MEASURING ACCESS TO PUBLIC ARCHIVES AND DEVELOPING AN ACCESS INDEX: EXPERIENCES OF THE NATIONAL ARCHIVES OF ZIMBABWE

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Abstract

The reason for the existence of national archival institutions and, indeed, archives is to preserve and give access to the national cultural heritage. The level of access to archives may be used as a measure to establish how far the archives have been taken to the people. One of the National Archives of Zimbabwe's strategic goals is to increase access from 75 to 100% by 2013. This goal raises several questions including: Is access measurable? What exactly is constituted by the current 75% and the proposed 100%? The National Archives of Zimbabwe (NAZ), in seeking to answer some of the above questions, has embarked on an exercise to develop an auditable access regime. This development coincides with ongoing efforts by the International Council on Archives (ICA) to develop an access standard and global thrust towards open and transparent societies. A discussion of access invariably leads to other debates that include acquisition policies, archival automation, legislation that have a bearing on, for instance, closure periods, freedom of information and copyright, archival processing, access fees, facilities capacity and access times. This article looks at current efforts to develop an access index for the National Archives of Zimbabwe. To achieve 100% access by 2013 requires that an access baseline be established using quantifiable parameters such as accessioning and

processing volumes, reader figures, finding aids, publications and access carrying capacity. Although this is work in progress, the numbers so far seem to show that access can be objectively quantified at the National Archives.

Keywords: Access to Archives, Access Index, Accessibility for the Disabled, ICA Access Principles, Measuring Performance, National Archives of Zimbabwe, Wikinomics

Introduction

The reason for the existence of national archival institutions and, indeed, archives is to preserve and give access to the national cultural heritage. Administering access is an essential archival function. Accordingly, "(a)ccess to archival materials continues to rank as the highest demand for researchers and archivists alike" (Purcella 2005:54). In the context of archives, access may be defined as "the ability and opportunity to discover, use, and understand" the nation's documentary heritage (Loewen 2008:164). Access to public archives is fundamental to promoting democracy and justice, fostering accountability and transparency, and advocating the nation's cultural heritage. Public funded bodies such as the national archives should facilitate the fulfilment of these mandates and remain accountable for the expenditure of the taxpayers' money. In that regard, they should promote wider accessibility and use of their archival resources.

The level of access to archives may be used as a measure to establish how far the archives have been taken to the people. One of the National Archives of Zimbabwe's strategic goals, under the Results Based Management Scheme that is being championed by the Public Service Commission in its effort to ensure that public bodies achieve their performance goals, is to increase access from 75 to 100% by 2013. This goal raises several questions including: Is access measurable? What exactly is constituted by the current 75% and proposed 100%? A discussion of access invariably leads to other debates that include acquisition policies, archival automation, legislation affecting closure periods, freedom of information, archival processing, access fees, facilities capacity and access times. Taking

the cue from Rhoads (1981:13), one may further ask:

> … how effectively *does* an archives perform its role of stewardship – does it accession the right records, and does it take the necessary measures for their security and preservation? – and on its responsiveness to the needs of users and potential users.

The National Archives of Zimbabwe (NAZ), in seeking to answer some of the above questions, has embarked on an exercise to develop an auditable access regime. The development coincides with ongoing efforts by the International Council on Archives (ICA) to develop an access standard and global thrust towards more open and transparent societies. Starting with the reason why access should be measured, followed by ICA access principles, global trends influencing access, Web 2.0 technologies and their impact on access, decentralisation of archives, access to the archives by the physically challenged and the current access regime at NAZ, this article concludes by looking at NAZ's proposed parameters for measuring access.

Need for an index to measure access

The development of measuring metrics is lacking in the archival discourse of sub-Saharan Africa (SSA). The importance of metrics in the management of archives is underscored by a study by Duff and others (2010). However, there is deep scepticism towards developing indices to evaluate the performance of archives (Graf 2004:132). The argument is that the managerial ethos of quantification may lead to wrong budget choices that may negatively impact on the archives as centres for historical research. However, archives are no longer the preserve of historians. The demographics of the users of archives are gradually changing. As a result of the changing demographics of stakeholders, it is no longer enough to measure access using the level of use and satisfaction of historians and History departments. The archive as a place of historical research is fast holding less sway because increasingly more citizens are coming forward to consult the archives than ever before.

That means that archives must be managed systematically and in measurable terms by developing tools to measure the levels of their

service delivery. That calls for new measurement metrics for a core function of the archives, that is, access. Gone are the days when statistics and sheer volumes were considered to be surrogates for value and rigorous measurement. Statistics do not clearly show who the users of the archives are, what use they make of archives, what benefits they get from the information contained in archives, and what their levels of satisfaction with the archives are. An interest in answering these questions means that there is need of a framework such as a measurement index. Some of the following reasons necessitate the development of an index to measure access to archives (Dearstyne 1993; Duff *et al.*, 2010; Ellis 1993; Graf 2004; Grimard and Pagé 2004):

- offering better services to archives users;

- showing the benefits of archival services to the community;

- developing an assessment culture;

- predicting trends and planning for them;

- judging success of the efficiency and the effectiveness of the access programme;

- being responsive to archives users;

- developing methods and models to measure quality such as total quality management (TQM) which may be adaptable to archives;

- assessing performance against stated goals;

- helping to monitor progress and measure services;

- recognising strengths and identifying areas that need attention;

- developing a tool that can be used to justify expenditure and attract funding for the activities to promote access;

- proving effectiveness and effectiveness of archival access activities;

- counting only what is important because as Albert Einstein pointed out, "Not everything that is countable is important, not everything that is important is countable" (Graf 2004:127);

- promoting and publicising the programme with accuracy and confidence (Ellis 1993:73); and

- establishing benchmarks for improving archival activities.

There is a need for archivists to debate the issues of measuring access, as well as developing frames that they may rely on for setting targets, developing action plans and assigning responsibilities to tasks. Measuring performance and collecting appropriate data are fundamental to the proper management of records and archives (Pederson 1987:64; Dearstyne 1993:97). Even if at the moment literature on the subject is limited in sub-Saharan Africa, indices provide measurable indicators that may give archivists an opportunity to evaluate their services in a robust and consistent manner.

International Council on Archives (ICA) access principles

There are in existence a number of general self-evaluation guidelines and principles in the archival management environment (Grimard and Pagé 2004:105); however, in 2011, the International Council on Archives developed ten fundamental principles of accessing archives (ICA 2011). The access principles take cognisance of technological changes, freedom of information, and issues of equity, openness, transparency and collaboration that have permeated our societies. They are also in line with international conventions such as the Bill of Rights and *Updated Set of Principles for the Protection and Promotion of Human Rights through Action to Combat Impunity* (2005) of the United Nations High Commission on Human Rights. The access principles provide archivists with an external benchmark against which to measure their existing access practices and to support archivists who seek to adopt new or modify existing access rules. Each access principle includes a short description and explains its importance.

The access principles are as follows:
- The public should have the right of access to archives of public bodies. Both public and private entities should open their archives to the greatest extent possible.

- Institutions holding archives should make known the existence of the archives, including the existence of closed

materials, and disclose the existence of restrictions that affect access to the archives.

- Institutions holding archives should adopt a proactive approach to access.

- Institutions holding archives should ensure that restrictions on access are clear and of stated duration, are based on pertinent legislation, acknowledge the right of privacy in accordance with cultural norms, and respect the rights of owners of private materials.

- Archives should be available on equal terms of access.

- Institutions holding archives should ensure the preservation of, and access to, records that provide evidence needed to assert human rights and to document violations of them, even if those records are closed to the general public.

- Users should have the right to appeal a denial of access.

- Institutions holding archives should ensure that operational constraints do not prevent access to archives.

- Archivists should have access to closed archives and perform necessary archival work on them.

- Archivists should participate in the decision-making process on access.

Global trends influencing access to archives

Freedom of information (FOI) legislation is changing how information held by the government in general and the national archives in particular become available to the public. FOI legislation brings into effect the constitutional guarantees on access to official documents enshrined in the democratic principles of the *Universal Declaration of Human Rights*. The advent of FOI legislation means that the closure period no longer determines access to records unless they fall under an exemption grounded in law. FOI legislation gives the public the right to be told whether a public entity holds the information and to be provided with that information. This right may vary from country to

country, but that is the fundamental thinking behind the enactment of FOI legislation. The right to FOI is an important tenet of the international guarantee of freedom of expression.

There is a move towards transparency, openness and liberalising of access to information held by institutions that are funded by public funds. This is one of the global trends that is behind the paradigm shift in the provision of access to information held by publicly funded institutions. The thread of openness, human rights and justice runs through the ICA access principles, especially the second principle. The ability of archival institutions to provide information about their holdings and making them available to users depends on having up to date finding aids and the absence of backlogs of archives without description.

Archives utilising Web 2.0 technologies

The advent of information and communication technologies (ICTs) is another trend that is revolutionising the way archival institutions do their business. The Internet as the FOI legislation is democratising access to online archival and information resources. That is the trend overseas, but how much are we using these technologies to enhance access to public archives in SSA? Archivists in the twenty-first century in general and SSA in particular, need to reinvent themselves if they are going to make their holdings more accessible and remain relevant to society. They should have a pro-active approach to access as espoused by the third ICA access principle.

In other words, archivists must tactically embrace emerging technologies (Prelinger 2007:118). As President Barack Obama, the President of the United States of America, observed: "The rules have changed. In a single generation, revolutions in technology have transformed the way we live, work and do business" (Obama 2010). The change in technology has ushered in the concept of "wikinomics" (Tapscott and Williams 2006). Wikinomics is based on the principles of openness, peering, sharing and acting globally while working collaboratively. These technological changes are influencing the way that archivists should interact with their clients and make their holdings accessible. That will involve being open and transparent in discharging their functions. Archival institutions have a unique

opportunity to digitise their collections and make them available in the living Web or Web 2.0 environment, which include Web logs (blogs), photo sharing sites, social booking sites, wikis and social networks (Daines III and Nimer 2009). In fact, they are obliged to "harness the new collaboration or perish" (Tapscott and Williams 2006:12). The National Archives of Singapore has used these tools to create a one-stop portal (http://www.a2o.com.sg/a2o/public/html/), which provides access to cultural and heritage information dating back to the seventeenth century (Beasley and Kail 2009).

Many archives in the East and Southern Africa Regional Branch of the International Council on Archives (ESARBICA) region, Zimbabwe included, are working towards automating some of the information about their collections and the finding aids in order to make it available online. An effective web presence communicates clearly the purpose, activities and collections of the archives. Calls are also getting louder for archival content to be available online. In Zimbabwe, this is viewed with suspicion. The few in the region that have tried this have had their fingers burnt. Challenges are mainly to do with the digital or resource divide. Such investments tend to be, so far, unsustainable, or of greater benefit to users in the developed world than locals leading to fears of information imperialism (Garaba and Ngulube 2010).

Decentralising archives

Archives should be taken to the people by decentralising public archives to the regions and provinces. Decentralising does not necessarily mean taking the physical archive to the people. ICTs make it possible for both content and finding aids in the archives to be automated. This has the potential of increasing users several folds. People may request for archival documents from wherever they would be if they know of their existence. They may also make decisions to visit the archives knowing quite well that the information they need is available. Archivists may also take advantage of powerful tools of networking and collaborating provided by ICTs such as Web 2.0 technologies to explore new opportunities and decentralise their services making them accessible on a nationwide basis without requiring people to visit the archival building housing collections, which in most cases is located far away from the people.

Access to the archives by the physically challenged

The fifth ICA access principle which encourages the provision of fair, equitable and timely access may be applied to persons with disabilities. The physical challenged or persons with disabilities face a lot of problems when accessing archives. The physical challenged include the deaf, blind, those with mobility problems and the aging. Deaf people are a challenge to the reference or control desk archivists. Most archival documents are inaccessible to blind people. The people with limited mobility may have problems with areas that do not have wheelchair access including reference room tables that cannot accommodate a wheelchair. The elderly may also have problems of mobility, vision and hearing. Archivists must contend with all these group of people if they are to give equitable access to their holdings.

However, the special needs of these people are often neglected in the archives (Kepley 1983:42) and there is a paucity of information about the subject. Kepley's (1983) observation remains poignantly insightful in the context of access to archival institutions in many countries. Access to archives by the disabled is limited. In spite of the archivists' claims to providing equitable access to their holdings, provision of access to archival holdings do not take into consideration the special needs of the disabled. The physically challenged have a right to access to information in order to conduct activities such as educational and leisure, historical research and genealogical studies, civic engagement and decision-making. In other words, all privileges "available to all other people should be available to those with disabilities" as well (Kepley 1983:43).

However, it may not be feasible to make all archival materials accessible to all the disabled people because specific groups of disabled persons have needs that are peculiar to their disabilities. Archivists need to be realistic and balance the need to make archives accessible and their capacity to do so. As Nugent (1981:506), a person with disabilities pointed out, even if the law required services to be accessible to everyone in a practical and normal way, not every "nook and cranny of a facility" can be physically accessible and usable by the disabled. Archivists should not use the need to be

pragmatic and realistic as an excuse to deny access to their collections to the disabled, but they should find innovative ways of providing disabled persons with fair and equitable access to their holdings as envisaged in the ICA's fifth access principle.

Current access regime at the National Archives of Zimbabwe

NAZ access policy is enshrined in the enabling legislation and rules and regulations enacted by management from time to time. These include, but are not limited to, User requirements/regulations, the Clients Charter and Fees and Charges for accessing archival services. In fact NAZ's overarching role is "... to acquire, preserve and provide access to historical documentation ..." for the advancement of Zimbabwean society and humankind.

Most significant archives in the ESARBICA region are state or national. NAZ is national. The beneficiary for the archival service is not clearly defined but is generally implied to mean the public in the sense of nationals and their visitors. In practice the audience is the academic researcher community in which foreigners are a significant portion. The benefitting local public is a tiny portion of the national population which runs into millions (see Table 1). Currently there is a lot of talk about taking archives to the people, which is seeking to reach out to a truly national audience. This ideal dream has remained elusive in the ESARBICA region because of backlogs of unprocessed archives, reading room fees, opening hours, size of the reading rooms and dysfunctional reprographic equipment.

Processing is at the heart of what archivists do. Processing makes uncatalogued archives accessible. The relationship between access and processing is not adequately addressed in archival discourse (Prom 2010:146). Current processing procedures of accumulated backlogs affect access to archives at NAZ. Currently, whatever measurement metrics are developed will not provide accurate data because of backlog bottlenecks that affect access to the archival holdings.

Effective acquisition must be complemented by effective processing (arrangement and description). Owing to high staff turnover, as in the case of Zimbabwe, huge processing backlogs resulted, leading to

users being denied access to significant portions of the matured collection. Zimbabwe has a backlog of unprocessed archives of 11000 cubic feet. At current processing averages (see Table 1) it would take 54 years to clear the processing backlog and at maximum capacity so far attained it would take 14 years to clear the backlog alone. NAZ should take advantage of the memorandum of agreement (MOU) it has with the National University Science and Technology (NUST) to creatively deal with backlogs. The MOU provides an opportunity for fourth-year records and archives management students at NUST to carry out their practicum at NAZ. In previous years these students have brought a great deal of relief as they were able to process large deposits of backlogs in a very short space of time.

Other than the bibliographical and intellectual access to archives described in the preceding paragraphs, there is the physical side of access (Ngulube 2006:142). Open hours may hinder physical access to archives. In ESARBICA most national archival institutions, as in Zimbabwe, use the traditional Monday to Friday working week. This tends to exclude many working class nationals from accessing archives. Another systemic hindrance to accessing archives is the capacity of some of the reading rooms in some national archival institutions. Most institutions have limited seating, and supervision capacity to service researchers. The number of researchers visiting an archival facility may be limited by its carrying capacity. For instance, the NAZ reading room can only accommodate 25 researchers at any given time. This means that, assuming a researcher on average spends a day in the reading room, its annual capacity cannot exceed 6 500 people per year, a figure which is far much higher than the statistics provided in Table 1. Zimbabwe seems to perform better than other national archival institutions in the region if figures in Table 2 for 1999 to 2001 are anything to go by.

Table 1: Current access and processing figures at the National Archives of Zimbabwe

Year	Cubic feet processed	Researchers
1999	297	2 292
2000	217	4 020
2001	188	4 088
2002	232.5	4 208
2003	312	3 049
2004	762	3 628
2005	569	3 400
2006	788	3 525
2007	161	2 346
2008	167	1 548
2009	231	1 693

However, at the moment this should not be the main worry because little is known about the existing and potential users of archives services, their needs, their expectations and their level of satisfaction with the archival services. Tools such as the access index may help to determine whether or not the current space provisions are a limitation to access or not.

Should we then have paid access to archives, if access is the primary driver in the management of archives? Is paid access not a constraint to taking the archives to the people? Access to heritage institutions such as museums is on a fee basis, so why not in archives? Answers to these questions are bound to vary from archivist to archivist depending on their context and circumstances. Some archival institutions in SSA charge access fees. Access fees at NAZ are US$1/day or US $30/year for both locals and foreigners, whilst in the region these range from universal free entry in Botswana and South Africa to US $0.80 in Mozambique and US$95 in Zambia for annual readers ticket for foreigners and US$22 for locals. In Zanzibar, foreigners pay US$150 in addition to the burden of paying for a government permit. Zanzibaris have free access to the archives.

ESARBICA should consider harmonising the charges and having a common approach to accessing to the archives. Furthermore, taking archives to the people will require significantly discounted fees if not free entry for locals, most of whom earn wages below the poverty datum line, especially in Zimbabwe.

Table 2: Comparisons of trends of visitors to reading rooms in Botswana, Malawi, Swaziland, Zimbabwe and South Africa (Ngulube 2009:355)

Visit to the archive facility	1998	1999	2000	2001
South Africa (including Pretoria)	5614	5190 (-8%)	5509 (+6%)	13930 (+153%)
National Archives Repository (Pretoria)	850	959 (-12.82%)	410 (-57.25%)	2850 (+595%)
Botswana	4282	3279 (-23.42%)	2034 (-37.97%)	1342 (-0.34%)
Malawi	163	135 (-17.18%)	114 (-15.56%)	124 (+8.77%)
Swaziland	163	389 (+138.65%)	429 (+10.28%)	516 (+20.28%)
Zimbabwe	4586	2292 (-50%)	4020 (+75%)	4088 (+2%)32

Enabling legislation is prescriptive on what constitutes archives. The general closure period of 25 years in Zimbabwe is currently not a big issue. Acquisition is dependent mainly on enabling legislation. For most national archives statutory obligations mean that most of the collections are government generated records supplemented by haphazardly acquired private manuscripts. Users are at the mercy of acquisition policies as they can only access that which has been acquired.

Although access is the primary driver of the activities of archival institutions, preservation and security imperatives may result in restrictions on photography, reproductions and access to fragile originals. However, most of the time photocopiers at NAZ do not work yet archives are not supposed to leave the archives buildings. This

leads to adoption of restrictions that support coping on demand. The eighth ICA access principle implores archives to ensure that operational constraints do not prevent access to their holdings.

Progress made towards measuring access at NAZ

Public archives and the reference library are the most utilised sections by those who seek information contained in archives at NAZ. The National Archives of Zimbabwe has embarked on an exercise to develop a measurable or auditable tool to measure access to its archival holdings. The initial focus is on measuring access to the public archives and reference library. The following principles will provide guidance on access for public archives:

- Who is happily using the facilities? This question will be partially answered by the use of a visitors' book at the reception and a register at the control desk. The register at the control desk will also show the number of successfully retrieved items versus unsuccessful. Reasons for unsuccessful requests will be recorded. These may include, for example, poor lighting and misfiling. Currently, statistics of actual visits only are captured and that masks frustrations endured by some of the visitors when they fail to locate their requested items. Annual stocktaking figures will be compared with instances of those files that could not be retrieved to gauge the prevalence of the problem. Lastly, user studies will be conducted to find out who the users of the archives are, including their interests, experiences at NAZ, expectations and so on. For instance, how many are searching for a quick answer to a straightforward question, or a genealogist tracing a certain family, or a researcher at a university and so on? The figures in Table 1 may not be useful for that purpose. Furthermore, the archives need to know what channels the users employ to reach the archives, for example, written letter, email, blog, podcast, and in person. Information is needed on their physical abilities, nationality and age so that the archives may provide equitable access. As advised by Evans (2007:390):

> To understand customer's demands, archivists must rigorously track the use of collections, but not just produce aggregate statistics for the annual report. With data about the nature and the use of collections, together with

researchers' comments and requests, archivists can make informed decisions about setting processing priorities, determining which collections should get the fuller treatment of detailed processing.

- What should be the priorities in making archives available to the public? Priority should be given to clearing backlogs of unprocessed archives. Records should be processed as soon as they mature. Annual targets for processing should be set, and those targets should either be reached or exceeded. In the first instance, processing of backlog should be done selectively prioritising most researched areas, considering that the backlog currently standing at 11 000 cubic feet that will require several years to clear. NAZ should take advantage of the MOU with NUST to reduce backlogs of unprocessed archives.
- Complementary services such as microfilm readers, photocopiers, scanners and other reprographics equipment should be always functional to avoid turning away clients. That will be in line with the eight ICA access principles.

With regards to the Reference Library the following are priorities:
- Has the material been processed? Processing involves cataloguing, classification and indexing, resulting in the production of catalogue cards which should be properly filed in the catalogues as access points to the library's collection. After processing, books should also be properly filed because a book misfiled is as good as lost thereby hindering access to materials.

- How do I find what I want? Proper reference services should be offered at the control desk by the control desk officer. User education should be conducted, thereby educating users on how to use finding aids efficiently in accessing required information.

- Why was the request unsuccessful? Unsuccessful requests can be named under the following:

  ✓ Catalogue cards are in the catalogues, but the item is not found on the shelf.

- ✓ The item is not in the catalogue, but we are supposed to have it, for example, materials that fall under the Legal Deposit Act not yet deposited.

- ✓ The item is there in our holdings but due to its state we are unable to issue it to users. These include newspapers in a fragile state.

- ✓ Unsuccessful requests can also be those materials not accessed because the medium storage is dysfunctional, including deceased estates and newspapers because the microfilm reader is down.

The progress made towards measuring access at NAZ may be further complemented by the ICA access principles and the following ten questions adapted from Hackman (2011) and Loewen (2008):

- Does the repository have a well-worded policy mandating open and equitable access for use of collections?

- Is the staff trained to provide courteous and appropriate reference help to users without favouring certain individuals?

- Are obstacles such as photocopy fees kept to a minimum?

- Do readers receive appropriate training in using both manual and online finding aids?

- Does the repository have a welcoming and helpful website?

- Is there an outreach programme to ensure that those who need the information in the archives know it is there?

- Does the archives staff project the core values of openness and integrity?

- What kind of tools and professional expertise encourage optimum access?

- What does it really mean to treat researchers equitably?

- To what extent do access needs determine the selection and retention criteria as well as the choice of what gets the attention of preservation?

Conclusions

The attempt is not to produce a formal and rigid tool for measuring access. Instead, we are advocating a tool that may be helpful for self-evaluation for archival institutions such as the National Archives of Zimbabwe. Such a tool may provide grounding and cohesion for the archival access programme. Starting with the framework articulated in the previous section, NAZ can develop an advanced access tool that incorporates more ICA access principles than is currently the case. The framework may provide a basis for any consideration of the evaluation of an access programme in an archival environment, especially in developing countries where standards are not part and parcel of archival practice. An appropriate framework can help archivists to collect meaningful, helpful and usable data to assess and monitor progress achieved, establish a baseline against which to measure the effects of the access programme's change on service performance, and demonstrate the contribution of archives to the advancement of society.

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