

# Idaho State Historical Records Advisory Board (SHRAB)

---

---

Serving the present and future generations of Idaho by providing expertise in archival and information management to encourage the preservation of historical and significant records.

---

---

2205 East Old Penitentiary Road, Boise, ID 83712-8250 (208) 334-2620 Steve.Walker@ishs.idaho.gov

## Agenda November 3, 2005 9:00 am - 3:00 pm

Department of Agriculture, Basement Meeting Room  
2270 Old Penitentiary Road, Boise, ID

9:00 - 9:15

Welcome to SHRAB members and introduction of new members

Attendees:	Not in attendance:	guest (attended - morning)
Steve Walker	Byron Johnson	Linda Morton-Keithley
Jeff Bryant	Roseanne Abrahamson	
Carter Wilson	Denton Darrington	
Bonnie Fuller		
Blaine Bake		
Duane Bogstie		
Darrell Roskelley		
Steve Smylie		
Mary Reed		
Robin Wilson		

9:15 - 9:45

### Report on NHPRC Grant #2005-089- Steve Walker

The SHRAB received a \$10, 000 grant to cover some basics, including funding for three in-person SHRAB meetings between now and the end of the grant, July 2006. It will cover the cost of some training around the state. Steve will be asking for an extension so that we can try to make it run from now until December 31, 2006.

The Board will need to make another NHPRC Grant proposal by the end of May 2006.

Status of programs usually performed using NHPRC grant funds – Steve Walker reported that most programs (training on records preservation and management, presentations on the Archives and the State Records Program) have been on hold due to delays in the opening of the new Idaho History Center. He is planning to schedule various workshops around the state – especially with the Idaho Association of Cities, with the assistance of the Boise chapter of the Association of Records Managers and Administrators (ARMA).

### New Manuals for SHRAB members

Steve Walker distributed a copy of the Council of State Archivists (CoSA)(formerly Council of State Historical Records Coordinators, COSHRC) materials given to each State Archivist. The binder includes a CD-rom of the online course “The Basics of Archives”, as well as copies of the informational brochures on records preservation available from the State Archives.

The SHRAB/CoSA Manual contains examples of handouts, brochures (labeled according to stakeholder group, such as, state agency, local historic society, etc.) for use in informing the public – each is color coded. Robin Wilson will make a list of the colors and the stakeholders the brochures target.

Robin Wilson: Are any of the materials in the binder dated/in need of updating?

Steve Walker: The brochures and handouts are from the time of the first strategic plan. The most dated information included in the brochures and handouts are the email address and phone numbers for the Archives and for his office.

Steve W then provided his new email address and direct office phone number:

[Steve.Walker@ishs.idaho.gov](mailto:Steve.Walker@ishs.idaho.gov) (case sensitive address)

new direct phone line: 208-514-2323.

The main Archives phone number remains 208-334-2620.

The new addition to the Merle Wells Archives building has been named the *Idaho History Center*. It is a division of the *Idaho Public Archives and Research Library*, the new name for the organizations reporting to the ISHS.

The new general email address for the Archives is:

[public.archives@ishs.idaho.gov](mailto:public.archives@ishs.idaho.gov)

The street address remains: 2205 East Old Penitentiary Rd., Boise, ID 83712-8250.

#### Status of the opening of the Idaho History Center and updated Archives –

They are awaiting fixtures for offices, working on the building still (completion was due in September) – completion is currently due November 5, 2005, but the building really isn't ready.

Mary Reed announced her intent to resign from the SHRAB, effective as of the end of this meeting. She has been named *Representative-at-Large* for the Idaho Association of Museums (Boise will be hosting the 2006 Western Museums conference and Mary is on the conference committee). She asks that the Board consider recommending a grassroots member to take her place on the SHRAB.

**NOTE:** Further discussion resulted asking Mary Reed not to retire from the SHRAB at this time, but to complete her term, through 2006.

See later notes on SHRAB memberships and appointments.

#### Training and Orientation

Steve Walker – reported on the orientation given to the new members, Carter Wilson, Jeff Bryant and Bonnie Fuller in Boise during September.

Presentation materials are part of the SHRAB binder – was done in Sept for Carter, Jeff and Bonnie

#### Duane Bogstie - Report on Training Activities

Duane and Steve Walker have held state agency records training workshops

Duane demonstrated the slide/powerpoint exhibit they use which includes information about the purpose of the State Records Center and the State Archives, their legislative background and what an agency records program needs to include to be legally defensible.

These workshops take about a half day. To date, the Department of Agriculture, Idaho State Police (51 attended) have participated. Duane noted that the State Police records manager (Shannon Squire) had been having trouble getting her agency personnel to participate.

University of Idaho Records Training was provided to Ron Town, Assistant Financial Vice President in charge of the Financial Computing System for University of Idaho, his staff and to Julie Crea, Financial Assistant with VP Finance for Lewis Clark State College. Ron has been assigned responsibility for UoI's records program following downsizing that resulted in the layoff of their Records Officer. He previously had no idea what records management was about. Julie Crea has been tapped for records management responsibility at LCSC and also has no prior records management experience. The training was attended by Robin Wilson in her capacity as Records Manager for Idaho State University, as part of her outreach budget, to share her experiences since starting ISU's Records Program in 2000.

Currently Duane and Steve Walker are helping Ron prepare a one-time blanket record disposal. Spent approximately 10 hours in person (2 hours day of training, 8 hours day after)

Coeur d'Alene training for the Administrative Assistant to the County Commissioners, plus their County Clerk. They discussed the State Records Center providing a service to the county of accepting FTP (file transfer protocol) downloads of "born digital" permanent retention records to a CD to provide preservation media in order that a hard copy and/or CD can be transferred to State Archives (which currently can not provide this service), leaving the county in possession of a useable/accessible version of the same records.

Duane discussed how this kind of training is essential to improving records management around the state. He would like to look for a larger grant or some sort of grant to cover the cost of more training.

Carter – the counties could put in for grants for CD conversion/storage

Mary – On the subject of training content – wondered what the SHRAB could do to provide the local historical societies something to read explaining what they can do to preserve their materials/records.

Duane – Pointed out that the SHRAB Guidebook used for this training is posted on the ISHS/SHRAB website.

The need for and appeal of a "one sheet" on resources and preservation concepts was discussed, as well as the need to for a mailing of the current brochures.

Steve W – planning a mailing of brochures to coincide with the January 26<sup>th</sup> ISHS Legislative Reception (will also coincide with the 'christening' of the new Idaho History Center.

Darrell – the county clerks tend to go to the Attorney General's office for record retention information/guidance. It was agreed that the SHRAB needs to make contact with the AG to build cooperation with them, in order to ensure that their legal recommendations match Idaho public records law as well as existing policy based upon IDAPA rules (the Department of Administration Records Retention Schedules and Records Guide). Especially considering that the AG has their own guide concerning the Public Records law that talks about records retention, but does not currently refer to the DoA Schedules or Guide.

The Deputy Attorney General, William (Bill) Von Tagen has been making presentations around the state about the public records law that do not include references to the DoA and the State Records Program or to the State Archives. The contents of the AG office presentations is based upon AG Office legal opinions and not on existing language or published guidance from the Department of Administration (who has the authority per Idaho Code). In Idaho, there is real fragmentation in the messages about how to deal with agency records.

Are vital statistics records being handled differently?

Steve W – every county has same type of vital statistics – birth, death, marriage; these are submitted to state Bureau of Vital Statistics – That Bureau sets restrictions on access, however, the counties set differing restrictions, these vary even from county to county.

Blaine – regarding the Bureau of Vital Statistics – They only recently have handled marriage records. For example: for records created between 1911 and the present, birth records have their access restricted to family for 100 years, and death records for 50 years. However, the federal Social Security Number Death Index is available after about one month delay. These conflicting rules make matters troublesome.

Carter – In Tennessee you can request a certified copy of a death record if you are a family member, whereas non-family must wait for 25 years from date of death and still will not be given a cause of death

There was discussion of a suggesting an ‘unsealed’ version of a birth certificate for research purposes.

Steve Smylie – reported an email-based scam related to his father’s death – where a non-family member was trying to establish a claim to the estate.

Duane- this is where training comes into play, for example, he just met with Legislative Services at their request for record training. At that time there was discussion of having the Governor’s office staff joining the session, but this last was delayed. The Legislative Auditors have had the training as well. That session included a discussion of their cost of record storage at the State Record Center. They wanted to know why the statewide expense for this storage is growing /ongoing. Duane pointed out to them that the Records Center regularly notifies agencies that their records are past their retention date, are eligible for destruction, but the agencies are refusing to do so.

#### Influence of Other States’ changes in Records Management

The problems following Katrina and Rita with access to records, especially property records, proving mortgages, tax rolls, etc, seem to be having a good effect, in part because of some success stories in cities, counties and agencies where their disaster recovery plans were successful.

Steve Walker has been distributing information posted by other states reflecting their changes to open records plans, or public record access laws, to the SHRAB as well as to the ISHS Board of Trustees and members. Idaho is going to find itself in the middle of these issues soon – he hopes that the ISHS Board of Trustees has been paying attention to this information. Consensus: Idaho needs well defined laws on the books to make restrictions on access to public records clear, consistent. Many states have established an upper time limit for restricting information, that is,

'exempt' public records will remain so only for a fixed period of time, say 25 to 50 years from date of record.

Steve Smylie – Idaho has have been working on (records-related) legislation on a piece meal basis - legislation gets done by building coalitions. Idaho needs a unified records management code.

In the last several years there have been 2 or 3 changes to the Idaho code affecting public records, if not IC 9-338 specifically – confidentiality of research (trade secrets) records was one.

### Future Plans

#### Grants

- a. SHRAB grant, what to do?
- b. Strategic plan revision (2001)
- c. Legislative review grant proposal for e-records/UETA-related regulations concept was presented by Robin Wilson. Very preliminary

A grants committee was formed, comprised of Jeffrey, Carter, Bonnie, and Robin.

#### Legislation

A legislative relations committee was formed, comprised of Steve Smylie, Darrell Roskelley, proposing Denton Darrington, Byron Johnson as well. The cities and counties have been conciliatory about records legislation.

Carter – Could we ask the legislature to consider the formation of an omnibus task force to review records management issues as relates to Idaho Code?

Steve Smylie has made a motion – to share the following final language with the ISHS Board of Trustees tomorrow:

**“We are willing and amenable to participate in the formation of a coalition to examine Idaho code for inconsistencies in records related language.”**

Blaine seconds the motion and will present the statement on behalf of the SHRAB.

Other concepts were considered for discussion with a coalition, once formed.

- Idaho Code has already given the state guidelines for records management – Why not review those guidelines and firm them up with code basis?
- Would a replevin law help Idaho preserve its records? There was once a replevin law, but it was repealed. In most states, according to Alan Virta, these are one-sentence amendments to existing records laws. Could easily be added to Idaho Code.

Blaine – The SHRAB have made a lot of progress about our credibility. We're interested in being a soundboard for records issues. He will mention replevin during a conversation with the Board of Trustees – express an interest in “replevin” legislation.

Carter - Motion tabled about introducing concept of replevin legislation – Unanimously approved.

#### Possible workshop dates and locations

CD included in the SHRAB Guide, *the Basics of Archives*

Steve W asked for suggestions on organizations to contact to offer presentations

- Assoc of Idaho Cities
- Idaho Association of Museums
- Idaho Association of Counties

(Linda M-K reported that during the last legislature Dan Chadwick (Assoc of Counties) agreed to meet with Steve Guerber, they met and both gave the go-ahead to meet with counties and provide training.

The county clerks are about to have a meeting, Darrell will see if SHRAB can make a presentation there.

- The two groups are expecting to get together.
- Idaho Homeland Security has asked for training – when?

There was discussion of a number of instances of public records being destroyed or misappropriated: a county court records manager who has threatened to throw away records if they can't transfer them (implied 'if not soon'). In another example, a former county clerk took records of the assassination of a former governor home when they retired. The Governor's office had been scanning permanent records and then destroying the originals, however, after the SHRAB training, Legislative Services stated that they were going to tell them to stop.

12:00 - 1:30 ISHS Annual Luncheon at the Owyhee – included the ISHS Historic Preservation Award presentation, the Esto Perpetua Awards Ceremony. The SHRAB closed the meeting at 11:30 to attend.

### **Issues from the Floor**

- New member appointments

Robin Wilson reported that Parra Byron, Education Liaison to the Governor, relayed a request from the Governor for new SHRAB appointments, as the current terms for Duane Bogstie, Blaine Bake, Darrell Roskelley and Denton Darrington lapsed during October 2005. Blaine Bake's long-standing term with the Board was discussed.

Blaine strongly states the need for a county clerk on the Board – until then this body cannot truly represent the records of the state. Darrell will be contacting Dan Chadwick with the Association of Counties for a suggestion on a county representative for the Board, based on his motion to do so, approved unanimously.

The Board agreed that a letter should be addressed to the Governor recommending that Blaine Bake, Duane Bogstie, Denton Darrington, and Darrell Roskelley all be reappointed for additional two-year terms. Blaine provides much-needed continuity and awareness of the SHRAB's history at a time when the membership is turning over substantially. Mary Reed is in her final term and Senator Darrington (it is speculated) will not serve another term. Duane and Darrell have not served very many terms. Blaine has also volunteered to step down should a county representative become available, if need be.

- Robin reported that personal matters have kept Roseanne Abrahamson from starting her term, but she agreed to deliver the SHRAB binder to Roseanne upon return to Pocatello during December.

- The State Board of Education has expressed a willingness to adopt the Department of Administration record retention schedules, where applicable, during the current revision of the Higher Education Higher Education Records Retention Schedule and Guide. The SBoE Schedule is currently in review for updating (first review since 2002). Robin Wilson, Ron Town, Julie Crea, Duane Bogstie and Steve Walker are the revision team working in conjunction with Nancy Szofran, Chief Technology Officer for Office of the SBOE.
- Set dates for SHRAB Meetings

Budget discussion related to the meeting schedule - Traditionally have had 4 meetings a calendar year, but this grant proposal included only 3 meetings. This is the first meeting. Next two meetings need to be scheduled.

Considerations: there is a May 2006 application deadline for next NHPRC grant proposal. We can have conference calls for meetings that result in resolutions, and official actions, email for discussion.

Thursday, January 26<sup>th</sup> – next meeting  
8:00 a.m. until 4:00 p.m. at the Idaho History Center multi-purpose room.  
Will schedule the next meeting at that time.

4:00 p.m.  
Meeting Adjourned to tour new Idaho History Center

Addendum to Minutes: Blaine Bake, Steve Walker and Robin Wilson attended the Friday, November 4, 2005 ISHS Board of Trustees Meeting. Blaine Bake reported on the SHRAB meeting.