ARCHIVES THOUGHT FORCE (2025)
Presentation to Utah Area Fall Assembly
September 20, 2025
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CHARGE:

Using Al-Anon KBDM and the Utah Area Archives Guidelines, discuss and report, and possibly make recommendations, about the path of the Utah Area Archives both physical and digital.

Things to consider: Should Utah have an Archives Coordinator and an Archives Custodian (splitting physical and digital)? Should Utah Area pay for a storage facility? How should the digital archives be stored (stay with Dropbox or switch to a different platform)? Do not limit the discussions/recommendations to these questions.

The goal(s) of the Thought Force should be to explore ways to simplify adding to the archives and also maintenance of the archives. Although changes and/or edits to the Utah Area Archives Guidelines may be recommended, it should not be the focus of the Thought Force.

FRAMING:

At the Utah Area 2025 Spring Assembly the Archives Coordinator (Archivist) reported on the challenges he has been facing in this service position. Some of these difficulties are: 1) storage of the many boxes containing documents, memorabilia, and other historical items; 2) ability to access the digital archives both to store and retrieve historical material; and 3) continuing the process of digitizing the archives. These issues had been previously brought to the attention of the Area Chair and members of the Area World Service Committee (AWSC.) The AWSC recommended this issue be discussed at the next Assembly. Following the Archivist's report, members of the Assembly were invited to share their observations and eventually agreed with the Area Chair that a Thought Force would be useful in addressing how best to move the Area Archives forward.

BACKGROUND

The purpose of an Area Archive is to preserve the experience, history, and memorabilia of the Al-Anon fellowship from the beginning of the family movement in that locale. This history should be preserved so as to be available to the membership and the serious researcher, within the framework of our Traditions, for the good of Al-Anon as a whole.[1]

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[1] *Al-Anon Guidelines,* Area Archives (G-30), Al-Anon World Service Office

The Utah Area physical Archives is collection of materials stored in approximately 25 plastic "totes" or "tubs" filled with binders, folders, and memorabilia. The tubs are typically stored in the home of the current archivist. Some of contents of some of the tubs have been uploaded into a digital archive utilizing the Dropbox platform. The materials in the Archives comprise a wide variety of documents and collectables with a comprehensive catalog/index available in both hard copy and digital form[2]. These materials date from 1945 when Utah Al-Anon was an auxiliary of AA, through the development of our Groups, Districts, and the Area to the present day.

At the 2016 Spring Assembly a conversation was begun focusing on how best to preserve the history of the Utah Area. At that time a Thought Force was convened and asked to consider how the Area should handle the Archives taking into consideration the past, the present and the future of the Archives. The 2016 Thought Force raised many questions in regard to the Archives, including what material should be kept in the Archives vs. what might be discarded, and if a digital Archive should be primarily a copy of the physical Archive, or should it be used to reduce the size of the physical Archive. The Thought Force also focused on how to provide access to the Archives by our members while retaining anonymity. Ultimately three recommendations were offered:

1) Create an Area Archives Guideline.
2) Continue creating a digital copy of the Archives.
3) A detailed catalog should be made publicly available so members can access it.

The robust work of that Thought Force is attached to this report as Appendix B and should be consulted for a full understanding of the issues addressed by the current Thought Force.

During the Fall Assembly 2017, the *Utah Area Archives Guideline* (attached to this document as Appendix C) was approved. The Guideline reflects a comprehensive attempt to answer the questions and incorporate the recommendations of the 2016 Thought Force, including the establishment of a digital Archive.[3] Since 2017, several minor changes to the Guideline have been approved. The Guideline is currently posted on the Utah Area Al-Anon website[4] and is available as a reference document for our Area leadership, the Area Archivist, and all interested members.

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[2] *Recommendations for the Utah Area Archives,* Presented to the Utah Area 2016 Fall Assembly, p. 6
[3] *Utah Area Archive Guideline,* Paragraphs 6 and 7.
[4] https://utah-alanon.org

DISCUSSION

The members of the current Thought Force engaged in a wide-ranging discussion of the issues affecting our Utah Area Archives. We used the *Utah Area Archives Guideline*, the recommendations of the 2016 Archives Thought Force, the *Utah Area World Service Committee Guidelines,* and our own knowledge of the Archives as resources. The current Archivist was a member of the Thought Force. We acknowledged our commitment to a thorough Knowledge Based Decision Making (KBDM) process: our responses to the four KBDM questions can be found in Appendix A.

In responding to the Charge, we focused mainly on the three "things to consider" included as part of the Charge and one additional question:

Should Utah have an Archives Coordinator and an Archives Custodian (splitting physical and digital)? The idea of splitting responsibility for the physical Archives (the tubs) from the responsibilities of the Archives Coordinator (Archivist) came out of the discussion at the 2025 Spring Assembly. During the conversation, a previous Archivist offered to store the tubs as she had done during her tenure. She also offered to actively continue the process of digitizing materials stored in the tubs.

It is recognized that at least one other Al-Anon Area (Washington State) has split the Archives Coordinator position to create a Custodial Archivist. "In the Washington Area, we have a Custodial Archivist that preserves and maintains all historical records and items. This position does not rotate and is appointed by the Chair. They hold this position for as long as they are willing. We also have an Archives Coordinator that collects the records and items related to the panel they are appointed to."[5]

In discussing the possibility of the Utah Area establishing a Custodial Archivist, the current Thought Force members identified several concerns that might arise:

1) Would the Custodial Archivist become an additional member of the AWSC? Would the Area accept the additional expense of an additional member of the AWSC ($200-$450 per event?)
2) Would there be enough interest among the membership to fill two Archive related positions? What would happen if no one stood to become the

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[5] *AFG Connects*, Past and Current Conference Members, Permanent Archivist and/or Archives Coordinator

Custodial Archivist? Would our area want to follow the Washington Area and appoint a Custodial Archivist to serve as long as they wished?

3) What would happen if the Archive Coordinator and the Custodial Archivist were geographically far removed from one another? How would the Archive Coordinator have access to the physical archives, or would there be a strict division of duties as suggested by Washington's approach?

During our discussion, the members of the Thought Force focused on the idea of a fully realized Archive Committee. The *Utah Area Archive Guideline* provides for an Archives Committee empowered to assist the Archivist in "reviewing archive guidelines and procedures, reviewing archives security access and credentials and assist in reviewing technologies for implementing and supporting archive guidelines."[6]

While the *Utah Area Archive Guideline* does not specifically address the possibility of creating a separate Custodial Archivist, paragraph 11 clearly speaks to the versatility of the Archives Committee. The members of this Thought Force were unanimous in suggesting that a separate Archives Custodian could be created from within the Archive Committee, rather than adding a separate and new Coordinator position (see Recommendations, below.) Identifying a volunteer Custodian for the Physical Archives from among Archives Committee members would relieve the Area from having to create and finance an additional Coordinator position and provide each new Archivist (and Archives Committee) flexibility in determining how best to fulfill the responsibilities of their service positions. (Such flexibility is consistent with *Utah Area Archive Guideline,* paragraph 6c and Concepts 3 and 9.)

Additionally, having a Custodial Archivist from among the Archives Committee would not require the identification of an additional elected position and would allow for close coordination with the Archives Coordinator.

Finally, this approach allows each panel to make decisions about the location and accessibility of the physical Archives best suited to their own needs. (See Recommendations below.)

Should Utah Area pay for a storage facility? The *Utah Area Archive Guideline* establishes a standard for the preservation of a physical archive.[7] Specifically, paragraph 6c states that "the Utah Area determines the storage facility location taking into consideration the Utah Area Archives Guidelines. This topic needs to be discussed by the Area in efforts to not only provide a safe and secure

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[6] *Utah Area Archive Guideline,* paragraph 11
[7] *Utah Area Archive Guideline,* paragraph 6

environment per the guidelines, but also taking into consideration the ability for future archive coordinators to accept the position." It is unclear when or how the location of the physical archives should be discussed by the Area.

It is the consensus of this thought force is that a fully functioning Archives Committee should be responsible for deciding how best to store the Archives each panel, always remaining consistent with the *Utah Area Archive Guideline.* (See Recommendations below.) A review by the Area Chair, Area Officers, or the AWSC could confirm the designated storage location and thus fulfill the intent of paragraph 6c of the Guideline.

Tradition 7 states that our Groups be "fully self-supporting through our own voluntary contributions." The spirit of the Tradition suggests that all levels of our Fellowship would do well to strive to be fully self-supporting. With regard to the Utah Area Archives, we have regularly accepted the donation of storage space from interested members. Our physical archive is currently in storage, cost free, at a member's home. At times, in the absence of a volunteer or when the Archivist did not have space, the Archives have been placed in a commercial storage facility.

The *Utah Area Archive Guideline* is specific about how the archives are to be stored:
  a) Hard copy records to be stored in acid free folders, boxes & photo sleeves.
  b) Storage facility should mitigate all possible deteriorating conditions by providing a cool, dry environment that will protect from external elements.
  c) The Utah Area to determine storage facility location taking into consideration the Utah Area Archives Guidelines.[8]

If the physical archives are stored at a member's home, the members of the Thought Force feel it is essential that the requirements of the Guideline for safe storage be met and that we always honor our 7th Tradition. (See Recommendations, below.) When not stored in a member's home, storage costs are the responsibility of the Area.[9] The current cost to the Area for a commercial storage facility that meets the Guideline requirements would be approximately $60-$80 monthly.

How should the digital archives be stored (stay with Dropbox or switch to a

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[8] *Utah Area Archive Guideline,* paragraph 6
[9] *Utah Area Budget and Reimbursement Guidelines,* IIA

different platform)? Multiple platforms for archival storage exist,[10] some more complex and expensive than others. Our digital archives are currently stored on Dropbox at a cost to the Area of $128 annually. It is clear that problems related to uploading, storage, indexing, access, and retrieval exist. These problems, however, may not be related to deficiencies in the platform, but rather to a lack of understanding on how Dropbox works. Moreover, the *Utah Area Archive Guideline* delegates to the Archivist and the Archives Committee the authority to determine the best technology to use for the storage of the digital archives.[11] The Utah Area Technology Coordinator is encouraged to "support the Archives Committee, (digitization, storage efforts, etc.)"[12] Going forward it seems very important that the Archivist, possibly with the help of the Technology coordinator, become fully conversant in the use of Dropbox or an alternative platform and be able to assist others in its use. (See Recommendations, below.)

How can the Area Archivist be supported in their Service Position? The *Utah Area Archive Guideline* refers to an Archive Committee several times[13] with neither elaboration how such a committee would be chosen nor how it would actually function. The *Utah Area World Service Committee Guidelines* (paragraph B4e) also mentions an Archives Committee: "With the support of an Archives Committee, [the Archivist] implements all requirements of the *Utah Area Archive Guideline.*" Additionally, other Area Officers and Coordinators are encouraged or mandated by our Guidelines to have committees to call upon for support:
- ♦ The Area Chair has the Area World Service Committee (AWSC.)
- ♦ The Area Treasurer has the Finance Committee.
- ♦ The Alateen Coordinator works with and assists the District Alateen Coordinators.
- ♦ The Guidelines Coordinator "chairs the guidelines committee…"[14]
- ♦ The Area Technology Coordinator "chairs a Technology Committee which assists…"[15]

It seems clear that an active Archive Committee would be of tremendous help to the Archivist. As noted above, the Archive Committee supports the Archivist in implementing all the requirements of the Archive Guideline. Specific ways the Committee can help are outlined in paragraph 11 of the *Utah Area Archive*

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[10] *Best Data Archiving*, https://www.softwarereviews.com/categories/data-archiving
[11] *Utah Area Archive Guideline,* paragraphs 9b and 9c
[12] *Utah Area Service Structure Job Posting,* Upcoming Term 2020-2022
[13] *Utah Area Archive Guideline,* paragraphs 7e, 9b, 9c, 9d
[14] *Utah Area World Service Committee Guidelines,* paragraph B6d
[15] *Utah Area World Service Committee Guidelines,* paragraphs A and B

Guideline:
   a. The archives committee should assist in reviewing archive guidelines and procedures.
   b. The archives committee should assist in reviewing archives security access and credentials.
   c. The archives committee should assist in reviewing technologies for implementing and supporting archive guidelines.

In addition, an Archives Committee could help the Archivist make storage decisions (forward materials of interest to specific AWSC members for review, i.e. Forum magazines to the Forum Coordinator,) prepare Archive displays for Assemblies and other events, and upload digital materials. (See recommendations below.)

RECOMMENDATIONS

1. Create an Archives Committee at every Election Assembly to assist the newly elected Archivist in their duties. Composition of the Committee might include the Archives Coordinator as chair, the Technology Coordinator, the Area Secretary and two interested Al-Anon members (one with tech skills and one a Past Delegate.) If this recommendation is approved, the *Utah Area Archive Guideline* would need to be amended.
2. Store the physical archive in compliance with the *Utah Area Archive Guideline.* A member of the Archives Committee may volunteer to provide storage space; the space must meet the requirements of the Guideline. Otherwise, the Archivist would seek approval from the Area for a commercial storage space.
3. Encourage the Archivist to consider requesting a member of the Committee to serve as Custodial Assistant. The Assistant might store and manage the physical archive while the Archivist manages the digital archive, or vice versa. This approach would provide the potential benefits of splitting the Archive Coordinator position without having to create a new AWSC position. If approved, the *Utah Area Archive Guideline* would need to be amended.
4. Support the Area Archivist and Archives Committee in implementing the *Utah Area Archive Guideline*. Promote familiarity with, and the implementation of, the *Utah Area Archive Guideline* among the members of the AWSC, the District Representatives, Group Representatives, and Utah Area Al-Anon members.

APPENDIX A

ARCHIVES THOUGHT FORCE (2025)
KBDM Questions

1. **What do we know about our members' (and prospective members') needs, wants and preferences that relate to this issue? What do we wish we knew, but don't?**

   o Our robust archives provide much information about the history of our area and the growth of Al-Anon in Utah.
   o Newer members do not appear to be invested in what happens to archives. Do younger members really want an archive? Younger members may not care about "old" items.
   o Do we know what WSO requires we maintain, and for how long? Are we in compliance with WSO requirements?
   o Are we only thinking of older members? Some members are quite sentimental, passionate, and protective of the archives.
   o Do members understand the importance of archives?
   o Do members know how the archives benefit their recovery?
   o The safe storage of our archives is of vital importance to maintain our history and track our progress.

2. **What do we know about the resources and our vision for Al-Anon and our meetings that are relevant to this issue? What do we wish we knew, but don't?**

   o We don't know if our members want to keep archives.
   o We know that some longtime members have sentimental attachment to the archives, but we don't know if our members know about the archives.
   o We have members who have participated in the history of Utah Al-Anon whom we could ask to participate in education.
   o Are archive documents/items in a displayable condition? If not, what will it take to make them so?
   o Are past publications of the Forum available from WSO in electronic media? If so, can we access and share? If not, can we scan members' copies and add them to digital archives?
   o What is the job of the Area Archives Coordinator? This job is bigger than one person. Do we need two coordinators or a designated committee?
   o We have a large amount of "stuff." How do we want to maintain the physical archives and preserve them? We have guidelines that offer some guidance in what to maintain and how to maintain it but is it enough? WSO offers guideline G-30 as well.
   o We have a scanner for scanning print material.

- o We have a Dropbox to upload electronic media. (Who maintains Dropbox? Is there a better alternative?)
- o We don't know who is responsible for putting generated documents into Dropbox. How can we help to make sure this is happening?
- o We have physical documents and memorabilia.
- o Norma has offered her basement for storage.
- o Norma has offered her services to help organize materials.
- o Other area Archive contacts. (Who can we contact to see how they maintain their Area Archives)

3. **What do we know about our "culture" and "environment" that is relevant to this discussion?**
   - o Our Archives can be a great resource for education members.
   - o New Members may not know the value of this resource.
   - o The Archives need be me more accessible.
   - o How can we make the Archives more known at the Group level?
   - o How do other Areas handle Archives?

4. **What are the ethical implications of our choices? Would we be practicing our "principles in all our affairs"? What do we wish we knew, but don't?**

   - o The ethical implication would be to preserve our history and honor the fine people who came before us who had the vision that makes Al-Anon what it is today.
   - o "The Principle of Participation has been built into our whole service structure." How members contribute to Al-Anon is captured in our history. "Participation is the key to harmony." Concept Four.
   - o Equanimity: Do what's best for the Area as a whole, and not what's best for individuals. Will the material we keep be fair to all, i.e. some obituaries but not all? We cannot please everyone, but we can discuss options and reason things out.
     We can make suggestions and recommendations towards making any recommendations These recommendations may not be right for some, but will they be the better option for most?
   - o In our Fellowship we learn "that all decisions be reached by discussion, vote and whenever possible, by unanimity." Our Archives are our record of discussions, votes, agreements, and disagreements. General Warranties of the Conference, # 3
   - o Principles in all our affairs would suggest we need to maintain our current period documents in accordance with WSO archive requirements and area desires and ensure that we are bringing the past documents forward into compliance.
   - o Learning from ESH of others.
   - o What other areas, and WSO do with their archives and how they handle consolidation, storage, cloud based, and transport for their events.
   - o Our action will move us into the right direction to bring our archives into the current century if we are remembering that a Higher Power is at work.

- o Anonymity: Will the material saved keep anonymity? Are we breaking Anonymity by taking photos for Archives? Keeping the integrity of the program by following our traditions and the anonymity of our past members.
- o Financial Responsibility: How do we pay for storage? Is it necessary? Is there something that our dollars would serve Members better?

APPENDIX B

RECOMMENDATIONS FOR THE
UTAH AREA ARCHIVES

Presented to the Utah Area 2016 Fall Assembly

Archives Thought Force
Formed: Spring Assembly 2016
Patrick M, Jason C, Chris C, Denise L, Mary Y, Jacklyn J, Beverly J, Norma D, Glenna C,
Roberta A, Michelle G (chair)

FRAMING/CHARGE
At the 2016 Spring Assembly a conversation occurred about how the Area Archives should be handled. This 2016 Area Archives Thought Force was formed as a result. Our charge: How should we handle the Area Archives taking into consideration the past, the present and the future?

BACKGROUND
The purpose of an Area Archives is to preserve the experience, history, and memorabilia of the Al-Anon fellowship from the beginning of the family movement in that locale. This history should be preserved so as to be available to the membership and the serious researcher, within the framework of our Traditions, for the good of Al-Anon as a whole. Al-Anon Guidelines, Area Archives (G-30)

ARCHIVES PAST
The Utah Area Archives consist of a well-organized collection of materials stored in approximately 25 plastic "totes" filled with binders, folders and memorabilia and stored in the home of the current archivist. The materials in the Archives consist of a wide variety of documents and collectables with a comprehensive index. These materials date from 1945 when Utah Al-Anon was an auxiliary of AA, through the development of our Groups, Districts, and the Area to the present day. A complete catalog/index of the Archives in both hard copy and digital form is available.

Individual members kept early documentation of the development of Utah Al-Anon in their homes and continued to do so well into the 1990s. The beginning of an actual Utah Area Archive seems to have begun with the work of Vera Jones, the first Secretary of the State Assembly, Thelma Caine, who wrote "History of Intergroup", Anna Marie Bowers, who compiled the "Utah Area History," and others (Elsie Whiting, Thelma Day, Arlita Bigler, Mary Ericson, Edith Lamb Atterbury) in the 1950s and 1960s.

Through the subsequent decades, our Archives continued to grow through the dedicated work of

elected archivists like Glena C, Connie D, Leeta L, Delores V, Joy M, and Norma D.

Our practice of storing the Archives at the home of the current archivist is consistent with a significant portion of the past. Several years ago, an attempt was made to store the totes in a commercial facility, but it was decided that the cost and difficulty accessing the Archives made commercial storage impractical. Storing the totes in the home of the archivist has necessitated the physical relocation of the Archives with each new archivist. It is possible that an archivist could reside in an area of the state far removed from population centers, thus making access to the Archives quite difficult. The physical security of the Archives would likely vary from panel to panel depending on the physical circumstances of the archivist.

Some auditory materials from the Archives have recently been digitalized; no decision has been made as to how best to store this digital material. The Area has no established standards for the storage of the Archives.

It appears that some Districts have collected items that properly belong in the Area Archives.

ARCHIVES AT PRESENT
Currently, there is no clear delineation of items that belong in the Area Archives. The WSO Guideline "Area Archives" (G-30) lists 14 "possible categories…[of] what to keep and what to build on", but there is no Area policy. Paper and electronic indices of the contents of the Archives are currently stored with the Archives. The contents of the archival totes are also listed elsewhere. An Area Guideline of how the Archives should function and what materials belong would be helpful.

Additions to the Archives appear to be haphazard with no clear understanding of what materials belong, how materials should be collected, and what potential, but inappropriate, material should be discarded. It is unclear what the best method would be to update the Archive indices as new materials are added. The current process appears to be simply adding more binders/totes and expanding the index.

Currently, members wishing items from the Archives must consult directly with the archivist to request materials. The index to the Archives is not readily available to members; again, the archivist must be directly consulted. Presumably items requested by members from the Archives are freely given; there are no guidelines for a process of borrowing and returning. Although an electronic index exists, there are no guidelines as to where the index is stored or how members could access it.

There is a sense that the Archives are very under-utilized and that the exposure of the Archives to the membership is directly related to the enthusiasm of the archivist. A display of portions of the Archives at Area Assemblies has at times been a common practice but has always been a function of the interest of the archivist.

THE FUTURE OF THE ARCHIVES
Going forward, it seems reasonable to think that a digital Archive of some sort should be created and maintained. It could be helpful to make past events, flyers, minutes, and records of

assemblies readily available for new leaders to access quickly and see how things were done in the past. We could then build on the past and not doom ourselves to repeat old mistakes. However, it is also important to think that a paper Archive of some sort should be kept. Some documents have intrinsic value because of who created them or how and why they were created. (The original letter from Anne B. and the actual letters written to Lois have value beyond a digital copy.) There may also be value in preserving important documents in two places, for safety reasons. What is unclear is exactly how much of a paper Archive to retain, exactly how a digital Archive would work or how each could be more easily accessible to members and researchers. In studying the work of professional historians, we find there is still a lot of reliance on the actual pieces of paper, because, for a variety of reasons, an actual document is what seems to hold our emotion.

What sorts of items should be kept in the Archives in the future? This is a point we don't know. We have some good agreement that it is great to have a living, breathing, useful physical history beyond a collection of storage bins, but we don't know exactly how we determine what things should be kept. The Al-Anon general Guideline (G-30) provides some help, but we still need to determine whether our Archives should be paper, digital or both. It is hoped that the KBDM process and a continuing conversation at the Group, District, and Area levels will really help us in addressing this matter, i.e. what do we know about the needs of the Area and our resources, vision, and mission in relation to the Archives? What do we know about the current realities and evolving dynamics of our world/fellowship concerning our history? We seem to agree in general that our Archive is mostly effective in addressing the identified purpose of having an Archive, with the notable exception that we would all like to see the Archives more accessible in the future.

The KBDM questions are also very critical when we consider member accessibility. While having a digital Archive may facilitate accessibility, creating such an Archive is not a simple process. Questions of anonymity, item selection, standardized file format, and access control are among the first that must be addressed, and our recommendations for initial action consider these. The work required to convert our current Archive to even partial digitalization would be monumental, given the demands of sorting, redacting (censoring for anonymity), and imaging. This is where the KBDM question on ethical implications is really important and what do we wish we know but don't? We need to clearly decide what to keep in the Archive and what not to, and how to determine this, and if the Archive should be fully duplicated paper and digital or not. And if we move to a fully digitalized Archive, what do we do with the first edition Al-Anon books and other non-paper memorabilia? Do we have the commitment and energy to undertake such a task?

SUMMARY
The good news is that we have a robust, rich, and extensive Area Archive that has been faithfully maintained over the years by some dedicated archivists and other interested members. Our Archives are replete with interesting, valuable, historical, and meaningful items. On the downside, our Archives are not easily accessible and likely not recognized or understood by the majority of our members. The expectations of the Area archivist with regard to educating members about the Archives have been dependent on the enthusiasm of the archivist, as no Area

Guidelines per the Archives exist. Likewise, there is no clear Area guideline as to exactly what materials belong in the Archives or how to assure they are collected. Finally, the storage and safety of our Archives is a matter of real concern with the regularly changing physical location, undetermined risk factors, and no safeguards for borrowed items. How to move our Archives into the 21st Century offers our Area an exciting, challenging, and potentially difficult opportunity.

RECOMMENDATIONS

1) Create an Area Archives Guideline

Given our findings, we think that it would be helpful to the archivist and the Area membership to have an Archives guideline created. The purpose of the Archives is being fulfilled well, in general, with the exception of access to the Archives. Our Thought Force has raised many questions in regard to the Archives, including what material should be kept in the Archives vs. discarded, should a digital Archive be primarily a copy of the physical Archive, or should it be used to reduce the size of the physical Archive and how can we provide access to the Archives to our members while retaining anonymity? To help answer these questions, we believe that the guideline should cover the following topics:

a) *What material should be kept in the Archives and what should not be? How should an index of these materials be kept and updated?*
b) *How should material that is being discarded from the Archives be disposed of? One suggestion from the Thought Force was to bring such materials to an assembly and have members take it if they would like.*
c) *How should the physical Archive be stored? The current situation is that the archivist keeps them in their home if they have that ability. One problem we thought of with this is if the archivist is not located near the bulk of our members, access is reduced. We also see the need to keep the Archives safe from physical dangers and degradation. Is it sufficient to let the archivist determine where the physical Archive is kept, or does that need to be determined by another body?*
d) *What should the digital Archive look like?*
   i. *Should it be a complete copy of the physical Archive, or should certain things be disposed of from the physical Archive one they become digital? Or should only a select few things be digitally Archived? Or should there only be a digital index of the Archives?*
   ii. *How should it be stored? The Thought Force went into some depth in looking at the security and safety of data in "cloud" environments.*
   iii. *Who would be responsible for it? The archivist? The web coordinator? A combination of people?*
e) *How should the Archives be accessed by members? As a Thought Force, one of the major points of agreement is that we would like to see the Archives be more accessible and useful to the members. There are, however, many security and ethical concerns.*
   i. *Can what is in the digital Archives be freely and fully accessible, or will part or all of it have limited access (e.g. password protection)? What would such access look like? Could each group be given credentials for access and these credentials reset/updated as needed or on a regular schedule?*
   ii. *The level of access that is provided to the Archives will have implications on what*

can go in the digital Archive. For example, if the digital Archive is fully, publicly accessible without password, then we must limit what is in the Archive to protect the anonymity of our members.

      iii. How should the physical Archives be accessed? How do we ensure that items borrowed from the Archives are returned?

   f) What should happen when there is a new archivist? Currently, there is a situation where there are some materials left with a previous archivist, who does not know what do with it.

   g) Should the responsibility of the Archives be handled by a committee instead of a single individual?

We would like to see such a guideline to provide direction to the archivist and the fellowship, but we also know from Concept 3 that the right of decision makes effective leadership possible, so we also believe that the guideline should not be overly restrictive. It is important that the archivist should be left with enough autonomy over the Archives to be effective in their position.

The KBDM questions are important to us as a Thought Force. Two of them are especially. pertinent to the guideline we propose. First the points listed above are basically what we as a Thought Force came to find that we did not know about the Archives, but wished we did know. Second there are many ethical questions raised in making a digital Archive and making it accessible to members. Anonymity is the spiritual foundation of our fellowship, and we feel that is critical in creating a guideline addressing these topics. The three remaining KBDM questions are also important to consider, as the needs, resources and realities of our fellowship and the Area specifically provide guidance to us, as well as limitations on what we can do. We hope that we have provided information in this report that will answer the KBDM questions fully and enable the Area and its members to have the information they need to act.

2) Continue creating a digital copy of the Archives.

   a) Continue digitizing the physical Archives for access solely by the Archivist in order to share documents more easily with inquiring members upon request, and to have backup images of hard copy documents in case of damage to or loss of the physical Archive.

   b) Begin collecting new Archives submissions in digital format when available in addition to the physical format.

3) A detailed catalog should be made publicly available so members can access it. This could reasonably be accomplished through the website as the catalog is less than 1 MB in size. And at 64 pages with minimal text on each, it can be easily redacted to avoid breaking anonymity. This would at least immediately allow members to peruse the general contents of the Archives and make document requests from the Archivist.

APPENDIX I
The KBDM Questions

What do we know about the needs of the Area that is relevant to this discussion?

- *Our robust Archives provide much information about the history of our Area and the growth of Al-Anon in Utah.*

- *Many of our members are unfamiliar with the Archives in general, the contents of the Archives, and how to examine or obtain materials from the Archives.*

- *Because of the large geographical area that Utah encompasses, a centrally stored paper Archive is not easily accessible to all our members.*

- *The safe storage of our Archives is of vital importance.*

- *As we move deeper into the 21st century, many of our members rely on electronic devices to obtain information and would like to see our Archives digitally based.*

- *Other members remain hesitant in the usage of electronically stored information and are reluctant to embrace developing technology.*

What do we know or need to know about our resources, our vision and mission for the Area and our strategic plan or goals that could be relevant to this discussion?

- *Since the earliest days of Al-Anon, interested and enthusiastic members have committed large amounts of loving volunteer time to the preservation of our history.*

- *As an Area we are committed to safely maintaining and growing our Archives.*

- *We seek ways to assure that our Archives are secure from fire, flood, insects, time, or other potential harm.*

- *We want the contents of the Utah Area Archives to be easily available to interested members and researchers.*

- *Despite these admirable goals, there is no Area Guideline pertaining to the collection, storage, use, or display of our Archives.*

- *Some of the auditory materials (tapes) in our Archives have already been converted to a digital format. These materials are now available in either analog format (the original tape still physically stored in the Archive "tub," or in digital format (on a flash drive) in the possession of the current archivist.*

- *As with most issues in our Area, constraints of money and member involvement must be taken into account.*

- *In order to better utilize the existing Archives, ways to more clearly identify collectable material, efficiently organize and store materials, and educate the membership about potentially interesting materials could be developed.*

What do we know about the current realities and evolving dynamics of the world and our fellowship that is relevant to this discussion? What are the Pros and Cons of the suggestions we are making?

- *Worldwide, and within our Fellowship, there is currently a strong movement towards the digitalization and electronic storage of all things paper.*

- *In the world of historical archiving, some paper-based materials have intrinsic value and must be maintained, even if digital copies are created and stored.*

- *Our Fellowship resists "either/or" thinking and is receptive to changes and solutions that incorporate ideas that are creative, inclusive, and flexible.*

Pros:

- *Digitalization and electronic storage of archived material safeguards our historical documents against physical loss from fire, flood, insects, and the effects of time. A vendor can automatically back up such documents; thus insuring that documents will never be lost.*

- *Cloud storage is inexpensive, safe, and reliable.*

- *An electronically based Archive could be easily accessible to members and researchers regardless of the person's location.*

- *Ongoing contributions to the Archives can be made easier through email and other methods of electronic transfer and cloud storage.*

Cons:

- *Not all materials in the Archives can be digitalized, i.e. books, mugs, other "collectables."*

- *Some paper documents have intrinsic value and, while having a backup copy is recommended, original correspondence, signatures, flyers, and minutes, etc. must be retained.*

- *Therefore, a physical Archive must endure even if a part of the Archives are digitalized.*

- *Issues that currently exist surrounding the maintenance of a physical Archive will continue.*

- *There is a monetary cost associated with electronic storage methods.*

- *The transfer of even a portion of the current physical Archive to an electronic format will be a formidable task requiring hundreds of man-hours likely spanning many years.*

- *Many documents in the Archives contain information that clearly identifies past and current Al-Anon members. Those documents, if made generally available electronically (such as on a website), would need to be physically redacted before being digitalized to preserve anonymity.*

What are the ethical implications of our choices? In other words: Will our suggestions/decisions be consistent with our spiritual principles?

- *Al-Anon is a worldwide movement, it's history both at the international and local level deserves to be captured and maintained. "The ultimate responsibility and authority for Al-Anon world services belongs to the Al-Anon groups." We need to know how our groups formed, how they have contributed, and how they have changed. Concept One.*

- *"The Principle of Participation has been built into our whole service structure." How members contribute to Al-Anon is captured in our history. "Participation is the key to harmony." Concept Four.*

- *"No matter how carefully we design our service structure of principles and relationships, no matter how well we apportion authority and responsibility, the operating result of our structure can be no better than the personal performance of those who serve and make it work." Our history provides a picture of Al-Anon service in Utah and helps us to improve. "Good personal leadership at all service levels is a necessity…" Concept Nine.*

- *In our Fellowship we learn "that all decisions be reached by discussion, vote and whenever possible, by unanimity." Our Archives are our record of discussions, votes, agreements, and disagreements. General Warranties of the Conference, # 3*

- *Particularly with regard to creating digital access to the Area Archives or its catalog, the spiritual foundation of all our traditions, anonymity, must be the top priority. Even within the Al-Anon fellowship, when the audience is large and broad (as with The Forum, for example) personal anonymity is strictly maintained.*

What do we wish we knew, but don't?

- *What portion of our Archives would readily lend itself to digitalization?*

- *How long would it take to convert that portion of the Archives to a digital base, considering time to redact, organize, scan, upload, etc.*

- *How can we assure member anonymity and still make the Archives electronically accessible?*

- *How much cloud space would we need? What would be the cost?*

- *How much use would the membership make of an electronic Archive?*

- *How can we best preserve and utilize the physical portion of the Archives even if we digitalize?*

- *Will the members of the Utah Area support a long-term project involving the future of the Archives?*

APPENDIX C

Utah Area Archives
Guideline

The purpose of this guideline is to describe the procedures for establishing and maintaining the Utah area's archives in addition to offering direction to those who attempt to uphold these procedures. These guidelines are not intended to replace the information in the Al-Anon/Alateen Service Manual but instead provide a supplement to the Service Manual.

1. The following categories of items need to be maintained within the Utah Area Archives:

    a. Area specific memorabilia with intrinsic value

    b. Area specific items with historical value

    c. Delegate specific service items

    d. Examples of items that should be archived are as followed but not limited to minutes from Area Assemblies, Areas Officer and Coordinator reports, AWSC meeting minutes, Thought and Task Force reports, KBDM documents, minutes of special presentations or activities, skits, and flyers.

    e. Examples of items that would not be maintained in the Archives include items archived at the World Service Office (Forum Magazines, Conference Summaries, Conference Approved Literature (other than first editions or autographed copies,) love gifts from the World Service Conference, trinkets, bookmarks.

    f. Documents containing lists of member names, addresses, or phone numbers should not be archived.

2. Items maintained within the Utah Area Archives need to follow standard naming convention to include the following.

    a. Short Description

    b. Date

3. Items maintained within the Utah Area Archives need to be indexed for both record keeping and searching proficiencies.

    a. Alphabetically by type (flyers, minutes, skits, etc.)

    b. Chronologically by date and or panel term

    c. Stored and accessible on the Utah Area Website

    d. Metadata identifiers

4. The following procedures need to be utilized in determining which items to discard when dealing with both current and future possible archived elements.

    a. What is the current intrinsic value

    b. What is the possible future intrinsic value

    c. Are items tangible (physical objects v. words or text)

    d. Would we lose intrinsic value if only a digital copy existed?

5. The following procedures need to be utilized in discarding of both current and future archived items.

> *a. Physical items deemed to contain little or no intrinsic value in relationship to maintaining their existence within our Utah Area Archives can be auctioned off to Utah Area members.*
> *b. Utah Area Archives coordinators and committee members must exercise the upmost care in efforts to apply total anonymity when presenting items for auction.*
> *c. Physical items deemed to contain little or no intrinsic value in relationship to maintaining their existence within our Utah Area Archives should be displayed at Area Assemblies.*
> *d. Items deemed to contain little or no intrinsic value in relationship to maintaining their existence within our Utah Area Archives that have not been auctioned or distributed to Utah Area members will follow a proper disposal procedure of shredding or recycling.*

6. The following procedures need to be utilized when storing physical & tangible items that meet the Utah Area Archive criteria.

> *a. Hard copy records to be stored in acid free folders, boxes & photo sleeves.*
> *b. Storage facility should mitigate all possible deteriorating conditions by providing a cool, dry environment that will protect from external elements.*
> *c. The Utah Area to determine storage facility location taking into consideration the Utah Area Archives Guidelines. **

7. The following procedures need to be utilized when storing digital or digital files of achievable items.

> *a. Digital copies to be made of all tangible and or physical items deemed to have intrinsic value.*
> *b. Digital copies need to be stored in 2 separate digital formats such as the creation of a cloud account and an external storage drive.*
> *c. External storage drives should be kept in a separate location from the physical archives storage location.*
> *d. Index of digital files should be stored and accessible from the Utah Area website.*
> *e. Archive Coordinator and Archive Committee members should review digital format. As an example, PDF file formats are the current technology formats.*

8. Utah Area archived items need to be accessible to Utah Area members. The following procedures need to be applied in creating access to the Utah Area digital archived files.

> *a. Anonymity of members along with the integrity of archives should take precedence when allowing access to digital files.*
> *b. Security standards need to be developed and maintained.*
> *c. Area officers (Archives Coordinator, Area Chair, Delegate) should maintain security credentials.*
> *d. Security credentials to be distributed through Utah AWSC members. Archive Coordinator to provide District Rep, District Rep to provide Group Rep, and Group Rep to provide group member.*
> *e. Security credentials will need to be updated on regular intervals. These updates to take place whenever there is a change in Utah AWSC panel, a change in Area Officers that maintain security credentials, and on an annual basis.*

9. The following procedures need to be applied in creating access to the Utah Area physical archives.

a. Digital archive file should be utilized first if available and if it meets the needs of requesting member.
b. Archive coordinator along with the archive committee should create checkout procedures in efforts to track physical archived items requested and obtained by area members. These procedures should be reviewed upon formation of a new archive committee. If procedural changes are needed, they should be presented to the guidelines committee and approved by GR's.
c. Archive coordinator along with the archive committee should explore possible technologies for checkout fulfillment. This might be similar to an assets management and tracking application. (Research app store)
d. Archive coordinator and committee should create procedure addressing non-returned items. These procedures should outline the inquiry and retrieval process utilized by archive coordinator and Utah AWSC members. If procedural changes are needed, they should be presented to guideline committee and approved by GR's.

10. All Utah Area AWSC members including District & Group Representatives when providing achievable items to the Utah Area should apply the following procedures.
a. Utah Area AWSC members need to adopt a digital reports distribution policy providing both the Area Secretary and Area Archive Coordinator with a digital copy of all reports and presentations.
b. Utah Area Archive Coordinator should work with the Utah Area Website Coordinator to establish a portal for uploading digital files.
c. Utah Area AWSC members including District & Group Representatives should bring physical items to area assemblies in efforts to pass them onto the Utah Area Archives Coordinator.

11. The Utah Area Archives Coordinator has the ability to implement and form a Utah Area Archives Committee. The purpose of such a committee will be to assist in the implementation and supporting of Utah Area archives guidelines.
a. The archives committee should assist in reviewing archive guidelines and procedures.
b. The archives committee should assist in reviewing archives security access and credentials.
c. The archives committee should assist in reviewing technologies for implementing and supporting archive guidelines.

* This topic needs to be discussed by the area in efforts to not only provide a safe and secure environment per the guidelines, but also taking into consideration the ability for future archive coordinators to accept the position.