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Reflections on the Evolution of Appraisal at Library and Archives Canada

From Content to Context to Content through Context

Speaking notes for Daniel J. Caron at the
National Archives of the Netherlands

Library and Archives Canada
Bibliothèque et Archives Canada
Canada

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July 6, 2011

Printed in Canada

ISBN 978-1-100-54049-8
Cat. no.: SB4-18/5-2011

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Introduction

It has almost been 20 years now since the National Archives of Canada first introduced a theoretical, methodological and systematic approach to the appraisal of the records of the Canadian federal government for the purposes of establishing their disposition and status as documentary heritage. We called this approach macroappraisal, and notably, its origins and strategies were significantly influenced by contemporary ideas and concepts then circulating among our colleagues in the Netherlands under the rubric of what you were calling Project PIVOT (a project for the implementation of the reduction transfer period).

Twenty years ago we faced similar challenges, and while the implementations of our shared thinking and ideas were eventually nuanced in slightly different directions to suit our own local domain circumstances, intentions and interests, we did come to some rather similar conclusions, for example, about the primacy of creator context over the information content in documents and records as the resident site or ethos of archival value, and about the utility of a functional-structural model as an analytic tool to support the process of archival appraisal. Twenty years ago, above all else, we also concluded that archival appraisal was an intellectual endeavour of decision making requiring theory, concepts, discipline, rigour, criteria and applications based on scientific principles. We broadly shared the goal of creating a relevant appraisal environment based on an approach that PIVOT was articulating as "maximally objectified subjectivity." Within our respective jurisdictions, we were beginning to search for a new paradigm and form of archival science.

I am very pleased to be here with you today to offer some reflections on the status and progress of these conclusions. I also want to share some thoughts and information about what we have been doing at Library and Archives Canada to address the emergence of a new set of appraisal circumstances very different from what we collectively encountered and faced back in the early 1990s. In particular, I would like to discuss aspects of the transformations and transitions presently involved in the passages from analogue to digital communication, and more broadly, in the global evolution towards a digital society.

What impacts are these changes having upon the way we will make appraisal choices and identify documentary heritage in the future? Can we construct and establish an appraisal strategy with sufficient intellectual rigour and capacity to satisfy our documentary objectives in the digital environment, and to bridge between documentary theory and the implementation of practical documentary outcomes having public benefit? My intervention will transpire through three phases of discussion: macroappraisal, recordkeeping and a Whole-of-Society model.

Macroappraisal

Let me begin with the introduction, implementation and eventual replacement of macroappraisal by Library and Archives Canada. In the brief telling of this story, let me be perfectly clear on one point: macroappraisal was a very innovative first step towards the development of an intellectual perspective for the identification and selection of documentary heritage; however, it began to become less relevant to public administration over time, and it became practically obsolete within the emerging information and communications technology context of the digital environment. Today at LAC, the discourse of macroappraisal has been largely superseded by the discourse of recordkeeping, although macroappraisal remains a source of inspiration and there are certain elements of continuity with our new recordkeeping initiative and its methodology.

In fact, the obsolescence of macroappraisal was not necessarily related to its theory or to its implementation, which were largely appropriate to the circumstances of the times and the problems and issues the strategy was designed to address at first instance. These included among other things, and I am sure some of this will sound very familiar, an alarming rate of indiscriminate records acquisition and ingest; a disproportionate archival representation of lower level bureaucratic business transactions at the expense of policy documentation and records of executive-level decision making; inconsistent appraisal decision making and the general absence of criteria; and last but not least, a very inefficient, ineffective and insubstantial methodology of analysis—if one could even call this a methodology—wherein archival value was ascertained subjectively or intuitively on a file-by-file or document-by-document basis by individuals.

As it was being formulated, expressed and refined through the 1990s into the early 2000s, however, it was becoming clear that macroappraisal rested on some theoretical assumptions and had

certain strategic predispositions which were limiting its capacity to adjust and adapt. In particular, as time passed, the incapacity to fully address the growing complexity of public administration and the nature and characteristics of its information resource production was becoming increasingly problematic from the perspective of having logical and legitimate documentary outcomes. If records were being regularly transferred to LAC by departments—and this was not always the case—we were beginning to wonder whether they provided the most accurate and synthetic representation of government's administration. Were we acquiring the "right" records? In fact, macroappraisal was beginning to struggle both conceptually and tactically with the emerging horizontality of policy development and decision making associated with the transition from activity-based to results-oriented administrations through the inauguration of new public management and integrated planning, reporting and performance evaluation across the Canadian government. And of course, there were also the enormous changes occurring within the business cultures, behaviours and relationships of public administration generally, largely coincidental with the innovation of new information and communications technologies, social media, and the materialization of networks. I shall come to this discussion in due course.

Having said all this, the introduction of macroappraisal in 1992 by the former National Archives of Canada was a watershed moment and it represented a huge achievement. It completely redefined the landscape and development of archival appraisal theory and strategy both at the National Archives and across Canada, and eventually, it would come to have some significant international profile and prominence. It introduced, for example, provenance-based appraisal linked to structured systems thinking and functional analysis; communications form, format and medium-agnostic appraisal; it focused appraisal analysis endeavour at the context and tier of the records creator rather than on the content of documents and records; and it insisted upon a new primary objective: to identify and capture a documentary representation or illustration of how government develops policy, makes decisions, establishes infrastructure and interactively delivers programs and services to citizens through public administration over time, rather to account comprehensively for all business activities and their corresponding information resources at the enterprise level of business transactions.

Unfortunately, and practically as it was being introduced—as we would come to understand—macroappraisal was already slightly out of sync with the contemporary operation and

progression of public administration. In the mid-1990s, government was in the process of launching a major initiative of policy renewal and redirection, bringing substantial changes to its administrative goals and objectives, and to the ways and means of decision making with public business enterprise. In this environment, a documentary theory supporting a top-down appraisal approach based on the identification of command and control authority hierarchies and their information outputs was essentially passé, and its limitations would soon be exposed. In addition, with the arrival of technology at the desktop, subsequently enhanced by social media and other Web 2.0 tools—and what this meant for development of collaborative public administration—provenance-focused appraisal was unable to fully engage the new semantic relationships and workflows enabled by technology within emerging business networks.

We also eventually learned that the appraisal and records disposition processes of macroappraisal were positioned badly in relation to the public administration it was ostensibly intending to document. In effect, our processes were not really integrated or aligned with government business, and managers and administrators generally neither understood our intentions nor necessarily saw any value in their participation. Ultimately, even with the development of coping mechanisms for administrators such as interpretive guides, macroappraisal remained an archival appraisal technique and tool largely and substantially designed for archivists. Actually to succeed from the perspective of documentary heritage, we were going to have to change our philosophy, our documentary objectives and tactics, and especially the conversation and discourse around fundamental intentionality and purpose. The first step in that direction would emerge through the development of a regulatory regime for recordkeeping within government institutions under our leadership and authority. I shall return to recordkeeping shortly.

When I reflect upon the accomplishments and achievements of macroappraisal, my thoughts invariably turn in combination to one of its enduring strategic principles, the scenario of its before-and-after, and what its implementation actually meant and represented for the institution and its professional archivists. From a technical or tactical perspective, the primary contribution was to shift the focus of archival appraisal away from a highly subjective analysis of the information resource content contained in documents and records either according to quasi-codified value taxonomies (e.g., Schellenberg) or pure intuition linked to anticipated research utilities or potential as documentary source material for

historical exposition. In the place of this traditional approach, the reforms of macroappraisal proposed that the archival and historical value of government records should be identified in relation to the provenance of their creation or production, and to their status as documentary evidence of the business functions and activities associated with the primary source of their administrative origin, *ergo* the genus of structural-functional analysis and provenance-based appraisal with which macroappraisal is largely associated. Ultimately, macroappraisal represents a significant shift from documentary content to documentary context, and in this sense, it substantially changed the ways and means of appraisal at the National Archives of Canada and elsewhere.

Through this transition—about which much has been written—we can easily recognize that the National Archives had been for years locked into a form of archival appraisal which was both highly contentious and highly inefficient because it relied almost entirely on the intuitive artisanship of its professional archivists working unilaterally as individuals and largely without institutional guidance provided through appraisal strategy, methodology and criteria. Macroappraisal helped to change this, it was a key juncture, and it represents the first major turning point in our institution's ongoing appraisal journey.

In retrospect today, I largely see macroappraisal as one of the seminal catalysts for directional change within archival institutions and within the archival profession. As with the contemporary propositions of documentation strategy in the United States, which may have differed slightly in theory, but not necessarily in terms of goals or objectives or techniques, with macroappraisal one has the initial steps towards a corpus of scientific thinking. Here we have something more intellectually robust, something more principled and deliberative, something more theoretically rigorous, something approaching the context of the social sciences and their analytic models and methods, although it remained essentially expressed in the form of technique, methodology and tools. The desire to move in such a direction has, in fact, been part of our appraisal discourse for many years, certainly since Ernst Posner started writing about the necessity of moving the archival profession towards a greater emphasis upon social science perspectives in the 1950s.

And yet, and this has been my main conclusion about macroappraisal, documentation strategy and other similar approaches, we have so far not been able to break the bonds of our own discipline and our own basic concepts, techniques and tools in order to bring the full range of the intellectual dimensions and capacities to bear

on the identification and selection of documentary heritage. We continue to reference social theory and social epistemology and social science, but we largely remain unwilling to fully engage or to cross entirely over into potentially new analytic and trans-disciplinary territory in order to inform archival appraisal philosophy and strategy, and to become more scientific in our thinking and decision-making applications. Despite the welcome introduction of new discourse at times, for example, the allusions to postmodernism we now regularly see in the archival literature, when the moment comes to actually make decisions about the archival value of information resources, we seem to fall back and confine ourselves to the processes, techniques and principles of what has passed for a generic archival science over time supplemented by local domain theories. For example, I have been hearing lately about some proposals to expand and change the definition of archival provenance in order to permit its accommodation and operation within the digital functionality of information and communications networks and social media. Perhaps it would be easier, wiser and more logical simply to recognize and admit that provenance is an outdated analogue concept which does not translate well to the digital infosphere of the computing cloud.

Let me now take you to the next chapter in our institution's appraisal story. We are now in Library and Archives Canada, created in 2004 by merging the former National Library and National Archives. It is early 2006, and opportunities are presenting themselves to allow us to change our philosophy and discourse around information management and archival appraisal, in effect, to change the conversation. Significantly this time, we are not going to have this discussion exclusively amongst ourselves (archivists) and the "usual suspects" (records managers). We are going to go to the centre of our public administration, win support at the highest levels, and work collaboratively with departments to issue the Government of Canada's Recordkeeping Directive under our sponsorship and leadership three years later in 2009.

Recordkeeping

Of course, the situation and its resolutions were slightly more complicated than these matter-of-fact statements convey. First, we already knew by 2006 that the government records disposition program supported by macroappraisal was not working very well. LAC was not acquiring government records on a regular basis, and moreover, we had begun to question the quality of the documentary heritage being transferred by departments to LAC through the techniques and channels that had been established.

We also knew that departments and agencies were not managing their information effectively for a variety of reasons, but that this problem had become recently compounded with the full deployment of the electronic desktop and the installation of new information and communications technologies including social media, the combination of which produced several largely unforeseen and adverse effects.

On one hand, the transition of public administration into the desktop and ultimately into cyberspace was having enormous benefits in terms of information sharing and the development of collaborative workflows within departments, and public servants were readily gravitating into the digital workspace. Ironically on the other hand, however, some of the benefits and utilities for public administration enabled by this integration of people and technology were also leading inadvertently to the emergence of an increasingly pervasive and largely unrestrained institutional culture of rampant information production and indiscriminate information storage and disposal evolving counterintuitively to information resource needs and organizational business requirements. This "counterculture" was becoming enormously problematic, since all of the accounting and accountability requirements associated with results-based public administration are entirely contingent upon the creation, production, capture, management and persistence of the information necessary to support corporate decision making and to satisfy the corollary requirements of review, performance measurement, evaluation and audit, and more broadly, the emerging context of public scrutiny.

The immediate impacts of this situation were quite clear. The assumption of documentary presence and accessibility within departments was not especially well supported either practically or theoretically, and consistent corporate control over business records and other forms of documentary evidence was increasingly suspect if not entirely dubious. Essentially, departments were losing

organizational custody and control over their information resources to individuals operating unilaterally, indiscriminately and without any form of recordkeeping discipline at the desktop; questions were being raised both inside and outside of government about the institutional capacity to have accountability and transparency for decision making within the business domains of public administration; and last but not least, LAC was encountering enormous difficulty translating its appraisal and documentary heritage decisions and directions to the departments in a manner such that they could be understood and implemented in a meaningful way.

To set departments on a corrective course to begin to address this multi-dimensional problem, LAC set an initiative of consultation in motion at the most senior levels in government with the permission and support of the Clerk of the Privy Council, including a roundtable discussion on the subject of information management by Deputy Ministers, and subsequently an Assistant Deputy Minister Task Force on Recordkeeping. After some considerable debate and deliberation, we collectively concluded that a regulatory regime for recordkeeping was required to bring fundamental integrity, process, rigour and discipline to the development and management of information as business capital integral to decision making and effective public administration, and that the regime should be constituted in the form of a policy directive linked directly to government's Management Accountability Framework (MAF).

I would be here for the next two days were I to attempt to explain everything that transpired in the process, and in any case, many of the details are available on our LAC website. For the present, I would like to highlight three particular elements which led us to this conclusion, and to the substance of the Government of Canada's Recordkeeping Directive issued in April 2009. The concepts and ideas articulated within these three components were instrumental in establishing new perspectives on and approaches to information resource management within departments, and core essentially critical to LAC within the context of its own institutional modernization agenda. This agenda, which I announced shortly after I was appointed Librarian and Archivist of Canada, focuses pre-eminently upon the need for LAC to establish renewed and fundamental relevance to Canada and its citizenry within the transformational paradigm and evolving environmental circumstances of our new digital society. In my view, the possibility of developing and sustaining societal relevance for documentary repositories such as archives and libraries largely rests with the relevance of the documentary heritage that is identified, selected and rendered accessible

through an intellectual construct and documentary theory of appraisal based on scientific principles.

With respect to the recordkeeping elements, the first thing LAC did was to change the conversation, discourse and business context around information management. We moved the discussion from one of records and information disposition within a life cycle to one of information resource development within a business value continuum. To put it another way, we changed the conversation from "waste disposal" to asset development. In a knowledge economy, information resources represent business capital requiring management with care and discrimination; they are not simply bureaucratic detritus to be systematically thrown out. Consequently, we also introduced the concept of recordkeeping as a core component of effective and efficient public administration, and insisted that information resources be treated with the same discipline and rigour accorded to human and financial resources. And we went even further. With full integration in mind, LAC proposed that recordkeeping should be directly linked to the central agency policy framework animating the federal transition to results-based public administration, namely the Management Resources and Results Structure (MRRS) policy; the new Program Activity Architecture (PAA) requirements within departments; the Management Accountability Framework (MAF); and the Whole-of-Government (WOG) approach to federal financial resource allocation and reporting.

To facilitate all of this, LAC introduced two major innovations. First, we established the notion of documentation standards for program and service activities across departments. Essentially, within discretely defined and formal parameters of business function and process, documentation standards identify the documentary evidence required by organizations to operate and account for program and service activity; determine the nature, composition and extent of the documentation that needs to be created and kept by organizations to satisfy these business requirements; and explain how government institutions will capture, manage, and preserve this evidence over time regardless of its origin, source, form or format. Most important I think, LAC also completely changed the context, discourse, theory and objectives of information management at the federal level in Canada. Traditionally, information management had simply been conceived as the life cycle management of information for the purposes of its disposal. With recordkeeping, LAC transformed information management into an information resource development function, focusing primarily on the creation and capture of information resources with deliberate documentary intent.

In fact, the fundamental purpose of recordkeeping based on documentation standards is to establish the business value of government's information resources integrating the business enterprise of public administration purposefully with a documentary ethos. This is truly the source of its innovation. With documentation standards, the appraisal and evaluation of information resources becomes a core function of effective public governance from corporate accountability, stewardship and documentary perspectives.

As a second element in the recordkeeping conversation, LAC also decided to identify and address a different audience. From the outset of the recordkeeping initiative, not only did we go to the "centre" to win support for our information policy reform intentions, but afterwards and subsequently, rather than speaking to CIOs and records managers about the related information management issues, LAC spoke almost exclusively to business managers about the information resource requirements of program and service activity using the language of business and public administration. Therefore, not only did we change the conversation and the discourse, we also worked closely with program and service managers to change the accountabilities and responsibilities for information resource development and management within federal public administrations. With the full co-operation of the centre and government's senior business managers, the GC Recordkeeping Directive has rendered the entire complement of the executive cadre accountable for the implementation of recordkeeping within departments and agencies.

The final recordkeeping element I would like to note will act as a springboard forward to my concluding remarks.

As LAC continued its research and analysis around the implementation of the Directive in departments and agencies, we recognized the presence and potential of two very fundamental impact effects. We realized that the corporate decision making about the business value of information resources within public administration—especially now within the digital environment—needed to be pushed very far upstream to the point of information resource creation, or possibly even before, *ergo* the notion and development of documentation standards. We also began to understand and to pursue the decision-making point—what I like to call the documentary moment—as an inclusive and continuing decision serving business value and archival value on a simultaneous basis. In other words, given the digital and administrative circumstances, LAC concluded that information resources of archival value were not only a subset of business value, but that the decision making should transpire bilaterally at the same time between LAC and departments

under the direction of inter-institutional and multidisciplinary teams bringing different criteria and expertise to bear. In effect, the appraisal of government information resources for business and archival values should occur within a single business process. At the moment, LAC is advancing this process through a new recordkeeping methodology, which we hope to have fully rolled out in departments by the end of 2014.

Today, even with a new recordkeeping context and process, and however sophisticated these may be—and they are very much cutting-edge in my opinion—I must say that appraisal at LAC continues to remain quite subjective within the current context of its methodology, technique and tools. For some time now, certainly since I assumed leadership over the Recordkeeping Initiative in 2008 as Assistant Deputy Minister and continuing on now as Librarian and Archivist of Canada, I have been wondering about the societal relevance of our institution's intended documentary outcomes. Do the information resources that LAC causes to be preserved through the appraisal lenses that it applies contain relevant documentary content of public benefit and utility?

My sense is that our documentary outcomes need to become more objectively representative of how society functions as a whole, inclusive of how government operates within it by developing policy, making decisions and interacting with citizens over time. However, as we all know, society writ large is undergoing fundamental change at a rate of unprecedented velocity and on an evolutionary scale of transformation. In this new context, and for a variety of reasons, I believe that our contextual analysis—which has become the primary source of inspiration for archival appraisal—needs to become more scientific than it has been in the past. Let me conclude this afternoon with some remarks about the Whole-of-Society model for appraisal that we are currently discussing and developing at LAC under the rubric of institutional modernization, and what I believe needs to happen in order to bring greater analytic objectivity and rationale to our appraisal decision making.

Whole-of-Society Model

As you know, Library and Archives Canada is not simply a repository for documentary heritage created by the federal public administration. We have always preserved information resources from the private and civil sectors, and collected Canada's published heritage within our bilateral function as a National Library. In the past, we have largely focused our appraisal attention (*ergo* macroappraisal) on the corporate records of government because of the

extent and volume of the documentary production, and simply followed the regulations we have created for the legal deposit of publications. We have some "orientations" for appraisal within the private and civil sectors, but nothing truly approaching policy or strategic direction. Now with a new mandate to preserve Canada's documentary heritage writ large, I believe LAC is in an enviable position. We have a major opportunity to redefine ourselves in the digital world of the 21st century, and we have the legal authority, objects and powers to do some remarkable things in this regard. On the other hand, I am less sanguine as to whether we have yet fully developed the documentary way forward to support the documentary means we have at our disposal.

Along these lines, my own appraisal thinking has been evolving in two directions, one related to appraisal policy development at the institutional level, the other related to the intellectual rigour and scientific principles required to make appraisal decisions and provide rationale. From the institutional perspective of appraisal policy, part of my modernization agenda has been to begin building a stakeholders network of documentary repositories to address documentary heritage and related appraisal issues from a broad pan-Canadian perspective. LAC is one of approximately 800 archives and 2,000 libraries in Canada, and it is axiomatic that we share roles, responsibilities and interests. Can we now collaborate to create a Whole-of-Society framework that would allow institutional members within this network to work together and move towards collective appraisal decisions, or at least to an understanding of the nature and direction of their respective documentary intentions? So far, reactions to this proposal have been encouraging, to the extent that the stakeholder community is already talking about creating a documentary agora: a kind of commercial marketplace to discuss potential acquisitions. It is a beginning, but there is obviously much more to discuss around institutional documentary intentions from a policy perspective.

More problematic and complex, of course, is the nature and content of LAC's documentary outcomes, and it is in this particular area that I have been focusing my reflections and asking for

enhanced analysis and greater precision of documentary intention and justification from my staff. My reading of the situation is that while LAC, like many other institutions, has moved the location and application of appraisal analysis to the context of documentary creation, we have not yet advanced the framing of it sufficiently into what social theorists and social scientists typically call the "thick context" of interpretation, value, meaning and cognition. Our understanding of creator context and our lensing of it essentially remains very "thin," largely confined to analysis and assessments conceived through archival concepts and techniques (provenance, fonds, original order, etc.). And almost inevitably, viewed and articulated from this "thin" perspective, our perceptions of society often remain unilateral to the extent that the documentary content refracted into the repository through our particular set of context lenses is also quite limited in scope, sometimes bordering on a one-dimensional reflection, or what could be called, a purely "archival sense of the past."

My view on this is that we need to return to the question of documentary content through a new set of appraisal lenses, and this means a very much broader and deeper exploration of societal context. One option could be a more direct focus on the public endowment and preservation of our foundational civic "goods"—the original documents of our decisions and actions, and the information contained in our books and other documentary media and artifacts—which are required within society to articulate, express and share common goals, assumptions, values and ethics; to provide individuals and groups with the capacities of social literacy necessary to enable their democratic participation within communities; and to ensure accountable public administration and responsible governance under the rule of law.

In effect, I mean focusing appraisal attention on the selection of society's *causa materialis*: the documents which permit us to socially "live our lives" within a state of law; to function collectively as a democracy; and to have continuing and inclusive social consensus and progress through the distribution and sharing of information resources and the preservation of an accessible documentary heritage. I am suggesting that documentary repositories should concern themselves primarily with the identification and persistence of the information resources and documents articulating the modern democratic state and its broader domain of inter-sectoral governance and activities, including its corresponding regularities, ethics and discourses expressed through contemporary "socio-economic" actions and behaviours at various individual, group and organizational levels. In relaying this broader and multi-layered

understanding of societal context and its relation to appraisal and the selection of information resources, I am proposing the articulation of a new social epistemology rooted in a documentary corpus whose nature, construction and constitution are inspired and informed by social theory and social science, including the diversity of approaches variously expressed in the socio-centric writings of scholars such as Bourdieu, Foucault, Ricoeur, Habermas, Goody, Giddens, La Capra and others.

If we are truly to understand the agency and functionality of society, and especially the nature of the semantic relationships now animating human actions, transactions and societal discourse within the networks and documentary production environments of cyberspace—the new locus of what once Pierre Bourdieu called social habitus—my sense is also that a "thick" understanding and a comprehensive documentary representation of our new digital society requires a fundamentally different set of appraisal lenses expressed through a fundamentally new set of appraisal questions. Our line of questioning needs to become more expansive and inclusive of other reflections, to be more focused on research and analysis, more socio-centric, and ultimately more scientific. And we certainly need to become much more collaborative with other social sciences in exploring the answers to these questions.

Right now at LAC, through the proposition of a Whole-of-Society model and approach to documentary intentionality and documentary outcomes, I am asking archivists and librarians to begin to articulate and develop the questions that we need to ask as an institution in order to broaden and deepen the documentary context we bring to the identification and selection of documentary content. I am asking for a new appraisal model based on research, analysis and scientific principles primarily illuminated by the discourse located within social theory. At the moment, we are exploring the various dimensions of this direction through the tools of domain analysis and agency theory commonly utilized in many of the social sciences. In a hybrid adaptation integrating social theory and social science perspectives, we are attempting to build the intellectual capacity necessary to assure the persistence of authoritative, registered and enduring documentary outcomes in a digital world of increasingly perishable and compostable societal memory.

This concludes my formal remarks this afternoon, and I would be delighted to answer your questions and begin the conversation.

Thank you