The World Bank Group Archives’ Open Archives Program

April Miller, Program Lead – WBG Archives

European Association for Banking & Financial History
Vienna, Austria
April 28, 2016
WBG Archives’ Mandate and Responsibilities

Records Management Services & Advice

• Lead the development of Bank Group recordkeeping strategies
• Advise Bank Group units on vital records plans and programs
• Monitor recordkeeping practices in units
• Issue records retention schedules that describe records and prescribe their retention and disposition
• Destroy records according to their governing retention schedules
• Provide secure and cost-effective storage services and convenient access and retrieval of records
• Perform records management outreach and training activities

Care and Control of Historical Materials

• Appraise Bank records to assess their long-term value
• Arrange and describe records according to ISAD(G)
• Archives’ History Team and Oral History Program
• Create knowledge products such as exhibitions, websites, etc.
• Physical preservation for all media
• Provide reference services to historical materials for internal and external researchers in the Archives’ Reading Room
• Implement the Bank’s Access to Information Policy
WBG Archives Holdings

Records related to World Bank Group member countries dating from 1946 to the present. The holdings include lending project files, country files, economic and sector work records, policy files, oral history interviews, films, videos, photographs, and much more.

- 499 million pages of paper records (208,000 linear ft.) dating back to 1946.
- Over 250 oral history interviews.
- Over 500 linear ft. photographic material.
- Over 100 linear ft. film reels.
- Over 30 linear ft. audio & video tapes.
- 110,000 formal Bank reports and serialized publications available on-line on the “Documents & Reports” website.
- Stacked, the boxes would reach 7 times as high as Mt. Everest.
- …and growing!
## WBG Archives – Records Center

<table>
<thead>
<tr>
<th>Information</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Location:</strong></td>
<td>Pennsylvania</td>
</tr>
<tr>
<td><strong>Construction:</strong></td>
<td>Former limestone mine</td>
</tr>
<tr>
<td><strong>Size:</strong></td>
<td>54,000 square feet</td>
</tr>
<tr>
<td><strong>Staff:</strong></td>
<td>4 staff, 3 contractors</td>
</tr>
<tr>
<td><strong>Records:</strong></td>
<td>208,000 linear feet</td>
</tr>
<tr>
<td><strong>Temperature:</strong></td>
<td>18°- 20° C</td>
</tr>
<tr>
<td><strong>Humidity:</strong></td>
<td>30% - 35% RH</td>
</tr>
<tr>
<td><strong>Services:</strong></td>
<td>Daily courier to and from DC</td>
</tr>
<tr>
<td></td>
<td>Staff augmentation</td>
</tr>
<tr>
<td></td>
<td>Destruction (pulping)</td>
</tr>
</tbody>
</table>
The WBG Archives has vast and valuable holdings on economic development and poverty reduction.

How do we **unlock the power** of this information?
<table>
<thead>
<tr>
<th>PUBLIC SEARCH AND DISCOVERY:</th>
<th>ACCESS TO INFORMATION REQUEST:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Via Archives Holdings Website, OPS Portal, and Documents &amp; Reports</td>
<td>Via external AI request form</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PUBLISH PUBLIC FINAL REPORTS: Documents &amp; Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>PUBLISH PROJECT FOLDER LISTS: OPS Portal</td>
</tr>
<tr>
<td>PUBLISH DESCRIPTIONS: archivesholdings.worldbank.org (AtoM)</td>
</tr>
<tr>
<td>DIGITIZE RECORDS: Scan, QA, publish PDFs via WBDocs</td>
</tr>
<tr>
<td>DECLASSIFY RECORDS: Access to Information Policy Review</td>
</tr>
<tr>
<td>DESCRIBE RECORDS: Arrangement &amp; Description of Archival Records</td>
</tr>
<tr>
<td>KEEP RECORDS: Records Schedules, Appraisal &amp; Accession of Records</td>
</tr>
</tbody>
</table>

WORLD BANK GROUP
Information and Technology Solutions
Open Archives Program

Why Archives on-line?

- AI Policy is the primary driver: enabling informed requests by users and “publish what you fund.”
- WBG’s members and work occurs worldwide: do not let physical distances become a barrier to making available the lessons of the past for development practitioners in the field today.

Our Audience?

- WBG Staff
- Member countries and their agencies
- Students
- Economic development historians
- Development and poverty reduction practitioners
- Everyone!
| Information management-related policy oversight and implementation | Appraisal and Records Retention and Disposition Schedules | Chain of custody and descriptive controls on records | Archival arrangement & description | Access provision |

**KEEP RECORDS:**
Records Schedules, Appraisal & Accession of Records
Chain of custody and descriptive controls on records

- Controlled records transfer procedures for paper, with workflow in TRIM Context.
- Data entry for new transfers (folder and box level) entered in TRIM.
  - Title
  - Dates
  - Disposition
  - Etc.
- Location tracking via barcode.
- Reporting transfer activities via intranet.
- Country Office disposition missions.
- Resources for staff: all on-line, including how-to videos.

KEEP RECORDS:
Records Schedules, Appraisal & Accession of Records
• Uses the International Standard for Archival Description (ISAD[G]).
• Describes aggregates of records hierarchically: from top - down.
• For each node in the hierarchy the description includes:
  • Title
  • Date span
  • Extent (volume of records)
  • Administrative history of the creating unit
  • Information about scope & content of the records themselves
  • See-also references
  • ...plus MANY others
ISAD Hierarchy

Records of one creator (Fonds)
- Administrative sub-division of the Fonds (Sub-fonds)
  - Records from one function (Series)

Example

Fonds: Office of the President
Sub-fonds: Records of President Robert S. McNamara
  Series: Daily Schedules
  Series: Travel Briefings
  ....
  ....
PUBLIC SEARCH AND DISCOVERY:
Via Archives Holdings Website, OPS Portal, and Documents & Reports

PUBLISH PROJECT FOLDER LISTS: OPS Portal

PUBLISH DESCRIPTIONS: archivesholdings.worldbank.org (AtoM)

DIGITIZE RECORDS:
Scan, QA, publish PDFs via WBDocs

DECLASSIFY RECORDS:
Access to Information Policy Review

DESCRIBE RECORDS:
Arrangement & Description of Archival Records

KEEP RECORDS:
Records Schedules, Appraisal & Accession of Records
AtoM and Projects & Operations website for description of archival records

Platforms to display digitized archival records within appropriate context.
AtoM
(web-based open source application for ISAD descriptions of records)

Archivist’s brain
Enters in TRIM
CSV import to AtoM

Digitized objects

World Bank Group Archives Holdings

Series - Daily schedules

- Series Daily schedules
- Series Statements, speeches and interviews
- Series Board [of Executive Directors] Actions files
- Series Contacts - Member Countries files
- Series IPA chronological file (outgoing)
- Series Travel briefings of staff assistants to the President
- Series Correspondence of Economic Advisor Hollis Chenery
- Series Memoranda for the record

Records of the Office of the President » Records of President Robert S. McNamara » Daily schedules

Identity area
- Reference code: WB IBRD/IDA EXC-10-4544S
- Title: Daily schedules
- Date(s): 1966 - 1980 (Creation)
- Level of description: Series
- Extent and medium: 1.60 linear feet of textual records

Context area
- Repository: World Bank Group Archives
- Immediate source of acquisition or transfer: McNamara took this series with him when he retired in 1981. He transferred it to the Joint Bank-Fund Library on 13 November 1984, and the Library transferred it to the Archives on 27 October 1993.

Content and structure area
- Scope and content: The calendar has daily information on President McNamara’s whereabouts, visitors, and telephone calls for his entire office. Itineraries, programs, guest or participant lists, briefings or correspondence pertaining to the occasion are

Export
- Dublin Core 1.1 XML
- EAD 2002 XML
Projects & Operations

Records Center staff enter data about paper records in TRIM

Export to P&O via search grant

Digitized objects

### Bali Tourism Project

<table>
<thead>
<tr>
<th>FOLDER NO.</th>
<th>FOLDER TITLE</th>
<th>DATES</th>
<th>DISCLOSURE STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>30156807</td>
<td>Bali Tourism Project - Indonesia - Credit 0479 - P003738 - Correspondence - Volume 16</td>
<td>June 3, 1982 - July 29, 1987</td>
<td>Partial Disclosure</td>
</tr>
<tr>
<td>30156906</td>
<td>Bali Tourism Project - Indonesia - Credit 0479 - P003738 - Correspondence - Volume 15</td>
<td>April 9, 1981 - May 28, 1982</td>
<td>Partial Disclosure</td>
</tr>
<tr>
<td>30166805</td>
<td>Bali Tourism Project - Indonesia - Credit 0479 - P003738 - Correspondence - Volume 14</td>
<td>April 2, 1980 - March 26, 1981</td>
<td>Partial Disclosure</td>
</tr>
<tr>
<td>30166804</td>
<td>Bali Tourism Project - Indonesia - Credit 0479 - P003738 - Correspondence - Volume 13</td>
<td>May 1, 1979 - March 25, 1980</td>
<td>Partial Disclosure</td>
</tr>
<tr>
<td>1166075</td>
<td>Bali Tourism Project - Indonesia - Credit 0479 - P003738 - Correspondence - Volume 12</td>
<td>July 11, 1979 - April 2, 1979</td>
<td>Partial Disclosure</td>
</tr>
<tr>
<td>30106817</td>
<td>Bali Tourism Project - Indonesia - Credit 0479 - P003738 - Correspondence - Volume 11</td>
<td>September 1, 1977 - June 23, 1978</td>
<td>Partial Disclosure</td>
</tr>
<tr>
<td>30186816</td>
<td>Bali Tourism Project - Indonesia - Credit 0479 - P003738 - Correspondence - Volume 10</td>
<td>June 1, 1977 - August 31, 1977</td>
<td>Disclosed</td>
</tr>
<tr>
<td>30199815</td>
<td>Bali Tourism Project - Indonesia - Credit 0479 - P003738 - Correspondence - Volume 9</td>
<td>September 3, 1976 - May 30, 1977</td>
<td>Partial Disclosure</td>
</tr>
<tr>
<td>30198814</td>
<td>Bali Tourism Project - Indonesia - Credit 0479 - P003738 - Correspondence - Volume 8</td>
<td>February 9, 1976 - August 31, 1976</td>
<td>Partial Disclosure</td>
</tr>
</tbody>
</table>
DESCRIBE RECORDS:
Arrangement & Description of Archival Records

KEEP RECORDS:
Records Schedules, Appraisal & Accession of Records

DIGITIZE RECORDS:
Scan, QA, publish PDFs via WBDocs

DECLASSIFY RECORDS:
Access to Information Policy Review
### AI case handling

- Archives AI team – 4 staff + 1 team lead.
- Manages requests for information that was created or received before July 1, 2012.
- GoPro for case handling and correspondence.
- Rigorous procedures with accompanying manual.

### Declassify

- In response to Access to Information requests
- Archives has authority for declassification for records over 20 years of age.
- 10 hours to declassify 1 linear foot of records
- Removal notices for records falling under non-eligible exception

### Digitize

- We select to digitize based on two criteria:
  1. Frequently requested fonds where we want to minimize handling.
  2. Automatic queue from declassification.
- Includes condition assessments and 100% QC
- 32 hours to digitize 1 linear foot of records
• Leveraging our external web presence to create a “campus” of sites that are interconnected.
• Create and launch a photographs and A/V portal within the campus.
• Facilitate crowd-sourcing, hack-a-thons with digitized records and descriptive metadata.
• Podcast series: Tips and tricks to finding WBG information
• Stronger integration between the AI request form and our finding aids.

Thank you!