservation of heritage, including its protection, can serve as tools for urban development and planning, which is particularly relevant for the urban context of the Indian Lake neighborhood. Additionally, “understanding the relationship between the surrounding heritage and the citizens, especially the local communities, can play an important role in urban and regional planning” (Monteiro, Painho & Vaz, 2015), which has a direct impact on economic value.

The role that the cultural heritage of built infrastructure has within sustainable urban development has been previously explored (Tweed & Sutherland, 2007). We will expand this statement further and say that *unbuilt* cultural and community heritage has a role to play within sustainable urban development; that is, unbuilt infrastructure and cultural heritage and its relationship with sustainable urban development create value in the preservation of heritage. An example of this is the neighborhood's push against the proposal of building Route 52 over a portion of Indian Lake in 1970. Such action from the neighborhood members and the documentation and preservation of this history have set a precedent for sustainable urban development for the community. Moreover, heritage preservation of this nature has the potential to shape the community's identity and empower the inhabitants to see themselves as active agents of change in their neighborhood.

Although heritage has intrinsic value, it also serves as a means for community engagement and unifying identity. The movement against building Route 52 over Indian Lake is an example of community planning. One approach to community planning is asset-based community development, which "seeks to uncover and highlight the strengths that already exist within communities" (Sapu, 2009). This approach has the potential to mobilize community members to create positive change in their neighborhood. Instead of focusing on the shortcomings and challenges of a community, the community makes use of its assets – like the skills of inhabitants, the dedication of citizens' associations, and the resources of formal institutions – to help them progress. Some concrete actions to take in this approach include "collecting stories of community successes" and "building relationships among local assets for mutually beneficial problem solving within the community" (Sapu, 2009). The preservation of the community and cultural heritage in the Indian Lake neighborhood has the potential to bring the neighborhood together by making the memorialization of its events and artifacts a collective goal and a community project.

According to Tweed and Sutherland (2007), built heritage contributes to the satisfaction of human needs, by analyzing it through the lens of Maslow's hierarchy of needs. We will adopt this approach to analyze how community heritage contributes to the satisfaction of human needs. Maslow's hierarchy of needs consists of five levels and is usually depicted as a pyramid. The most basic need, physiological need, is at the bottom level. According to this theory, to satisfy higher needs, the lower, more basic needs must be satisfied. The pyramid is also divided into deficiency needs and growth needs. The first four levels are often referred to as the deficiency needs and the top level, self-actualization, is known as growth or being needs (B-needs), which include "beauty, meaning, truth, wholeness, justice, order, simplicity" (Tweed & Sutherland, 2007). In this light, communities and heritage are not merely functional and so they contribute to the satisfaction of higher needs rather than just basic needs. It can be argued, then, that heritage preservation very well falls into the B-needs due to its contribution to truth, meaning, wholeness, and other aspects, and hence allow for individuals and communities to grow and advance.



Maslow's hierarchy of needs, however, has its limitations and multiple papers explore them (Fallatah & Syed, 2017; King-Hill, 2015; Trigg, 2004). Firstly, a key limitation of this theory is that it only focuses on the personal growth of the individual (Trigg, 2004). Additionally, although humans do have needs that need to be met, the rigid hierarchical approach in Maslow's hierarchy of needs is limited. The theory does not account for differences in the "cultural needs of societies and their unique social and intellectual needs" (King-Hill, 2015). Moreover, the focus on needs for self-actualization and self-fulfillment assumes an individualistic society, whereas a collectivist society and a community-oriented approach to fulfilling human needs would be a better framework to analyze the importance of heritage preservation. It is in this context, one in which "community and acceptance and belonging within this structure" (King-Hill, 2015) are the focus, that the value of heritage preservation is better understood. The heritage and history are of, and belong to, the community; hence its value is better understood beyond just the fulfillment of the needs of individuals. Therefore, Maslow's hierarchy of needs is useful in the sense that it offers a distinct range of human needs. Some of these needs are directly linked to the importance and value of heritage preservation in individual growth, but it comes short in its rigid hierarchy.

A major focus of our project is that of preserving the institutional memory of the ILWA. One may wonder: what is institutional memory, what is its purpose, and why is it important? According to the Dictionary of Archives Terminology, institutional memory is "the information held in employees' recollections and experiences that provides an understanding of the history and culture of an organization, especially the stories that explain the reasons behind certain decisions or procedures"; this also includes institutional records. Corporate memory is a synonym of institutional memory. According to Garaba and Mahlasela (2018), university records are essential to the corporate memory of an academic institution. Moreover, institutional records need to be managed throughout their life cycle for "accountability, transparency, good governance and for reference purposes" (Garaba & Mahlasela, 2018). In the case of accountability, records provide evidence of activities.

The National Archives of Australia ("Information Management Standard", n.d.) states that "well-managed business information is a valuable asset that contributes to good government". In this sense, preserving the institutional memory of the ILWA can lead to more efficient business and operations, inform current and future decision-making, and demonstrate accountability and transparency. Ultimately, the preservation of institutional memory can support the ILWA in its mission to help restore and preserve the environmental quality of the Indian Lake and the surrounding areas.

A question that we attempt to address through our research is how we will preserve the collected materials related to the history of Indian Lake. According to Ventresca and Mohr (2017), "archival methods are those that involve the study of historical documents; that is, documents created at some point in the relatively distant past". These documents provide us "access that we might not otherwise have to the organizations, individuals, and events of that

earlier time”. The Archive that we hope to create will provide future generations access to documents that point to the community’s and Association’s past.

Finally, there are several challenges and major points of debate that come up in the work of preserving heritage. Some of the challenges faced by those doing the work of preservation include the “discussions of values, of how social contexts shape heritage and conservation, and of the imperative of public participation” (De la Torre, 2002). Further, in the current social and political context of conflicting ideas, another specific challenge is democratizing the heritage work in the decision-making process of what is preserved and how it is done.

The success criteria of this project are based on our main goal: to create and establish a partially populated digital Archive for the ILWA that will be handed over for future population. The Archive should be organized efficiently, such that it is easily accessible by the Association. It should also be editable. It is important that the Archive be built upon in the future and kept up to date for future use and access. The most important goal for our group will be to create a proper structure for all the varying types of documents and information going into the Archive. Ultimately, we hope to create an Archive that not only preserves the administrative documents of the ILWA but that can also contain and preserve the history of the Indian Lake and the community. Our final recommendation will then need to consider the future population of historical (non-administrative) documents and oral histories.

# Methodology

The goal of our project was to create an Archive for the ILWA. The Archive will serve as a repository for future generations and contain documents and materials that point to the history of the Indian Lake and the ILWA. A major focus of the Archive was to document and preserve the institutional memory of the ILWA. We had three objectives that we met to create this repository.

For our first objective, we gathered information on what the best archiving practices are, including potential digital platforms for preservation. Related to this first objective, a question that came to mind was: how do we organize decades of documents that belong to an institution or organization?

For our second objective, we decided on the historical relevance of the documents. The documents that we were given ranged in importance and relevance, and a question that stood out was: how do we know what documents are important that should be included in the Archive?

For our third objective, we created an archiving manual to help document our archiving processes, as well as the conventions and standards that we created. Since the Archive is to be maintained and expanded by the ILWA, a question that came to mind was: how do we present the archiving process that we used and refined for future maintenance of the Archive?

We conducted semi-structured interviews with Amy Smid at the WPI Gordon Library's Archives & Special Collections so that we could learn about archiving practices and methods from a professional. The WPI Gordon Library's Archives & Special Collections “collects, preserves, and makes available university records, historical and cultural collections, artwork, and objects of enduring value”; it also serves as the institutional memory for the University (WPI). Since our project scope includes both the preservation of the heritage of the Indian Lake community as well as historical documents and archives for the ILWA, learning about the role of the Archives & Special Collections at WPI through a semi-structured interview informed us about how our project could address the need of an Archive for the ILWA. In our interview, we were able to ask questions and learn more about how to properly preserve institutional memory through the creation of a digital Archive.

Amy Smid was able to guide us in the right direction to learn about the organizational structure of our Archive. We inquired about different categorization methods she used in her work with various archives and how we could apply them to our project. Another aim of the interview was to ask about which documents we should or should not keep within the Archive. Knowing the importance of each document within the repository allows us to slim the Archive down to the documents which will be used by the ILWA in the future.

To gather information on the best archiving practices, we also consulted a resource that was provided to us by Amy Smid. She pointed us to a book, *Arranging and Describing Archives and Manuscripts* by Kathleen Roe, which provided a lot of useful information on archiving techniques and considerations, as well as examples of archival repositories and organizational methods. This information was important because it directly informed our process of designing and creating the archival repository. We used and consulted the book throughout different phases of our project. What was most fruitful from using these resources was that we could compare findings from these with any others we had from our interview with Ms. Smid. We then chose whatever made the most sense for our project. For the most part, however, the contents of the book only confirmed what Ms. Smid had recommended to us.

We received five banker's boxes and a Google Drive containing files from Aaron Sakulich, our sponsor at the ILWA. As we explored the contents of the boxes, we organized the documents based on what we believed was necessary to be included in the Archive, and what could be excluded. This included organizing the documents into similar categories including Projects, Lake Management, Finances, and History. The excluded documents were primarily papers that did not appear to fit into a category or scrap paper with an illegible scribble. This allowed us to gain insight into information the ILWA was trying to preserve, so we could better organize the Archive later as well. This also allowed us to be able to organize our thoughts for our interview with Dr. Sakulich, so we could further conclude what information was unnecessary and historically irrelevant based on our needs. This helped us to begin the creation of the Archive as we now had the ILWA confirm which information was important to not only us but them as well.

We then decided it was time to take a deeper dive into the boxes. We had created a preliminary design of our Archive and wanted to organize all the physical documents in this way to ensure that all bases were covered in terms of document series, subseries, and sub-subseries. This process allowed us to create a more robust Archive design, which allowed for the placement of all known physical documents. We also rehoused the existing records into new folders that are acid-free, and that do not have file cabinet hangers, which helps preserve both the older documents as well as the condition of the banker's boxes they are housed in.

After determining where each document belonged, we began scanning the documents and sending them to one email address, to allow us to keep the information organized and easily accessible to all individuals working on the project. It also allowed us to become familiar with using the scanner in addition to how to further organize the ILWA's documents. We also kept track of the documents that had been scanned and renamed according to the naming conventions that we created later by using an Excel spreadsheet. In the spreadsheet, we added columns for series, sub-series, and sub-subseries to indicate which specific folders had already been processed.

We then needed to determine what was previously organized on the Google Drive provided to us by the ILWA. This would allow us to determine what organizational methods the ILWA was currently using so we could keep our organization relatively close to its original organization to not confuse people adding information to the Archive. This also allowed us to determine what was already digitized, which would save us time moving forward.

Our final objective was to create an archiving manual. We hoped for this manual to act as a tutorial on how to add additional documents to the Archive in the future. To produce the best possible manual for the ILWA community we looked to interview other archivists, asking questions about how they look to continuously update their Archive. The goal of the manual was to deliver clear and concise information on how to add to the Archive so that anyone with access to do so, may be able to in the future. Through these actions, we will potentially enable the ILWA community to keep an up-to-date Archive, preventing them from falling into the same predicament they had in the past.

After creating the Archive structure, organizing all the documents, and creating the naming conventions, we conducted a semi-structured interview with Beth Proko, the former ILWA president. We went through all the documents listed above to get her feedback on whether she believed what we created would be useful and easy to follow by all the members of the ILWA. This would help us to ensure that the Archive was up to the standards of someone who has spent many years with these documents. After this interview, we felt very confident about the overarching structure of our Archive, however, Mrs. Proko did have some slight concerns such as the location of WPI-specific projects.

## Results

Through our interviews with Amy Smid, we learned about different archiving practices and methods that could be adopted into the Archive for the ILWA. These practices spanned multiple areas such as series and subseries, how to maintain a physical Archive, what should be preserved, and how to record digitization.

In our second interview with Amy Smid, one main topic that came up was how to utilize series and subseries to organize the Archive. “A series is defined as a group of records based on a file system or maintained as a unit because the records result from the same function or activity” (Roe 2008, p. 61). In the ILWA Archive, an example of a series would be a folder containing Projects; the subseries would be a project folder named “Frostholm”. This project folder would contain sub-subseries to hold each item that may be pertinent to that project (Roe, 2008). One key to our organization is standardizing the sub-subseries that can be contained within the series. For our standardization of the Project series, we looked at all the documents that were given to us and decided upon thirteen sub-subseries that could be used (Figure 1). Each series has different sub-subseries that documents can fall under. If a project contains a document that belongs to one of these sub-subseries, then a folder for that sub-subseries is created inside the series folder. The document, or item, is then added to the sub-subseries folder. These sub-subseries allow the contents of the Archive to be easy to locate. One major key to having a well-organized archive is minimizing the time for an item to be located, and these tools help us achieve that.

When maintaining the physical Archive, we must make it mirror the digital Archive exactly. These ideas and rules were a direct result of our interviews with Amy Smid. When asked about general advice on what to do with the physical documents, she explained the importance of maintaining both Archives to the same standard. So, if the digital Archive contains four sub-subseries for a specific subseries, we must create a folder for each sub-subseries in the physical Archive as well. This ensures that each item that is in both the digital and physical Archive can be found in the same spot. Another key behind maintaining the physical Archive is the folders and boxes used to store the documents. When we first received the five banker’s boxes, the documents were stored in either manilla folders or filing cabinet folders. The manilla folders were mostly bent and falling apart, and the filing cabinet folders still had the metal rods in them. These metal rods can cause damage to the documents and the boxes they are stored in. To fix this problem, we decided to only use new manilla folders while reorganizing the new Archive.

- Projects
  - Project Name 1
    - ◆ Articles
      - > Item
    - ◆ Contracts
      - > Item
    - ◆ Correspondence and Communications
      - > Item
    - ◆ External Resources
      - > Item
    - ◆ Finances
      - > Item
    - ◆ Flyers
      - > Item
    - ◆ Forms
      - > Item
    - ◆ Layouts/Plans/Blueprints
      - > Item
    - ◆ Maps
      - > Item
    - ◆ Permits
      - > Item
    - ◆ Photos
      - > Item
    - ◆ Proposals
      - > Item
    - ◆ Studies and Reports
      - > Item

*Figure 1: Example of Archive structure for Project series. Subseries are individual projects (e.g., Project Name 1) and sub-subseries are the different types of content that a project may contain (e.g., articles, contracts).*

Another characteristic of the physical Archive is using the same standardized naming convention as the digital Archive. Each manilla folder follows the naming rule of “[subseries] – [sub-subseries]”. Once the folders were named, they were stored alphabetically by series, and then subseries. This ensured that the series stayed together in the boxes and were easy to locate. All the projects were put together into a banker’s box while the history folders were kept separate in another box.

One key discovery we made while interviewing Amy Smid was the subject of active vs. inactive files. We had not thought about this before she mentioned it to us during our second interview with her. In our Archive, we should only have inactive records. For the Archive, the term inactive is used to describe a file that is either two years old, or no longer in use. Some files of multi-year projects would be considered active if the project is not completed. This would mean that a five-year-old project layout that is still not finished would remain active. For the Archive we are building, we only deal with inactive records. The active records can use the same architecture as the inactive records Archive. For our digital Archive, the idea is to have

documents that can be viewed and not edited. Active records may have to be edited since they are still being used by the Association.

From there we decided the best option for active documents would be a Google Drive so the ILWA would be able to access them daily if needed, and a Preservica for documents considered out-of-date or inactive, and should not be edited to preserve historical value. We came to this decision considering Google products are highly utilized in the United States, and our documents could be shared seamlessly as the ILWA also utilizes Google services.

Next, the inactive Archive needed to be stored in a location that would be accessible for future use without concerns of losing access to any data or files. After careful consideration and comparing Preservica with Google Docs and Archive.org, we found the features available in the Preservica software would best meet our needs both presently and in the future.

Preservica's features go beyond data storage and document text searching and include data transfer into encrypted files. These files are also able to be translated to different file formats as needed regarding technological advances, which will offer protection from the risk of losing access to these files. In comparison, Google Drive does not do this conversion as it is mainly used for quick access to edit documents. Preservica also offers protection against cyberattacks and viruses, as it can scan all documents for "bugs" to ensure there is no risk of corruption. The final reason why we found Preservica to be our best option is its user-friendliness. This application is easily accessible to the public, while also maintaining privacy in the Archive where needed. These privacy features can be enabled by the owner of these archives, specifically allowing the ILWA to have selective public access while limiting data as needed. These privacy settings can be adjusted as needed through the website's link-based system. (Preservica, 2022).

Another important outcome of our interviews with Ms. Smid was that she pointed us to different resources. One of these resources was academic literature on archiving practices, in particular, *Arranging & Describing Archives & Manuscripts* by Kathleen Roe. This book aims to provide a foundation for modern archival practices and theory. For us, it served as a guide for arranging and describing archival materials. Through our study of this literature, we became better informed about what the best archival practices are. For example, a key finding was that an archival repository can be divided into series and subseries. This confirmed our findings from our interview with Amy Smid. Beyond conceptually understanding what series and subseries were, the book gave us different examples of multilevel descriptions and series and subseries within a group. An example of this was from the National Association of Colored Graduate Nurses Records from 1908 to 1958; the series in this group of records included Minutes, By-Laws and Articles of Incorporation, Correspondence, Studies and Reports, and other series (Roe 2005, p. 62). This and many more examples of archival repositories gave us ideas on how to organize the repository for the ILWA. For instance, from the example in the book above, we decided to include different series for Board Minutes and Agendas, By-Laws and Articles of



Incorporation, and Correspondence and Communications, all of which are relevant to the material provided by the ILWA.

Internal institutional records should follow a records-management scheduling process, where records should be transferred to the archival repository. However, another important finding from both our interviews with Ms. Smid and our research from the literature is the need of having donor agreements for personal records and manuscripts. Concerning this, “formal legal donor agreements are essential to establish the right of an archives to have custody, as well as to provide the conditions for administering that group of records” (Roe 2005, p. 47). The ILWA will need to carefully consider their process of receiving donations of personal records and manuscripts, for instance, personal scrapbooks. Part of this process may include having a template donor agreement (Appendix A), in which donors assert the legal transfer of the records. For the scope of our project, since the boxes were given to us and they are mostly institutional records, and the original owners of various scrapbooks have mostly passed away, we do not have to consider in-depth this aspect of transferal of records. However, in the future, the ILWA will also need to consider keeping accession files, which are “internal resources for documenting the legal transfer of records to an archives” (Roe 2005, p. 50).

Through our interview with Dr. Sakulich, we gained a better insight into what documents should be included in the Archive. This was decided as our main way of determining what documents would be considered for the Archive as Dr. Sakulich had knowledge of the documentation we were handling as well as an idea of what is expected from us as a product. In the meeting, we learned that most of the documentation presented to us initially would be relevant to the Archive. One example of documentation we found to be useful through our interview was the ILWA’s annual reports. Dr. Sakulich brought up the point that this type of information/documentation can be extremely useful in an Archive for the ILWA board members to be able to look back on. Another example of useful documents was flyers and brochures for past ILWA-run events for the community. These documents could be used by ILWA board members as a template for future events. On the other side of relevant documentation were photos and scrapbooks. These types of documentation are relevant due to the history it preserved of the ILWA and its surrounding community. The documentation to be considered irrelevant came in the form of handwritten, scattered, and illegible notes. Examples of these varied from different sections within the physical documents we were given. Dr. Sakulich’s instruction for these notes was to review them to determine if they were legible and if they contained relevant information. When these notes were determined to be legible and contain relevant information they were kept for scanning, well anything illegible or irrelevant was discarded. The information in most of the physical documentation given to us being useful in the Archive was not surprising. Through prior interviews with Amy Smid, we had an idea of the significance each document could potentially hold within the Archive.

When it came to ensuring the Archive’s easy implementation and future updates from the ILWA, we decided it would be best to create a manual. The rationale behind creating an

archiving manual was that it would allow us to share all our experiences and know-how from creating the Archive for the ILWA. We felt this was important as it took time to figure out the more streamlined processes and organizational methodology. The manual is a set of instructions for adding files to both the Google Drive and Preservica Archives.

The first step in the manual is to identify a file worth uploading to the Archive; physical files should be scanned and digitized, while making sure the file is in PDF format. The next step is to decide whether the file belongs in Google Drive or Preservica. The guideline set is that any files that are more than two years old and are no longer in active use should go to Preservica Archive; all other files should go to Google Drive. The next step is to determine where the file should go within the two Archives, with both programs utilizing identical organizations. The structure comes in three layers series, then subseries, and finally followed by sub-subseries. The Archiving Manual (Appendix B) provides the subjects behind each series, subseries, and sub-subseries. Once the correct sub-subseries for a file is located, the file may be dragged and dropped into it or inserted via the “Add” button. Finally, the file should be renamed according to the Archiving Manual’s (Appendix B) specifications.

After organizing the documents, creating the Archive structure, and creating the Archiving Manual, we were able to populate the online Archive with scanned documents. We found that using the flatbed document scanner for the newspaper clippings as well as the larger maps and scrapbooks was the easiest option and that the letter-size document scanned much better and faster on the feeder scanner. We took on this task and began scanning many of the documents, and after everything was completed, we estimate that we were able to scan and rename over 500 documents. This process first allowed us to review our manual, as well as our structure to ensure that it was easy to follow and easy to populate for the ILWA members that will need to complete this in the future.

Finally, our interview with Mrs. Proko provided us with a lot of positives about our Archive. She was thrilled at the work that we had completed and thought that the Archive was structured very well. One area of improvement was where WPI-specific projects and reports were to be placed. We originally had these projects falling underneath the overarching project in which they were completed to support. After talking to Mrs. Proko, we decided it was best to add a WPI identifier preceding the project name and make the WPI projects have their project folders so that they are easier to find for those looking to find only the WPI projects in the future, without having to sort through the other projects to find them.

## Recommendations and Conclusion

Our results were found by addressing our different objectives to accomplish our overarching goal: to establish a partially populated Archive for the ILWA. These findings can impact the preservation of the history of both the ILWA and the Indian Lake community. We established an archiving structure and methodology that we recommend that the ILWA follow in their future work of preserving their institutional memory and the heritage of the neighborhood.

Donations of physical records and artifacts will naturally be given to the ILWA for preservation purposes. We recommend that the ILWA should have donor's agreements (or deeds of gift), as found in Appendix A that set legal backing that the donated items are now the property of the ILWA. This documentation will also help the ILWA to keep track of the origins of items. This donor agreement is not needed for institutional records but should be used for everything else.

Once the ILWA has in their possession records related to a project, for example, they should arrange them according to the archiving structure that we established. Any intellectual relationships between documents should be identified when arranging the documents. For example, when the ILWA gets a box full of random documents, in one case they may find many records related to a project, like a Lake Cleanup event. In this scenario, all the documents related to that cleanup project should be grouped. Further organizing of those documents should follow the organizational structure for a Project folder, as found in the Archiving Manual in Appendix B. Any preservation needs should also be identified, including deteriorating folders that need replacement or the removal of metal bars in hanging file folders. One major aspect of our work was to rehouse the records in the five boxes given to us. We recommend that new manilla, acid-free folders with the proper naming conventions, as per the Archiving Manual in Appendix B, are given to the records going into the physical Archive. Figure 2 is an example of our rehousing of the records with proper naming conventions.



*Figure 2: Example of records rehoused in new manilla, acid-free folders.*

Once the physical records are arranged in the right folders according to their groupings, we recommend that the ILWA digitize the documents and add them to the digital repository. We also recommend that the ILWA keeps track of which physical folders of files have been digitized in the Excel spreadsheet that we have provided for them. For the digital repository, we recommend that the ILWA utilizes the Preservica account that we created as an inactive Archive. This will enable the ILWA to make certain folders and assets available to the public, allowing the whole neighborhood and community to access them. We then recommend that Google Drive serves as the active Archive. This will allow the ILWA to keep their records more organized with less clutter from older documents while allowing them to maintain a level of privacy in current activities. This transfer from active to inactive should occur after a specified amount of time, decided on by the ILWA. Once documents and assets enter the inactive Archive, we recommend they be kept unchanged, to not alter the ILWA's history. We recommend that both Archives, the Preservica and the Google Drive, are maintained according to the structure we have provided. This structure will best allow the ILWA to maintain a consistent level of organization throughout its future on both platforms.

Our next recommendation is regarding the printing of unnecessary documents. Emails, Word documents, and PDFs that are electronically generated do not need to be printed out to be kept for future reference. For example, any online articles, journals, or newspapers about a project could be saved as a PDF and then saved in the appropriate Archive. This practice decreases the space needed to store physical records and eliminates clutter and the disorganization of many documents. Moreover, the addition of handwritten scribbles to the Archive is another consideration. Many documents sorted through were handwritten notes of meetings or other events, as these accounts are good to have on record for the person who wrote them; from an outside perspective, they are difficult to understand. We recommend taking these

notes during the meeting then transferring them to a Word document with their meaning written out, then saving these files to the appropriate Archive in PDF format.

We aimed to give the ILWA broader access to their history and documents they had stored away. Before the Archive existed, access to the documents was limited to the owner of the banker's boxes; now every ILWA member can easily view the archived documents from anywhere. Through the physical and digital Archives that we created, the ILWA can view all their documents without the hassle of riffling through banker's boxes trying to find one specific document. With the help of Amy Smid at the WPI Gordon Library's Archives & Special Collections, we created an organizational system that makes this all possible.

Now that the documents are all archived, we raise the question, what is the best way to present the archived material to the public? This only applies to the documents that can be made public, but the ILWA's history should be shared with more people. Another future project that can be done is to expand the Archive with more historical documents or even with existing digital institutional records; in theory, the organizational structure would be to acquire more historical material. This material could come in the form of audio files, digital documents, videos, or artifacts. This historical material could be used by future generations to gain an understanding of how the ILWA has evolved.

This project has potential implications for and impacts on the Indian Lake neighborhood, the ILWA, and the City of Worcester. First, through the preservation of its history and heritage, the neighborhood can document its learnings and set precedence for its development, for example, its urban development as in the case of the history of Route 52. Moreover, the preservation of the heritage of the neighborhood can become a community project that brings the neighborhood closer together. Narratives and stories have the power of establishing patterns and identity, as well as empowering their community members. Second, having created an Archive for the ILWA, the project has implications for strengthening its institutional memory and could allow it to grow by allowing its members to easily draw from archived information. Lastly, this project could lead to a wave of neighborhoods in Worcester establishing local community-based Archives, and a movement to preserve the heritage of the City.

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## Appendix A: Donor's agreement



## DEED OF GIFT

Indian Lake Watershed Association

**Name:**

**Date:**

**Address:**

**City:**

**State:**

**Zip:**

**Phone:**

**Fax:**

I own the personal property described below and desire to give said personal property to the Indian Lake Watershed Association. I do hereby give and transfer to the Indian Lake Watershed Association all right, title, and interests, including all copyright, trademark, and related interests, in and to the following described property.

Description of gift:

By my signature below I accept the foregoing conditions and acknowledge reading any attached information.

**Donor/Agent** \_\_\_\_\_ **Date** \_\_\_\_\_

**Date Received:** \_\_\_\_\_ **Received by:** \_\_\_\_\_

THE GIFT DESCRIBED ABOVE IS ACCEPTED FOR THE INDIAN LAKE WATERSHED ASSOCIATION ARCHIVES

**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## Appendix B: Archiving Manual



# Indian Lake Watershed Association Archiving Manual



## 1. Have a file to put into the Archive

Once you have your file, if it is in a physical format, scan it to your computer. If your file is already digitized, make sure it is in PDF format.

Digital documents should not be printed out since they are being put into a digital library.

## 2. Decide if your file belongs in the active or inactive Archive

If the file is 2 years old and no longer being actively used, then it should be placed in the inactive Archive on Preservica, otherwise, it belongs in the Google Drive.

## 3. Determine the category

In the Archive, the top level of the organization is a category. Determine which category your file belongs in. These categories are outlined in the Digital Archive Structure below.

Categories are denoted by the square bullets.

## 4. Determine the series

In each category, the series is the next level of organization. These series are outlined in the Digital Archive Structure below.

Series are denoted by the circle bullets

If your file belongs to a series that is not yet created. Create a series folder with the name of the series so that you have a place to put your file or subseries folder.

## 5. Determine the subseries

This is the final level of organization for the Archive. Each series will have different subseries which you can choose from to place your document. These subseries are outlined in the Digital Archive Structure below.

Subseries are denoted by the diamond bullets

If the subseries you need to place your file in is not yet created in the series folder, then add that subseries folder to the series folder.

## 6. Place the file into the subseries

In the folder, drag and drop your file into the folder to place it into the Archive.

Another option is to click the “Add” button on the screen and select your file from your computer’s library.

## 7. Renaming the file

In the Naming Convention below, find which file type you have and use the naming convention to rename the file.

To rename the file, right-click on it and click “edit”. Enter the new name and then save the name.

Naming conventions are denoted by the arrows.

# Digital Archive Structure and Naming Convention

## ➤ ILWA Admin

- Correspondence and Communications
  - Newsletters
    - [ILWA Newsletter]\_[YEAR]-[MONTH]-[DAY]
  - Press Releases
    - [Press Release Subject] - [Date Released]
  - Neighborhood Correspondence
    - ◆ Brochures
      - [Brochure Title] - [Date/Date Received if applicable]
    - ◆ Letters and Email
      - [Subject] - [Date Sent/Received]
    - ◆ Presentations
      - [Presentation Title] - [Date/Date Received if applicable]
    - ◆ Photos
      - [Photo's Subject] - [Date Received/Date taken if applicable]
  - Government Correspondence
    - ◆ Forms
      - [Form Subject] - [Date Filed]
- Projects
  - [Project Name] -[Years Active(ex. 2015-2018)]
    - ◆ Articles
      - [Article Title/Subject] - [Date Published]
    - ◆ Contracts
      - [Contract signed W/] - [Subject] - [Date Signed]
    - ◆ Correspondence and Communications
      - [Subject] - [Date Sent/Received]
    - ◆ External Resources
      - [Resource Origin] - [Resource Subject] - [Date Published]
    - ◆ Finances
      - [Grant Name] - [Letter of Support] - [Item name]
      - [Grant Name]- [Check/Deposit/...] - [Organization/Individual] - [Date]

- [Invoice sender] - [Date Issued]
  - [Receipt Store] - [Date Issued]
  - [Estimate Subject] - [Date Issued]
- ◆ Flyers
  - [Flier Subject] - [Date/Date Received if applicable]
- ◆ Forms
  - [Form Subject] - [Date Filed]
- ◆ Layouts/Plans/Blueprints
  - [Layout Subject] - [Date]
- ◆ Maps
  - [Map Location] - [Map Subject] - [Date]
- ◆ Permits
  - [Permit Type] - [Date Issued]
- ◆ Photos
  - [Photo's Subject] - [Date Received/Date taken if applicable]
- ◆ Proposals
  - [Proposal Subject] - [Date Issued]
- ◆ Studies and Reports
  - [Study/Report Origin] - [Subject] - [Date received]
- Financial Records
  - Bank Statement Reports
    - [Account Name] - [Date Issued]
  - Fundraising and Grants
    - ◆ [Grant Name] (these grants are general grants given to the ILWA with no specific project in mind)
      - [Letter\_of\_Support] - [Item name]
      - [Correspondence] - [Item name]
      - [Check/Deposit/...] - [Organization/Individual] - [Date]
      - [Proposal/Request\_for\_Response] - [Name]
    - ◆ Donations
      - [Check/Deposit/Money Order] - [Organization/Individual] - [Date]
    - ◆ Contact Lists
      - [Year]
  - Annual Reports
    - [Year]

- Expenses
  - [Invoice sender] - [Date Issued]
  - [Receipt Store] - [Date Issued]
- Government
  - [Subject] - [Date Issued]
- Minutes and Agendas
  - [Year]
    - [Month] [Minute/Agenda]
- By-Laws and Articles of Incorporation
  - [Revision Date]
- Equipment
  - Equipment Name/Type
    - [Invoice/Manual/Receipt] [Name]
- Donor Agreements
  - Archive Donor Agreements
    - [Asset Description] - [Date Signed]
  - Other Donor Agreements
    - [Asset Description] - [Date Signed]
- Community History
  - People
    - ◆ [Person's Name]
      - [Document Category] - [Brief description] - [Date]
  - Events
    - ◆ [Event's Name]
      - [Document Category] - [Brief description] - [Date]
  - Scrapbooks
    - [Scrapbook Donator] - [Topic]

# Naming Convention Physical Folders

**Maps** folder inside Project:

- [Name of Project] – Maps

**Correspondence and Communications** folder inside Project:

- [Name of Project] - Correspondence and Communications

**Photos** folder inside Project:

- [Name of Project] - Photos

**Newsletters** *item* naming convention:

ILWA Newsletter\_[YEAR]-[MONTH]-[DAY]

Examples:

ILWA Newsletter\_2022-04-01

ILWA Newsletter\_2021-08-16

Sub-subseries inside a WPI project inside Projects:

- [WPI Project] [Project Name] – [Articles/Contracts/Correspondence and Communications/External Resources/Finances/Flyers]



# Description of Categories

**Correspondence and Communications** - Any general correspondence that does not pertain to a specific project.

**Projects** - Any general projects in which the ILWA partakes.

**Financial Records** - Any overarching financials that do not pertain to a project.

**Minutes and Agendas** - Notes are taken from neighborhood ILWA meetings.

**By-Laws and Articles of Incorporation** - Any information about By-Laws and Articles of Incorporation.

**Equipment** - Any information about equipment used by ILWA.

**Donor Agreements** - Contractual document between the ILWA and a donor.