Postcustodialism vs. Custodialism: Trust and Descriptive Representations in Archives

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Introduction:

Much work has been done to dissect differing schools of thought within the archival profession. Descriptive traditions in the field are a derivative of overarching philosophies guiding the acquisition, maintenance, preservation and storage of archival records. As more and more records are created digitally, the archival profession has been working to understand the requirements for the long-term preservation of digital objects.   Many theorists have taken a look at postcustodialism as a way to deal with onslaught of archival records in digital environments. The Society of American Archivists (SAA) defines postcustodialism as such:

"The idea that archivists will no longer physically acquire and maintain records, but that they will provide management oversight for records that will remain in the custody of the record creators" (http://www2.archivists.org/glossary/terms/p/postcustodial-theory-of-archives). Due to a vast increase in electronic record creation, a postcustodial model may be inevitable. Accordingly, is essential that archivists closely examine both descriptive traditions in a traditional custodial and in a postcustodial environment in order to examine the role that the archivist assumes with creating archival metadata.

In order to do so, the following questions must be raised: Are descriptive metadata standards in postcustodial environments trustworthy? Are current American archival description traditions more or less trustworthy than in a postcustodial environment? To provide insight into these questions it is helpful to examine both the American custodial model and the Australian post-custodial model.   Drawing this comparison requires an overview of each tradition to establish context.   Once contextualized, a comparison between the two archival schools will serve illuminate points of contention regarding trust. Findings indicate that descriptive standards

from each tradition should be incorporated for either one to provide a reasonably trustworthy

descriptive metadata set for both access and posterity.

American Model - Custodialism:

The SAA is the oldest national professional association for archivists in the United States and

was founded in 1936.   The foundations of the SAA are rooted in the European tradition of

maintaining control over archival records through institutional bodies, or archives. The SAA

maintains that, "The primary task of the archivist is to establish and maintain control, both

physical and intellectual, over records of enduring value"

(http://www2.archivists.org/profession).

Control, in this context, includes the housing of records, the appraisal and selection of

records that the archive will ingest, the arrangement and description of records, and the long-

term preservation of both the records and their associated metadata.   The definition of an

archival repository in the American context as outlined by SAA is an institutional body that

holds "the non-current records of individuals, groups, institutions, and governments that contain

information of enduring value" (http://www2.archivists.org/profession).

Once an item has been selected for ingestion into an archival repository, it becomes a

"record". At that point, it is the sole responsibility of the archive to make the record available for

future use and to care for that record for posterity. A large component of making the record

available is arrangement and description. The SAA notes that, "the archivist arranges and

describes the records, in accordance with accepted standards and practices"

(http://www2.archivists.org/profession).   In the American context, the accepted standard for

arrangement and description is the SAA's Describing Archives: A Content Standard, more commonly referred to as DACS.

The foundation of DACS is built upon the assumption that the archive will maintain physical control of archival records, whether they are institutional records, governmental records or personal records. In the "Statement of Principles" section of DACS, the manual reads: "Holdings of archival repositories represent every possible type of material acquired from a wide variety of sources. How archives manage and describe their holdings is rooted in the nature of the materials, the context of their creation, and 200 years of archival theory" (Society of American Archivists, 2007).   The management and description outlined in DACS is based upon principles of respect du fonds, or provenance, and original order.

In his seminal work "What is Past is Prologue: A History of Archival Ideas Since 1898, and the Future Paradigm Shift", Terry Cook succinctly defines these principles. He describes provenance as the principle that archives "must be kept carefully separate and not mixed with the archives of other creators, or placed into artificial arrangements based on chronology, geography, or subjects" and original order as the principle that archives must arrange a collection of a single provenance "based on the original organization of the archival collection, which in the main corresponds to the organization of the administrative body that produced it"(1997, p. 21). With these two principles in mind, DACS mandates that once arranged, the description of archival records must be produced in the form of a single finding aid that is based off of the arrangement and context of the records.

DACS states that "If archival materials are to be described consistently within an institutional, regional, or national descriptive system, the rules must apply to a variety of forms and media created by, and acquired from, a variety of sources." (Society of American Archivists,

2007).   Of course, these principles presuppose that the archive will be the custodian of the

record. In this context, the archivist at an archival institution produces a finding aid for the

collection that will be the access point for the record, and all description will be controlled by the

archive. Not only does the institutional authority control description using the nationally

recognized set of rules included in DACS, but also the descriptive metadata will be managed and

preserved through the repository.

The tradition of complete physical and intellectual control over archival records does

indeed span centuries. Jeannette Allis Bastian gives an account of just how strongly rooted

custodianship is in the Western archival tradition in her article "Taking custody, giving access: a

postcustodial role for a new century".   She notes that even in ancient times, there was evidence

that public and in some cases private records were held in physical custody through a centralized

institutional body. What's more, the concept of an archival institution that collects the records of

multiple creators is itself over 200 old, dating to the Public Records Act of 1838 decreed through

British Parliament. She states: "the bringing of records into custody meant only the bringing of

them under the control of one institution and ideally under one roof" (Bastian, 2002).

The tradition of custodianship was further defined through the creation of the first widely

agreed upon set of rules for arranging and describing records, *Manual for the Arrangement and

Description of Archives*. Samuel Muller, Johan Feith, and Robert Fruin created the *Manual* gave

birth to the notion of *respect du fonds* (provenance) and original order, but they also cemented

the idea of custodialism in archives. Bastian notes that the Dutch *Manual* was "concerned with

the establishment of generally accepted rules governing the orderly transfer of records" (2002, p.

84). As the archive profession in the Western Tradition developed over the 20th century,

prominent archivist such as Sir Hilary Jenkinson and T.R. Shellenberg continued to develop the

archival profession, re-evaluating the guidelines for arrangement and description as well as evaluating the appraisal process for selecting records in archival repositories. However, these developments all rested on the assumption that archives would maintain full control over the records. As Cook aptly states, "As late as 1956, American archival theorist Theodore R. Schellenberg called the Dutch *Manual* "a Bible for modern archivist," and both he and English theorist Sir Hilary Jenkinson based their landmark books on this very solid Dutch foundation" (1997, p. 22).

Archival custodianship remained unquestioned in the Western tradition until 1981, when American Archivist F. Gerald Ham introduced the term "postcustodialism". He called for a push to decentralize archives due to the ever-increasing amount of record creation in institutional and governmental bodies. This revolutionary thinker foresaw the eventual problems posed by the advent of electronically created records if archives, including the National Archive and Records Administration (NARA) of the United States, continued to ingest records using a custodial model. He envisioned the new era of archival processes as one that was more closely aligned with records management than with the ingestion of records (Ham, 1981).

Throughout the 1980s archivist discussed amongst themselves the possibilities of using postcustodial models in the United States. However, nothing came from these discussions on a wide scale and today NARA is still very much a custodial archive, maintaining full physical control over both traditional and digital records. In 1998 NARA launched the Electronic Records Archive (ERA), a repository where digital material is ingested, arranged, described and preserved. Archivists arrange and describe according to DACS and finding aids are produced for both types of record formats. Preservation standards are guided by the Reference Model for an Open Archive Information System (OAIS) developed by the Online Computer Library Center

(OCLC) (Sproull and Jon Eisenberg, 2005).

Australian Model - Postcustodialism:

While the American archival tradition very much develops off of the archival principles

first established in the 19th century through the Dutch *Manual*, Australian archivists completely

departed from Western convention.   In the mid 20th century, archivist Peter Cook defied

tradition by introducing the Australian "series" system for arranging and describing archival

records for the Commonwealth Archives Office (COA), now the National Archives of Australia

(NAA). The principles behind the series system was the mastermind of Ian Maclean, chief

archivist at the COA in the 1940s and 50s (Smith, 1995). The system was created in order to

deal with the increasing fluid administrative practices evident in Post WWII society. Below is

the definition of a series as outline by the National Archives of Australia (NAA):

> A series is a group of records created or maintained by an agency or
>   person that, regardless of currency, value or present custody:
> - are in the same numerical, alphabetical, chronological, or
>   other identifiable sequence; or
> - result from the same accumulation or filing process and are of
>   similar function, format or informational content.
>
> A series may be recorded by successive agencies or persons, or by
>   several agencies or persons simultaneously.
>
> The records in a series generally comprise one or more items.
>   (http://naa12.naa.gov.au/manual/Series/SeriesDefinition.htm)

Strikingly, the NAA "series" system discards the traditional idea of provenance; rather than the

defining the provenance for a record as relating to only one creator or creating body, the NAA

allows for many relationships between the record and creator/creators. To provide for multiple

creators and contexts, there is no collection level aggregate description in the series model.

Description starts at the series level with complete irreverence to the notion *respect du fonds*.

Moreover, in order to create descriptive metadata for records in the Australian tradition, archivists attempt to gather information about the object while it is still in active use. McKemmish, et, al. define descriptive metadata in a series system context as "all standardized information that identifies, authenticates, describes, manages and makes accessible *through time and space* documents created in the context of social and business activity" (McKemmish, Acland, Ward, & Reed, 2006, p. 4).

The goal of the series system is to demonstrate the context of the record through many to many relationships, rather than simply record to creator.   In order to accomplish this descriptive ideal, the Australians use a "continuum" model to understand the context of a record from its creation onward. The traditional Western approach to archives uses an "information life-cycle" model for understanding the nature of records. Cook defines the information life cycle in the Western sense as such: "records [are] first organized and actively used by their creators, then stored for an additional period of infrequent use in off-site record centers, and then, when their operational use [ends] entirely, "selected" as archivally valuable and transferred to an archives, or declared non-archival and destroyed" (Cook, 1997, p. 26). Thus, in the American tradition, archivists passively ingest items they have appraised and selected for retention. The archivist's relationship with the record begins when the information is no longer in active use.

In the Australian continuum model, records are evaluated wherever they are in their lifespan. The continuum model merges archival practices and records management practices into one approach in order to facilitate their use as evidence. Due to backlogs and unorganized record keeping within Australia's governmental and institutional bodies in the mid-twentieth century, the COA became increasingly concerned with their ability to manage the archival records in their possession. As a result, they sought to create system for enhancing

administrative efficiency and the preservation of the nation's cultural record. In this context, the

continuum model was born as a way to describe records within the Australian series system. As

a result, the series system and the continuum model must be taken together as a whole when

contextualizing archival description in Australia (Smith, 2010).

Along those lines, postcustodialism became inherent to the model laid forth by the COA

and Peter Cook. It is continued on in the archival tradition of the NAA to this day. The

continuum model requires that records be understood and described "through time and not in

time…irrespective of their age or location"(Cumming, 2010 p. 42). Records must be surveyed

while they are in active use and records management plans be established for creating bodies. In

this model, archivists work collaboratively across the profession and with record creators

themselves in order to preserve archival material. Included in this collaboration is the idea that it

does not matter who has custody of the records, so long as they are guided by the NAA. The

continuum model and the series system maintain a postcustodial outlook; records remain with

the record creator because they never fall out of 'active use'. Essentially, "post-custodialists

think of custody in terms of the defense of the record, not possession" (Upward, F., &

McKemmish, S., 1994).

In order to capture the many relationships between records and creators, the Australian

model does not have a traditional 'finding aid'. Instead, they have 'descriptions'. Guidelines

for descriptions are outlined in the Commonwealth Record Series Systems Manual (CSR).

Descriptions document the relationships evident, the context of the record, contexts of the

records, content of the records, the scope of the records and so forth. This may seem like a

finding aid similar to the American set of archival rules for description found in DACS, however

they are added onto throughout the lifespan of the record. Adding descriptive elements

throughout the record lifespan is intended to "providing them with ever broadening layers of

contextual metadata. In this way they help to assure the accessibility of meaningful records for as

long as they are of value to people, organisations, and societies - whether that be for a

nanosecond or millennia" (McKemmish, 2001, p. 336). In the CSR attributes such as

"Accumulation Date Range" are required. What's more, the record description is completely

distinct and separate from the context description. This is entirely unlike the traditional finding

aid where context is determined through provenance.

In order to differentiate between series, as there will be more than one descriptive

document for each series, series are given unique identifiers so as to link all descriptive elements.

Another distinction in the Australian model is that the "Depth of Description" must be

documented and the archivist who created the series must register themselves as a 'series

archivist'. Archivists also have to enter a "Series Archivist Note" that explains all of their

description decisions, any observations that are relevant to the series, sources of information for

describing the series and any record management action taken when surveying the collection at

the creating institution (http://naa12.naa.gov.au/manual/Series/SeriesIndex.htm).

Further differentiating the American custodial model and the Australian custodial model

is the fact that in the custodial model, the finding aid remains with the archival collection, thus

preserving the provenance of the *fonds*.   In the postcustodial Australian model, descriptions are

separated from the series they describe. Descriptions are controlled by the NAA and the creators

maintain the records. The idea behind this separation in the postcustodialist continuum model is

that "recordkeeping and archiving processes fix documents which are created in the context of

social and organizational activity, i.e. human interaction of all kinds, and preserve them as

evidence of that activity by disembedding them from their immediate context of creation"
(McKemmish, 2001, p. 336).

The act of separating the description from the record effectively renders the idea of
archives as a place meaningless in the Australian archival tradition. The physicality of archives is
nonexistent in the postcustodial continuum model. Rather than assuming the responsibility to
care for the long term preservation and maintenance of physical or electronic records, Australian
archivists need only concern themselves with preserving the context and authenticity of the
records.   Terry Cook understands the responsibility of Australian archives as "[combining]
archival concepts concerning evidence and recordness with creating institutions' own self-
interest in protecting themselves legally and ethically" (Cook, 1997, p. 40).

Effectively, this outlook relieves the archives from legal and ethical responsibility. The
postcustodial model works incredibly well for digital records. Electronic records are produced in
such a vast quantity and are laden issues surrounding rights and intellectual property;
relinquishing control over the digital object creates an environment where archivists need not
assume responsibility for violation of IP laws or maintenance of proper storage space for the
records. Postcustodialism indeed makes affordances for the complicated nature of electronic
records. Astutely observed, "a postcustodial stance is that the archival profession can no longer
afford to be seen primarily as physical caretakers if we are to exercise an appropriate role in
relation to electronic recordkeeping" (Upward, F., 1996).   However, this stance is the polar
opposite of the practices observed in the American archival school, as evidenced through
NARA's ERA.

Custodialism vs. Postcustodialism – Trust in Descriptive Metadata Techniques:

One of the most obvious advantages to a postcustodial archival management system is that the creator will be able to access their records throughout the lifespan of the record. In the custodial model, when an archive ingests a record, they assume total control over it. In some cases, the creator might be prevented from accessing their own records due to this transfer of rights. Bastian offers a compelling case for placing trust in a postcustodial model when considering access to archival records. The records that chronicle the emancipation of the slave population in St. Croix in 1848 when the island was a Danish colony were originally deposited at the Dutch National Archive following the uprising that lead to emancipation. However, in 1919 they were sold to the United States after the Virgin Island territories were sold and claimed as an American territory.

The records were transferred to the National Archives in the 1934. Through custodial transfers, documents became ambiguated and historians created versions of the events. Archivists described the contents of the collection through the lens of a colonial power and eventually, history was rewritten to exclude the legendary figure known as General Buddhoe, who Virgin Islanders believe instigated the rebellion. The existence of General Buddhoe is so widely recognized in St. Croix that there is both a statue commemorating him and a park named after him in Frederikson, the site of the rebellion. Upon reading the history written about the rebellion authored by those who had access to the archival records of the event, Virgin Islanders were outraged. Not only had they been denied access to their own records, but also a legendary figure established through cultural memory had been displaced. Without any access to their records, the people of St. Croix had absolutely no way of controlling the historical account of the events that transpired in 1848 (Bastian, 2002).

The example of contested knowledge highlighted in the case of St. Croix elucidates the importance of access to cultural heritage. Bastian's assertion that "custody only serves an archival purpose in the long term if it accommodates the people and events to whom the records relate as well as the collective memory that the records foster" (2002) reveals that trust in archival custody is not necessarily warranted. The ability for the record creator to maintain control over records in the postcustodial model becomes paramount when considering trust in descriptive metadata. If the collective memory contained in an archival record is made inaccessible to the community in which the record was created in the first place, descriptive metadata cannot be trusted. There exists no way for the community to determine its own historical narrative if they do not have access to the cultural record.

When considering descriptive metadata and access, it must also be noted that in the postcustodial model, access to descriptive metadata and access to the record are two distinct concepts.   However, postcustodial models of descriptive metadata techniques make affordances for revision. Since descriptive metadata both creates data and serves as an access point for data, the postcustodial model ensures that any biases in the descriptive metadata are documented as its own historical record. The record then not only has the original description object itself, but descriptive metadata documenting the changes in descriptive metadata as it is added to the record and changed over time.   Postcustodial archives acknowledge that "archives not as sites of knowledge retrieval but of knowledge production, as monuments of states as well as sites of state ethnography" (Stoler, 2002, p. 90).

The following examination gives a brief summary of the inescapable lens through which the archivists creates descriptive metadata:

> The representer's value system…is the final arbitrator on the content of a
> representation. Each archivist must decide what information about which

records to highlight; what transitory data to capture and make visible. When describing records archivists will remember certain aspects and hide or forget others. They will highlight some relationships and ignore others. (Duff & Harris, 2002, p.295)

In the case of Australia, the CSR explicitly accounts for any biases that the archivist might have imposed on the record through its metadata requirements. Adding metadata elements for "Accumulation Date Range" and "Series Archivist Note" regarding the description and arrangement of the records in a series ensures that there is a record of any points of contested knowledge, aware of the archivists' role in creating the representation of a record.

Record creation as well as descriptive metadata creation have no beginning or end in the continuum model. Conversely, the custodial model mandates an end to the information lifecycle. The American archive will only ingest records once they are no longer in active use. Ingesting records that are no longer in active use ensure that the *fonds,* or collection, will always remain together, as no more records are being created for the collection. The finding aid created for the collection will serve as a static document in which all aspects of the record are controlled by the archive and the descriptive information will never be removed from the context of the record.

The language of DACS cements the view that the American archival tradition aims to create a neutral descriptive document. For instance, when outlining the rules for "Access Points" for a finding aid, DACS instructs that "terminology used to describe such a topic in the scope and content statement must be subsequently translated into the formal syntax of a subject heading, as specified by a standardized thesaurus like the *Library of Congress Auth*orities" (Society of American Archivists, 2007). Necessitating authority-controlled vocabulary deemphasizes the archivists' role in creating a unique representation of an object through description. Further indications that the American custodial tradition is rooted in providing a

neutral gateway to evidentiary information is found in the "Overview of Archival Description"

section of DACS. It reads:

> The nature of archival materials, their distribution across many
> institutions, and the physical requirements of archival repositories
> necessitate the creation of these descriptive surrogates, which can then be
> consulted in lieu of directly browsing through quantities of original
> documents. (Society of American Archivists, 2007)

Examining DACS on a granular level reveals that the American custodial model refuses to take

responsibility for their own archival biases. Presumably, the reason for this is that the archive

must physically maintain complete control over the object and is thus saddled with the

responsibility to preserve its authentic and evidentiary value. It would be inadvisable to question

the neutrality of the finding aid. Archivists would not want to be held responsible for

misrepresenting records for which sole responsibility and guardianship falls onto the archival

institution.

However, there is value in maintaining complete control over a record. Postcustodialism

indeed "advocates an evolving approach which transforms the archivist's role from a keeper to a

creative manager" (Bastian, 2002, p. 91). Given this transformation, trust in descriptive

metadata must wane when considering all of the ways in which postcustodial archivists insert

themselves during record creation. It is impossible to quantify the type of manipulation over a

record a postcustodial archivist has if they are directly managing the records during active use.

Additionally, while postcustodialism accounts for personal bias when creating archival

description, it simultaneously entrenches bias since the archivist has a much more intimate

knowledge of the record creating institution. Bias can develop over time, and this is certainly an

issue when considering trust in descriptive metadata in a postcustodial model.

Trust is further called into question when considering the sort of control that a creating body has over its own representation in the postcustodial model. If a record is always considered in active us, and the record creator always has rights to the record, there is nothing to prevent manipulation of the cultural record.   Luciana Duranti observes this postcustodial paradigm flaw in her essay "Archives as a Place". She writes, "To leave records in the hands of those who are accountable *through* them is equivalent to placing them in a situation of potential conflict of interest, and makes impossible transparency in the preservation of records" (1996, p. 251). In a postcustodial model, considering the record as active throughout its lifespan problematizes the preservation of a complete and authentic historical record.

Conclusions:

Contrasting the trajectory the American descriptive tradition with that of the Australian continuum model provides a lens through which to posit the degrees to which each resulting metadata set generates a trustworthy representation of archival records. The advantages are evident through the shared responsibility to creating an accurate descriptive record. In Australia record creators must adhere to the guidance provided for by the NAA in order to meet the requirements for archival retention. In the American archival tradition, the record creator freely creates records without considering the role that the archive will eventually assume; records management within the creating body is presumed a discreet role. The archive therefore adopts full responsibility for inaccuracies or biases in the arrangement and description of the *fonds*.

Trust within a postcustodialist system is generated since there is more than one institutional body held accountable for descriptive metadata. A more granular look at the descriptive metadata standards embedded with each archetype puts the role that the archivist

plays in each model into further perspective. An active records management type approach in a postcustodial model leaves significant room for the archivist who is managing that series to impose their own hierarchy on the records being created. Stating that archival records can also be active and can continue to change and acquire new description creates an environment where creators could potentially alter creation habits and self impose censorship.

In this way, the postcustodial model is simply not trustworthy. Description is essential for access, preservation and authenticity. Providing an authentic record requires that descriptive metadata be added once the record is no longer actively being changed. Another advantage embedded in postcustodial archives that storage space is not be an issue. As archives are not repositories in the postcustodial model, consideration not need be paid to creating space for a vast wealth of records. This reality is especially pertinent when considering the onslaught born-digital records in archival repositories.

However, postcustodialism is further proved untrustworthy when considering the preservation of descriptive metadata in a digital environment. Custodial archives necessitate that the OAIS standard for Trusted Digital Repositories be followed since preservation responsibility is their sole responsibility (http://www.oclc.org/research/activities/trustedrep.html?urlm=16006). The Australian CSR standard can only provide guidelines and issue recommendations for the preservation of digital records, as they do not control the physical records (http://naa.gov.au/records-management/agency/digital/).   Consequently, there is no way to verify that digital records are kept in trusted digital repositories.

When considering all factors, trust in metadata creation and retention is more fully actualized in a custodial model. Lack of trustworthiness in failure to identify biases in DACS should be addressed, however. In order to do this, descriptive metadata techniques in custodial

systems should closely examine the CSR on a granular level.   Aspects of the CSR should be

integrated into DACS so that the inherent biases and perspectives of the archivist generating

descriptive metadata may be taken into account for access purposes. Primarily, attention should

be paid to including the archivists' decisions regarding arrangement and level of description. If

ever traditionally custodial archives begin adopting postcustodial methods for dealing with born-

digital records in the future, they must find a way to merge custodial traditions with postcustodial

practices.

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