CONGRESSIONAL SERVICES BRIEF

History Associates Incorporated

History Associates Incorporated (HAI) is a leading professional services firm offering services to government, congressional, commercial, legal, education, association, and museum clients. Headquartered just outside of Washington, D.C., we have served hundreds of clients across the United States and around the world since our founding in 1981. Since 2004, we have offered records management expertise to over 50 Congressional offices representing 31 states and U.S. territories.

PREVIOUS CONGRESSIONAL CLIENTS INCLUDE THE OFFICES OF:

SENATORS

- Ted Stevens
- Barbara Mikulski
- Olympia Snowe
- Jon Kyl
- John Edwards
- Orrin Hatch
- Pat Roberts
- Heidi Heitkamp
- David Vitter

REPRESENTATIVES

- Elizabeth Esty
- Fred Upton
- Louise Slaughter
- Cliff Stearns
- Jack Kingston
- Cheri Bustos
- Don Young
- Dan Burton
- Barbara Lee
- Joe Barton
- Eddie Bernice Johnson

31
states and territories represented through HAI archives projects

28+
years of experience working on Capitol Hill

10,000+
linear feet of political archives inventoried and processed

50+
congressional offices served by HAI archivists

TESTIMONIALS

> HAI has provided outstanding services to our office since 2009. HAI's archivist inventoried the Senator's papers and memorabilia with great care and professionalism. We continue to rely on their professional guidance and collaborative approach to preserving the Senator's archives.
>
> **Jayne Balzano**
> *Administrative Director*
> *Office of Senator Pat Roberts*

> The Vitter collection arrived at Tulane fully processed and described. Without the help of History Associates, it might have taken years—rather than weeks—to make these papers available to the public.
>
> **Leon Miller**
> *Head of the Louisiana Research Collection*
> *Tulane University*

POINTS OF CONTACT

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CONGRESSIONAL SERVICES BRIEF

The Research, Discovery, and Experience Company

The following are preliminary descriptions of HAI's services based on typical projects, however every project and office is unique and HAI's project approach is customized to the needs of the office. HAI will provide a more detailed proposal with firm costs once project scope is defined.

Please note that the content here is proprietary.

CONSULTING

Embedded Archivist

For offices unsure of their needs or looking for long-term archives support, HAI can embed an archivist within the office one or two days per week or on the office's preferred schedule. Work can include but is not limited to:

- Records management support
- Assessment of digital or physical records
- Inventory of records
- Consultation on repository selection and review of deed of gift
- Staff training

Records Management

Records Management is about managing active files. HAI's team can help organize files and develop a file structure, develop a file naming convention, and conduct staff training.

Assessments

An assessment provides more information about your office's records. HAI's team will conduct a survey of any physical or digital records, analyze the data, and write a report summarizing our findings and provide recommendations of any future steps. An assessment often leads to development of records management recommendations or can be of use when corresponding with potential receiving repositories.

COST DRIVERS

- Number of onsite days per week or month for embedded archivist
- Can be done on a project basis or time and materials basis (usually an agreed-upon hourly rate and not-to-exceed budget)

- Quantity of records (digital or physical)

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CLOSEOUT SUPPORT

Digital Records Inventory & Packing

HAI will create archival copies of all the office's digital records and package them with preservation metadata according to the Library of Congress' BagIt specification. Digital records often include:

- Share/network drives
- Third-party hosted locations (such as DropBox)
- Constituent Relationship Management system (such as IQ)
- Social media accounts

Deliverables include:

- Secure archival copy of digital records packaged according to the Library of Congress' BagIt specification and ready for transfer to a repository.

Paper Records Inventory & Packing

An inventory of an office's paper records will ensure that office staff and future repositories have a full understanding of the office's files and that files which must remain with Congress (such as committee records) are retained. The inventory will provide essential information to support donation discussions regarding the preservation and use of such material.

Deliverables include:

- A folder or box inventory of the paper records
- Boxes of paper records ready to be palletized and shipped

Memorabilia Inventory & Packing

HAI will inventory the office's official memorabilia including statues, plaques, awards, framed art, and other items received as part of the Member's official work. The inventory can be used to identify specific items for transfer to a repository or to be disseminated as gifts. The inventory will provide essential information to support donation discussions regarding the preservation and use of such material or can serve as a repository's index to the office's memorabilia.

Deliverables include:

- An item-level inventory of the office memorabilia
- Access-quality photographs of each item
- Memorabilia safely packed in boxes for shipment

COST DRIVERS

- Total number of files and file size
- Number of digital records repositories

- Amount of paper records
- Required inventory level (e.g. folder or box)
- Required travel to any district offices

- Number of memorabilia items
- Required travel to any district offices

PROCESSING AND DIGITIZATION

Digitization

HAI can support digitization of paper and photograph records to ensure that the assets are well-preserved and accessible both before and after transfer to a repository.

Deliverables include:

- Digital surrogates of selected office records

Archival Processing

HAI can create a research-ready archival collection through the appraisal, arrangement, rehousing, preservation, and description of the office's records. This can be done in collaboration with a repository or independently to improve access to records.

Deliverables include:

- Fully-processed, research-ready archival collection

Metadata Creation

HAI will help add metadata to digital files (such as photographs), such as names of identifiable people, dates, locations if known from context, etc... This metadata will improve searchability and findability.

Deliverables include:

- Metadata either embedded into the files or created as README files

COST DRIVERS

- Number of items to be scanned
- Size and format of items to be scanned
- Desired quality of digital files
- Location of scanning activities

- Amount of materials
- Level of processing desired (e.g. minimal, full-level, etc.)

- Number of files to be described
- Size and format of items to be described