

## **ONE MESSAGE, MANY AUDIENCES: THE DEVELOPMENT OF DISTANCE EDUCATION COURSES IN RECORDS AND ARCHIVES MANAGEMENT FOR COMMONWEALTH-WIDE DELIVERY**

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### Introduction to the MPSR project

The Management of Public Sector Records (MPSR) Project was initiated in 1994 by the IRMT. The MPSR Project seeks to define international solutions to the management of both paper and electronic records systems and to develop local mechanisms to implement these solutions. In 1997, the MPSR Project became a joint enterprise between the IRMT and the ICA.

A wide range of information and records professionals from around the world are contributing to the development of the Management of Public Sector Records educational tools as authors, contributors, reviewers, or testers. Participants in the programme include internationally recognised archival educators, records management consultants, former and current national archivists and specialists in specific aspects of records care such as business systems analysis, emergency planning, financial records management, legal records care and so on. Participants from developing countries are assisting extensively with input about adaptation of modules, construction of case studies, and adoption of the modules in universities and colleges.

The MPSR Project's objectives include:

- the development of an integrated series of educational modules on records and archives management, which may be used in Commonwealth countries around the world for self-study, as part of a distance education programme, or as resource tools for face-to-face or workshop teaching
- the development of associated training tools, including case studies, manuals and user guidelines to accompany the educational modules and enhance their use
- the production of video films illustrating issues of relevance to information and records management
- the delivery of seminars in Commonwealth countries world-wide to raise awareness amongst archivists, senior managers and decision makers about the role of information in supporting accountability, transparency and efficiency in government.

The MPSR Project has been funded from a wide range of sources, including the UK Department for International Development, the Commonwealth Secretariat, the British Council, the Canadian International Development Agency, the Organization of American States and the United Nations Development Fund.

### **Understanding records and archives issues**

Records and archives management is often touted as one of the world's oldest professions; as long as people have had the tools to document their activities, there have been records or archives. Naturally, however, the nature of those records depended -- and continues to depend -- on the communications technologies available to a society and the nature of that society's organization and structure.

Among the earliest forms of documentation were tablets and papyrus documents, with hieroglyphic and cuneiform signs, a combination of pictograms, or symbols representing objects,

phonograms, representations of symbols, and determinatives, or signs helping to clarify terms and avoid ambiguity. The Rosetta Stone is among the most famous of early records. The stone was a trilingual priestly decree, also written in demotic script, and the deciphering of the inscriptions on the stone led to great advances in the understanding of ancient languages.

In medieval Europe, scribes documented the decrees and dictates of priests and popes. Relying on available tools such as iron ink and parchment or vellum, monks laboured their whole lives to record the decisions and desires of their masters; the precious and unique volumes were often stored in abbey crypts or scriptoria -- rooms dedicated to the creation and preservation of the record.

In the colonies of the British Empire, records systems were established based on English models, including the establishment of centralized operations to manage current and non-current records, the documentation of information in bound volumes, usually leather bound and of great size and weight, and the creation of registry systems to administer records creation and use. The vast range of colonial office records were copied again and again to ensure all parties, whether in London or far afield, had access to key information. And Colonial Governors were instructed on the methods and means of communicating and documenting their work, including packing up some -- but perhaps not all -- of their records and transporting them back to London on completion of their 'tour of duty.'

Today, record keeping around the world is challenged by the advent of computer technologies. Centralized management of records is an unrealistic option in a world of decentralized management and administration. Record keepers from North America to Europe to Africa to Asia are faced with the reality that they can no longer simply let records sit in boxes in storage rooms, retrievable eventually, if not easily, by dint of hard work -- as long as the records have not been lost to flood or fire or other hazards. Today records can be lost with the push of a button, as electronic records are erased and rewritten continuously.

Record keeping has never before been as challenging and complex as it is as we approach the end of the twentieth century. It is a common fact that the average North American absorbs more information in a day than his or her ancestor in medieval England might have received in a life time. It is also a fact that much of that information comes in the form of records, and at no time in history has there been such an overabundance of recorded information, and no so few controls on how to manage it, what to keep, and what to ignore.

### **Recognizing regional realities**

This excess of information is coupled with another reality, mentioned earlier. The nature of record keeping depends greatly on the nature of the society creating the records. An oral society may not incorporate written technologies to a great extent. A society heavily reliant on written communication may perhaps be overwhelmed by the paper it creates. Record keeping will be different in a country with one or two cities within a vast landscape, with limited communications technologies and a large rural population, than it will be in an urbanized and contained environment. Namibia and Zimbabwe may have evolved significantly different record keeping practices from Singapore and Hong Kong. The nature of record keeping will depend not only on the information being created but also on the technologies used to create that information, the society using the information, the government structures in place, even the geography and climate.

In today's global village, there is a perception that, since we can now communicate across oceans instantly, everyone, including people in fields such as records or archives management, can move closer together theoretically, practically, and professionally. This is true. Now that we can "talk" electronically, record keepers in Australia can learn about new initiatives in Argentina; archivists in Malaysia can compare experiences with colleagues in Malta. The profession can only grow and prosper as our understanding of each other grows.

But the global village suggests a certain uniformity of understanding and practice that in some ways contradicts the very nature of records and archives work. Just because archivists and records managers in different parts of the world can communicate with each other doesn't necessarily mean they are communicating about the same record-keeping issues. The differences in language, political systems and technologies between Australia and Argentina may mean that their understanding of records and

archives issues may differ. The fact that Malaysia and Malta each have vastly different histories, record-keeping systems, and even climates suggests that there are areas of divergence as well as similarity.

### **Records and archives education**

Societies around the world need expert help in managing their information resources. That help is provided by the archivist and the records manager. These two fields of endeavour have existed in some form since the beginning of the record keeping process, thousands of years ago. The central task of the archivist and records manager is to manage recorded information, whether it be found in an archival repository or found in the an organisation's office. Archivists and records managers are responsible for managing the products not just of pen and ink and typewriter but also of fax and computer and satellite.

Archival and records educators are responsible for teaching the management of recorded information. There are basic principles, guidelines, and practices common to the care of records and archives that cross societal and cultural boundaries. However, just as the nature of record keeping differs from country to country and region to region, it is not surprising to find that the education of record keepers also differs depending on the society's perception of what is or is not important in the record keeping process. Electronic records care is critical to the work of a records manager in Boston or London or Sidney; it is as yet less of an issue in Botswana or Lesotho or the South Pacific. The management of papyrus scrolls is an integral part of archival management in Delhi, but of course is not even considered part of the portfolio of an archivist in Dallas.

As a result of the subtle and not so subtle differences that distinguish practice in different parts of the world, a variety of programmes in archival education have emerged, each teaching locally relevant methodologies and practices. As countries around the world have recognized the importance of record keeping, their universities and colleges have instituted a range of educational offerings, from short courses to graduate degrees. There are today approximately 125 educational programmes in archives management in over 40 countries around the world, of which less than ten are outside of UNESCO Europe (at last analysis, two programmes were offered in Africa, two in Asia and four in South America). International schools include EBAD, the Ecole des Bibliothecaires, Archivistes et Documentalistes, at Dakar in Senegal, and the Department of Library and Archival Studies of the University of Ghana, opened with United Nations' support in 1975. There is also the Centre Interamericano de Desarrollo de Archivos, in Cordoba, Argentina, and a school in Pondicherry, India.

These different educational opportunities address the particular needs of their own societies. For example, Italian archival education is based on a strong legal orientation because many educational programmes were established in the eighteenth century, when archival institutions were largely concerned with legal questions. German, French and Austrian schools, founded in the nineteenth century at the time of the rise of von Rankean theories about historical study, showed a more historical orientation. North American programmes have evolved in co-operation with schools of history and librarianship, reflecting the strong academic and research orientation traditionally given to archival materials. In the developing world, the orientation has often been on learning how to preserve the evidence of the past, which has sometimes emphasised the acquisition or copying of colonial records over the management of current government information.

In spite of the regional realities and differences, there are a number of core principles of records and archives management. The international records community has found that these principles are not always being taught adequately, leading to the poor management of records and archives. One of the responsibilities of the international archival community today is to develop educational initiatives that cross boundaries, both intellectual and technological, in order to ensure that records receive adequate care and that the fundamental principles of record keeping are respected. Just as a doctor's first principle might be "do not harm the patient", record keepers need to understand how not to "harm" the record.

The initiatives to be developed have to address both the widespread similarities in record-keeping work and the diversities found in different parts of the world. While it is important, if not essential, to communicate the principles of archival management universally, it is also critical to teach those principles in such a way that archivists and records managers can adapt these theories to the realities of their particular workplace. For example, while the principles behind how records are physically arranged and filed will remain firmly based on the archival concepts of context and original

order, the practice of arrangement may differ, depending on whether the documents in question are paper or electronic, audiovisual or cartographic.

Similarly, the principles involved with the physical care and handling of records are uniform across countries and continents. The reality of preservation, and the reason it is so critically important to archival work today, is that preservation practices must reflect the realities of local environmental conditions. An archivist in Singapore and an archivist in Norway will both need to understand issues of climate control, but each will practice climate control according to the needs of his or her region -- hot or cold, wet or dry. Similarly, the principles of emergency planning remain the same around the world, but an archivist in the Caribbean may be more concerned about flood prevention than an archivist in Zambia; a records manager in Japan more involved with earthquake preparedness than a records manager in England.

### **The Management of Public Sector Records Project**

It was as a result of this call for internationally relevant educational programmes, sensitive to local realities, that the International Records Management Trust (IRMT) and International Council on Archives (ICA), working in collaboration with valued colleagues such as the Association of Records Managers and Administrators (ARMA) and University College London (UCL), developed the MPSR Project. The project aims to

1. provide a globally relevant records and archives education programme that encompasses a clear understanding of basic and internationally accepted record-keeping principles and practices
2. construct this global educational programme so that it may be adapted to regional needs, in order to recognize and respect local realities, be they professional, administrative or cultural.

### **The generic modules**

The MPSR Project includes the development of fifteen generic educational modules, organised to address core, advanced and specialist issues in records and archives management, as outlined below:

#### **CORE MODULES**

Principles of Records and Archives Management  
Managing Current Records  
Appraisal, Retention and Disposal  
Managing Semi-Current Records  
Managing Archives  
Preserving Records and Archives  
Managing Essential Records

#### **ADVANCED MODULES**

Managing Records and Archives Programmes  
Analysing Business Systems  
Managing Electronic Records  
Automating Records Systems

#### **SPECIALIST MODULES**

Managing Financial Records  
Managing Personnel Records  
Managing Hospital Records  
Managing Legal Records

Each of the fifteen generic modules follows the same structure and format, with text; illustrations or examples; charts and graphs; self-study questions; and summaries. In each module, the main text is divided into lessons, based on a logical division of subjects or issues. Following each lesson and again at

the end of the module are summaries of the key points raised. Appendices include lists of recommended readings and a glossary of the terms used within the module.

The generic modules will provide core educational information -- principles, policies, and theories that ought not to differ regardless of where in the world they are put into practice. For example, a key policy of records care is to respect the creator of the records, series of records should not be filed by subject or date or physical format. To do so would be to destroy the integrity of the records, to obscure the administrative history that explains the records and allows them to explain the creator. This principle applies whether records are kept in paper or electronic form, in boxes or bundles, in storage centres or offices. The generic modules introduce these key points in order to raise awareness world-wide of important, fundamental records practices.

### **Audience for the modules**

The primary client for the MPSR Project's educational is the archivist or records manager, particularly but not exclusively those working in the public sector. The modules are intended to help raise the level of expertise and competence amongst working professionals who may not have the opportunity to leave their positions for extended periods of study.

The MPSR Programme was initially conceived with the needs of developing countries in mind, to serve people who may not be able to participate in existing educational programmes in records and archives management or who have limited access to publications, conferences, professional programmes or other opportunities for study and practice in the field. The modules have been developed with international input, initially to address the concerns of records and archives personnel in developing Commonwealth countries: that is, countries that have emerged from or adopted an English model of governmental and judicial administration.

The modules are designed to be flexible. The goal is to see the modules used in different ways in different countries, appropriate to that country's own needs. For example, the modules may be used for self-study, as part of an in-house training programme, within a distance education environment, as curriculum for face-to-face teaching, or as resource material in existing educational programmes. The ideal application is in a distance education environment, in universities, colleges, or institutions in developing Commonwealth countries.

### **Instructional design for a global audience**

The MPSR Project team identified a number of professional and practical issues to be addressed as the project unfolded. First, the impetus for the project was coming from senior levels of the international archival community, but local interests and needs had to be identified and respected. The MPSR team sought to ensure collaboration and communication between these groups by organizing international awareness raising seminars for records and archives practitioners in developing Commonwealth countries. The team also drew extensively on the experience and knowledge of key players in developing countries, who could comment on the political, economic, and other realities of records and archives practice in their environments.

The MPSR team then formulated the curriculum for the programme and commenced writing of generic modules, commissioning subject experts to prepare content in their specialities, from business analysis to management principles to financial records care. The writing process was supervised by a General Editor -- a former head of the UK Public Record Office with extensive experience in the developing world -- and a Managing Editor -- an archival and records educator with not only writing and editing experience but also with a long involvement in instructional design and production in distance education. A Project Manager co-ordinated contributions, managed budgets, and ensured timelines were met and participants kept up to date.

Style guidelines were developed so that contributors would adhere to the needs of a generic product; specific case studies and examples were produced separately from generic modules, so that they could be "mixed and matched" to regional use. Authors were also advised of the specific framework for all modules, so that they would conform to the planned structure. Completed modules were substantially edited to ensure language was inclusive and clear, examples relevant, and lessons well structured and logical.

## **Instructional design for local realities**

Once the framework for the generic modules was established, the MPSR Project focused on adapting the generic materials to actual use in the field, in universities, colleges, or institutions in developing Commonwealth countries around the world. In order to be effective, the educational programme had to be adapted by and incorporated into the existing educational structure of a country or region; there was never an idea that a “global” educational programme could be established; as discussed earlier the essential realities of records and archives management meant that people tended to think of the subject in local, not global, terms. Thus, rather than develop a complex educational programme that might not be sustainable internationally, the team opted to create a ‘building block’ programme.

Thus the instructional design for the MPSR Project encompasses a variety of methods and tools, including the development of locally relevant case studies, the creation of practical manuals on records and archives practices, and the production of video materials as learning tools and awareness raising devices. Each of these items can be added to appropriate modules, and the modules can be combined to provide longer, more complex courses of study. As well, the MPSR Project team decided to create a “professional development kit” to assist with adaptation of the modules, and the team has prepared and hosted a range of awareness seminars world-wide to explain the project and encourage adoption of the products.

### Case Studies

The fourteen modules in the MPSR Project are supplemented by a series of case studies, intended to illustrate key issues of theory and practice through real-life examples from around the world. A total of 28 case studies are being developed, illustrating situations in such countries as Malaysia, Ghana, Canada, the United Kingdom, Australia and Jamaica. The case studies are designed to relate directly to specific modules, so that they may be easily used as supplementary teaching materials.

The case studies address issues of relevance in developing countries, such as:

- automating records and archives management systems in a developing country context
- managing electronic records with limited resources
- migrating electronic records from old or obsolete computer systems to current systems
- preparing disaster plans in archives and in office environments
- managing preservation and restoration services in areas with extreme climates
- managing centralised versus decentralised records management
- revising archives legislation to serve accountability and transparency in government
- managing limited resources effectively in both the public and private sector
- managing hospital, personnel and legal case files.

### Manuals

Also accompanying the MPSR Project modules are a series of practice manuals, designed to demonstrate the one “best practice” application of the concepts, theories and principles addressed in the modules. The manuals will be particularly useful for in-house educational programmes in governments, where adaptation of the manuals can serve as part of the educational exercise and result not only in enhanced understanding but also improved systems.

### Videos

The MPSR Project also includes the production of a series of video films on records and information issues relevant to developing countries. The videos highlight the importance of managing records and archives as strategic information resources. Films are being produced on such topics as organising information resources in the developing world, the importance of efficient records management for good government, and the management of records in the transition to an era of electronic government.

### Professional Development Kit

In order to help users of the generic modules and associated materials determine the most appropriate way to use the modules, a Professional Development Kit is being developed. This Kit will allow educators, professional associations, governments and others to tailor the modules to their own educational requirements. The Kit will outline the various ways the modules may be used, identify

appropriate educational and professional resources and propose educational models that may be adapted to local use. It will include such information as how to organize a training seminar, how to adapt the modules to a workshop format, who to contact for more information on a particular topic, and so on.

### Awareness raising

The MPSR Project has been enhanced by the organisation and delivery of four international seminars designed to raise awareness of records issues. Each seminar has served a particular region: the Trinidad seminar for Caribbean participants, the seminars in The Gambia and Kenya for African delegates and the seminar in Malaysia for representatives of South and South East Asia.

At the seminars, senior information management professionals from around the world have contributed their knowledge and shared in discussions and debates. In addition, the MPSR Project videos have been shown and the educational modules tested, reviewed and discussed. The seminars have raised awareness of records issues around the world; they have also introduced records and archives professionals and senior administrators to the importance of high-quality, flexible education and training for efficient records care.

### **Working with distance educators**

A number of countries have expressed strong interest in the project and its products; as of the date of writing a range of agreements are being negotiated; the examples offered below involve institutions with which the ICA and IRMT have commenced preliminary discussions. The MPSR Project team is now working closely with these agencies and with distance educators, archival and records educators, and others in developing Commonwealth countries to adapt the materials produced, and the instructional design principles used, to suit the instructional methods and technological and educational requirements in different countries.

For example, archival education at the University of the South Pacific is limited; discussions have begun about adapting the modules into an already existing library education programme to make best use of established infrastructures. Modules would need to be adapted to relate to the time frames used for teaching at USP and the credentials offered would need to be comparable to those in the library education programme, at least initially.

In Malaysia, the country's national public sector training institution sees an important role for records and archives education in public administration courses; modules may be adapted as components of other courses and offered either face to face or by distance education, perhaps in conjunction with the Faculty of Information Studies and distance learning programme at the Institut Teknologi MARA. The Faculty of Information Studies already offers face-to-face courses at the bachelor's and master's levels, and the distance learning programme is active in the development of courses in other subject areas. However, the institute has not the resources to divert faculty time to writing new distance education modules; in this case, the MPSR Project team can bring the completed modules to Malaysia for adaptation and use in undergraduate and graduate-level courses.

In Africa, discussions are underway with countries such as Botswana, which has a growing archival studies programme but a more limited distance education capacity, and with Ghana, which has both a longstanding archival programme in Accra and expanding distance education programmes in some universities. Ironically, since the materials were prepared initially for developing Commonwealth countries, the MPSR team has received a range of requests for use of the materials from educational institutions and archival agencies in Eastern Europe, China, and even Canada. Even before the project components are all complete, work has already begun on the task of adapting the modules to other linguistic and cultural environments. Particular emphasis is being placed on translation and adaptation to meet the requirements of French- and Spanish-speaking countries.

To facilitate the adaptation and use of the MPSR products, they are being produced not only in traditional desktop published, printed format but also in electronic format for adaptation and use with ease. Instructional design elements such as graphs, charts, icons and so on are as simple and clear as possible, and instructions will be provided on conversion of graphics to other formats.

**Future directions**

The ultimate success of the MPSR Project will be when the modules, case studies, manuals, videos, and other educational tools are no longer needed by anyone. One looks forward to the day when all countries have functioning, relevant, and modern records and archives education programmes, but this is inevitably a long way off. In the meantime, the MPSR Project is available to serve a global need, to raise awareness of and improve education in the care of records and archives. The MPSR Project team hope to serve that need by ensuring the world-wide relevance of the content of the educational modules, and by seeking ways to adapt the training tools to the realities of all the regions of the world.