# RLG (Organization) Records, 1974-2006:
## Archive inventory

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**Processing Note**

This list resulted from examining the contents of 215 cartons of materials donated by RLG and by Noel Hanf, Esq., Wiggin & Dana.  It is not a professional finding aid, and very little attempt was made to organize and reduce redundancy across cartons (which were reviewed in batches of 2-4 at a time, over several years). Terminology is inconsistent, as are cross-references to related topics in various cartons. File descriptions listed in this inventory are not always identical to the titles written on the physical folders within the boxes.

RLG board and board committees:  The board's meeting agendas, minutes, and additional correspondence with its members are included in cartons from the President's Office, Corporate Communications, RLG's legal counsel Noel Hanf, and occasionally department directors. Different contributors saved and/or annotated materials in various ways, and no attempt was made during inventory to compare these in order to eliminate pure duplication.

Materials were sorted and described by Jennifer Hartzell, former staff member of RLG.

**Note on box numbers:**  Gaps in the numbering sequence are the result of combining some materials and weeding others that were redundant or out-of-scope.  These numbers were eliminated as a result: 22, 70, 71, 72, 73, 74, 75, 76, 77, 78, 82, 84, 94, 102, 118, 124, 125, 127, 131, 132, 137, 138, 144, 160, 162, 179, 180, 182, 189, 190, 194, 195, 198, 215.

**CARTON 1: Member Programs; supplemented by Finance & Administration**

1976-1999: Materials about early grants from the National Endowment for the Humanities, extracted from Accounting unit's files; plus records of some programmatic initiatives in the 1990s -- exploring photo preservation, digital imaging ("DIAP"), and coordinated digital materials online (Digital Collections Project - "DCP: Studies in Scarlet").

- NEH grants to RLG: Partial records from Accounting files (on grants to create online access for the Library of Congress to a MARC database, and a bit on funding bibliographic control -- pre-Stanford), 1976-1977
- NEH grants to RLG: Partial records from Accounting files (East Asian records in RLIN, 1982-1983 NEH audits conducted by Simpson & Simpson), 1979-1983
- NEH grants to RLG: Partial records from Accounting files (cooperative preservation microfilming, NEH auditor survey of RLG's financial controls & RLG response -- James Michalko to NEH Inspector General), 1989-1990
- NEH grants to RLG: Details of RLG data provided by Patti McClung to NEH auditor for Brown University, Columbia University, Cornell University, New-York Historical Society, New York Public Library, Princeton University, Stanford University, University of California at Berkeley, University of Michigan, University of Minnesota, University of Southern California, Yale University, early 1990

Stanford University Library – Special Collections

- RLG Task Force on Photograph Preservation: Work that preceded the DIAP effort -- task force charge, participants, PR, minutes of two meetings (more were held), draft collections survey form, "cheat sheet" for selecting project participants, May 1992 - May 1993
- DIAP - Digital Image Access Project: Request for Proposal to participate in project, March 1993, plus interest/inquiries from potential participants, April-May 1993
- DIAP - Digital Image Access Project: Selection of member proposals for inclusion, spring 1993
- DIAP - Digital Image Access Project: Stokes Imaging Services -- Partial record of role in technical tests and support for project, 1992-1994
- DIAP - Digital Image Access Project: Conduct of project, meetings, etc., in 1993
- DIAP - Digital Image Access Project: Conduct of project, including correspondence, meeting reports, paper by Jackie Dooley (Getty Center); plus Patti McClung's October 1994 resignation announcement (to become a project consultant, in 1995), 1994
- DIAP - Digital Image Access Project: Participants' assessments and outcomes from project, 1994-1995
- DIAP - Digital Image Access Project: Materials related to final, invitational DIAP Workshop (2-1/2-days session on project findings and results), held 31 March - 1 April 1995
- Member Services Department: Memo describing member files set-up, September 1994
- DCP - Digital Collections Project/Studies in Scarlet: Origins of project, considerations, players, launch of database, 1995
- DCP - Digital Collections Project/Studies in Scarlet: Formation and work of Digital Collections Project Task Force, 1995
- DCP - Digital Collections Project/Studies in Scarlet: External/scholar content or theme advisors identified and contacted by DCP Task Force, August-November 1995
- DCP - Digital Collections Project/Studies in Scarlet: Defining project/collection theme -- Stanford White - Harry Thaw - Evelyn Nesbit trial as an example, 1995-1996 (scrappy file)
- DCP - Digital Collections Project/Studies in Scarlet: Call to members for participation in the project, inviting their proposals, October 1995
- DCP - Digital Collections Project/Studies in Scarlet: Member proposals accepted for the project -- Harvard University, New York Public Library, New York University, North Carolina State Archives, Princeton University, University of Leeds, University of Pennsylvania, fall 1995 - fall 1996
- DCP - Digital Collections Project/Studies in Scarlet: Member proposals turned down -- Brown University, Cornell University, Emory University, New York Academy of Medicine, New York State Library (turned RLG down), Syracuse University, University of California at Berkeley, CURL (proposal submitted by University College London on behalf of four members of Consortium of University Research Libraries and one non-member), fall 1995
- DCP - Digital Collections Project/Studies in Scarlet: Evaluation and decisions on member proposals for the project, August 1995 - September 1996
- DCP - Digital Collections Project/Studies in Scarlet: Proposal to and funding granted from NCAIR (National Center for Automation Information Research), plus various progress and financial reports to NCAIR, June 1995 - July 1998
- DCP - Digital Collections Project/Studies in Scarlet: Proposal to William Penn Foundation for funding in collaboration with University of Pennsylvania -- turned down as out of area/scope, April-August 1996
- DCP - Digital Collections Project/Studies in Scarlet: Other fund-raising efforts besides NCAIR and William Penn Foundation (no success), December 1995 - November 1996
- DCP - Digital Collections Project/Studies in Scarlet: Miscellaneous work involving Ricky Erway and Win-Shin Chiang (project managers), including creation of a Wylbur (Stanford's

mainframe text-editing software) "DCP Library" for project papers, September 1995 - September 1998

- DCP - Digital Collections Project/Studies in Scarlet: Creation of RLG Listserv DCPPART-L and information posted there for all project participants (not a complete record), November 1995 - October 1996
- DCP - Digital Collections Project/Studies in Scarlet: Participants' technical meeting (some photos included), at New York University, 12 April 1996
- DCP - Digital Collections Project/Studies in Scarlet: "Bean counts" of materials to be included online and how they would be processed, with concluding summary sheet, April 1996
- "Collaborative Conversion": Talk given by Ricky Erway at Rare Books and Manuscripts division's American Library Association pre-conference (focusing on digital conversion activities such as Studies in Scarlet, but applicable to a variety of RLG programmatic activities), July 1996
- DCP - Digital Collections Project/Studies in Scarlet: Revising participants' budgets, August-September 1996
- DCP - Digital Collections Project/Studies in Scarlet: Partial records of efforts to evaluate content and uses of the Scarlet digital collection (known as "Marriage, Women, and the Law: 1815-1914"), January 1997 - October 1998
- DCP - Digital Collections Project/Studies in Scarlet: News pick-up and RLG promotion of this project, November 1995 - May 1999

## CARTON 2: Member Programs supplemented by Finance & Administration

1979-1992: These records contain a good deal of systems development work undertaken at John Haeger's instigation -- MRDF (Machine-Readable Data Files) project expanding RLIN; GRIN (Geo-Referenced Information Network) design; plus mixed bag from Accounting files including member-driven projects, new-systems development, a 1986-1992 Mellon Reserve Fund.  [See also Cartons 6 and 12 for GRIN material.]

- PRIMA (Program for Research Information Management): Update to Public Services Committee -- list of current projects plus possible ones in future, over 18 in all, November 1988
- MRDF (Machine-Readable Data Files) in RLIN: Information provided to John Haeger by ICPSR (Inter-university Consortium for Political and Social Research) -- background for the Pew Foundation-funded MRDF project, 1979-1983
- MRDF (Machine-Readable Data Files) Pilot Project: Information and updates on Pew-funded project progress, circa 1987 - 1989
- MRDF (Machine-Readable Data Files) Pilot Project: Participants' meeting, 6 June 1988; agenda, white papers, notes distributed in July 1988
- MRDF (Machine-Readable Data Files) Pilot Project: Meeting, with participants' reports included, held during American Library Association mid-winter meeting, January 1989
- MRDF (Machine-Readable Data Files) Pilot Project: Final report publication preparation (actual report itself not found in this file), January- May 1989
- MRDF (Machine-Readable Data Files) Pilot Project:  Invitations to follow-on Workshop, held 28-29 September 1989
- GRIN (Geo-Reference Information Network) Background: GIS (geographic information systems) requirements and guidelines -- nothing here specific to RLG's actual design project, but provides context for it, 1981-1985

- GRIN (Geo-Reference Information Network) Project: Initial meeting at University of California, Santa Barbara -- start of collaboration, 1985 - 1986
- GRIN (Geo-Reference Information Network) Project: GIS meeting in Santa Barbara -- planning, agenda, papers, report, and next steps; held 6-7 January 1986
- GRIN (Geo-Reference Information Network) Project: Agenda and outcomes from Geoinformation Task Force ("GISTF") meeting held 19-20 May 1986
- GRIN (Geo-Reference Information Network) Project: Agenda, handwritten notes, work on proposal to Keck Foundation following Geoinformation Task Force meeting held at Stanford on 1-2 July 1986
- GRIN (Geo-Reference Information Network) Project: Background for and notes from Geoinformation Task Force meeting held at Stanford on 1-2 June 1987  [see 1987 function requirements in Carton 12]
- GRIN (Geo-Reference Information Network) Project: Agenda, background, handwritten notes for Geoinformation Task Force meeting held 19-20 November 1987
- GRIN (Geo-Reference Information Network) Project: Creation and use of Geodata User Questionnaires, 1986-1987
- GRIN (Geo-Reference Information Network) Project: Agenda and bits of handout (very incomplete record) from Geoinformation Task Force meeting held 13-14 June 1988
- GRIN (Geo-Reference Information Network) Project -- Context: Request/proposal to W. M. Keck Foundation "for partial support of the activities of the Committee on Status and Research Objectives in the Solid-Earth Sciences: A Critical Assessment," plus "Preliminary Draft of Panel Report on Data Management Systems," coming from National Academy of Sciences - National Research Council subgroup, August-November 1988
- GRIN (Geo-Reference Information Network) Project: Internal planning/status in May and December 1988
- GRIN (Geo-Reference Information Network) Project: Correspondence about work and contacts with Geoinformation Task Force and others, 1988 - August 1989
- GRIN (Geo-Reference Information Network) Project: Sean Ahearn (University of Minnesota) consultancy to product Functional Design/Requirements for GRIN Data Entry Subsystem (incomplete records/design documents), February 1988 - April 1989
- GRIN (Geo-Reference Information Network) Project: Presentations to USGS and NASA, elsewhere by James Michalko and Cecil J. Bloch -- skeletal record, March/April 1989
- Collection Management: Use of RLG's Conoco Study [find more in other cartons] to inform New York Public Library Earth Science Collection Assessment Project (from Leslie Hume's files), July 1989
- CPMP1 - Cooperative Preservation Microfilming Project, Phase I: Proposal, grant, first 6-month performance report, sidelights (correspondence fragments) on later developments as accrued interest on grant permitted -- incomplete record from Barbara J. Lindeman's Accounting files, July 1982 - January 1994

[Following folders all culled from Barbara Lindeman's Accounting files:]

- Mellon Foundation grant for "Scholarly Information Program" ($35,000 for series of meetings) -- one origin of RLG's late 1980s-early 1990s PRIMA (Program for Research Information Management) -- October 1985
- Visiting Associates Program: December 1986 guidelines for supplementing RLG staff and developing member staff through short terms at RLG headquarters on specific projects; plus May 1987 memos describing Nancy Elkington's assignments as an RLG Visiting Associate for Preservation, July-October 1987  [Elkington later returned to RLG as full-time program officer]

- RLG audited financial statements (bound) and cover letter, for 1 September 1989 - 31 August 1990 [*very* probably duplicated in other cartons]
- Hans Rutimann, consultant: Skeletal contracting record indicating at least some years of total span during which Rütimann served as occasional explorer/advisor on potential scholarly or international activities for RLG, August 1989 - September 1994
- RIPD (Research in Progress Database): 1 memo from this PRIMA (Program for Research Information Management) project -- contributions to RIPD from the National Council for Research on Women, 1 November 1990
- Andrew W. Mellon Foundation development reserve fund: Mellon granted to RLG $1,000,000 (one million) for developments over August 1986 - July 1991, and later extended the period to 1992 (used to help fund "RLG92" changes); April 1990 report on uses made of fund
- RLIN capacity to process/display Arabic: Grant from KFAS (Kuwaiti Foundation for the Advancement of Science) -- correspondence, outcomes, interrupted contact during first Gulf War, 1987-1992
- Cataloging Oxford Text Archive in RLIN: Project funded by the Andrew W. Mellon Foundation -- includes final report, August 1989 - March 1992
- AVIADOR (Avery Videodisc of Architectural Drawings on RLIN*)*: Implementation project plan, later level of RLG's support for resulting product, 1990-1992
- "Micropublisher Survey" for Commission on Preservation and Access (CPA), contracted by RLG with Erich Kesse (at member institution), 1991-1992
- EPB (Early Printed Books) Project: Skeletal information capture from Accounting files of this John Haeger - Henry Snyder initiative; forerunner of later Hand Press Book database with the Consortium of European Research Libraries 1991-1992

## CARTON 3: Member Programs

1981-1988: Appears to have been stored by La Vonne Gallo, who was a program officer in Member Services at the time she left RLG. Folders are a combination of materials originally filed by Alan Tucker and Gallo's additions. Facets of RLG's Archives & Manuscripts work, both on the standards/guidelines front and in expanding RLIN's capacity to process materials in the Archival & Manuscripts Control (AMC) MARC format. [Format now called "Archival Materials."] Some facets of RLG - National Archives collaboration, of the Seven States Government Records (in RLIN) project, of New York State Archives archival systems use, and a bit on the Getty Art History Information Program's "Museum Prototype" project in which Alan Tucker figures.

- Archives & Manuscripts computer processing development: Files of Alan Tucker -- mix of documents from the Society of American Archivists' National Information Systems Task Force (SAA NISTF) (formed in 1977), and from RLG's collaborative/parallel work; includes Yale-coordinated, National Endowment for the Humanities-funded, manuscripts project using RLIN; key figures include David Bearman, Larry Dowler, Barbara Brown and others; 1981
- Archives & Manuscripts computer processing development: Files of Alan Tucker -- mix of SAA NISTF documents and collaborative/parallel work by RLG, 1982
- Archives & Manuscripts computer processing development: Files of Alan Tucker -- mix of SAA and Library of Congress (LC … USMARC material) documents and RLG's work to implement the AMC format in RLIN; January-July 1983, plus one document from December 1983 and one from September 1984

- Archives & Manuscripts computer processing: RLG and National Archives and Records Service (NARS; "Service" later became "Administration" for NARA) -- collaboration to test MARC AMC in RLIN, September 1984 - January 1985
- Archives & Manuscripts computer processing: "The MARC Format and Life Cycle Tracking at the National Archives: A Study," final report to the Archivist of the United States from NARA Archival Research and Evaluation Staff (written by Edie Hedlin and Thomas Weir) on an 18-month project, begun in spring 1984, that tested the MARC AMC format using RLIN; softbound, spring 1986
- Archives & Manuscripts processing projects: Disparate materials from RLG's "Seven States" Government Records Project, including work on an archival functions vocabulary and guide; one issue of "The Exterminator" ("the newsletter that keeps RLIN from bugging you") -- spiritual editor Kathleen Roe, corporeal editor Beth Golding (New York State Archives; and RLG's final project report to the National Historical Publications and Records Commission; November 1985 - August 1988
- New York State Archives: Report on local system developed in addition to use of RLIN AMC, September 1984; plus proposal to NEA IIC to process archival maps, 1987 -- RLG/RLIN appears in both documents
- Getty Art History Information Program, early RLG involvement: Miscellaneous & incomplete set of documents indicating Alan Tucker's participation in AHIP "Museum Prototype" project, March 1983 - June 1984
  [In the mid/late 1990s RLG and AHIP would collaborate more formally on several areas.]

## CARTON 4: Member Programs

1977-1985: Materials filed originally for John Haeger, covering the steps that led to his becoming first, director of the ACLS (American Council of Learned Societies) East Asian Library Program on August 1 1978, and then, simultaneously, associate director for Program Coordination at RLG on 1 July 1979, where he was instrumental in the development of RLG's East Asian programs and RLIN support for non-Roman scripts. While many folders appear to be dealing with the ACLS program, the coordination and collaboration with RLG appears almost from the beginning. This carton provides the back story to other materials dealing specifically with the RLIN and RLG East Asian program developments.

- ACLS East Asian Library Program: Miscellaneous contextual background reports, 1977-1978
- ACLS East Asian Library Program: Karl Lo's Union Catalog Proposal -- partial background to theme running through the ACLS's Joint Advisory Committee meeting files in Carton 4. Materials intermittently from October 1977 to February 1980; more related to this topic in other files.
- ACLS East Asian Library Program: National Union Catalog - Serials -- Part of discussion/proposals taken up in ACLS Joint Advisory Committee meetings; this partial file contains materials from December 1977 to November 1979.
- ACLS East Asian Library Program: Letter sent to Ford Foundation outlining John W. Haeger's appointment as ACLS program director -- reactions to his appointment, aspects of initial work set-up, July 1978 - early 1979.
- ACLS East Asian Library Program: RLG enters the picture -- letter to John Haeger from RLG president James Skipper (August 1978), relationships as Haeger becomes a director within RLG in 1979.

- ACLS East Asian Library Program: Formation and rosters for ACLS's Joint Advisory Committee, comprising representatives from ACLS, ARL (Association of Research Libraries), and SSRC (Social Science Research Council), July 1978 - September 1980.
- ARL (Association of Research Libraries) Workshop on Japanese Collection Librarians in American Libraries: Attended by John Haeger in role of ACLS East Asian Library Program director; Washington, DC, 28-30 August 1978.
- ACLS East Asian Library Program: Materials related to Joint Advisory Committee meeting (New York, NY), 28-29 September 1978.
- ACLS East Asian Library Program: Japan - United States Friendship Commission grant to ACLS for a conference to be held on machine processing of East Asian scripts; filed materials from October 1978 to May 1980.
- ACLS East Asian Library Program: Rockefeller Brothers grant to ACLS for a conference to be held on machine processing of East Asian scripts; filed materials from November 1978 to May 1980.
- ACLS East Asian Library Program: Encouragement of Cambridge - British Library project to enable computer processing of Chinese and Japanese bibliographic data -- project involved Alan Tucker then at Cambridge; first connections made between John Haeger, Tucker, and RLG November 1978 - May 1980.
- ACLS East Asian Library Program: Response to the "President's Commission on Foreign Languages" -- also appears in other Carton 4 files as part of Joint Advisory Committee business; filed materials from December 1978 to April 1979.
- ACLS East Asian Library Program: Topic brought to the Joint Advisory Committee -- Proposal for interface between East Asian collections and the proposed National Periodicals Center (NPC), by Merrily Taylor, January 1979.
- ACLS East Asian Library Program: Materials related to Joint Advisory Committee meeting (Phoenix, AZ), 2-3 February 1979.
- ACLS East Asian Library Program: Materials related to Joint Advisory Committee meeting (New York, NY), 17-18 May 1979.
- ACLS East Asian Library Program: ACLS grapples with grant budgets involving Ford Foundation, Japan - United States Friendship Commission, Rockefeller Brothers Fund, and RLG, John Haeger's employer; 1979-1980.
- ACLS East Asian Library Program: Reports and correspondence concerning three Ford Foundation grants for the ACLS program's work; more material about the Ford Foundation's role appears in other Carton 4 files, but not a full picture; 1979-1981.
- RLG and RLIN support for Chinese, Japanese, and Korean scripts: Miscellaneous material for RLG research into technology available, plus RLG proposal to the Ford Foundation for a three-year program to address CJK-language serials control, anticipating RLIN CJK support by 1983 -- project to run from September 1980 through August 1983; filed materials from 1979-1980.
- ACLS East Asian Library Program -- and RLG: Materials related to June 1979 Japan trip taken by John Haeger, James Agenbroad, Hideko Kaneko, and John Schroeder to inform and advance efforts like the upcoming ACLS conference on East Asian scripts computer processing; January-October 1979.
- ACLS East Asian Library Program: Bits of correspondence not filed in Joint Advisory Committee meetings folders as either preparation or outcomes/follow-up, or in relation to other activities (conferences, RLG projects) -- correspondents are Richard Sullivan, Carnegie Corporation; Christian Murck; Jason Parker, ACLS; Gary Saxenhouse, University of Michigan -- between September 1979 and December 1980.

- ACLS East Asian Library Program: Materials related to ACLS conference on machine processing of East Asian scripts -- preparations, participants, observers' notes, brief report, deposit of full proceedings at Hoover Institution and Harvard; Stanford University, 8-10 November 1979.
  [Full proceedings not included in Carton 4.]
- ACLS East Asian Library Program: Extended US travel for several East Asian participants in the ACLS conference held on 8-10 November 1979.
- ACLS East Asian Library Program: Librarian training plans (an ongoing concern for the Joint Advisory Committee) -- miscellaneous materials, 1969-1980.
- ACLS East Asian Library Program: Librarian training plan from University of Michigan -- reactions from Joint Advisory Committee and John Haeger, October 1979 - April 1980.
- ACLS East Asian Library Program: Materials related to Joint Advisory Committee meeting (New Orleans, LA), 6-7 December 1979.
- People's Republic of China: Information provided by Douglas Murray, head of Stanford University's US-China Relations Program, to John Haeger and the Stanford Librarian's office regarding PRC visitors and efforts to computer-process Chinese, December 1979 - July 1980.
- ACLS East Asian Library Program: Materials related to Joint Advisory Committee meeting (Washington, DC), 23 March 1980.
- ACLS East Asian Library Program: Materials related to Joint Advisory Committee meeting -- including future of committee funding (Santa Fe, NM), 22-23 May 1980.
- ACLS East Asian Library Program: Librarian training plan from University of California, Los Angeles -- reactions from Joint Advisory Committee and John Haeger, May-November 1980.
- International Workshop on Chinese Library Automation (Taipei, Taiwan), 14-19 February 1981: Some materials related to this event, in which ACLS and John Haeger participated, April 1980 - February 1981.
- ACLS East Asian Library Program: Materials related to Joint Advisory Committee meeting (Toronto, Canada), 16 March 1981.
  [No records found in Carton 4 for any committee meeting in fall 1980; Ford support running out]
- ACLS East Asian Library Program: Minimal materials related to final Joint Advisory Committee meeting (Charleston, SC), 21-22 May 1981.
- ACLS East Asian Library Program: Various reports on program's purpose and progress, late 1978 through July 1980.
- ACLS East Asian Library Program: Some materials related to Joint Advisory Committee's final report (only partial draft comments); report itself is in Carton 41; 1981.
- "Author list produced from JAPAN MARC test tape using ALPS Kanji machine," undated (at least in English); plus 1981 offer for JAPAN-MARC magnetic tape from Maruzen Company, Ltd.
- RLG and RLIN support for Chinese, Japanese, and Korean scripts: Alan Tucker (now on RLG staff) and Ryoko Toyama's "Preliminary analysis of the data gathered by the questionnaires sent to the heads of East Asian collections in RLG member institutions in 1980" (revised 11 February 1981).
- RLG and RLIN support for Chinese, Japanese, and Korean scripts: "RLIN Requirements Definition for East Asian Character Support Enhancements," December 1980.
- RLG and RLIN support for Chinese, Japanese, and Korean scripts: "RLIN External Specifications for the East Asian Character Support Enhancements," February 1983.
- RLG and RLIN support for Chinese, Japanese, and Korean scripts: "RLIN External Specifications for the CJK Character Set Thesaurus," March 1985.

- RLG and RLIN support for Chinese, Japanese, and Korean scripts: "RLIN East Asian Character Code and the RLIN CJK Thesaurus," by Karen Smith-Yoshimura and Alan Tucker; plus "Thesaurus administrator's hoped-for role in Phase 1 implementation," notes by Karen Smith-Yoshimura; May 1985.

## CARTON 5: Computer Systems (aka Development)

1977-1985: Files from Library Systems Development (LSD) director Tina Kass on system design elements of RLG programs.  At this time, systems analysts and service designers were organized in a separate department from programming staff.  Refer to early organization charts in Carton 119 for more organizational background.

- BALLOTS descriptive articles, JOLA (*Journal of Library Automation*), March 1975, & LRTS (*Library Reference & Technical Services*), spring 1977.
- Database (Union Catalog) reconfiguration, aka RDB project, 1980-81. (Major early systems development – record clustering – Jessie Herr – Keith MacLaury – "Big Bang").
- ESTC project and RLG's first interest in/correspondence on, 1978-1980.
- ESTC-related (see 1978-1980 file): Rare books cataloging issues, 1979-1982.
- Library Systems Division: Sample of e-mails to director Tina Kass, mid-March – mid-May 1985.
- Designation form for member RLG Coordinator & program committee representatives [1985].
- Music Program/Committee and related topics, 1979 (1 item) – 1984. (Music cataloging – MARC & libraries' practices – music data in RLIN – AAA/ARSC [Associated Audio Archives/Association for Recorded Sound Collections] proposal – Rigler-Deutsch Index – competing retrospective conversion proposals [OCLC's REMUS & another, "AMLG"].)
- Preservation Program/Committee and related topics, 1979-1984. (Origins of Cooperative Preservation Microfilming effort, funding for it, RLIN cataloging support developments.)
- Press releases (RLG's), 1979-1985. (*See also* set of releases in Carton 8.)
- Printers for centralized RLIN output production and for local use, 1979-1982.
- Problem Management System for RLG computer operations: design and development, 1983-1985.
- Production (catalog cards, tapes of records) – problems, 1983 – early 1984.
- Rates for use of RLIN, FY1980-1985 (Sept. 1979 – August 1985); plus J. Michalko on rates setting.
- Realia online issues, early 1984. (Precursor to AMIS – Archive & Museum Information System project)
- Recon, 1979: Preparing RLIN, pricing, and standards for members' retrospective cataloging conversion projects.  (C. Hulett – J. Yarborough – T. Kass – J. Levine – C. Stewart – L. Driver – L. Kershner – OCLC/LC papers.)
- Recon, 1989: Determining standards, procedures, pricing, approved projects for members' retrospective cataloging conversion.  (BIBTECH – T. Kass – J. Michalko – member responses to questionnaire – D. Martin – comparison of prices to OCLC.)
- Recon, 1981: "Online Catalogs Enhancement Project" -- coordinated member projects. (Content – funding – defining – request for proposals & members' responses – selection – freeze on project owing to costs involved – draft procedural guidelines.)
- Recon, 1982: Tape-loading retrospective conversion records that members created elsewhere ("archive loads"), other issues.  (Where archive tapes are done – Board-approved

policy – REMARC/Carrolton Press [*see also* Recon, 1984 REMARC folder] – recon issues – specifications for RLIN-produced MARC tapes.)
- Recon, 1982: RLG retrospective conversion project "Procedural Guidelines for Cataloging."
- Recon, 1982-1984: Member in-house retrospective cataloging conversion procedures. (U. of Iowa, Johns Hopkins U., U. of Michigan, U. of Minnesota.)
- Recon, 1983: Board regroups on renewed role, commitment of RLG to retrospective cataloging conversion projects to feed into RLIN (Union Catalog) and support cooperative programs. (Lead up to and minutes from Special Meeting on Retrospective Conversion, 20 April 1983 – new questionnaire to members toward a Cooperative RECON Program.)
- Recon, 1983-1984: Member responses to 18 October 1983 Recon Projects Survey.
- Recon, 1984: REMARC negotiations end. (Various Board members, primarily Richard DeGennaro, then at U. of Pennsylvania.)
- Recon, 1982-1984: Approaches from SAZTEC.
- Recon, 1984: InFour proposal. (Richard DeGennaro – Brett Butler – RLG central staff.)
- Recon, 1984: Background and T. Kass, E. Glazier participation in CLR (Council on Library Resources)-supported "Retrospective Conversion Meeting," 16-18 July 1984, put together by ARL (Association of Research Libraries) staff and including ARL, RLG, OCLC/RLAC (Research Libraries Advisory Council), and WLN (Washington Library Network).
- Recon, 1984-1985: ARL's "Plan for a North American Program for Coordinated Retrospective Conversion" and background (Association of Research Libraries).
- Recon, 1983-1985: Approaches from Information Transform Inc. and MITINET. (CEO: Hank Epstein, who had been director of the BALLOTS project ca. 1969-1977.)
- Recon, 1984: RLG's Coordinated Retrospective Conversion Program/Project finally launches for real. (Planning continued from 1983 – another request for proposals to members – funding begins to arrive: Getty, Hewlett Foundation, Andrew W. Mellon Foundation to come – James Coleman as project coordinator – project correspondences and first results.)
- Recon, 1984: Batch retrospective conversion system: single internal staff memo on how this might be done. [Ca. 1988 RLG did produce a PC-based local system for this called "BRCON."]
- Recon, 1985: Program/project results from 1984 and call for proposals on work in 1985.
- RLG/RLIN in-house library, 1979-1981.
- RLG and RLIN: "Case-making" papers for engaging in, by Patricia M. Battin and Edward E. Shaw, 1979.
- RLIN (& RLG) article in "Online" by Jan Thomson and Jennifer Hartzell, 1979.
- "RLIN II" Integrated Technical Processing System ("ITPS") overview, 1980-81. (See also same-period folder in this carton on Database Reconfiguration, aka RDB project.)
- RLIN Reports System (RRS), originally part of RLG Acquisitions Subsystem: developments in 1981-1982. (Designed to provide 33 orderable reports for using library's newly cataloged holdings, orders and receipts, fiscal information, reference tables data.)
- RLIN Reports System (RRS), User Questionnaire (part of development process), 1982.
- Shared Resources Program/Public Services Committee activities & related material, 1979-1982. (Includes notes on "first" Public Services Committee meeting.)  [NOTE: Shared Resources program material can be found in Cartons 5, 16, 18, 31, 32, 36, 39, 42, 56, 62, 80, 88, 122, 126, and 191.]

**CARTON 6: Computer Systems (aka Development)**

1988-1991: From programmer Cecil Bloch's files; for AMIS materials, see also Box 29, and Cartons 83, 197, 200, and 204; for GRIN materials, see also Cartons 2 and 12.

- AMIS (Archives & Museum Information System) design, 1991 – (1) design team work & memos among Andrew Roberts (Museum Documentation Consultant), Cecil J. Bloch, David Ripp, Michael Carroll, Lenore Jones, Alan Tucker.
- AMIS (Archives & Museum Information System) design, 1991 – (2) technical architecture papers.
- AMIS (Archives & Museum Information System) design, 1991 – (3) Andrew Roberts' data design and outline of functions & processes.
- "Bibliofinder" application, incomplete, for searching "slices of RLIN data" extracted to optical disk, a la NeXT's Digital Librarian, 1989.
- BRCON2 PC program for batch retrospective conversion (of cataloging information) – Functional Specifications and notes, 1991.
- BRCON2 PC program for batch retrospective conversion (of cataloging information) – PC Processor Technical Documentation, 1988-1991.
- BRCON2 PC program for batch retrospective conversion (of cataloging information) – Code (include, main, io, file, help, print, repair), 1990-1991.
- GRIN design presentation (Geo-Referenced Information Network), 1989. (In 2 forms: cardboard-framed 8-1/2" x 11" transparencies and 35 mm slides).

**CARTON 7: Marketing & Sales – photos**

1974 – 2006: Photos of every RLG staff member for which one or more pictures could be found and identified in archives donations, alphabetical by last name. Carton begins with a key to staff names and tenures and a cross-reference to Carton 119 for more on organization and departmental names, staff titles, etc. over the years. ALSO: Earliest photos from RLG history at front of carton, and some photos of RLG's headquarters (at least Jordan Quadrangle on the Stanford campus and two addresses in Mountain View, CA).

- Central staff over 20 years: Chart created by Lennie Stovel for 1985-2005; very detailed and useful, but excludes 1975-1984 (when RLG was in CT or Stovel worked elsewhere for a time); includes some of RLG's "visiting associates" (from member institutions), contract, casual, or temporary staff; PLUS: one RLG phone list from 1979, listing staff names while RLG was housed in Encina Commons behind Encina Hall on the Stanford campus – this list changed often during a period of rapid growth
- First RLG president – James Skipper: Served ca. 1974/75-1978; Skipper served briefly as vice president after Edward Shaw was named RLG's second president
- Second RLG president – Edward E. Shaw: Served 1978-1982; also shown in 1995, in a group shot at RLG's 20th anniversary annual meeting, together with the 3rd, 4th, and 6th RLG presidents
- Third RLG president – Patricia M. Battin: Served as interim president in1982 (into early 1983) during presidential search after Ed Shaw's resignation; Battin was University Librarian of Columbia University at this time
- Fourth RLG president – Richard W. McCoy: Served 1983-1987
- Fifth RLG president – William Timlake: Served in 1987, but ill health cut short his term and he passed away in 1988

- Sixth RLG president – James Michalko: Served 1989-2006; in 1988 served as acting president while Timlake on medical leave; after a full presidential search, Michalko was chosen by the board and took office in 1989
- RLG early players:  Founders, leaders, early business/governance meetings at the point that Stanford joined RLG and became its host institution; 1978 -1989
- RLG "General Membership Meeting," 1981 (at New York University, NYC): 8-inch x 10-inch black-and-white photos
- Miscellaneous color slides of some central staff, ca. 1980: Included here are Vivian Drew Berger, John W. Haeger, Jennifer Hartzell, Susan Heron, Connie Williams, John Heyeck, John Sack, John Schroeder, Gary Schultz, Ed Shaw, Nancy Melen (Melin), Charla Meyer, Karen Perry, Theo Pryzybyszewski, Norman Roth, Jan Thomson
- "Visiting Associates" (multiple departments): Staff from mostly member institutions who came to RLG for 6 months to 3 years to work in specific areas of expertise; some of these later became full RLG employees
- Temporary, casual, or contract employees – more a list than photos: Where more than one photo could be found, staff are given individual folders in Carton 7, regardless of exact status
- Joan M. Aliprand (JMA), Systems Analyst, pre-1985 – 2005
- Joe Altimus (___), Data Loads Analyst, primarily, 1995-2006
- Arnold Arcolio (AJA), writer, information architect, more, 1989-2006
- David Arekelian (___), Finance & Administration staff, 1998-2006
- Russell Arterberry (___), Network Operations staff, 1989-1998
- Carol Baker (uncertain identification) (___), 1986-1987?
- Clif Baker (___), Network Operations supervisor, 1989-1997
- Kathy Bales (KOB), Systems Analyst & manager, ca. 1979-2000 (retired); PLUS, one photo of daughter Elizabeth Bales, an intern in the Corporate Communications unit in the early 1990s (while at Mills College)
- Gina Balestin (___), Product Management staff, 2001-2005
- Brenda Barnhart (___), Finance & Administration (also Operations?), 1997-1999
- Barbara (Barb) Barone (___), library operations/RLG Information Center staff, 1988/89 – 1998/99
- Robert J. Beebe (RJB), Operations staff, pre-1985-1988; and again, 1997-1999
- Katia Bejan (___), RLG's last Human Resources Officer, 2005-2006
- Hanan Bell (HSB), Programmer; began at BALLOTS and on an RLG 1979 roster, but left early in RLG's lifespan
- Karen Bendorf (KAB), data analyst, started in BALLOTS era? (came out of Stanford libraries) at least 1979-2005
- Ramesh Bharadwaj (___), Computer Systems?, 1989-1992
- Matthew Blevins (MJB), Computer Systems secretary, 1987-2000
- Cecil J. Bloch (CJB), Computer Systems programmer, 1987-1995
- Susan (Susie) Borton (SLB?), Corporate Communications assistant, 1985-1988?
- Barbara Brown (___), Programs officer, ca. 1979-1984
- Don Brown (DHB?), Operations manager, pre-1985 – 2005
- Tanya Brunot (___), Library Coordination staff, early 1980s-1986
- Judith Bush (JEB), Computer Systems manager, 2001-2006
- Glee Cady (GHC), Computer Systems manager, started with BALLOTS, moved to Montana in 1986
- James (Jim) Campbell (___), departmental director, 1991-1994

- Nancy Campbell (___), Human Resources Officer, 1996-2003
- Karen Carbonnet (___), Marketing & Sales director, 2005-2006
- Pamela (Pam) Carls (PDC), Operations/RLG Information Center, 1989-2006
- Cindi (nee Brooks) Carlson (___), multiple units including Corporate Communications, 1989 and 1993-1996
- Michael J. Carroll (MJC), Computer Systems programmer, pre-1985? – 1998
- Rosalie Carty (___), Human Resources?, 1999-2000
- Jacqueline (Jackie) Caselli (___), library operations/catalog card profiling, at least from 1983? – 1993
- Cathy Chan (___), Finance & Administration supervisor, at least from 1980? – 1988
- Ed Chan (uncertain identification) (___), department?, pre-1985 – 1987
- Jui-wen Chang (___), Computer Systems programmer, 1991-2006
- Elizabeth (Liz) Chapman (___), writer, mostly in Computer Systems, 1990-2005 (mostly as temp/contractor from 1999 on)
- Win-Shin Chiang (WSC), Programs officer and product manager, 1991-1998
- Ho-chun Chin (HCC), Computer Systems programmer, 1992-2006
- Mary Clopton (___), Finance & Administration staff, 2000-2005
- James W. Coleman (JWC), Programs staff, 1985 (earlier?) – 1994
- Lorna Corbetta-Noyes (LCN), Computer Systems documentation writer, 1995-2005
- Elizabeth Cooney (___), library operations/catalog card profiling?, early 1980s -1990; see also 1986 group photo in Legal Box 38
- Jon Corelis (JYC), Operations staff, 1991-2005
- Barbara Cormack (not completely certain ID) (___), Computer Systems staff, 1998-1999
- Brian J. Cox (BJC), Computer Systems programmer, pre-1985 – 1997
- Laura (Lobato) Cox (___), Operations staff, at least 1985-1992; sister of Christina (Kasson) Schmehl, also on RLG staff
- Walt Crawford (WCC), Computer Systems, Product Management, programmer/analyst; at least 1979 – 2006
- Willy Cromwell-Kessler (KES), bibliographic analyst, in Member Programs?, 1997-1998
- Wei-ling Dai (WLD), library coordinator, 1983? – 1990 (earliest date uncertain)
- Robin L. Dale (RLD), Member Programs program officer, 1997-2006
- Paula Davidson (___), secretary to various directors, pre-1985-1993
- Kathy Davis (___), human resources officer, seconded to RLG from Stanford for a time; ca. 1986-1988?
- Wayne E. Davison (WED), manager in various departments – last, Customer Operations and Support; started in BALLOTS, pre-1978-2005
- Fran Devlin (FED), secretary/assistant in Member Programs, 1994-2006
- Pamela Dewey (___), Marketing & Sales – also significant photographer for RLG; 2001-2006
- Linda Driver (LAD), systems analyst, in Computer Systems – during second stint at RLG (was a library coordinator at the end of the 1970s); 1997-2006
- Steven J. Eastman (SJE), programmer in Computer Systems, pre-1985-2006
- Claudia Eddy (___), in Finance & Administration, ??-1988?
- John Eilts (JAE), in Member Programs and predecessor departments; Middle East and Mid-East language specialist and product manager for Ariel and ILL Manager; 1988-2001
- Soren Edgren (___), Chinese Rare Books Project (based at Princeton University); listed as on RLG staff 1991-1992, but his work on project's Chinese rare - RLIN cataloging guidelines went on some years after that

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- Nancy E. Elkington (NEE), "visiting associate" to RLG in 1987; on staff 1989-2006 as Member Programs program officer; also staffed RLG's UK office for several years in 1990s and started up New York City office in 2000s
- Nilo Enerio (NAE), multiple departments, primarily Operations; 1989-2006
- Marla Entrikin (___), president's secretary/assistant), 1985-1987
- Ricky Erway (RLE), Member Programs and later Product Management, 1995-2006
- Kathy Farrell (___), data loads analyst in Computer Systems, 1996-2001
- Jay Field (___), program in Computer Systems, worked on accounting and batch products; was both on-staff and later a temporary employee, 1986-1997
- Daralyn Foodym (___), in the (at the time) Library Operations department?; 1986
- Richard Fuchs (RBF?), programmer in Computer Systems, pre-1985-2006
- T. Monique Funnie (TMF), graphics specialist and production coordinator in Corporate Communications, 1993-2006 (should have acute accent on final e – name pronounced "foonyay")
- La Vonne Gallo (LFG), library coordination and programmatic work – particularly engaged in RLG's archival collections activities from early 1980s; 1979/80? – 1998
- Judie Gee (___), sales associate in Marketing & Sales, 1993-1997
- Judy Gerstle (___), analyst? in Computer Systems, 1997-2006
- Fred Gertler (FRG), multiple divisions, with focus on user operations and support; 1979-1990
- Tony (Anthony) Gill (___), Member Programs with focus on standards work, 1999-2002
- Martha Girard (MXG), in earlier version of Member Programs (started as library coordinator??); 1988 (earlier?) – 1993
- Ed (Edward) E. Glazier (EEG), systems analyst and RLG bibliographic/cataloging standards officer ("Officer Ed"); pre-1985-2006
- Anna (nee Castaneda) Gonzalez (___), in Operations and then in Finance & Administration?, 2000-2006
- Constance C. Gould (CCG), in John Haeger's PRIMA program – researched/wrote/oversaw RLG's three "Assessments of Information Needs" (the humanities, social sciences, and sciences); ca. 1989-1991
- Jack (Jackson) Grantham (JXG), director of Customer and Operations Support; 1990? – 2005
- Layyen Grey (___), Computer Systems, 1999-2003 (returned to Malaysia that year)
- Walt Griffeth, Operations? OR Allen Carter (___) – identification uncertain; ca. 1986-1988?
- Dave Grolle (___), Operations, 1990-2005
- Dick (Richard) Guertin (RDG), programmer in Computer Systems; 1995-2004 off and on as temporary, contractor, or on staff (1996-1998); was on the SPIRES/BALLOTS staff from earliest days, and remained a SPIRES luminary
- Siska Hadipronoto (___), in Human Resources or other role in Finance & Administration?; 2001-2002?
- John W. Haeger (JWH), director of variously titled departments; RLG's longest-serving vice president; 1979-2002, and did some further work as vice president emeritus; NOTE: could be a key oral or written history provider about RLG initiatives?
- Diana Hall (DFH), customer support in Operations; pre-1985-2006
- Fae Hamilton (___), data loads analyst in Computer Systems, 1994-1996 and 2000-2006
- Hilary Hannon (HBH), writer, primarily for RLG News magazines, in Corporate Communications, served as staff photographer, and created the "Discovering RLIN" book; ca. 1983/4 – 2000
- Steve Hanson (SJH?), programmer in Computer Systems, 2001-2006

- Roy Harrison (___), staff in Operations, particularly network operations center; 1999-2006
- Jennifer Hartzell (JLH), editor/writer/manager, starting with BALLOTS, in what evolved into Corporate Communications unit; also assistant secretary to the RLG Board, (ca. 1986-2005); pre-1978-2005; creator of inconsistent, belated, and idiosyncric inventory of RLG archives (caveat emptor)
- Sue (Susan) Harwood (___), assistant in Corporate Communications, 1989-1993
- Elsa Henderson (ELH), multiple departments, ca. 1980/81? – 1999
- Susan Heron (___), library coordinator, 1979 – early 1980s
- Jessie Herr (JJH), programmer in Computer Systems; a protean figure in RLG programming developments; also source of RLG expression "intertwingled"; ca. 1978?-1984
- John C. Heyeck (___), director of Finance & Administration; pre-1979? – 198?
- Madelyn Homick (MRH), executive assistant to RLG's president; also RLG Board's assistant secretary (late 2005 – June 2006); 2000-2006
- Sarah How (___), library coordinator, mid-1980s? – 1987ish
- Carol Hughes (CAH), Member Programs officer, 1993-1997
- Leslie Hume (LPH), in Member Programs and Planning, the division under John Haeger, 1979-1991
- Paula Hutton (PLH), RLG Information Center – customer support, 1993-2005
- Cathy Hwang (___), Finance & Adminstration, pre-1985 – 1991
- Marc Israel (MEI?), Finance & Administration financial analyst – comptroller at end?, 1994-2006
- Jeffrey Jackson (___), data loads analyst in Computer Systems?, 2000-2002
- Jan James (JXJ), began as library coordinator, became director of Customer Support, including coordinators and the RLG Information Center, until these functions were melded with computer operations; ca. 1980? – 1993
- Dana Jemison (___), data loads analyst in Computer Systems?, 1998-2006
- Lenore Haas Jones (LHJ), manager in Computer Systems; ca. 1979-2006
- Lori Jones (LRJ), Customer & Operations Support, 1993-2006
- Susan Jurist (CSJ), multiple departments, beginning as a library coordinator; pre-1985-1989
- Hava (nee Rubenson) Kagle (___), Computer Systems programmer, 1998-2005
- Corrinne Kahla (CFK?), programmer/manager, Computer Systems, largely focused on financial accounting systems
- Linda (aka Rainbow) Kaplan (___), in Computer Systems, at least 1986
- Mark Kas (___), in Customer and Operations Support?, 1997-2000
- Tina Kass (TDK), director of early department(s?) – Library Systems?; 1979?-1985?
- Christina (formerly Schmehl) Kasson (___), began in library services and customer support functions – not sure of ultimate department or title; ca. 1980? – 1991
- Zoe Keating (___) (umlaut over first e – pronounced "Zoh-ee"), information architect/programmer in Computer Systems (worked on RLG Cultural Materials and ?); ca.1999-2003?
- Ann Kelcy (name retaken after having been Ann Jucker) (___), writer in Corporate Communications unit, 1979-early 1980s
- Katie Keller (___), program officer in Member Programs, 1997-1998
- Ronna Kelly (___), secretary/assistant in Member Programs, 1988-1993
- Lois Kershner (LMK?), head of early marketing and external relations; pre-1980? – 1983?
- Brian Keyes (___), sales associate in Marketing & Sales, 1993-1997

- Melodye Khattak (MMK), manager of RLIN/RLG user documentation unit in Computer Systems after originally joining staff as a Library Services writer (user documentation); ca. 1982-1992
- Elena Khazina? (identification very uncertain) (___), in Computer Systems?, 1991-1992
- Vineeta Kolleru (___), programmer in Computer Systems, 2003-2006
- Richard Koprowski (___), systems analyst in Library Systems (early department, whose staff mostly went later to Computer Systems?); pre-1981? – 1988
- Dick (Richard) Lagerstrom (___), programmer in Computer Systems, focused on accounting system and batch products; ca. 1979? – 1992
- Dan (Taniela) Latu (___), in office management unit in Finance & Administration, 1995-2005
- Curtis Lavery (CRL?), member of John Haeger's proto-Product Management group? involved with ESTC and HPB; 1996-2002
- Jon (Jonathan) Lavigne (___), began as writer in Library Services, late went to Computer Systems (along with other tech./user doc. writers); 1989/90 – 1995
- Sandy (Elsann) Laws (___), with Lynn McRae, worked on SPIRES-programmed services for RLG in early period, such as "non-Books Cataloging" and "Special Databases" [remember that these notes are dredged up from dim memory and are very partial], ca. 1978-1982
- Brenda Lee (___), computing documentation writer in Computer Systems, 2000-2006
- Lydia Lee (___), contract writer in Corporate Communications unit, focused on Web site makeover and content and RLG News magazine; 2003/4 – 2006
- Carol (nee Farlow) Lerche (CAF), programmer in Computer Systems end of 1970s; on staff again 1986-1989, and temporary work status in 1985, 1990-1997
- Robert Lerche (___), programmer, on staff in 1986, at least, and later – as MSB (Most Significant Bit) – handled RLG contract work for several years
- Linda Lerman (LPL?), program officer in Member Programs, focused on RLG's Jewish Studies activities and content enhancements for the RLG Union Catalog?
- Mei Li (___), programmer in Computer Systems, 1999–2004
- Barbara Lindeman (BJL), manager in Finance & Administration, at least 1985-1993
- Will Llewellyn (___), programmer in Computer Systems, 1993-1997
- Linden Lovvik (___), customer support in the RLG Information Center, 2003-2006
- Jody Lucas (JLL), programmer in Computer Systems, early-mid-1980s? – 2002, with some coming and going between stints on staff
- Jim (James) Lucas (___), manager, Corporate Communications unit, 2006
- Lexa (Alexa) Mack (___), multiple departments? secretary/assistant?, pre-1988?-1989
- Keith MacLaury (KDM), programmer-analyst, Computer Systems, ca. 1979 – 2006
- Carmen MacLeod (___), office support staff in Finance & Administration department?, 1987 (later?) – 1993
- Constance Malpas (___), Member Programs officer; with Nancy Elkington, opened New York City RLG office; 2004-2006
- Alexis Manheim (___), customer support in the RLG Information Center, 2003-2006
- Sue Marsh (___), Member Programs officer/member services, 1998-2003
- Tony (Anthony) Marshall (___), programmer, Computer Systems, 198? – 1985?
- Katherine Martinez (KCM), Member Programs officer – focus on art, architecture, visual materials activities; 1996-1998
- Dennis Massie (DXM), Member Programs officer for Shared Resources (SHARES), 1997-2006
- Rao Mattaparthi (___), programmer, Computer Systems, 2000-2006
- Marianne Maxon (___), manager in Finance & Administration, 1994-2006

- Patti (Patricia) McClung (PAM), began in John Haeger's Member Programs department, later became director of a separate department, Member Programs and Services; ca. 1984-1995
- Linda McDonald (____), in Finance & Administration, pre-1985-1999
- Lynn McRae (____), with Sandy Laws worked on SPIRES-programmed services for RLG in early period, such as "non-Books Cataloging" and "Special Databases" [remember that these notes are dredged up from dim memory and are very partial], ca. 1978-1982
- Annette Melville (____), Member Programs officer, 1987-1989
- Shannon Moffat (____), writer in Corporate Communications unit, ca. 1980-1982?
- Camilla Morrison (____), in Finance & Administration, 1992-1999
- Angie (Angela) Morton (____), in Finance & Administration, 1986-1995
- Jane Moss (JGM), Webspinner then Webmaster in Corporate Communications unit, 1998-2006
- Linda Murdoch (LKM?), customer support in RLG Information Center, 1999-2006
- Susan (formerly Taylor) Nitzberg (SMT?), president's office, then Marketing & Sales, 1995-2005
- Carmen Musat (____), in Finance & Administration? 1996-1998
- Barbara Norgard (____), systems analyst in Computer Systems, 2002-2006
- Kevin Opstedal (____), office manager and RLG poet laureate, 1994-2006
- Susan (formerly Robillard) Oros (SMR?), focused on data loads – worked with Karen Bendorf at least part of this time; pre-1985 – 1996
- Rob Owens (____), worked in early equivalent of Operations department (supervisor was Tom Reid), 1978? – 1980ish?
- Rose Padden (____), manager of Customer Support (RLG Information Center) in Operations (later absorbed into Computer Systems, aka Development), 2000-2006
- Lynn Pazar (____), administrative assistant, Member Programs, 1996-2006
- Karen Perry (____), department? on staff ca. 1979 – early 1980s; see also in "Misc. color slides" folder in Carton 7
- Maureen Phayer (MTP), multiple departments – mostly assistant/secretary to RLG vice president John Haeger; pre-1985? – 1993
- Michael J. Pobuda (MJP), programmer, Computer Systems; at least 1984 – 1991
- Jennifer Porro (JMP), writer, Corporate Communications unit, 1990-1993 (some work done on Member Programs publications following that time?); developed flying Ariel logo (later tweaked by tompert design) and worked on marketing materials for that, Eureka, CitaDel, and more; key figure in RLG communications during her tenure
- Brandy Powell (____), Product Management (hired after Gina Balestin left), 2005? – 2006
- Chrissy Powell (____), Operations; 1989-2003
- Merrilee Profittt (____), Member Programs; 2001-2006 (continued after with OCLC)
- Quentin Pugh (____), Finance & Administration); 1988/89 – 1996
- Theo Pryzbyszewski (____), writer, worked several times at RLG starting in 1980, when he recreated the RLG Newsletter, and continuing in Computer Systems, where he developed the RLIN Operations Update extensively in the late 1990s; see also "Misc. color slides" folder in Carton 7 for 1980s shots in all-staff meetings
- Wes Ramirez (WRR), network operations expert, Operations (later part of Computer systems); 1988-2006
- Tom Reid (____), manager in early incarnation of Operations department; ca. 1979-198? (started with BALLOTS?)
- Maxine Reneker (MHR), Member Programs, 1992-1993; was a "member services officer" for the Shared Resources program

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- David R. Richards (DRR); 1978-2006 (started while still BALLOTS staff, continued on to OCLC after merger in 2006); director of Computer Systems (aka Development) department for over 20 years
- David Ripp (DXR?), programmer, Computer Systems, 1985-2006, continued with OCLC after that
- Marilyn M. Roche (MMR? MXR?), was first a consultant, later on RLG staff; focused on Interlibrary Loan – costs, automation, RLG's offerings, including Ariel; was program officer for Shared Resources program; 1989-1992
- Linelle Russ (LXR?), Human Resources officer (head of that unit); 1987-1993
- John Sack (___), director for Planning and Schedules; Computer Systems; 1979-? (long career at Stanford after RLG)
- Michael Sanderson (MRS?), programmer, Computer Systems; 1988-2006
- Leonard San Juan (___), supervisor in Finance & Administration; 1995-2005
- Samantha Santana (___), assistant in Human Resources?; 2000-2004
- David Sare (___), office supervisor in Finance & Administration; 1988-1999
- Ron Sax (RJS), programmer-analyst in Operations, 1988-2000
- C. James Schmidt (CJS), RLG's first vice president after staff established at Stanford; later also director of RLIN including operations and customer services; 1979-1989
- John Schroeder (JRS), began in BALLOTS era, was then RLG director of Computer Systems prior to David Richards; pre-1978-1980?
- Paula Schwartz (___), programmer-analyst, Computer Systems, after coming to BALLOTS at the time of its first public libraries network – ca. 1975? Left in 1989
- Diane Seward (___), office services (mail room?), Finance & Administration?; 1991-1995
- Frank (Fuchen) Shen (___), programmer-analyst, Computer Systems – "visiting associate" from China; 1997-1999
- Kitty Shih (___), programmer, Computer Systems; 1979?-1985?
- Cathy Simkovsky (___), position in Finance & Administration; 1999-2005
- Lynne Sinclair (JLS?), early library coordinator, in department then called Library Operations; with LaVonne Gallo, learned about archiving from Rocky Nilan and Maggie Smith at Stanford University Archives as part of preparations for RLIN support of archival processing; early 1980s
- Molly Singer (MXS), director of Finance & Administration and later Chief Financial Officer, and later also Chief Operating Officer; 1991-1999 and 2004-2006
- Karen Smith-Yoshimura (KSS), hired first as documentation writer in preparation for RLIN support for East Asian scripts support, went on to become key to RLG's East Asian and Bibliographic developments and activities in Member Programs; ca. 1981-2006 (continued with OCLC)
- Sammy Spears (___), support staff in Operations?; ca. 1989-1991
- Anne Stanton (___), customer support expert in RLG Information Center (RIC); 1989-2003
- Sophie Cheng Stevenson (___), staff in Finance & Administration; 1996-2006
- Charles Stewart (CMS?), library systems analyst, department then called Library Systems?; ca. 1979-?
- JoAnn Stewart (___), programmer/analyst, Computer Systems; 1986-1992
- Lennie (Madeleine) Stovel (MDS), programmer/analyst, then a top manager in Computer Systems; started in BALLOTS, ca. 1970-71 – 1976ish; second tour ca. 1985-2006 (continued with OCLC  beyond that)
- John Sundell (___), director of Finance & Administration, 1999-2004
- Stella Tafoya (___), secretary/assistant in President's Office; 1987-1991

- Kristen (Kris) Tague (KRT), head of Sales & Marketing; 1993-2004 – RLG's first marketing & sales pro
- Peter Tam (___), programmer, Computer Systems?; 1987-1997
- Wesley (Wes) Taoka (WMT), Product Management; 1998-2006
- Paul Thomas (PET), networking specialist, Operations (later part of Computer Systems) – and chief coordinator of in-house Girl Scout cookie operations by RLG daughters; pre-1985? – 2006
- Sarah Thomas (SET), manager in early Library Operations department; 1979? – 1984??
- Jan Thomson (___), in President's Office, ca. 1979-1982?
- Lynne Toribara (LYN?), part of Customer Support (then Jan James's unit); began as a library coordinator in Jamie Ingram's time as head of Library Operations; 1986-1990
- Alice Tow (___), worked with/for Win-Shin Chiang in earlier version of Product Management; 1998-2000
- Alan Tucker (AMT), leading figure in Library Systems department under Tina Kass, later worked on various special projects under John Haeger and Jim Michalko?; came to work on CJK, key to RLG's archival processing developments and the plans for AMIS; 1980-1995
- Dylan Tweney (___), term employee in Corporate Communications unit (had already been guest speaker at the RLG Annual Meeting in Ottawa); wrote/edited RLG News magazine and cut the Gordian knot (tied by contract programmer) in early corporate Web overhaul work; 2003
- Anne Van Camp (AVC), an RLG "visiting associate" from Hoover Archives and then joined Member Programs department, becoming manager of programs staff; 1996-2006
- Sharon Vaughn-Lahman (SVL), multiple departments, last being Marketing & Sales?; 1997-2006
- Gordon Wachtel (___), manager in Finance & Administration, 1989-1997
- Elizabeth Wahl (ESW), took on various research information projects under John Haeger, with and after Connie Gould; 1996-1998
- Bruce Washburn (BTW), multiple divisions (Information Center – RIC?), including Computer Systems; key figure in Eureka development, as well as just about anything Web (such as RedLightGreen); 1987-2006 (continued with OCLC after that point)
- Guenter Waibel (GXW), Member Programs; 2003-2006 (continued for a time after with OCLC)
- Carissa Wang (____), support staff in Finance & Administration; 1999-2005
- Jinsheng Wang (___), programmer/analyst, Computer Systems?; 1989-1997
- Bill (William) Washington (WOW), manager in Computer Systems (data analysis, loading, and more); 1997-2006
- John Wescoat (___), programmer/analyst in Computer Systems (batch products/accounting?); 1984 (maybe earlier) – 1988
- Linda G. West (LGW), director of Member Programs department (was also a "visiting associate" at beginning of 1990s) and CMO (chief morale officer); 1995-2005 (photos here include "ice cream social" party before LGW returned home to Boston
- Kathy Wheatley (KEW), mix of on-staff and contract work in Finance & Administration; cameo star of "The Wheatley Witch Project" film created by Kevin Opstedal et al. and shown at least annually at RLG headquarters (and which, unfortunately, is NOT in the archives); 1993-2005
- Gregory Whitfield (GRW), began in RLG Information Center (RIC), moved on – last department: Product Management (particularly responsible for the development and rollout of Archive Grid in early 2006); 1987-2006
- Tim Winterich (___), networking, in Operations?; 1998-1999

- Andrew Wong (___), Operations – networking?; 1999-2006
- Hoi Wong (___), Operations? support staff for products like catalog cards?; ca. 1986-1993
- Mimi Workeneh (___), staff in Finance & Administration; 2005-2006
- Zhiqiang Xu (___), on loan from China to work on RLG CJK development under John Haeger's aegis (Karen Smith-Yoshimura could clarify); at least 1985 – 1987
- Susan M. Yoder (SMY), director of Product Management (department renamed from "Integrated Information Services," which SMY also directed); 1998-2006
- Paul Yusi (___), Operations – networking; 2000-2006
- Joe Zeeman (___), programmer/analyst, Computer Systems; 2002-2006
- RLG quarters: "The trailers" on Stanford University campus, 1980-1988; as a group, address was "Jordan Quadrangle, Stanford University, Stanford, CA 94305"; names of the trailers (aka "modulars") were Laurel, Oak, Birch, Acacia, and Juniper; photos include individual staff, managers, activities, interiors (chance to see Jim Michalko when he had a mustache)
- RLG quarters: "Villa Street" headquarters, 1988-2003; address was 1200 Villa Street, Mountain View, CA 94041-1100; photos both BxW and color, with some staff in shots (on proof sheets); one snap of 1989 Loma Prieta earthquake effect in C. James Schmidt's office
- RLG quarters: "Stierlin Court" or "Shoreline," 2003-2006; address was 2020 Stierlin Court, suite 100, Mountain View, CA 94043-4684; pics include moving from Villa Street

## CARTON 8: Marketing & Sales (Corporate Communications)

1973-2000: Archived by Jennifer Hartzell. Published perspectives on RLG and its programs, services, and activities.

- Clippings and published articles about RLG, its programs, services, publications, news. Pieces from 1973 to 2000; coverage increasingly diminished from 1993 on, as more attention went to information on the Internet. (Collecting clippings was always an extra task, not a core responsibility.)
  - 1973-1991, sorted by year.
  - 1991-1993, sorted by topic (e.g., RLG, membership, specific systems & software).
  - 1992-1997, small folder of uncategorized (but sorted by year) material. (Gathered at the time but not properly filed.)
  - 1981-2000, large folder of completely uncategorized material, gathered while packing up materials donated by staff to a future archive in 2003 (at the time of RLG's move to Stierlin Court.)
- RLG Press Releases, 1977 – 1993. (Releases from 1994 into 2006 appear in the News section of www.rlg.org, RLG's corporate Web site. If that site is altered, this can be viewed using the Internet Wayback Machine.)

## CARTON 9: Product Management

1984-2000, predominantly 1994-1998: Scarcely one-half carton, archived by program officer and products manager Ricky Erway, but contains materials originally filed by Katherine Martinez and others. (Ricky E. came to RLG in 1995.) Focus is on expanding RLG's services into new forms of information, particularly museum resources.

- AVIADOR: Avery Videodisc project and RLG's part (to develop interface between videodisc player of Avery images and their cataloging in RLG's bibliographic database), 1984-1991.

[AVIADOR material found in Cartons 2, 9, 23, 54, 58 – include 3 actual VIDEODISCS, and 192.]

- Getty Art History Information Program (AHIP), databases, and standards: Background to support reading of the various Getty-RLG files, 1994 … 199?
  --See also early folder in Carton 3 regarding AHIP and RLG
- Getty Art History Information Program (AHIP) and RLG: "Distributed Database Initiative" (for RLG to make Getty indexes more widely accessible; possibilities besides the Avery Index to Architectural Periodicals and the Art & Architecture Thesaurus included Bibliography of the History of Art, Provenance Index, Union List of Artists' Names, Geographic Place Names); activity in 1994-1995
- Getty Art History Information Program (AHIP) and RLG: "Distributed Database Initiative" (for RLG to make Getty indexes more widely accessible) – activity in 1996, file 1 of 2 (includes revised schedules, negotiations, news release, meeting notes), January-April 1996
- Getty Art History Information Program (AHIP) and RLG: "Distributed Database Initiative" (for RLG to make Getty indexes more widely accessible) – activity in 1996, file 2 of 2, July-November 1996
- Getty Art History Information Program (AHIP) and RLG: "Distributed Database Initiative" (for RLG to make Getty indexes more widely accessible) – activity in 1997-1998 (facets), plus information from 2000
- Museum Educational Site Licensing (MESL) Project, as a source of information to RLG in creating AMICO database service, 1995-1997
  [Reams of non-RLG MESL reports and articles not retained in RLG archives]
- CIMI (Computer Interchange of Museum Information) Consortium and RLG: CIMI's Cultural Heritage Information Online (CHIO) demonstration project, 1994-1996, and its proposal for CHIO II
  [If not useful supplement to other RLG archived files on CIMI relationship, this could be deaccessioned?]
- CIMI (Computer Interchange of Museum Information) Consortium and RLG: Exchanges and background, 1996-1999
  [Unclear, certainly from this file, how much CIMI and RLG really cross-fertilized each other's work and whether there were any substantive collaborative or adoptive actions]
- Finding aids online using EAD mark-up: Facets of RLG's entry into a major project, from Ricky Erway's files, 1995-1998 – see other cartons for more extensive files with which this might be combined
- FAST (Finding Aids SGML Mark-up): Aspects of RLG's FAST workshops to get finding aids online using EAD (Encoded Archival Description) SGML, from Ricky Erway's files, 1996 – see other, programs, cartons for more on FAST
- Strategic business planning: Aspects of work by staff and consultants, from Ricky Erway's perspective and files, 1996 – more on this topic in other cartons
- Museum Licensing Collective aka Museum Digital Licensing Collective: Potential role for RLG? (file inconclusive), 1997-1998
- Strategic Planning: Aspects of work in next cycle after 1995-1996, from Ricky Erway's perspective and files, 1999 – more to be found in other cartons

## CARTON 10: President's Office (aka Administration)

1983-1991: Assorted files from Richard W. McCoy and James Michalko.

- CLR – BSDP (Council on Library Resources – Bibliographic Service Development Program), RLG participation in, 1983-1986 (when BSDP ended). See also related Linked Systems Project (LSP) files in Cartons 175 and 176).
- CRL (Center for Research Libraries) and RLG, attempts at relating, collaborating (Don Simpson of CRL, Patricia M. Battin, John W. Haeger, Richard W. McCoy), 1982-1986.
- Copyrighting union catalog databases: OCLC's and RLG's respective actions, 1983-1984; 1985; 1986.
- Copyrighting union catalog databases: OCLC's action, RLG's and others' response, 1983.
- OCLC newsletters: Samples of RLG management/staff attention paid to these (a few annotated issues, not at all comprehensive), 1983-1988.
- OCLC RLAC (Research Libraries Advisory Council) information, 1984. [Note: checking the RLAC acronym in 2006 turned up this history page about RLAC's formation and RLG: http://www.wustl.edu/baker/oclc.html.]
- James Michalko's correspondence, filed in monthly chronological files, for January through December 1991.
  [This was a major change year for RLG, under Michalko's direction; note in these files the correspondence related to "RLG92" organizational changes and discussions at the time with OCLC.]
- Separate September 1991 folder, "Board letters/election results" (for the first election to the newly created RLG Board of Directors, part of "RLG92" organizational changes).
- Slight files for a few materials found misfiled in 1991: January, August, and December 1990.

## CARTON 11: President's Office (aka Administration)

1978-1983: Significant source for early issues and activities as dealt with by president Edward E. Shaw and his "Directors' Group" of departmental directors and from time to time invited managers. See also Carton 119, the file on organizational changes and organization charts, to help determine roles – departmental/unit titles changed fairly often. Early files are the most complete, with at least some background attachments for most agendas. By May 1981, minutes begin to be missing, and files from then on are increasingly sketchy. No files for period between 9 September 1981 and the final 18 December 1981 agenda.

- Directors' Group (later called "Senior Staff") Weekly Agendas & Minutes, 2 July 1979 – 17 December 1981, in multiple folders with separators between weeks. [NOTE: see another four meeting agendas, for 1978, in Carton 60.]
- Background for a meeting topic in January 1982 (regarding RLG Z39 membership).

## CARTON 12: Computer Systems (aka Development)

1981-1988: CJK terminal, GRIN (Geo-Referenced Information Network) designs, OS (operating system) exploration -- provided by department director David R. Richards (carton 2/3rds full). [See Cartons 2, 6, and 12 for GRIN material.]

- CJK terminal project: TRANSTECH East Asian Character Set Input/Output Equipment Technical Proposal, April 1981. (Attachments are in 2 additional folders.)
- CJK terminal project: TRANSTECH East Asian Character Set Input/Output Equipment Technical Proposal, Attachments 2 (minus 2-2), 4, 6, April 1981.
- CJK terminal project: TRANSTECH East Asian Character Set Input/Output Equipment Technical Proposal, Attachment 2-2 [April 1981?].

- CJK terminal project: TRANSTECH information on its SINOTERM software, provided to John W. Haeger, June 1981.
- CJK terminal project: TRANSTECH (aka Transtech International Corporation, aka TTI) briefing to RLG, July 1981.
- CJK terminal project: TRANSTECH design document for RLG CRT controller board, January 1982 – plus cover memo to David R. Richards, 29 January 1982.
- CJK terminal project: TRANSTECH design document for RLG CJK keyboard, March 1982 – plus cover memo to John W. Haeger referring to "CRT driver software" [document with this title not attached], 31 March 1982.  (Cover letter refers to departure of David R. Richards from RLG; at some point Richards took another position but returned to RLG within a few years.)
- "RLG CJK Terminal Cluster Site Preparation Guide and Ordering Instructions," "Preliminary Edition" [prior to actual terminal availability], August 1982.
- "RLG CJK Terminal Manual," First Edition, May 1983 (unbound, but with binder spine/cover sheets included).
- GRIN (Geo-Referenced Information Network Functional Requirements, May (draft) & June (revised), 1987.
- GRIN (Geo-Referenced Information Network External Design: Data Design (Document A), Revision 3, October 1988.
- GRIN (Geo-Referenced Information Network External Design: Data Design (Document A), Revision 2, March 1988.
- GRIN (Geo-Referenced Information Network External Design: Data Design (Document A), Revision 1, January 1988.
- GRIN (Geo-Referenced Information Network External Design: Command Design (Document B), Revision 2, November 1988.
- GRIN (Geo-Referenced Information Network External Design: Command Design (Document B), Version 1, May 1988.
- GRIN (Geo-Referenced Information Network External Design: Interface Design (Document C), Version 1, November 1988.
- GRIN (Geo-Referenced Information Network External Design Documents, 1987-1988: Data Entry Subsystem (2/1988); Packet Data Model & Georef Index (10/1987); and Reference Data Components (10/1987).
- Operating Systems: Information to RLG on Key Logic's KeyKOS system, April 1987.
- Operating Systems: Information to RLG on Software AG's COM-PLETE system, July 1987.

## CARTON 13: President's Office (aka Administration)

Mostly 1986-1987: Board meetings nos. 34-41 & Board-related committee agendas & minutes; mostly looseleaf, one-sided page masters for making copies. Treat as back-up/supplement to more complete, two-sided versions from Jennifer Hartzell (RLG assistant secretary) – e.g., Carton 43 -- & Noel Hanf (RLG secretary) – e.g., Carton 151. Hanf/Hartzell sources are more likely to have handouts provided only at the meeting, handwritten notes, and supplementary details.

- Special Committee of RLG-member presidents, agendas and background, 1985-1989 (Harold Shapiro, Committee Chair)
- "Major Incidents," 1987-1988 (memos from Carlton Rochell, Board Chair, and Harold Shapiro, Special Committee Chair):
  - President William Timlake falls ill, 1987, & James Michalko made Acting President;
  - Series of Board and management actions/efforts;

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- New RLIN rates structure;
- RLG debt retirement plan;
- "RLG 1988-1991 Goals Statement and Needs Assessment"

- Special Committee's RLG Presidents' Meeting, September 1986 (meeting handouts; preparation background; followup)
- "RLG: The Shape of the Organization: Programs – Computing Services – Long-term Financial Trends," October 198?
- Board of Governors Meeting No. 34, 27-28 February 1986 (Stanford, CA), agenda copy master including "supplementary pages" originally distributed separately; MISSING: pages 93, 96, 98-102 (removed to made overhead transparencies in April 1986)
- Summary Minutes for Board of Governors Meeting No. 34, 27-28 February 1986 (Stanford, CA)
- Executive Committee Meeting minutes, 2 May 1986 (Minneapolis, MN).
- [NOTE: Agenda for Exec. Comm. Meeting of May 1986 not found in carton.]
- Board of Governors Meeting No. 35, 12-13 June 1986 (University of Iowa) agenda copy master including "supplementary pages"
- Summary Minutes for Board of Governors Meeting No. 35, 12-13 June 1986, including Executive Committee Meeting minutes, 11 June 1986
- [NOTE: Separate agenda for Exec. Comm. Meeting of June 1986 not found in carton]
- Executive Committee Meeting Agenda, 4 September 1986 (New York, NY)
- Executive Committee Meeting Minutes, 4 September 1986 (New York, NY)
- Board of Governors Meeting No. 36, 5 September 1986 (New York, NY) agenda copy master
- Summary Minutes for Board of Governors Meeting No. 36, 5 September 1986 (New York, NY)
- Executive Committee Meeting Agenda, 5 November 1986 (Brown University, RI)
- Executive Committee Meeting Minutes, 5 November 1986 (Brown University, RI)
- Board of Governors Meeting No. 37, 6-7 November, 1986 (Brown University, RI) agenda copy master, including supplementary pages [NOTE: Minutes for meeting no. 37 not found in this carton.]
- Executive Committee Meeting Agenda, 12 January 1987 (Palo Alto, CA)
- Executive Committee Meeting Minutes, 12 January 1987 (Palo Alto, CA)
- Executive Committee Meeting Agenda, 11 February 1987 (Palo Alto, CA)
- Executive Committee Meeting Minutes, 11 February 1987 (Palo Alto, CA)
- Orientation for library directors joining RLG Board of Governors, 10-11 February 1987 (Palo Alto, CA)
- Board of Governors Meeting No. 38, 12-13 February 1987 (Stanford, CA) agenda copy master
- Summary Minutes for Board of Governors Meeting No. 38, 12-13 February 1987 (Stanford, CA)
- Executive Committee Meeting Agenda, 15 April 1987 (New York, NY)
- Executive Committee Meeting Minutes, 15 April 1987 (New York, NY)
- Executive Committee Meeting Minutes, 7 June 1987 (Mackinac Island, MI)
- [NOTE: Agenda for June 1987 Exec. Comm. Meeting not found in this carton.]
- Board of Governors Meeting No. 39, 8-9 June 1987 (Mackinac Island, MI) agenda copy master
- Summary Minutes of Board of Governors Meeting No. 39, 8-9 June 1987 (Mackinac Island, MI)

- Executive Committee Meeting Agenda, 24 July 1987 (New York, NY)
- Executive Committee Meeting Minutes, 24 July 1987 (New York, NY)
- Board of Governors Meeting No. 40, 7-9 October 1987 (Philadelphia, PA) agenda copy master, plus supplementary pages not inserted in place
- Summary Minutes for Board of Governors Meeting No. 40, 7-9 October 1987 (Philadelphia, PA)
- Executive Committee Meeting Minutes, 7 October 1987 (Philadelphia, PA)
- [NOTE: Agenda for October 1987 Exec. Comm. Meeting not found in this carton.]
- Executive Committee Meeting Agenda and Minutes, 15 December 1987 (New York, NY)
- Board of Governors Meeting No. 41, 16 December 1987 (New York, NY) agenda copy master

## CARTON 14: President's Office (aka Administration)

March 1991 – June 1999: Board & some Board Executive Committee meeting agendas and minutes, meetings 52 through 82; mostly loose leaf, one-sided photocopy masters. This means handouts and notes made at meetings are not generally included. Treat these materials as backup/supplement to more complete, two-sided versions with additional handouts, in cartons from Corporate Communications and Noel Hanf.

- Board of Governors meeting agenda no. 52, 7-8 March 1991 (Mountain View, CA), including agenda for 7 March Executive Committee meeting
- Board of Governors minutes for meeting no. 52, 7-8 March 1991 (Mountain View, CA)
- Executive Committee meeting agenda for 18 April 1991 (New York, NY)
- Executive Committee meeting minutes for 18 April 1991 (New York, NY)
- Board of Governors meeting agenda no. 53m 13-14 June 1991 (Washington, DC), including agenda for 13 June Executive Committee meeting
- Board of Governors minutes for meeting no. 53, 13 June 1991 (Washington, DC)
- Executive Committee meeting minutes for 25 June 1991 teleconference and 25 July 1991 meeting (Chicago, IL) [NOTE: No agenda for either found in this carton.]
- Board of Directors meeting agenda no. 54, 4 October 1991 (Washington, DC) [1st all-members-elected board; note name change from "governors" to "directors" – and absence of Executive Committee in changed organization]
- Board of Directors minutes for meeting no. 54, 4 October 1991 (Washington, DC)
- Board of Directors meeting agenda no. 55, 31 January 1992 (Mountain View, CA)
- Board of Directors minutes for meeting no. 55, 31 January 1992 (Mountain View, CA)
- Board of Directors meeting agenda no. 56, 10 April 1992 (Washington, DC)
- Board of Directors minutes for meeting no. 56, 10 April 1992 (Washington, DC)
- Board of Directors meeting agenda no. 57, 24 June 1992 (Mountain View, CA – in conjunction with first annual all-membership meeting held at Stanford University)
- Board of Directors minutes for meeting no. 57, 24 June 1992 (Mountain View, CA)
- [NOTE: No agenda found in Carton 14 for the Board's 58th meeting.]
- Board of Directors minutes for meeting no. 58, 16-17 October 1992 (Washington, DC)
- Board of Directors meeting agenda no. 59, 12 February 1993 (Mountain View, CA)
- Board of Directors minutes for meeting no. 59, 12 February 1993 (Mountain View, CA)
- Board of Directors meeting agenda no. 60, 12 April 1993 (teleconference)
- Board of Directors minutes for meeting no.60, 12 April 1993 (teleconference), PLUS results of an unnumbered May 1993 teleconference regarding appointments to the board)

- Board of Directors meeting agenda no. 61, 21 June 1993 (Mountain View, CA)
- Board of Directors minutes for meeting no. 61, 21 June 1993 (Mountain View, CA)
- Board of Directors meeting agenda no. 62, 30 September – 1 October 1993 (Washington, DC)
- Board of Directors minutes for meeting no. 62, 30 September – 1 October 1993 (Washington, DC)
- Board of Directors meeting agenda no. 63, 2 February 1994 (Mountain View, CA)
- Board of Directors minutes for meeting no. 63, 2 February 1994 (Mountain View, CA)
- Board of Directors meeting agenda no. 64, 11 and 18 April 1994 (set of 2 teleconferences)
- Board of Directors minutes for meeting no. 64, 11 and 18 April 1994 (set of 2 teleconferences)
- Board of Directors meeting agenda no. 65, 6 June 1994 (London, UK), including 8 July 1994 distribution of FY1994 third-quarter RLG financial report
- Board of Directors minutes for meeting no. 65, 6 June 1994 (London, UK)
- Board of Directors meeting agenda no. 66, 25-26 September 1994 (Washington, DC) [NOTE: Agenda topic 10 background is missing from file.]
- Board of Directors minutes for meeting no. 66, 25-26 September 1994 (Washington, DC)
- Board of Directors meeting agenda no. 67, 24 February 1995 (Mountain View, CA)  [NOTE: FY1995 first-quarter financial report is missing from file.]
- Board of Directors minutes for meeting no. 67, 24 February 1995 (Mountain View)
- [NOTE: No agenda found in Carton 14 for the Board's 68th meeting agenda.]
- Board of Directors minutes for meeting no. 68, 21 April 1995 (teleconference)
- Board of Directors meeting agenda no. 69, 7 July 1995 (Washington, DC)
- [NOTE: No separate file of minutes for meeting no. 69 found in Carton 14; but see minutes incorporated in the 70th meeting agenda.]
- Board of Directors orientation slides (paper) for new directors, 6 October 1995 (Washington, DC) (orientations held in morning of first day of two-day fall meetings in DC; began practice in 1994?)
- Board of Directors meeting agenda no. 70, 6-7 October 1995 (Washington, DC)
- Board of Directors minutes for meeting no. 70, 6-7 October 1995 (Washington, DC)
- Board of Directors meeting agenda no. 71, 23 February 1996 (Mountain View, CA)
- Board of Directors minutes for meeting no. 71, 23 February 1996 (Mountain View, CA)
- Board of Directors meeting agenda no. 72, 21 June 1996 (New York, NY)  [NOTE: At this point board shifted its meeting pattern to New York in early summer, Washington DC in early fall, and Mountain View in winter.]
- Board of Directors minutes for meeting no. 72, 21 June 1996 (New York, NY)
- Board of Directors meeting agenda no. 73, 6-7 October 1996 (Washington, DC)
- Board of Directors minutes for meeting no. 73, 6-7 October 1996
- Board of Directors meeting agenda no. 74, 28 February 1997 (Mountain View, CA)
- Board of Directors minutes for meeting no. 74, 28 February 1997 (Mountain View, CA)
- Board of Directors meeting agenda no. 75, 20 June 1997 (New York, NY)
- Board of Directors minutes for meeting no. 75, 20 June 1997 (New York, NY)
- Board of Directors meeting agenda no. 76, 3-4 October 1997 (Washington, DC)
- Board of Directors minutes for meeting no. 76, 3-4 October 1997
- Board of Directors meeting agenda no. 77, 23 February 1998 (Mountain View, CA)
- Board of Directors minutes for meeting no. 77, 23 February 1998 (Mountain View, CA)
- Board of Directors meeting agenda no. 78, 26 June 1998 (New York, NY)
- Board of Directors minutes for meeting no. 78, 26 June 1998 (New York, NY)

- Board of Directors meeting agenda no. 79, 8-9 October 1998 (Washington, DC)
- Board of Directors minutes for meeting no. 79, 8-9 October 1998 (Washington, DC)
- Board of Directors meeting agenda no. 80, 25-26 February 1999 (Mountain View, CA)
- Board of Directors minutes for meeting no. 80, 25-26 February 1999 (Mountain View, CA)
- Board of Directors meeting agenda no. 81, 25 April 1999 (Los Angeles, CA – in conjunction with annual membership meeting)
- [NOTE: No separate file of minutes for meeting no. 81 found in Carton 14; but see minutes incorporated in the 82nd meeting agenda.]
- Board of Directors meeting agenda no. 82, 21 June 1999 (New York, NY)
- Board of Directors minutes for meeting no. 82, 21 June 1999 (New York, NY)

**CARTON 15: President's Office (aka Administration)**

1975-1995: RLG changes shape: Selection of BALLOTS by RLG; transfers between Stanford University & RLG; office and leadership moves from Branford, CT to Stanford, CA; early systems development and programmatic concerns; incorporation, bylaw developments, business registration, IRS classifications. Files are roughly most recent to earliest, also some by topic -- NOT in alphabetical order.

- RLG IRS classification – adding 509(a)(2) to 501(c)(3), 1991-1995.
- Bylaws & amendments to them, 1982, 1985, 1986.
- RLIN users "Account Status List" (who, what used, how much), July 1981.
- Linked Systems Project (LSP): Washington Library network (WLN), RLG, Library of Congress (LC) proposal to Council on Library Resources (CLR) for "A Standard Network Connection," 1981. [See also LSP in Cartons 175 and 176.]
- Systems development priorities, "Avenue A" and "Avenue B", 1980-1981.
  (One version of this list – 1980? – gives rationale for what makes these priorities in two categories, plus examples of projects in each category:
  Avenue A:
  - Synchronous communications format;
  - Non-Books formats;
  - Database reconfiguration;
  - Network acquisitions;
  - Cataloging subsystems;
  - Authorities data management and control;
  - Page-form catalogs;
  - Non-Roman support.
  Avenue B:
  - Patron Access;
  - Interlibrary Loan (ILL);
  - Serials control;
  - East Asian support;
  - "Special" databases;
  - Distributed/local processing services.)
- Systems development projects' features and estimated costs, October 1980.
- "Pre-SCIPIO": RLG early approach to the Samuel H. Kress Foundation to participate in such a project (letter from John W. Haeger), April 1980.
- Battelle Institute Vocabulary Switching System (VSS) for database searching, materials sent to RLG, 1980.

- Corporate Affairs & Jan Thomson's role, 1980 (1 memo from 1981). (Thomson came to RLG from Carnegie-Mellon U. and was given a number of key roles by Shaw in shaping RLG organization and operations.)
- Collection Development Policy Conspectus: plans & models for, 1980 (material from Paul Mosher).
- AACR2 (Anglo-American Cataloging Rules, version 2), resistance to their adoption (from Susan K. Martin) – discussed at an RLG Board meeting? 1980.
- Staff internal memos, miscellaneous, 1979-1980.
- Corporate development and relations, Edward E. Shaw correspondence, 1979-1980 (regarding members, nonmembers, loans, OCLC, and more).
- RLG Liaisons & RLG (Member) Coordinators, roles of and correspondence with, 1979-1981.
- RLG Board meeting materials, miscellaneous – mostly also in Board meeting agendas? 1979-1980.
- RLG Board correspondence from Edward E. Shaw, 1979-1980.
- WLN (Washington Library Network) relations (also involving CLASS and New York Public Library), 1979-1980.
- BCR (Bibliographic Center for Research, Colorado) & RLG, transfer of dealings to RLG at Stanford, 1979-1980.
- CLASS (California Library Authority for Systems & Services) correspondence, 1979-1980. [See also WLN file in this carton; for more on CLASS, see also Box 25 and Cartons 63, 106, 128, 152, 157, and 159.]
- "Internetwork [External] Relations" correspondence, John C. Heyeck, 1979-1980.
- Battelle Institute interlibrary loan/reference searching study and RLG's interests/part in, 1979-1980. (Actual study report not found as of 8/2006.)
- Early Law-program-related? "LAWNET" plans promoted by Betty Taylor, AALL (American Association of Law Libraries), correspondence with RLG, 1979-1980.
- Interlibrary Loan (ILL) messaging ("Message File") as part of RLIN, 1979-1980.
- Systems development (business plan letter), 1979.
- Wiggin & Dana legal services to RLG for year ending 31 May 1979 (a major transition year between Branford & Stanford).
- Peat, Marwick, Mitchell, & Co., RLG audit services, 1979.
- Zentec Corporation & RLG contracting for Z. terminals for RLIN users, 1979.
- NEH (National Endowment for the Humanities) & RLG correspondence re grant RC-25397-76-1150 (Bibliographic systems development? Not named here); contains background on John C. Heyeck and RLG – WLN relations, 1979.
- Funding BALLOTS, funding RLG (material from James Skipper, Edward E. Shaw, John Heyeck, Cheryl Hulett, and more), 1979-1980.
- RLG-RLIN Service Agreement (changes in transition year), 1979.
- RLG business registration; tax status in California, 1979.
- Bylaw amendments and incoming RLG members, Wiggin & Dana work, 1979.
- BALLOTS/RLIN transfer and other agreements between Stanford University & RLG, 1979.
- Memos/reports to Edward E. Shaw and staff from Branford, CT RLG office (winding up), 1978-1979.
- RLG selection of BALLOTS – steps before and after in 1978. (Any 1979?)
- BALLOTS & RLG: governance and management models, plus Bylaws adjustments, 1978.
- RLG Annual Report, 1977-1978.
- RLG IRS Employer ID number, 1976.
- RLG Certification of Incorporation & amendments to it, 1975-1991.

**CARTON 16: President's Office (aka Administration)**

1976-1985: Appears to be files related to RLG programs; there should be more, and more comprehensive, programs material in cartons from Member Programs.

- Program coordination: single John W. Haeger memo re program officer assignments, 1983.
- Archival & Manuscripts Control: proposal outline for NHPRC (National Historical Publications and Records Commission) "Seven States Project" with state archives, late 1984.
- Archives & Manuscripts Control: Meeting of RLG Task Force on Special Formats considering work to achieve online/RLIN support for archival materials, July 1981.
- Art & Architecture Program correspondence/activities, 1985.
- Art & Architecture Program correspondence/activities, 1983. (That's right; 1984 not found in this carton.)
- Art & Architecture Program correspondence/activities, 1982.
- Art & Architecture Program correspondence/activities, 1981.
- Art & Architecture Program correspondence/activities, 1980.
- Art & Architecture Program correspondence/activities, 1979.
- Art & Architecture Task Force correspondence/activities, 1978.
- Art & Architecture Task Force correspondence/activities, 1977.
- Art & Architecture Task Force correspondence/activities, 1976.
- BIBTECH Committee/Program correspondence/activities, 1985.
- BIBTECH Committee/Program correspondence/activities, 1982. (1984 or 1983 not found in this carton.)
- BIBTECH Committee/Program correspondence/activities, 1981.
- BIBTECH Committee/Program correspondence/activities, 1980.
- BIBPAC – STAC – COLTS – BIBTECH ("final" acronym) Committee/Program correspondence/activities, 1979.
  [Respectively, acronyms stood for: BIBliographic Processes And Control; Systems Technology Application Committee; Committee On Library Technical Systems and bibliographic control; BIBliographic systems and library control (aka "TECHnical processing"?). One might speculate that Edward E. Shaw devised "COLTS" but it didn't take.]
- BIBPAC (later became BIBTECH) Committee/Program correspondence/activities, 1978.
- CMDC (Collection Management and Development Committee/Program) correspondence/activities, 1986.
- CMDC correspondence/activities, 1985.
- CMDC correspondence/activities, 1982. (1984 or 1983 not found in this carton.)
- CMDC correspondence/activities, 1981.
- CMDC correspondence/activities, 1980.
- CMDC correspondence/activities, 1979.
- Collection Development Program correspondence/activities, 1978.
- East Asian Program/Committee (EAP & EAPC), 1985: CJK [original Chinese, Japanese, Korean scripts in RLIN] enhancements overview, appointment memo to new committee chair.
- East Asian Program/Committee, 1983 [1984 not found in this carton]: Proposal to NEH (National Endowment for the Humanities, plus internal discussion of, a new Bibliography of Asian Studies database. (Not done; internal discussion was on implementation in RLIN Integrated Technical Processing infrastructure or as a SPIRES "special database.")

- East Asian Program/Committee, 1982: correspondence as RLIN CJK nears deployment (in 1983); outreach by Patricia M. Battin and John W. Haeger to libraries to join RLG and participate in East Asian activities.
- East Asian Program/Committee, 1981: RLG's RFP to vendors for CJK equipment; overview of RLIN CJK design; committee meeting minutes; ACLS (American Council of Learned Societies) on the status and possibilities for East Asian library collections.
- East Asian Program/Committee, 1980: John W. Haeger correspondence; formation of East Asian Program and RLIN CJK development effort.
- East Asian Program preliminaries, 1979: hire of John W. Haeger; his correspondence related to new role; RLG – Library of Congress (LC) cooperative agreement for RLG to develop CJK online scripts cataloging and display.
- Correspondence about full-text files and what sounds possibly like article-citation databases, 1982.
- RLG's ILL (Interlibrary Loan) system use, a part of the history of Shared Resources Program/Public Services Committee, 1980.
- Law Program/Committee, 1985: Appointment letter to new committee chair.
- Law Program/Committee, 1984: Mostly correspondence regarding program dues/fees.
- Law Program/Committee, 1983: Exchange on RLIN price-setting cycle and timeframe (explained by James Michalko), plus committee's concern over program dues setting.
- Law Program/Committee, 1982: Meetings; plus 1 memo on the effect of "terminal rationing" [while RLG response time was suffering from hardware limitations].
- Law Program/Committee, 1980 [1981 not found in this carton]: Meetings; role of "Law Library Advisory Council." [From perspective of 2006, the LLAC looks like a non-member law libraries RLIN user group.]
- Law Program/Committee, 1979: Formation of program, committee, and Law Library Advisory Council; first meeting.
- Law Program influence, 1978: non-RLG report, "Towards a Law Network: Survey and Evaluation," by Brett Butler for AALL (American Association of Law Libraries) and AALS (American Association of Law Schools).
- Machine-readable data files correspondence, 1982.
- Medical and Health Sciences Program correspondence, 1982.
- Music Program correspondence, 1982.
- Preservation Program/Committee correspondence/activities, 1982.
- Shared Resources Program/Public Services Committee correspondence/activities, 1982. [NOTE: Shared Resources material can be found in Cartons 5, 16, 18, 31, 32, 36, 39, 42 56, 62, 80, 88, 122, 126, and 191.]
- "Special databases": ESTC (Eighteenth-century Short Title Catalogue), 1982.

## CARTON 17: Member Programs & Product Management

1996-2002: Files archived by former program officer Ricky Erway (subsequently digital resources product manager). Primarily regards the evolution of the AMICO Library by RLG and the Art Museum Image Consortium. [NOTE: For more on AMICO, see Cartons 17, 22 (marketing materials), 61, 88, 89, 123, 133, 152, 173 (slight), 183 (significant), 183, 184 (slight), 193, 202 (marketing materials), and 210.] These files are followed by a few on the WebDOC project, the abortive Digital Collections Project for "Global Immigration," and digital archiving/preservation activities.

- AMICO: "Earliest Discussions" (Ricky Erway's characterization), September 1996 – May 1998
- AMICO: Testbed for new service – negotiations and planning (overlaps with "Earliest Discussions" file), 1997-1998
- AMICO: Testbed – Proposals to participate and selection of request-for-proposal respondees from among RLG members, December 1997 – April 1998
- AMICO: First AMICO-RLG contract, March 1998; plus memo re pricing, from Susan Yoder to AMICO management, 4 January 1999 [may be a more complete contracts file among Susan Yoder's papers]
- AMICO: Distributor information package from AMICO management, version 1.0, June 1998
- AMICO: RLG-AMICO meetings (part of the "Testbed – negotiations and planning" sequence), October 1997, January 1998, April 1998, July 1998, December 1998
- AMICO: RLG involvement in preparation of AMICO proposal to NSF (National Science Foundation) Digital Libraries Phase II Grant Program, July 1998
- AMICO: Complete (?) AMICO Proposal to NSF Digital Libraries Phase II Grant Program, July 1998 (RLG characterized by AMICO as a "proposal partner")
- AMICO: Art Museum Image Consortium membership (signature pages of sign-ups), August 1998
- AMICO: Partial record of AMICO Executive Committee reports, Oct.-Dec. 1997, July 1999, January 2000; plus AMICO Board meeting report, January 2000
- AMICO: CAA (College Art Association) and VRA (Visual Resources Association) AMICO-convened focus groups, February 1999
- AMICO: AMICO members' annual meeting: Background and report to members, 8-10 June 2000
- AMICO & Luna Imaging: Work towards incorporating AMICO Library access into Luna Insight image-viewing/handling software, February-November 2001 [see also Susan Yoder's Luna files]
- AMICO: Assorted publications from/about the Art Museum Image Consortium and the AMICO Library, September 1996 – March 2003
- AMICO: Oddball (miscellaneous) files of some exchanges in January-September 1999 & 2000 (3 items) [fold in or toss when dealing with all AMICO-related files?]
- WebDOC: Exchanges and background, RLG & PICA, April-December 1995
- WebDOC: Work involving pilot participants and suppliers, RLG & PICA, January-December 1996
- WebDOC: Bits of continued work, mostly RLG's, January-May 1997
- Web Access & WACS ("WebAccessService") team: Facets of work on this for Studies in Scarlet, Finding Aids, other fiscal year 1997-1998 projects; a sketchy file, November 1995 – September 1997
- Digital Collections Project: Work on starting a "Global Immigration" digitizing project – primarily Anne Van Camp with Ricky Erway's input, November 1996 – July 1997
- Digital Collections Project: RLG's proposal to NEH (National Endowment for the Humanities) to build "Resources for the Study of Global Immigration," July 1997 – plus NEH reviewers' comments, early 1998 (turned down)
- Digital archiving/preservation: Facets of RLG's interests/involvement, (focus is on the joint RLG-CPA (Commission on Preservation and Access) Task Force on Archiving of Digital Information, formed in 1994, and its draft and final reports – 1993-1996
- Digital archiving/preservation: Reactions to Joint RLG-CPA (Commission on Preservation and Access) Task Force on Archiving of Digital Information report, "Preserving Digital Information" (1996); plus earlier task force reporting – October 1995 – June 1997

- Eureka Web access to RLG databases: User feedback and idbias (consultant) review of RLG's Web implementation, November 2000 – March 2001
- Bill & Melinda Gates Foundation request for proposals for a Public Access Computing Portal and memo on it and RLG from Susan Yoder, August-September 2001 [not undertaken; other files may add more to the reasons why]
- Digital archiving: Exploring a service offering; preservation project with JP Morgan iVault!, May 2001 – April 2002 [incomplete file]

**CARTON 18: Member Programs**

1990-1998: Packed by Anne Van Camp; her own files and those she inherited from others. Deals largely with FAST (Finding Aids SGML Training initiative); also a variety of other archival efforts; includes a couple of files on project scheduling and digital initiatives planning.

- Programs publication – Shared Resources: "On-site Access Guide to RLG Archival, Manuscript, and Special Collections," 1st edition, 1990 (unbound copy)
- NHPRC-funded Government Records Project: Five issues of "The GRP Standard" newsletter, addressing questions raised in and reporting progress on this project from its second year to its conclusion, April 1990 – March 1991
- User publications: "Using RLIN for Archival Reference," 1991; created first for a workshop; originally provided in a 1-inch 3-ring binder with clear-plastic-encased cover and spine; unbound [NOTE: Includes 4 5-inch-square diskettes.]
- Program publication: Curriculum for "The FAST Track: An RLG Workshop on the Application of Encoded Archival Description," 1996; includes later materials from 1997-1998, plus some small diskettes (unbound copy)
- Finding aids online: Proposal for "Bringing Primary Sources into the Information Infrastructure" to NTIA TIIAP  (US Department of Commerce National Telecommunications & Information Administration, Telecommunications and Information Infrastructure Assistance Program), 1995 – not funded
- PSALT-FAWG (Primary Sources in American Literature Task Force – Finding Aids Working Group): Role in FAST project evolution, May 1995 – February 1996 (some bits from 1994)
- NoExcuses Task Force: Timetable for tasks in WebDOC, Arches, and related projects, May 1996
- Digital initiatives/strategic planning: Linda West presentation to RLG members, June 1996; James Michalko's thoughts, July 1996 – includes FAST, Studies in Scarlet, Arches, WebDOC, international integrated information delivery
- EAD (Encoded Archival Description), AMC (Archival & Manuscripts Control using MARC), & RLG: European collaboration prospects, 1996 – John Haeger & Anne Van Camp
- Primary Sources Forum: "Enhancing Access to Primary Sources Internationally, 24 September 1996 (London) – plus scraps about "Local Access to Global Collections" forum held the preceding day, 23 September 1996 (London)
- Primary Sources Advisory Council: Formation and exchanges/meetings, October 1996 – March 1998 (plus related items)
- FAST project: Facets of planning and execution; includes costing out & some budgeting, but no grant/contract details, January 1996 – July 1997
- FAST project: Funding sought and granted from Gladys Krieble Delmas Foundation and CPA/CLIR (Commission on Preservation and Access/Council on Library & Information Resources); includes materials filed by Linda West, Kris Kiesling, Anne Van Camp), February 1996 – June 1998

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- FAST project: Negotiations, contract, and work on FAST materials with University of California, Berkeley staff Tim Hoyer (and a little with Daniel Pitti), March 1996 – March 1997
- FAST project: Contract for portion of instructional training done by Michael Fox, Minnesota Historical Society, July 1996; revised in December 1996
- FAST project: Kris Kiesling's file of workshop applications turned over to Anne Van Camp when Kris K. returned to University of Texas, Austin, after being an RLG "visiting associate" to work on FAST project, June – August 1996
- FAST project: Another Kris Kiesling file of FAST/EAD SGML training requests received, April 1996 – March 1997 [this and previous file not compared for overlap]
- AMC (Archival & Manuscripts Control using MARC, implemented in RLIN) and Finding aids online: Steps by RLG and others (related to FAST results), February 1996 – January 1998
- Finding aids online: Proposal to Gladys Krieble Delmas Foundation to convert and provide through a new online service a cross-section of member finding aids, plus members' proposals for specific materials to be converted, December 1997 – July 1988, plus May 2000 final report to Delmas Foundation
- Finding aids online: Work on Delmas-Foundation-subvened conversions of member-participants' guides, using Apex Data Conversion Service, March 1998 – December 1999 (incomplete file?)

**BOX 19: Computer Systems (aka Development) – Books**

1991–2000: Two editions of character standards.  RLG was a founding member of The Unicode Consortium; key participants in Unicode's governance and work were David. R. Richards, directors of the Computer Systems department, and Joan Aliprand, systems analyst in the department.

- "The Unicode Standard: Worldwide Character Encoding Version 1.0," The Unicode Consortium, copyright 1990, 1991 by Unicode, Inc.: Softbound, in Volume 1 (xx + 682 pages and Volume 2 (xii + 441 pages); RLG's Joan Aliprand among the "people [who] were central to the design and authorship of this book"; a 4-page insert at the back of Volume 1 lists changes made in Version 1.0.1 of the standard
- "The Unicode Standard Version 3.0," The Unicode Consortium, copyright 1991-2000 by Unicode, Inc.: Hardbound, 8-1/2 x 11 inches, published by Addison-Wesley, xxx + 1040 pages, CD in back pocket contains the "Unicode Character Database" as of 2000; major contributors acknowledged include RLG's Joan Aliprand, who "chaired the Unicode Technical Committee while Version 3.0 was under development.  She is responsible for the front matter, Glossary, References, and General Index.  She also contributed to Middle Eastern Scripts."

**CARTON 20: President's Office (aka Administration)**

1981-1984: Board meetings nos.16-28 plus related Special, Executive, and other committee meetings.  [NOTE: see also meetings nos. 16-28 in president's Carton 20, and meetings nos. 14-31 in Cartons 156 and 146 from Noel Hanf.]  PLUS: 1982-1985 RLIN performance reporting samples.

- Special Committee (of RLG presidents): Formation & first meeting minutes, 26 January 1981 (Chicago, IL) – Purpose: Strategic review, oversight, and advice to the board on RLG's finance/business plans, as well as source of advice to member presidents and foundations
- Special Committee: Correspondence – adding to the committee and tracing RLG's capital campaign, February-late 1981

- Special Committee: Meeting minutes, 13 April 1981 (Washington, DC)
- Special Committee: Report to RLG-member presidents, follow-up calls by Stanford president Donald Kennedy on behalf of RLG, March-May 1981
- Special Committee: Meeting minutes, 4 June 1981 (Chicago, IL)
- Executive Committee: Minutes for 5 meetings, sans agendas – 25 January 1981 (Chicago, IL); 2 February 1981 (New Orleans, LA); 4 June 1981 (Chicago, IL); 4 November 1981 (New York, NY – agenda is in Carton 163); and 9 December 1981 (New York, NY)
- Special Committee: Meeting minutes, 4 November 1981 (New York, NY)
- Special Committee: Meeting agenda, 16 February 1982 (Stanford, CA) – plus related prior memos by John C. Heyeck
- Executive Committee: Meeting agenda and minutes, 16-17 February 1982 (Stanford, CA)
- Board of Governors' Finance & Administration and Program & Operations Committees: Special meeting agendas, 17 February 1982 (Stanford, CA)
- Board of Governors meeting no. 16 agenda and minutes, 18-19 February 1982 (Stanford, CA)
- Board of Governors meeting no. 17 agenda and minutes, 20 March 1982 (Chicago, IL) (no background accompanying agenda outline)
- Board of Governors meeting no. 18 agenda and minutes, 22-23 April 1982 (Chicago, IL)
- Board of Governors meeting no. 18 (April 1982) – related material filed by Lois Kershner, dealing with meeting preparations and note taking
- "Board Materials, Finance and Administration, April 1982" – title of original binder; additions to the F&A Committee's portion of Board meeting no. 18 (April 1982)??
- "Papers Associated with Board of Directors [Governors] Meeting [no. 18], April 1982" – filed by John C. Heyeck, originally in two-pocket folder; left pocket and right pocket contents are separately clipped in this file
- Board of Governors' Finance & Administration Committee: Special meeting agenda, 24-25 June 1982 (Stanford, CA) – with James Michalko's annotations and inclusions
- Board of Governors meeting no. 19 agenda and minutes, 7-8 July 1982 (Philadelphia, PA) – with a few annotations and inclusions from James Michalko
- Special Committee: Meeting agenda and minutes, 26 July 1982 (Chicago, IL), with James Michalko's annotations and inclusions
- Board of Governors meeting no. 20 agenda and minutes, 30 September – 1 October 1982
- Board of Governors meeting no. 20 (Sept.-Oct. 1982) "Extra Attachments" – supplemental materials distributed for the meeting
- Special Committee: Meeting agenda and minutes, 19 October 1982 (St. Louis, MO) – agenda includes supplemental handout
- Board of Governors meeting no. 21 agenda and minutes, 2 December 1982 (Chicago, IL)
- Board of Governors meeting no. 22 agenda and minutes, 10-11 February 1983 (Stanford, CA)
- Special Committee: Meeting agenda, 18 April 1983 (Washington, DC) – 2nd copy annotated by James Michalko)
- Board of Governors meeting no. 23 agenda and minutes, 21-22 April 1983 (Norman, OK)
- Board of Governors meeting no. 24 agenda and minutes, 21-22 June 1983 (Santa Barbara, CA) – some inclusions (clipped, following minutes) not explained; agenda annotations and inclusions are James Michalko's
- Board of Governors meeting no. 25 agenda [look for minutes in Carton 146], 29-30 September 1983 (Hanover, NH) – organized by multicommittee discussion topics instead of the usual four committee agendas

- [NOTE: President's copy of meeting no. 26 agenda and minutes, 1 December 1983 (Chicago, IL) is filed in Carton 68.]
- [NOTE: President's copy of meeting no. 27 agenda and minutes, 1 March 1984 (Stanford, CA) is filed in Carton 68; but see next entry for related material]
- Paper related to Board of Governors meeting no. 27 (March 1984); also, copy of meeting minutes made and filed here in November 2006
- Board of Governors' Executive Committee and Computer Systems Committee: Special meetings agendas and minutes, 26 & 27 March 1984 (New York, NY) [correct agenda/s?]
- Board of Governors meeting no. 28 agenda, 19-20 June 1984 (Dallas, TX) – plus memo to board from Special Committee Chair Harold Shapiro, calling for board input on the future. [NOTE: No. 28 meeting minutes should be in meeting no. 29 agenda, which is in Carton 68]

Also in this carton: Small set of samples of system performance reports, 1982-1985, culled from much larger mass not retained:
- 1982 RLIN weekly performance reports, 31 October – 6 November
- 1983 RLIN weekly performance reports, 30 October – 5 November
- 1983 RLIN monthly performance reports, October
- 1983 RLIN monthly response time report, October
- 1984 RLIN daily performance reports, 30 October (Tuesday)
- 1984 RLIN weekly performance reports, 28 October – 3 November
- 1984 RLIN monthly performance reports, October
- 1985 RLIN daily, weekly, monthly performance reports, June and October (no October monthly reports found)

## BOX 21: Multiple departments – books

1982 – 2004: Eight reports/publications all touching on RLG and/or RLIN in some way. The first three, issued in the 1980s, focused on online catalogs and their use; the fourth described materials addressed later on in RLG's Chinese Rare Books Project; the fifth, by Susan K. Martin, library networks in 1986; the sixth, electronic information for the humanities; the last two contained Spanish and Polish translations of "RLG Best Practice Guidelines for Encoded Archival Description [EAD]."

- "Online Catalogs: Requirements, Characteristics, and Costs": "Report of a conference sponsored by The Council on Library Resources at the Aspen Institute, Wye Plantation, Queenstown, Maryland, December 14-16, 1982; softbound, v + 132 pages; published in March 1983 by The Council on Library Resources, Inc. -- Bibliographic Service Development Program; RLIN was one of the major systems represented, and a report to CLR from RLG, "Public Online Catalogs and Research Libraries," 1982, was a major paper referred to in the conference; its findings are summarized in Appendix D of this publication
- "Bibliographic Services and User Needs": "Report of a conference sponsored by The Council on Library Resources held at Linda Hall Library, Kansas City, Missouri, December 14-16, 1983; softbound, vii + 116 pages; published in March 1984 by The Council on Library Resources, Inc. – Bibliographic Service Development Program; among the "four challenge or discussion papers" given at the conference, one was by Tom Martin (then at Syracuse) – "the father of SPIRES" in earlier days at Stanford – and another was by Doug Ferguson, who had worked on SPIRES, BALLOTS, and projects at RLG over the years
- "Using Online Catalogs, A Nationwide Survey": " A report of a study sponsored by The Council on Library Resources, edited by Joseph R. Matthews, Gary S. Lawrence, and

Douglas K. Ferguson; softbound, xvi + 255 pages; published and copyright 1983 by Neal-Schuman Publishers, Inc.; includes results from users of both OCLC and RLG among many others

- "Chinese Rare Books in American Collections," exhibition catalog published by China House Gallery, copyright 1984 China Institute in America, Inc. Exhibition curated by Soren Edgren, who wrote the catalog introduction; materials described and illustrated came from 16 collections, 12 of them ultimately members of RLG; see also related materials about the "Chinese Rare Books Project," an international collaborative cataloging project of RLG that produced a union catalog within the RLG Union Catalog for these materials
- "Library Networks, 1986-87: Libraries in Partnership," by Susan K. Martin: Softbound, x + 251 pages, published and copyright 1986 by Knowledge Industry Publications, Inc.; "… it is a completely new publication … networks have established themselves as strong, independent players in the library world. … [Includes] complex and frequently highly charged issues" (from preface by Richard De Gennaro)
- "Electronic Information for the Humanities": Softbound publication of pages 575-830 from vol. 40, iss. 4, spring 1992 "Library Trends" – published by the University of Illinois Graduate School of Library and Information Science; references to RLIN/RLIN in several of the papers on this subject, as well as citation several times of "RLG's Connie Gould's 1988 "Information Needs in the Humanities: An Assessment"
- "Directrices de Buenas Practicas en Descripcion Archivistica Codificada": Spanish translation published in 2004 by the Fundacion MAPFRE TAVERA, Madrid, of the 2002 RLG publication "RLG Best Practice Guidelines for Encoded Archival Description [EAD]"
- "Archiwa w postaci cyfrowej: Materialy miedzynarodowych warsztatow DELOS CEE": all-Polish publication, copyright 2003 by, Warsaw; among about 12 papers, the 7th is [yes?] a Polish translation of "RLG Best Practice Guidelines for Encoded Archival Description [EAD]," of 2002

[Carton 22: See note preceding Carton 1 above.]

## CARTON 23: Marketing & Sales and Corporate Communications

1988-2005: Mix of marketing plans and materials that includes press kits, directory entries, ads, brochures, fliers, promotional postcards, exhibit booth designs; bulk of materials from the mid-1990s to 2005. [SEE ALSO Box 25 and Cartons 52, 79, 80, 86, 91, 99, 110, 126, 140, 153, 187, 188, 193, and 203 for more about Ariel.]

- "Sales & Marketing Handbook": Contains plans and background for 1995-1996 fiscal year, created by Kristin Tague, director of Sales & Marketing Department (original in 3-ring binder), 1995
- Potential "Variable Compensation Plan": One of several efforts to devise marketing/sales-based incentive/payment plan for Sales & Marketing staff, 12 December 1996
- RLG member receptions in conjunction with American Library Association: invitations to receptions held at 1994 and 1995 ALA Midwinter meetings
- Press kits for American Library Association meetings: Filed in original press kit folders for:
  - June 1997
  - January 1998 [nothing found for June 1998]
  - January 1999
  - June 1999
  - Midwinter 2000
  - June 2000

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- Midwinter 2001
- June 2001
- Midwinter 2002
- June 2002

• Entries in various indexes/resource guides for library market: Original publications filed:
  - Entries in Library Journal Buyer's Guide for 2003 and for 2004
  - Entries in Library Resource Guide for 2003-2004 and for 2004-2005
  - Entries, including descriptions and illustrated ads, in Librarian's Yellow Pages for 1995, 1996, 1997, 1998, 1999, 2000, 2002, 2003, and 2005
• Sample RLIN & RLIN21 marketing materials (fliers & brochures; including RLIN/RLG Union Catalog), 1985-2005
• Medieval & Early Modern Databank (MEMDB) brochure [part of PRIMA initiative; see other cartons], 1988
• BRCON (Batch Retrospective Conversion) system marketing materials, 1989-1993
• CitaDel [Citations Delivery; later marketed as RLG Citation Resources, and then as "RLG's Eureka Databases"] marketing materials, 1990-1996
• AMIS [Information Management System for Archives & Museums] flier, 1991
• AVIADOR (Avery Videodisc of Architectural Drawings on RLIN) flier, 1993
• RLG's Ariel software [for document transmission over the Internet] marketing materials, 1991-2002
• RLG's ILL [interlibrary loan] Manager software marketing materials, 1991-2002
• RLG Archival Resources marketing materials, 1998-2004
• AMICO Library & CAMIO (Catalog of Art Museum Images Online) marketing materials, 1999-2005
• RLG Cultural Materials & trove.net marketing materials, 2000[2001?]-2004
• RedLightGreen marketing materials, 2003-2005
• Multiple RLG services marketing materials, 1992-1998
• "Show cards": Marketing materials for RLG exhibits and meetings, ca. 1999[?] – 2005
• RLG exhibition booth designs, elements, 1990ish – 2002

## CARTON 24: President's Office (aka Administration)

1976-1983: Material from two long-stored cartons of roughly filed materials that combined files from the president's office with those of Lois Kershner, Cheryl Hulett, and possibly other early department directors. Several "early environment/context" files, business correspondence, "RLG Update" mailings from president's office, projects for retrospective conversion of cataloging, work with the Library of Congress, the Linked Systems Project, facets of RLIN, and more.  [For more on Linked Systems Project, see Cartons 175 and 176.]

• Office file schemes: Lists from early period – 1980-1982?
• Impact on University of California, Berkeley (UCB) – Stanford University Research Library Cooperative Program of RLG's making BALLOTS into RLIN plus UCB's choosing OCLC for systemwide use: "UCB/Stanford Annual Report" including Appendix D: RLIN Development Plans and User List, 1978
• Early environment and Washington Library Network (WLN): Descriptions of WLN services, charges, "membership," 1977-1978
• Early environment: "What Will Automation Do to Law Libraries," Harry S. Martin III, outlining an approach focusing on a LAWNET to merge data from OCLC, RLIN, and others, 1979-1980?

- Early environment and Library of Congress role: Nationwide Data Base Design Project, draft and response to reviewers' comments, January & August 1979
- Early coexistence issues: OCLC and record access, case of PALINET and University of Pennsylvania counter-bid (more in Carton 188 and probably elsewhere), January-February 1980
- Early environment and SOLINET: RLG watches decisions taken, especially by ARL institutions in SOLINET, 1978-1981
- Early environment and perspective of RLG governor on RLG/RLIN role: "Challenge of Change: Network-level Decisions – Reaction," Carlton C. Rochell, New York University, 3 November 1981
- Early comparisons: "The Four On-Line Bibliographic Utilities: A Comparison," *draft* of Joseph R. Matthews' 126-page study, 1979
- Early environment and financial drivers: "Report on the Economics and Financial Management of Research Libraries," *draft* from ARL's Office of Management Studies, plus cover memo to Edward E. Shaw from Duane Webster, the office's director, January 1982
- Early environment and UTLAS: Notes taken of UTLAS development by Hank Epstein (then BALLOTS director); early UTLAS information, 1976-1980
- Early UTLAS – RLG dealings, including Memorandum of Understanding, 1980-1982
- Business & Finance correspondence: Cheryl Hulett's chron file on rates-setting, cost centers, billing, forecasts, charging, service agreements, vendor dealings, hiring, etc., 3 January – 30 April 1979
- Business & Finance correspondence: Cheryl Hulett's chron file on early facilities, Yale facilities arrangement, RLIN billing, loans to RLG, closing of RLG's Branford, CT office, equipment ordering, early RLIN user contract, 3 May – 21 December 1979
- Business & Finance internal/Stanford correspondence: Facets of post-Cheryl-Hulett work by John C. Heyeck, with James Michalko second in the department; includes Business & Finance "task list," negotiations with Stanford on charges to RLG, budget performance and management, 29 May 1981 – May 1982
- RLG – Stanford University coordination/review meeting agendas, plus some meeting materials, for 2 June, 14 July, and 3 September 1981
- Treasurer's Advisory Council: Formation and members, early 1982
- Budget & Finance internal discussion: Wrestling with computer capacity and budgets – John Heyeck to Edward E. Shaw and C. James Schmidt, plus draft memos to community from Donald Kennedy (Stanford's president) and Ed Shaw, 9 February – 10 May 1982  [NOTE: By May Shaw had already retired effective June/July 1982.]
- Board of Governors' resolutions on RLG policies and guidelines (partial set of more that would be found in Board meeting agendas and minutes), October 1979 – December 1981
- "RLG Update," periodic mailing from President's office to members, Nos. 1-11, July 1979 – March 1982; plus Report from Special Committee, March 1981
- Early Library Services marketing – Lois Kershner's responsibility by 1979 (very incomplete coverage), 1978-1981
- Exhibitions/arrangements – General, 1978 (annotated in 1979/1980?)
- Coordinated retrospective cataloging conversion (recon): Plans for, Andrew W. Mellon Foundation grant, call to members for their recon proposals, 1980-1981
- Library of Congress dealings: Includes Memorandum of Understanding with RLG for data elements and automation work, 1975-1978
- Library of Congress dealings: Formal agreement for RLG to build MARC data elements database; RLG role on LC-convened groups, LC delegates to RLG standing committees; LC

involvement/agreement on RLG East Asian automation; LC begins using RLIN (searching), 1979

- Proposal to convert retrospective name authority data to automated format – done in response to LC request for proposal; not taken up, April-December 1979
- Library of Congress dealings: Meetings of Network Advisory Council (NAC); LC interest in working on "integrated consistent authority file service" with RLG and Washington Library Network (WLN); LC's early desire to convert Chinese transliteration to the Pinyin method; Eighteenth-century Short Title Catalogue and RLG/RLIN inaugural meeting; more – 1980 [NOTE: For more on early 1980s NAC work, see Cartons 150 and 165.]
- Library of Congress dealings: General correspondence with RLG – Ed Glazier's role as RLG's MARC expert; more LC appointments to RLG committees and projects; Network Advisory Council public forum preparations (at San Francisco American Library Association meeting), 1981, but file trails off in July 1981
- Linked Systems Project: First progress report on Council on Library Resources (CLR)-funded "RLG-WLN Linked Authority Systems Project," July 1980; proposal to CLR for Phase II (ongoing link system specifications, part of "original overall proposal"), October 1980 (for February 1981 – January 1982); "Organization and Communication Coordination Plan" (LSP/BA-2) for WLN-RLG-LC LSP: Bibliographic Analysis Project, May 1983
- "The RLG Cooperative Purchase File in RLIN" (a supplement to "Reference Manual to the RLIN Books System in Full-face Communications Mode"), 31 pages, December 1979
- Reconfigured Database (RDB) project, aka "Big Bang," aka "Record Clustering" (a few memos out of presumably much more), 1980-81.  [NOTE: For more on RDB, see also Cartons 5 and 37.]
- Public Services/Resource Sharing Program: Undated RLG On-Site Access Policy Statement (in two forms), 1980? 1981??
- RLIN terminals: Mix of specifications and user documentation, 1980-1981
- RLIN batch products & RLIN tapes: Mix of specification and design documents, 1980-1981
- RLIN Reports System (RRS): "Initial Implementation: Non-Statistical Reports Without Direct User Control: Overview and Preliminary Notes," Working Paper, 18 January 1982, plus March 1982 note from Walt Crawford; RRS Description and member questionnaire, April 1982
- "Overview of the RLIN Authorities Subsystem," written while subsystem still in development, 19 pages, January 1981
- "The RLIN II Acquisitions System, undated overview, 33 pages [1981??]
- "Fiscal Processing in RLIN II: An Overview," 33 pages, January 1982
- RLIN overview: Undated, 26-page illustrated walk through system purposes, projects, databases, structure – including records, searching, indexes, display screens, cataloging, RLG Message Subsystem, Acquisitions Subsystem, Tables Subsystem, Print Subsystem, Authorities Subsystem, and Training and Documentation – systems not yet done [undated; 1981/1982?]
- Library Coordinators (RLG staff role): Assignments to libraries, April 1983; plus stray memo from a Library Coordinator, March 1979

## BOX 25: Computer Systems (aka Development) – Magnetic Media

1985-2003: Multiple versions of RLIN terminal software (1985-1994), designed for different PCs and for additional functionality in RLIN bibliographic processing; CJK font software (ca. 1988-1997 -- for programmer/designers, not library users); and some of the software for batch retrospective

conversion (BRCON – 1988-1991), interlibrary loan (1988-2003), Preservation (1991), and Ariel (1991-1997).

RLIN terminal software without printed material; five 5.25-inch, double sided, double density disks, all 1985:
- "RLIN PC program, 3/27/85, 1A version" (handwritten; "Jan James" is also penciled in)
- "RLIN terminal emulation program, version 2B, EGA for PC and PC/XT.  All rights reserved, copyright 1985.  The Research Libraries Group, Inc.  Stanford, CA." (Hand-printed; might be by Bruce Washburn)
- "RLIN Terminal Emulation Software, CGA Version 2B, Copyright 1985.  (For PCs, PCXTs, PCATs) [with Amdek first TTPt mode C080]"  (handwritten; not sure about "TTPt" – last letter could be something else?)
- RLIN Simulation Evaluation Copy #1, 10-23-85/11-4-85, COLOR" and "Object & Data, © CLASS 1985, BACK UP COPY" (handwritten)
- "CLASS/RLIN Simulation Backup Copy, PC DOS 3.0, 11.1.85/11.4.85 Monochrome, © CLASS 1985" (handwritten)

RLIN terminal software without printed material; nine 5.25-inch disks except as noted below, 1989-1994:
- "RLIN PC Terminal Program / Standard Version – S1 / © Research Libraries Group, Inc., 1987, 1988, 1989 / RLIN 1 [of 2??]" (designed holder, typeset label)
- "RLIN PC Terminal Program / Standard Version / Version S2—Disk 1 of 1 / © 1987-1990 The Research Libraries Group, Inc." (designed holder, typed-up label)
- "RLIN PC Terminal Program / Standard Version / Version S2-Disk 1 of 1 / © 1987-1990, The Research Libraries Group, Inc." (3.5-inch diskette, designed label, typed-up)
- "RLIN PC Terminal Program / Extended Version – E1 / © Research Libraries Group, Inc., 1987, 1988, 1989 / © Metagraphics Software Corp., 1986, 1987 / © JHL Research, 1988 / RLIN 1 [of 2]" (designed holder, typeset label)
- "RLIN PC Terminal Program / Extended Version – E1 / © Research Libraries Group, Inc., 1987, 1988, 1989 / © Metagraphics Software Corp., 1986, 1987 / © JHL Research, 1988 / RLIN 2 [of 2]" (designed holder, typeset label)
- "RLIN PC Terminal Program / Extended Version E3d / © 1987-1994 The Research Libraries Group Inc. / © 1986-1990 Metagraphics software Corporation / © 1988 JHL Research" (3.5-inch diskette, typeset label)
- "RLIN Terminal Software, Version E3d.17 [".16" is crossed out], 5-13-94" [two earlier April & May dates are crossed out] (handwritten label)
- "RLIN PC Terminal Program, Version P6A / © Research Libraries Group, Inc., 1987, 1988, 1989 / © Metagraphics Software Corp., 1986, 1987 / © JHL Research, 1988 / RLIN 1 [of 2]" (designed holder, typeset label)
- "RLIN PC Terminal Program, Version P6A / © Research Libraries Group, Inc., 1987, 1988, 1989 / © Metagraphics Software Corp., 1986, 1987 / © JHL Research, 1988 / RLIN 2 [of 2]" (designed holder, typeset label)
- "RLIN Terminal Software, Async Pilot Version KQ [VQ??]," dates in 1991 crossed out except for final "91" (3.5-inch diskette, handwritten label)

CJK software without printed accompaniment; for programmers' use, not library users – all from JHL Research, Inc., Anaheim, CA:
- "CJK 24x24" [font?], version 2.00, RLIN Edition, October 1988 – regular (360KB) diskettes 1 of 2 and 2 of 2
- CJK CHINASTAR – III, System & Font, No. 1, Version 2.00, Release 3, copyright 1989, 1990

- CJK CHINASTAR – III, PC-Write 2.71, No. 2, Version 2.00, Release 3, copyright 1989, 1990
- Cyberbit CJK, 28 March 1997, Order #10780, for RLG from Bitstream Cyberbit, Cambridge, MA

Batch Recon software without printed accompaniment, labeled as follows:
- Batch Retrospective Conv. Program, BRCON Master Diskette, LI=CMSG, Copyright 1988, 1989, RLG, Inc.
- Batch Recon Change LI Procedure, 1-22-90
- BRCON 2 Master Diskette, Library Identifier = [not filled in], Copyright 1991, RLG, Inc.
- BRCON 2 3.5" MASTER
- BRCON stuff [that's all the labeling there is]

Software with little printed accompaniment for interlibrary loan and "PreNAPP":
- RLG ILL Workstation Demo Screens, preliminary version 1/31/89, copyright RLG, 1989
- ILL Demo Program/EGA/WYSE, Insert diskette, type "demo"
- RLG's ILL Manager for Windows, version 1.3, March 2003 – this DOES have packaging that includes installation instructions and a Quick Start insert dated 10/2000
- RLG PreNAPP: Preservation Needs Assessment Package, Version 1.00 – September 1991

Five packaged versions of Ariel document transmission software, for:
- Version 1.0, October 1991, with Installation Guide and User's Guide
- Version 1.1a for Windows, "full version," copyright 1996, with a User's Guide and Installation Guide dated August and September 1994, plus a page on changes in Version 1.1 made after the publication of the Guide
- Ariel Version 2, Disk 1, copyright 1994-1997, with a User's Guide dated February 1997
- Ariel Version 2.1, Disks 1 & 2, apparently 1997 per much briefer User's Guide and other instructions [boiled down by Arnold Arcolio, perhaps?]
- Ariel Version 2.2, Disks 1 & 2(Print Only) and Disks 1 & 2 (Full Version), no installation or user's guide, but a sheet on registering Ariel and additional information; still 1997?

[NOTE: A little to a lot about Ariel can be found in Cartons 23, 52, 80, 86, 91, 99, 110, 126, 140, 153, 187, 188, 193, and 203.]

## CARTON 26: Computer Systems (aka Development)

1978-2003: Variety of files contributed by three members of Systems Department: Keith MacLaury/KDM, Ed Glazier/EEG, and Judith Bush/JEB. These range from original network file system design and record clustering to the Linked Systems Project, growth in types and size of databases, issues in systems capacity, and the RedLightGreen Web resource for undergraduates.

- Network File System: Design, 1978-1979 (from KDM)
- Record clustering: OCLC approach, 1979 (from KDM)
- Record clustering: RLIN approach – works and editions, field matching, etc., 1979-1989 (from KDM)
- Network File System: PREBILD preprocessor history, design, notes, 1980-1982 (from KDM)
- RLIN II "Big Bang" records conversion: Conversion specification, 1981 (from EEG)
- Library of Congress – RLG – OCLC [later] Linked Systems Project: Multidocument folder, 1981-1989 (from EEG)
- RLIN "Special Databases": Users' manuals (mostly) for Avery Art & Architecture, SCIPIO sales catalogs, RLG Conspectus, Eighteenth-century Short Title Catalog, and Research in Progress databases, 1980s (from KDM)
- Hardware/operating-system platforms, including Amdahl & Aspen, 1984-1987 (from EEG)

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- "Aspen Folds": Need to find other solutions to RLIN growth/operation in lieu of Amdahl's Aspen operating system, October-December 1987 (from KDM)
- PREBILD/SPIBILD: Need to develop overday or concurrent processes, 1987-1989 (from KDM)
- FileDef explanations, 1988 (from KDM)
- Archives, Manuscripts, & Special Collections Program: Government Records Project (multidocument folder), 198?-1991 (from EEG)
- Prospective files/databases: View into recurring process for evaluating/responding to proposed additions, with various examples, late 1980s – early 1990s (from EEG)
- RLIN Technical Overview, 13 December 1988 (from KDM)
- File space: SPIRES developments to allow a larger RLIN Books file, 1988-1989 (from KDM)
- Database Server (MVS) project for RLIN systems: Project to overcome Stanford's Orvyl system limitations on database size, plus other issues – paper by Robert A. Lerche, task list, a few notes, June 1988 – January 1989 (from KDM)
- Strategic Technical Plan ("nearly final draft"), 1 August 1989 (annotated by KDM)
- Database Server project(?): Database conversion methodology to move databases to Phoenix, March 1993 (paper by KDM)
- Database Server project: Presentation by David R. Richards (and Keith MacLaury?), December 1994 (from KDM)
- Union Catalog on the Web (later "RedLightGreen") project: Advisory Group meeting, 21 September 2001 (from JEB)
- Union Catalog on the Web (later "RedLightGreen") project: plumbdesign report, "Optimizing Access to the RLG Union Catalog for the non-expert user," 10 December 2001 (from JEB)
- Union Catalog on the Web (later "RedLightGreen") project: Revision and expansion of September 2001 Advisory Group handout, February 2002 (from JEB)
- I-VAULT! test, testbed, and test application: (RLG – JP Morgan I-VAULT! collaboration undertaken to explore digital archiving/repository issues) Specification, 24 April 2002 (by/from JEB)
- Union Catalog on the Web (later "RedLightGreen") project: Planning Phase Final Report from RLG to the Andrew W. Mellon Foundation, 8 May 2002 (from JEB)
- Union Catalog on the Web (later "RedLightGreen") project: plumbdesign's functional specification, 8 & 22 July 2002 versions (from JEB)
- Union Catalog on the Web (later "RedLightGreen") project: Draft marketing plan from Azimuth Consulting, 31 July 2003 (from JEB)
- Union Catalog on the Web (later "RedLightGreen") project: Implementation Phase, Final Report from RLG to the Andrew W. Mellon Foundation, 14 October 2003 (from JEB)

## CARTON 27: Member Programs

1984-1990: RLG's Archives, Manuscripts, & Special Collections Program (AMSC): primarily, NEH-funded projects for building the Archival and Manuscripts Control data in RLIN (the "AMC file") and the joint Rosarkhiv – Hoover Institution – RLG Russian archives cataloging project. Materials come from La Vonne Gallo's files and include files that had come from Alan Tucker. (Resumes for both appear in some grant proposals in this carton.) Not complete for any of these topics, particularly the joint cataloging project; see other Member Programs cartons.

- Archives & Manuscripts Retrospective Conversion (Recon) Project: Proposal to National Endowment for the Humanities (NEH) for October 1984 through March 1986, submitted 3 May 1984

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- Area-specific On-Site Access Guides: Portion of records on project to produce these for Archives & Special Collections, East Asian Libraries, etc., 1988-1989
- Potential Archives & Manuscripts retrospective conversion (recon) projects: Survey of program participants showing areas of interest pointing to literature, 1988
- 1990 AMC Recon Project: Survey of members that fed into creating this project, 1989
- 1990 AMC Recon Project: American Antiquarian Society participation
- 1990 AMC Recon Project: Cornell University participation
- 1990 AMC Recon Project: Emory University participation
- 1990 AMC Recon Project: Hagley Museum and Library participation
- 1990 AMC Recon Project: Louisiana State University participation
- 1990 AMC Recon Project: State Historical Society of Wisconsin participation
- 1990 AMC Recon Project: University of Minnesota participation
- 1990 AMC Recon Project: University of Pennsylvania participation
- 1990 AMC Recon Project: Yale University participation
- 1990 AMC Recon Project: Virginia State Library participation
- 1990 AMC Recon Project: Completion in 1992
- Announcement of Society of American Archivists Distinguished Service Award to RLG for contributions to the archival profession, 1994
- Rosarkhiv – Hoover – RLG cataloging project: Articles, news, background publications, 1992-1995
- Rosarkhiv – Hoover – RLG cataloging project: RLIN capacity to handle Cyrillic – article by Joan Aliprand, 1993 (published in 1994)
- Rosarkhiv – Hoover – RLG cataloging project: Draft proposal, "Enhancing Access to Russian Archives Through RLIN," May 1992  [what is relationship of this to actual 1993 proposal sent to NEH?]
- Rosarkhiv – Hoover – RLG cataloging project: NEH-funded spring 1993 planning meeting – January 1993 proposal (minus budget & appendices) and May 1993 report on meeting
- Rosarkhiv – Hoover – RLG cataloging project: Complete revised proposal as sent to NEH, December 1993; notes on grant award; proposal reviewers comments, May-June 1994
- Rosarkhiv – Hoover – RLG cataloging project: Phase I scheduling and list of individuals involved, summer 1994 (slim file)
- Rosarkhiv – Hoover – RLG cataloging project: Budget cost-sharing background, summer 1994
- Rosarkhiv – Hoover – RLG cataloging project: Aspects of setting up the necessary hardware and software over 1994-1995
- Rosarkhiv – Hoover – RLG cataloging project: Aspects of setting up the project participants' RLIN accounts (Library Identifiers) and National Union Catalog codes, August 1994 – January 1995
- Rosarkhiv – Hoover – RLG cataloging project: Alan Tucker's and others' preparations for record selections and descriptions (what would be needed), 1994
- Rosarkhiv – Hoover – RLG cataloging project: Meeting of project participants in Moscow, 3-7 October 1994
- Rosarkhiv – Hoover – RLG cataloging project: Cataloging training meeting at Hoover Institution, Stanford, 4-18 December 1994
- Rosarkhiv – Hoover – RLG cataloging project: Some responses to RLG press release/announcements, December 1994 – January 1995
- Rosarkhiv – Hoover – RLG cataloging project: Advisory Board meeting in Amsterdam, February 1995

**CARTON 28: Member Programs**

1982-1990: Materials from RLG's Collection Management & Development Program, boxed up for archiving in 2003. [NOTE: Run of RLG Conspectus worksheets and auxiliary publications is incomplete; Copies may exist in a former RLG-member library or with a member librarian deeply involved in this work at the time.]

- "RLG Collection Development Manual," November 1982, vol. I: Overview of Collections Management & Development Program; RLG Conspectus elements; Selection officers; and four conspectuses – CJK [Chinese, Japanese, & Korean]; Linguistics, Languages, & Literatures; Art & Architecture; and Religion. [Filed as "volume I"; six more conspectuses are in a separate folder as "volume II"]
- "RLG Collection Development Manual," November 1982, vol. II: RLG conspectuses for Physical Sciences; Economics & Sociology; Political Science; Music; and review versions of South Asian data and Law data
- Collection Management & Development Program: Published articles on the RLG Conspectus and the role of verification studies, by Paul Mosher with Nancy Gwinn and Jim Coleman, March 1983 & July 1985
- Collection Management & Development Program: "Conoco Study in German Literature and Geology," report by Jim Coleman (RLG) and Scott Bennett (then at Northwestern University) on study to better understand RLG members' current collecting practices; work done in 1984-1985, issued in 1986? Plus: Follow-up study in German monographic series: worksheets and cover memo, 24 March 1987
- Collection Management & Development Program: Final data from Collection Management & Development Committee's "Short-term Serials Project" ("the Ulrich's list") – effort to arrive at a basis for reducing redundant subscriptions to serials costing over $200, April-September 1987
- Collection Management & Development Program: RLG Conspectus Worksheet for Agriculture, version 3 [no date], plus Supplemental Guidelines for it prepared by Leslie Kulp, National Library of Agriculture, 1988/1990
- Collection Management & Development Program: RLG Conspectus Supplemental Guidelines for Anthropology Conspectus, prepared by Jane Kimball, University of California, Davis, 1990
- Collection Management & Development Program: RLG Conspectus Worksheet for Art and Architecture, version 4 [no date], plus Supplemental Guidelines for it, 1988/1990
- Collection Management & Development Program: RLG Conspectus Verification Study in Romanesque Sculpture, prepared by Amanda Bowen and Alex Ross, Stanford University, 1990, plus a cut-pasted-photocopied set of citations in Renaissance/Baroque Art [relationship to study or to missing elements not clear]
- Collection Management & Development Program: RLG Conspectus Worksheet for Cartographic Materials, version 2 [no date], plus Supplemental Guidelines for it prepared by Philip Hoehn, University of California, Berkeley, 1988/1990
- Collection Management & Development Program: RLG Conspectus Worksheet for South Asia, version 1 [no date]
- Collection Management & Development Program: RLG Conspectus Worksheet for Economics and Sociology, version 3 [no date]

- Collection Management & Development Program: RLG Conspectus Worksheet for Education, version 3 [no date], plus Supplemental Guidelines for it prepared by Leslie Bjorncrantz, Northwestern University, 1988/1990
- Collection Management & Development Program: RLG Conspectus Worksheet for Education: Women's Studies Update [no version or date], plus Supplemental Guidelines for Women's Studies prepared by Sarah M. Pritchard, Library of Congress, 1990
- Collection Management & Development Program: RLG [Conspectus] Verification Study in Genetics [no date]
- Collection Management & Development Program: RLG Conspectus Worksheet for Government Documents, version 2 [no date], plus Explanatory Information and Supplemental Guidelines, 1988/1990
- Collection Management & Development Program: RLG Conspectus Worksheet for History, version 3 [no date]
- Collection Management & Development Program: RLG Conspectus Verification Study in Russian History and Literature prepared by Wojciech Zalewski, December 1984, plus Supplemental Guidelines for Russian Literature prepared by W. Zalewski, 1988/1990
- Collection Management & Development Program: RLG Conspectus Verification Study for Swiss History [no date]
- Collection Management & Development Program: RLG Conspectus Worksheet for Auxiliary Sciences of History, version 3 [no date]
- Collection Management & Development Program: RLG Conspectus Worksheet for Law, version 3 [no date]
- Collection Management & Development Program: RLG Conspectus Worksheet for Library and Information Science, version 3 [no date], plus Supplemental Guidelines for it prepared by Virginia Wade, University of California, Berkeley, 1988/1990
- Collection Management & Development Program: RLG Conspectus Worksheet for Linguistics, Languages, and Literatures, version 3 [no date]
- Collection Management & Development Program: RLG Conspectus Supplemental Guidelines for English and American Literature prepared by David Cooper, Johns Hopkins University, 1988/1990
- Collection Management & Development Program: RLG Conspectus tools related to Linguistics, Languages, and Literatures conspectus? – "General Guidelines for Verification/Title Overlap Studies [1 page, no date, but no earlier than 1988]; plus "List of Titles Used in Collection Analysis Project (taken from NCBEL and MLA)," comprising bibliographies "by section of project," from "Old English Literature General Criticism" to "Twentieth-Century Poetry: Thom Gunn" [no dates]
- Collection Management & Development Program: RLG Conspectus tools related to French Language and Literature – "RLG Collection Analysis Project: French Literature Methodology and Searching Instructions" [including 67 pages of citations] prepared by Jeffrey Larsen, Yale University, April 1983; plus Supplemental Guidelines for French Language and Literature prepared by Larsen in 1986/1990; plus "French Literature Collections Assessment Pilot Project B [Zola]," by Gaylord Brynolfson [no affiliation, no date], together with Verification Study instructions and citations for Zola [no date]
- Collection Management & Development Program: RLG Conspectus Supplemental Guidelines for German Literature prepared by Stephen Lehmann, University of Pennsylvania, and James H. Spohrer, University of California, Berkeley, 1990
- Collection Management & Development Program: RLG Conspectus Supplemental Guidelines for Mathematics prepared by Jack Weigel, University of Michigan, 1988; plus Verification Study in Mathematics from Jim Bobick, Temple University, October 1982

- Collection Management & Development Program: RLG Conspectus Supplemental Guidelines for Medical and Health Sciences prepared by Daniel Richards, Columbia University, 1988; plus Verification Study in Neurology with General Guidelines and Background, also from Richards, 1988
- Collection Management & Development Program: RLG Conspectus Worksheet for Music, version 3 [no date], plus Verification Study for Chamber Ensemble Music [no date, but post-1987], from RLG Music Program Committee with particular thanks to Karin Nagy, Stanford University, for her work
- Collection Management & Development Program: RLG Conspectus Worksheet for Natural History and Biology, version 3 [no date], plus Supplemental Guidelines for it prepared by Ted Sibia, University of California, Davis, 1988/1990
- Collection Management & Development Program: RLG Conspectus Supplemental Guidelines for Philosophy prepared by Jean Aroeste, Princeton University, 1988/1990
- Collection Management & Development Program: RLG Conspectus Worksheet for Physical Geography and Earth Sciences, version 3 [no date]
- Collection Management & Development Program: RLG Conspectus Worksheet for Physical Sciences, version 4 [no date]; plus Supplemental Guidelines for the Chemistry Division of this conspectus, 1988/1990
- Collection Management & Development Program: RLG Conspectus Worksheet for Political Science, version 4 [no date], plus Supplemental Guidelines for it prepared by Lynn Sipe, University of Southern California, 1989/1990
- Collection Management & Development Program: RLG Conspectus Worksheet for Psychology, version 3 [no date]; plus Supplemental Guidelines for it prepared by Jean Loup, University of Michigan, 1989
- Collection Management & Development Program: RLG Conspectus Supplemental Guidelines for Religion prepared by Marianne Goldstein, State University of New York at Buffalo, 1988/1990
- Collection Management & Development Program: RLG Conspectus Worksheet for South Asia, version 1 [no date]
- Collection Management & Development Program: RLG Conspectus Worksheet for Technology, version 3 [no date]

## BOX 29: Multi-departmental – Magnetic Media

1989-2003: Four kinds of content, some with printed accompaniment -- work on RLIN/MARC format integration, an RLIN PC terminal program, an introductory video on AMIS (proposed Archives and Museums Information Service), and bibliographies produced from the RLG Union Catalog.

- RLIN/MARC format integration work: 5.25-inch floppy disk, double-sided, double-density, of possible options for bibliographic data entry screens once the MARC (Machine-Readable Cataloging material formats became integrated, June 1989; plus a 3-page cover memo on the options from Susan Robillard Oros to a set of member-institution experts, 2 June 1989
- RLIN PC Terminal Program, Extended Version (Version E2): Program on a 3-inch HD two-sided microdiskette as well as on 2 5.25-inch floppy disks, 1990; plus a 6-page cover member to software recipients, a 2-fold usage brochure, and labels to apply to "working copy diskettes and RLIN PCs," 7 September 1990
- AMIS—Archives and Museums Information Service:  Two copies of videotape demonstration of what this service would do (30 minutes, early 1990s [undated]; plus undated 8-page paper about the AMIS project (a service never built)

- K.G. Saur World Bibliographies compiled (by license) from RLIN bibliographic records: 11 CDs, 1 manual, 2 cover letters delivering free copies to RLG's Karen Smith-Yoshimura; 2000-2003

## CARTON 30: Corporate Communications

June 1998 - September 2000: Assistant secretary's 3-ring binders of board meetings nos. 78-86; includes records of preparation, annotated agendas (with preceding meeting's minutes), supplementary/handout materials, notes taken to prepare summary minutes, and some follow-up notes. May contain background materials filed in anticipation of possible discussion.

- Board of Directors meeting no. 78, 26 June 1998 (New York, NY)
- Board of Directors meeting no. 79, 9-10 October 1998 (Washington, DC)
- Board of Directors meeting no. 80, 25-26 February 1999 (Mountain View, CA)
- Board of Directors meeting no. 81, 25 April 1999 (Los Angeles, CA -- special strategic planning discussion prior to that year's annual membership meeting)
- Board of Directors meeting no. 82, 21 June 1999 (New York, NY)
- Board of Directors meeting no. 83, 3-4 October 1999 (Washington, DC)
- Board of Directors meeting no. 84, 25 February 2000 (Mountain View, CA)
- Board of Directors meeting no. 85, 19 June 2000 (Boston, MA)
- Board of Directors meeting no. 86, 28-29 September 2000 (Washington, DC)

## CARTON 31: Member Programs

1981-1996: Shared Resources Program history files – see also Carton 42 -- passed down among successive program officers, from Barbara Brown in early 1980s through Carol Hughes in mid-1990s; archived by Dennis Massie, successor to Carol Hughes and part of RLG Programs department that merged into OCLC in mid-2006. Far from complete; other cartons may supplement.

- Shared Resources Program: Public Services Committee meeting agenda for 15-16 October 1981 – contains minutes for previous meeting of 26-27 June 1981
- Shared Resources Program: Public Services Committee meeting agenda for 22 January 1982 – includes minutes for previous meeting of 15-16 October 1981
- Shared Resources Program: Memos to members from program officer Barbara Brown, notably a copy of her memo to RLG president Edward E. Shaw that graphs member activity in interlibrary lending, "primary collecting," and original cataloging, March & May 1982
- Shared Resources Program: Public Services Committee meeting agenda for 9 July 1982 – includes minutes for previous meeting of 22 January 1982
- Shared Resources Program: Public Services Committee meeting agenda for 7 January 1983 – includes minutes for previous meeting of 9 July 1982
  --Agenda includes "RLG: The Shape of the Organization," a planning document sent to the RLG board in September 1982
- Shared Resources Program: Memos to members from Barbara Brown, including "Locations requests" (1 page), "GPO Depository Library Information" (for ready reference); University of Michigan "Humanistic Scholars Project" proposal (courtesy of Wendy Lougee and Richard Dougherty); and PSC Steering Committee meeting summary from April 1983, with meeting background; January-May 1983
- Shared Resources Program: Public Services Committee meeting agenda for 23 June 1983 – includes minutes of previous meeting of 7 January 1983

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- Shared Resources Program: Memos from program officer Barbara Brown regarding program participants, particularly Special Member institutions, July & November 1983
- Shared Resources Program: PSC (Public Services Committee) Steering Committee meeting agenda, including a list of future program priorities, for 18 October 1983
- Shared Resources Program: Public Services Committee meeting agenda for 6 January 1984 – includes minutes (detailing some program staffing changes) from previous meeting of 23 June 1983
- Shared Resources Program: Memos to members from program officer Barbara Brown and program officer Patti McClung on various facets of program operations/activities, December 1983, February, March, June 1984
- Shared Resources Program: PSC Steering Committee meeting agenda for 29-30 March 1984 – includes minutes for the 30 March meeting with the Collection Management & Development Committee's Steering Committee
- Shared Resources Program: Public Services Committee meeting agenda for 21 June 1984 – includes minutes for meeting of 6 January 1984
- Shared Resources Program: Minutes for Public Services Committee meeting of 21 June 1984  [No subsequent Public Services Committee agendas/minutes found in Carton 31.]
- PSC Steering Committee meeting agenda and minutes for 1-2 November 1984
- Shared Resources Program: Two memos to members from program officer Barbara Brown – new Public Services online "bulletin board" at BM.PSB, and second edition of "RLG Shares Resources Manual", January & March 1985
- Shared Resources Program: PSC Steering Committee meeting agenda (includes a 20-page BIBTECH "think piece on future directions for cooperative cataloging activities and other RLG "futures" items) and minutes for 18-19 April 1985
- Shared Resources Program: Documentation of the "Fairchild Project" (using fax machines in 6 member institutions as a means to improve ILL operations), from inception/proposal to Sherman Fairchild Foundation through final report to the Foundation, 1983 – March 1985
- Shared Resources Program: Fairchild Project report -- "A Project to Improve Inter-Library Loans Services Within the Research Libraries Group," report of consultant Malcolm D. Smith, British Library Lending Division, May 1984
- Shared Resources Program: "Fairchild Project" – sets of consultant's executive summary and of document code 84-86, "Fairchild Project Telefacsimile Cost Study," August 1984
- Shared Resources Program: ILL (interlibrary loan) net-lending policy implementation, from January 1987 memo to RLG board on greater equity, to late 1993 note on fiscal year 1993 net-lending calculations; see also folders on statistics implementation
- Shared Resources Program: Issues regarding counting/accounting for RLIN ILL (interlibrary loan) net-lending statistics – scraps from Marilyn Roche's file (and more – from Maxine Reneker?) of developments/strategies/ sample statistics/problems, 1989-1993
- Shared Resources Program: ARL (Association of Research Libraries) – RLG Inter-Library Loan Cost Study, 1991-1993
- Shared Resources Program: ILL (Interlibrary loan) net-lending statistics (requests filled), from 1988/1989 through 1995/1996, per Carol Hughes' research; see also folder on statistics implementation
- Shared Resources Program: ILL (interlibrary loan) net-lending statistics for member law libraries – memos to members from Law Program officer Win-Shin (aka Stella) Chiang, 1992-1994
- Shared Resources Program: SHARES Interlibrary Loan Survey/Assessment (performed by Maxine Reneker – tabulated data plus narrative report and summary), February-June 1993

- Shared Resources Program: Program participation – invitations, responses, sorting through Special Member - Associate Member policies; scraps from Marilyn Roche's files, July 1989 – June 1991
- Shared Resources Program: Miscellaneous memos and correspondence related to Marilyn Roche's work in program, especially CADS (Collection Access & Delivery Services) evolution (and see following files on this as well), January 1990 – late 1991
- Shared Resources Program: Activities, meetings, reports in and after the "RLG 92" reorganizational year [period of CADS (Collection Access & Delivery Services) formulation, successive program officers Marilyn Roche, Maxine Reneker, and temporarily Win-Shin Chiang (until Carol Hughes's arrival)], March 1991 – July 1993
- Shared Resources Program: CADS (Collection Access & Delivery Services) Survey responses, file 1 of 3, January 1992
- Shared Resources Program: CADS (Collection Access & Delivery Services) Survey responses, file 2 of 3, January 1992
- Shared Resources Program: CADS (Collection Access & Delivery Services) Survey responses, file 3of 3, January 1992
- Shared Resources Program: Items filed by program officer Maxine Reneker that indicate SHARES and other program planning/activities in period from late September 1992 to May 1993 [Reneker left RLG summer 1993]
- Shared Resources Program: Materials related to SHARES Futures Planning, late 1992 – January 1994
  --Basically Maxine Reneker's tenure as program officer; players included Terry Martin, Harvard, Karen Nagy, Stanford, RLG Task Force on Collection Interdependence, "Preferred Library Futures II" document
- Shared Resources/Collection Development Programs: Creating/postings to/closing of the RLGPSCD online listserv [supplanted by RLGMEM-L for general news and SHARES-ALL for Shared Resources Program activities [did a separate Collections Management & Development discussion list not get created at this point?], November 1993 – April 1994
- Shared Resources Program: Working Group on Enhancements to ISM AVISO software, for RLG-needed ILL management statistics – not complete; from Carol Hughes's files, January 1994 – January 1995
- Shared Resources Program: Materials from Carol Hughes's tenure as program officer – "RLG SHARES 1995 Activities Report"; RLG Interview Report [uses?]; "Answers to Questionnaire" [1996?]

## CARTON 32: President's Office (aka Administration); Finance & Administration

1973 - ca. 1993: Mix of materials originally stored from President's office that came from the 1970s, both at Branford, CT and Stanford, CA, and early 1980s (Patricia Battin's presidency). Note early Shared Resources materials. Some materials regarding BALLOTS prior to RLG were withdrawn to turn over to archivist responsible for Stanford University archives.

PLUS: Files culled from former Carton 64 (emptied and deaccessioned) of miscellaneous materials originally belonging to Finance staff Barbara Lindeman, possibly Gail Jack, and Ron Dean, from later in the 1980s into the early 1990s.

- Original packing list "from President" found in Carton 32 (materials relabeled and reordered chronologically, oldest in front)

- RLG origins: "The Research Libraries Group -- Proposals for cooperation Among the Libraries of Columbia, Harvard, and Yale Universities and the New York Public Library," study by Joseph A. Rosenthal (softbound, 161 pages), December 1973
- Earliest Shared Resources Program records(?): Public Services Librarians Meeting, 13 September 1973; formation of Reader Services Committee; and notes from approximately 14 RSC meetings, from mid-1974 to April 1976 (the last of the Reader Services Committee's meetings)
- Early RLG interlibrary loan meeting plus draft report on a (later?) ILL briefing session, 28 January 1975 and 24 April 1975
- Shared Resources Program: Interlibrary loan reports/statistics and related documents (Christine Andrews and Peter Graham; ILL aspect of program then called SHARP) distributed between mid-1975 and December 1978
- Earliest (?) origins of Medical & Health Sciences Program: Exploratory meeting, 17 October 1973; memo to James Skipper from C. Lee Jones, 11 March 1975; cover memo (only) from James Skipper, 18 March 1975
- Origins (?) of Art & Architecture Program: Creation of, 4 reports from, 13 meeting minutes of, the RLG Art & Architecture Task Force on Subject Headings, with a few related memos, late 1974 - May 1977
- RLG selection of bibliographic system: BALLOTS/Stanford correspondence internally and with RLG, 17 January - 20 December 1977 (prior to RLG site visit to BALLOTS at Stanford); plus RLG agenda for meeting on BALLOTS strategies, 3 April 1978
- University of Toronto systems & developments: Hank Epstein's interest in from BALLOTS/RLG perspective (as Stanford responded to RLG's request for proposals for bibliographic system), summer-fall 1977
- Stanford - BALLOTS RLG prehistory: Provost William F. Miller's memo appointing Edward E. Shaw as Interim Director of BALLOTS, replacing a departing Hank Epstein, 12 October 1977
- Stanford's response to RLG: "Stanford University Response to The Research Libraries Group, Inc. Request for Proposals for an Automated Bibliographic Control System" (1-inch thick, velobound), 12 October 1977
- Chicago's response to RLG: "The University of Chicago Library's Proposal to The Research Libraries Group, Inc. for a Network Data Management System for Research Libraries," Volume 1 (3/4-inch thick) -- plus 6-page separate overview with diagram of the University of Chicago system, 14 October 1977
- RLG impact on Stanford/BALLOTS & University of Chicago plans: negotiations to combine efforts and systems -- incomplete record, December 1977
- Patricia M. Battin as RLG interim president: Chronological correspondence, mid-July 1982 - January 1983
- Patricia M. Battin as RLG interim president: Chronological set of a few preserved e-mails, August-December 1982
- ESTC (Eighteenth-century Short Title Catalogue): Original BALLOTS proposal (under Edward Shaw) to be "the vehicle for record conversion in machine-readable form for the American Imprints Publication Project" (includes 1977-1978 background on BALLOTS capacities and infrastructure -- not transferred to Stanford BALLOTS archive because of background this provides to subsequent history of ESTC and RLG/RLIN); 29 August 1978
- Shared Resources Program: Interlibrary loan net-lending statistics -- notes on results for program years 1982/83, 1983/84, 1984/85 (most detailed), and 1985/86, from program officer Sarah How to president William Timlake; plus ILL net-lending policy of October 1987; plus ILL statistics summary for 1987/88; plus memo on how to calculate statistics for RLG

Full Members (Sarah How to director of Programs John Haeger), 28 July 1988; plus merest note on Principal Members policy, October 1990

- Retrospective conversion in RLIN (special rate; BRCON): (1) Early policy on recon projects, 1980/81(?); (2) Approvals for non-member and member projects, late 1983 - mid-1988; (3) Aspects of "new batch recon service," BRCON, 1988
- Travel cost components and procedures: Information supplied to the RLG board before and after its meeting in fall 1985
- Annual fixed-price arrangement for services to large customers: Partial file of an early (?) case, Stanford University's fixed-price arrangement for fiscal 1989 (September 1988 - August 1989), August 1987 - February 1988
- RLIN under new rates structure (resulting from "Herbster Commission" recommendations): Post-implementation review, February 1988 - October 1989; plus adjustments mid-year to rebates and "find ID" searches
- SCIPIO database contributors and changes to RLIN rates structure: Partial file of documents and memos on how access to SCIPIO was charged for and how founding contributors were reimbursed, May 1982 (contract), mid-1988 - mid-1989
- Program fee charges/changes: Miscellaneous spreadsheets and memos for partner fee, 4 principal programs, various subject programs, 1988-1990
- Finance & Administration procedures: Notes on fiscal year-end steps, from FY1989 to FY1990
- Database service developments: Partial file on service to make "global changes" to customers' records in RLIN databases, November 1987 - March 1988
- Searching service developments: Partial file on making individual searches (as opposed to blocks of searches) available to RLIN users; includes memo announcing individuals' search access options, as part of Public Services Committee meeting agenda for 13-14 April 1989; plus "Personal Access" brochure, July 1989, and need to make changes for fiscal year 1992; early 1988 - late 1992
- RLIN user documentation: "Batch Tape Requests: Ordering Selected Records Entered by Your Institution," 2-sided explanation/order sheet, 21 March 1989
- Marketing workshop for RLG managers: Notes from an all-day course conducted by Art Parker and including RLG treasurer William Herbster, helping staff to say the "M" work and get a focus on active marketing and RLG's circumstances, 19 September 1989
- Marketing fliers: "RLIN Search Service," September 1990; "BRCON," October 1990; "Engineering Citations & Document Delivery," September 1990; "Ariel," January 1991; "Prospero" [ILL management], January 1991
- Finance & Administration: Partial file on RLG capital plan for 1990-1993, development and players involved (filed by Gail Jack and/or Barbara Lindeman?) -- includes RLG strategic projects summary of 28 March 1989; December 1988 - 10 May 1990
- Telecommunications network planning: A "New Network" in 1987 (RLG X.25 Net) -- descriptive paper by Carol Farlow Lerche; "Network Futures Task Force Initial Report," 34 pages, August 1990; sets of access diagrams, 1990-1991; "Summary of RLIN Access Mechanisms," February 1991; "Charge to Telecommunications Transition Team" -- part of RLG 92 repositioning work, March 1991; bits of team's work and "Report of the Telecommunications Transition Team," 1 May 1991
- RLG 92 transition teams reporting to Jack Grantham (director of Customer Operations and Services): Charges to Hardware Transition Team, Telecommunications Team, and Publications Transition Team, 29 March 1991
- Operations planning: "Calendar 1992 Hardware Planning," by Jack Grantham, ca. 23 pages, plus follow-up e-mail, May 1992

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- RLIN Network Invoice Detail by Month, Fiscal Year 1992: Example of the kind of counting and reporting done internally over the years; how it was done at this period
- Finance & Administration daily activities: Small file of e-mails/daily activities from Ron Dean, Accounting Manager following departure of Gail Jack and retirement of Barbara Lindeman [looks negligible/deaccessionable as is], February-August 1993?

## CARTON 33: Marketing & Sales and Corporate Communications - photos

1975-2006: Companion to Carton 7 (which contains photos of RLG presidents, an early organizational meeting, RLG's successive staff offices on the West Coast, and individual staff photos).  Carton 33 contains a melange of photos, photo proof sheets, photo print-outs, and slides of the RLG board, member institutions, various meetings, exhibitions, product developments, staff celebrations, annual membership meetings, and the like.  Such folders stand in as examples of many more such events not recorded here.  Some folders correspond to CDs of the same photos, filed in a box or half-box.

- Board of Governors photos: Not at all comprehensive – should date from 1975-1991 (before reconstituted, smaller board was chosen by election); see board meeting minutes in other cartons or actual rosters of board members; this earlier period does include some "at-large" invited governors, such as John ("Jack") Sawyer.
- Board of Directors photos: Again, not at all comprehensive – these should date from late 1991-early 1992 forward, after the "RLG92" reorganization that provided for a smaller, elected board; see also more photos on CDs [SEE Half Box 40], election materials in Carton 135, and reports on new boards in RLG News, in Carton 49.
- Member institutions – early slides: Mostly color shots provided by members for use in RLG publications; institutions shown in this folder include American Antiquarian Society, Brigham Young University, University of California at Berkeley, Colorado State University, Columbia University, Cornell University, Dartmouth College, Harvard University (only the Fine Arts library), University of Iowa, University of Michigan, New York Public Library, New York University, University of Oklahoma, University of Pennsylvania, Penn State University, Princeton University, Rutgers University, Stanford University, Tulane University, and Yale University (photos could be the "leftovers" after best photos were selected and not replaced in this file); 1977-1980, mostly.
- Meetings – training events – visits with RLG members: Random sampling, pretty elliptical; ca. 1979-2003.
- Member institutions – photos: Acquired as/after institutions joined; most originally filed in institutions' membership files at RLG headquarters; these were primarily used in the RLG News magazine, occasionally in some other publications; again, incomplete, and some not even identified.
- Random 1979-81 color slides: Early RLG logos/signs, ca. 1980; Library Operations (departmental name?) staff meeting, ca. 1980-81; an RLG all-staff meeting upstairs in Encina Commons, Stanford campus, ca. 1979-80(?); and an early members' BibTech Committee meeting, including some RLG staff – ca. 1980?
- Varied collaborative/business meetings (rather a catch-all); also some award photos (no good organizing principle here); photos (some negatives), 1980-1998.
- Exhibiting photos (color and BxW): RLG booths and conference table displays – samples from ca. 1980 to 2000 (may be more examples in Carton 202).  See also Cindi Carlson's file in Carton 7.

- RLG/RLIN terminals, workstations, developments: Scattering of photos, including RLIN searching, CJK cataloging, Eureka (from the rear?), AVIADOR, and – AMIS? (a mockup on screen? never implemented); ca. 1980-1990s.
- Technical installation kit – "RLG Pad Cabinet Assembly": Old sticky-sheet binder originally had label in front that said, "This instruction book must be returned to Wes Ramirez at [1200 Villa Street, Mountain View, CA] as soon as possible after you complete your work.  Phone 415-691-2298 if you have any questions"; photos included were taken before RLG moved off-campus to Mountain View; ca. 1987-1989?
- AMIS (Archives & Museums Information System): BxW slide presentation, with slides 4 and 9 missing (actual system never built – not funded); November 1990.
- Ariel for Windows software introduction: Photos from staff event – 13 in all, unlabeled, not very clear; 1991.
- Eureka! search software completion: 12 color snaps of staff event; 31 August 1993.
- RLG Open House: Welcome to 1200 Villa Street, variety of photos; late 1988(?) (year of the actual move).
- Senior staff management retreat at Chaminade: Gathering at retreat/event place in Santa Cruz – just nine color photos; Some materials for this event are in Carton 33; early 1990s.
- Impromptu picnics, garden parties, etc.: Single photo (!) from 1982; such events were usually organized by staff, for staff (was before the "staff recognition" era).
- Musical events: Single example of staff musical side, although there were various strings and piano impromptus – shows country & western serenade for Susan Jurist's going away party, 1989.
- Staff recognition event – start of annual all-staff picnics(?): "Staff recognition picnic," Cuesta Park, Mountain View, color photos taken by Steve Eastman (more moved into individual staff files in Carton 7); 21 July 1991.
- Computer Systems (aka Development) departmental picnics: photos of a few of these (annual? over what time span?); 1992, 1993, 8 October 1999 (Half Moon Bay)
- Staff traditions in Mountain View – Chinese New Year's lunch: One example, 16 photos; 10 February 1997.
- Staff recognition event – annual holiday party: example, held at University of Santa Clara Faculty Club (where it was conclusively demonstrated that RLG doesn't dance, not really); 12 December 1997.
- Staff traditions – softball: Sample game from a tradition dating back to at least early 1980s – one of many; 1 photo from on campus, when RLG's was the "B team" (because RLG's mainframe was the "B machine"); most photos are of 1998 game between the Villa Lobos and the Honolulu Lounge Lizards (RLG's offices then at 1200 Villa Street in Mountain View, and the staff lounge was named "Honolulu").
- Staff recognition event – anniversaries: Sample of salute to staff with 20 years of service (counting 1979 as RLG's first year of employment for former BALLOTS staff already at Stanford University); in the 1990s staff recognition began at 5 years, with some kind of award every succeeding 5th year; 1999.
- Staff showers – another tradition: Sample of baby shower, held for Samantha Santana and Layyen Grey (may have been only double shower in RLG's history?); April 2001.
- Annual staff summer picnic: Tradition begun in 1991, this one was in Rengstorff Park, Mountain View; combination BxW and color photos, 48 in all; 1 August 2002.
- Annual staff summer picnic: Again at Rengstorff Park, Mountain View; photos printed on copier paper (CD may exist somewhere); summer 2003.
- Staff training event: Sample (there were many over the years, from learning new software to practicing how to sell) – this was to learn how to use RLG's last customer/user database, the

Onyx "Customer Relationship Management System" – one of various online data storage systems that superseded paper files and made the RLG paper record increasingly spotty as time went by; August 2003.

- Annual staff holiday party: (not sure when this tradition started, but it formalized after RLG 92 reorganization?); 55 photos printed on copier paper (and the CD is in a box?) Trader Vic's, Mountain View, 12 December 2003.
- Annual staff summer picnic: Held at picnic facilities at Stierlin Court; ca. 95 photos printed out on copier paper (should be on a CD in Half Box 40; ALSO: farewell for Mei Li (see cake in photos); 22 July 2004.
- Annual staff holiday party: Belt tightening in effect – held at Stierlin Court offices; print-outs or photocopies only; 16 photos, including some white elephant gifts, something of a tradition at this event; December 2004.
- Very long-time staff tradition – lunchtime potluck: Dates to pretty early days; this example is for St. Patrick's Day, in Stierlin Court offices; 19 color print-outs of photos by Roy Harrison; March 2005.
- Staff showers: Sample of bridal shower for Alexis Mannheim; color print-outs of ca. 50 photos by Roy Harrison, at Golden Wok restaurant in Mountain View; 29 March 2005.
- Hail & farewell to software/hardware – another staff tradition: Example here is of grand transition off the RLG mainframe and old systems, an event years in the making; specifically, a farewell to RLIN (replaced by "RLIN21") – staff party with dinosaur piñata outside Stierlin Court offices; glossy-paper print-outs of ca. 52 photos by Steve Eastman, Ricky Erway, and Fran Devlin; 1 June 2005.
- Annual staff summer picnic: Held at Stierlin Court picnic facilities; print-outs of ca. 84 photos taken by Fran Devlin and Steve Eastman; 3 August 2005.
- Annual staff holiday party: Again in economical mode at Stierlin Court offices; color print-outs of ca. 30 photos taken by Fran Devlin and Lori Jones; December 2005.
- Final annual staff summer picnic: Held at Stierlin Court picnic facilities; color print-outs of ca. 69 photos taken by 6 people (names listed inside this folder); set of past commemorative T-shirts on display (it was at this event that a final T-shirt was unveiled – "The RLG Endless Bummer Memorial BBQ: Riding Off into the Sunset – the Last Wave" (see it being worn at the Goodbye to RLG two folders below); 31 May 2006.
- Last staff potluck: 15 color printouts of photos taken in Stierlin Court offices (not sure how many staff on board at this point, since layoffs had begun in wake of merger into OCLC); 28 June 2006.
- Goodbye to RLG – last event at Zott's:  Early staff tradition had been occasional excursions to Rosotti's Alpine Beer Garden west of Stanford Campus (fostered in early days of BALLOTS by IBM sales reps.); this venue chosen for a final farewell to RLG and each other; in this folder are two earlier photos (from ca. 1988) and ca. 52 color print-outs of photos taken on 30 June 2006.
- RLG annual membership meeting, 1992, Stanford University (mostly taken at Law School, where meeting was held)
- RLG annual membership meeting, 1994, Stanford University (only 2 photos?) [No photos located from membership meeting 1993]
- RLG annual membership meeting, 1995, Harvard University (mostly taken at Law School, where meeting was held); celebrated 20th anniversary of RLG incorporation; day 2 was an RLG symposium, "Scholarship in the New Information Environment"; see print materials in other cartons for both days, attendees, program agenda, etc.

- RLG annual membership meeting, 1995 – 20th anniversary slide show: both slides and narrative script for a "Quick History of RLG"; of 129 slides, 25 are missing (taken for other uses and not returned to this folder, presumably)
- RLG annual membership meeting, 1996, American Philosophical Society, Philadelphia (very little)
- RLG annual membership meeting, 1997, Newberry Library, Chicago (mix up in photos & negatives – 1 set of each is missing)
- RLG annual membership meeting, 1997 – Membership Value slides (used by Linda West in her presentation; slide nos. are misleading – they are filed in proper viewing order)
- RLG annual membership meeting, 1997 – RLG Working Group on Digital Archiving slides (used by Sherry Byrne in her presentation for working group)
- RLG annual membership meeting, 1998, British Library, London; reception held at University of London (very few photos, no negatives)
- RLG annual membership meeting, 1999, Getty Center, Los Angeles (refer also to papers in Carton 67 and Carton 204 and to "RLG News" issue 49)
- RLG annual membership meeting, 2000, NYPL, New York City (member excursions after end of meeting to New York Botanical Garden and Brooklyn Museum of Art – both members)
- RLG annual membership meeting, 2001, Ottawa, Canadian Museum of Nature (WAS to have been at the National Gallery of Canada, a member, but staff strike caused last-minute relocation); photos in no particular order, and include some from a previous day's briefing for participants in the RLG Cultural Materials Alliance?
- RLG annual membership meeting, 2002, International Institute for Social History, Amsterdam
- [RLG annual membership meeting, 2003, held at Boston Public Library, Boston; photos are in Legal Box 38, and on CD in Half Box 40.]
- RLG board of directors meeting, February 2004, Mountain View, CA (print-out of some, small images from a more comprehensive CD filed in Half Box 40; this was board's first meeting in the Stierlin Court offices to which staff had moved in October 2003)
- RLG annual membership meeting, 2004, National Gallery of Art, Washington, DC (photos by Pamela Dewey, plus some sketches by Jennifer Tobias of Museum of Modern Art, NYC – a member)
- [No physical photo materials for RLG annual membership meeting, 2005, held at Huntington Library, Pasadena, CA – unless on a CD in Half Box 40.]
- Open Content Alliance meeting, 10 February 2006: small printouts of digital photos, plus agenda labeled "kick-off meeting for [OCA] working groups"; this involved RLG, the Internet Archive, California Digital Library, and OCLC Research – might check Half Box 40 to search for actual photos on a CD
- [Nothing contributed to RLG archive for RLG annual membership meeting 2006 (the last, held at NYPL)]

## HALF BOX 34: Marketing & Sales

1997 (maybe earlier) – 2006: Magnetic media without printed accompaniment: Internal files and e-mail, including a hard drive made in June 2006, nearly 20 CDs, and one audiotape. Attempt to supplement paper records with material maintained online. Among last items prepared for contribution to archive, in June 2006. [None of this actually tested during inventory.] NOTE: In December 2013 a June 2006 draft "Digital Archives Inventory" for these media turned up and was added to Half Box 34.

- Enhanced IDE hard drive in static shielding bag, 60GB [no idea how full]: A last-minute dump of the contents of RLG's "Notes" database online filing system and of key staff mail files after pre-archival weeding by staff [yes?]; intended to help fill in the record for later years when increasing amounts of information were stored online and not in paper file folders; made in June 2006
- 4 CD-ROMS that appear to be additional (earlier?) mail files: From BTW (Bruce Washburn), EEG (Ed Glazier), RLE (Ricky Erway), MRH (Madelyn Homick), LGW (Linda West), KEW (Kathy Wheatley), an unidentified mail CD, and former employees CVL (Curtis Lavery), CGM [if Constance Malpas, was not "former"], WED (Wayne E. Davison), and RXD (Robin Dougherty?)
- 2 CDs in one case: "1/28/2003 Back-up" and "JWH (John W. Haeger) files – all"
- Batch of 11 CDs that may have come from Madelyn Homick, Jim Michalko's executive assistant, identified only as:
  - a. JPM – 10/02/00 Back-up, DECS [or DOCS?] PRE KKM
  - b. 2-CD case: JPM – 10/02/00 Back-up, EXCEL & PPT; AND JPM -- 01/97-10/00, 10/02/00 Back-up
  - c. BOD [Board of Directors] presentation [undated]
  - d. 2-CD case: JPM – RLG Innovations [undated]
  - e. 2nd in 2-CD case: STEAK [??] RLG Annual Meeting [undated]
  - f. Jim Neal [then chair of RLG board], RLG Report[undated]
  - g. [Carol] Mandel ppt., AA04
  - h. Jim's [Michalko's, presumably] PPT, AA04
  - i. RedLG [RedLightGreen] presentation [undated]
  - j. 0703 RedLG [RedLightGreen] – Mellon [Andrew W. Mellon Foundation]
- 1 CD from Pamela Dewey: MPEGS UCW/Howard Bloom, together with post-it from Pam saying "Fran – For RLG archive; unedited footage from Howard Bloom interview prepared for 2002 Annual Meeting, March 2002"
- 1 smallish audiotape: RLG ABM Process, 7.29.97

## CARTON 35: Computer Systems (aka Development)

1982-1987: RLIN strategic architecture/technology research and development, funded by Carnegie Corporation of New York and the J. Paul Getty Trust. This was as close as RLG got to a "local RLIN" until the 2000s. Produced the RLIN network server infrastructure and gives one of the clearest pictures of the advent and fate of RLG's "Aspen Project," which appears in less complete form in other cartons and was a topic in several board meetings.

- Distributed processing plans: Proposal to Carnegie Corporation of New York to study/plan distribution/replication of RLIN in environment of multiple local library system installations, October 1982
- Distributed processing study: Member survey on system requirements, part of Carnegie Corporation-funded work, March 1983
- Distributed processing study: Tabulated responses to March 1983 member survey on system requirements -- internal review copy, July 1983
- Distributed processing study: Request for data as part of Carnegie Corporation-funded work -- to inform RLG's distributed system architecture, June 1983
- Distributed processing study: SAS programming/elements of feedback compiled for final report to the Carnegie Corporation of New York, August 1983

- Distributed processing study: "Processing and Data Distribution within the Research Libraries Information Network -- Final Report to the Carnegie Corporation of New York on a Study of Distributed Processing" (bound copy), November 1983
- Distributed processing study: Elements of unabridged final report to Carnegie Corporation of New York, not included in the bound copy made for more general distribution; includes "subjective comments" on local systems in Part IV and an additional Appendix B on detailed income/expense projections in Part VI; November 1983
- Distributed processing plans: "A Proposal for the Development of an Integrated Local Library System Based on RLIN/Aspen," with David Richards' cover note, November 1983
- Distributed processing -- RLIN Network Server: Proposal to and grant from Carnegie Corporation of New York to design and implement a server, including some correspondence between RLG president Richard W. McCoy and the Carnegie Corp., August 1984 - July 1985
- Distributed processing -- RLIN Network Server: Formal progress report to Carnegie Corporation of New York, January 1986, plus financial exchanges with Barbara Lindeman (RLG Accounting) & correspondence between David Richards and Carnegie Corp., January 1985-July 1987
- Distributed processing -- RLIN Network Server: Final Report to the Carnegie Corporation of New York, with cover memo from David Richards, April 1987
- Distributed processing -- Exportable RLIN (on Aspen): Proposal to the J. Paul Getty Trust to develop a transportable version of RLIN that would provide technical processing, plus an interface for library patrons, plus communications between local library systems and "the RLIN data resource node," and could be the Getty's local system, January 1984
- Distributed processing -- Exportable RLIN (on Aspen): J. Paul Getty Trust - RLG formal agreement (contract) for RLG's development of a transportable version of RLIN using Amdahl corporation's then-in-development Aspen operating system and including an online public access catalog (OPAC) patron access interface, September-October 1984 --plus subsequent agreement modifications and final termination, December 1985 - March 1988
- Distributed processing -- Exportable RLIN (on Aspen): Correspondence about and with the J. Paul Getty Trust regarding RLIN/Aspen project, from pre-grant through progress made, and on to Amdahl's cancellation of Aspen development the RLIN/Aspen project termination, May 1984 - March 1988
- Distributed processing -- Exportable RLIN (on Aspen): Progress report to J. Paul Getty Trust on RLIN/Aspen project, covering September 1984 - May 1985; June 1985
- Distributed processing -- Exportable RLIN (on Aspen): Progress report to J. Paul Getty Trust on RLIN/Aspen project, covering June 1985 - September 1985
- Distributed processing -- Exportable RLIN (on Aspen): Progress report to J. Paul Getty Trust on RLIN/Aspen project, covering September 1985 - July 1986
- Distributed processing -- Exportable RLIN (on Aspen): Progress report to J. Paul Getty Trust on RLIN/Aspen project, covering July 1986 - June 1987
- Distributed processing -- Exportable RLIN patron access interface: J. Paul Getty Trust-funded "Patron Access Project Phase I: Report to Phase II -- Development Issues," by Walt Crawford, October 1985
- Distributed processing -- Exportable RLIN patron access interface: J. Paul Getty Trust-funded "Patron Access Project Phase I: Issues Overview," by Walt Crawford, December 1985

- Distributed processing -- Exportable RLIN patron access interface: J. Paul Getty Trust-funded "Patron Access Project Phase I: Research Issues," by Walt Crawford, December 1985

**CARTON: 36: Member Programs**

1981-1987: Some programmatic correspondence, none for more than a couple of years at a time, mostly for 1985-1986, in the areas of Shared Resources (Public Services Committee), Preservation, and Art & Architecture; also includes a file on the RLG Avery Index, East Asian Studies, Law, Medical & Health Sciences, and Music.  Ends with some early SCIPIO correspondence (with the founding committee/task force).  Not a good source for formal committee agendas & minutes, although some are included.

- Shared Resources Program/Public Services: Issues in net lending & borrowing – Ed Shaw & John Haeger's views (2-3 memos), August-September 1981
- Shared Resources Program/Public Services (& Collection Development): "Issues in ILL Borrowing and Collection Development – A Study of Borrowing Patterns in RLG," plus cover memo from Barbara Brown, Jim Coleman, & Leslie Hume, October 1984
- Shared Resources Program/Public Services: Three short documents – Board of Governors' response to recommendations for RLIN ILL improvements; a digital fax experiment at University of Vermont (not a member); and the final report of Columbia University's Data Base Policy Committee (university-wide access to electronic information) – all of interest to the Public Services Committee, March & August 1985
Shared Resources Program/Public Services: Public Services Seminar, "Library Services in the Age of Telescience," Purple Sage Ranch, Bandera, TX – INCLUDES PHOTOS -- published report from seminar is in Carton 58; PLUS Public Services Committee meeting agenda with background; 22-24 & 25 November 1985
- Shared Resources Program/Public Services: Chronological bits of correspondence for program matters, including system uses; primarily from program officer Sarah How; 3 items from 1985, most of 1986, 2 items from 1987
- Preservation Program: Chronological correspondence, mostly filed by Patti McClung; 1 item from November 1984, plus January-June 1985
- Preservation Program: Chronological correspondence, mostly filed by Patti McClung; July-December 1985
- Preservation Program: Chronological correspondence, mostly filed by Patti McClung; January-June 1986
- Preservation Program: Chronological correspondence, mostly filed by Patti McClung; July-December 1986
- Art & Architecture Program: Chronological correspondence, mostly from Susan Jurist's files (includes a few meeting agendas/minutes); 4 items from 1984, plus January 1985 – July 1986
- Avery Index to Architectural Periodicals: Mostly correspondence between/within RLG and the Avery Library, Columbia University, on the Avery Index in RLIN; late 1984 through 1985, a few bits in 1986, 1 e-mail in 1987
- East Asian Studies Program: Chronological correspondence, mostly from Karen Smith-Yoshimura's files (some from John Haeger, Patti McClung?); January 1985 – 9 January 1987

- Law Program: Comparative study of RLIN & RLG vs. OCLC by University of Texas-Austin's Tarlton Law Library, with subsequent correspondence leading to Tarlton's RLG membership; September 1984 – May 1985
- Law Program: Chronological correspondence, mostly from John Haeger (slim file -- pretty intermittent); October 1984 – July 1985
- Medical & Health Sciences Program: Chronological correspondence filed by several Programs staff; December 1984 – August 1985, 2 items from 1986, 1 item from 1987
- Music Program: Chronological correspondence (intermittent) from Program's files, 1985
- SCIPIO (stood for [Art] Sales Catalog Index Project Input Online): Intermittent correspondence among founding libraries and RLG plus early database documents [more files needed for a real history – find in other Cartons?]; January 1981 – October 1986

## CARTON 37:  President's Office (aka Administration) – supplemented by Noel E. Hanf

1974-1987: Earliest RLG Executive Committee meeting minutes through February 1979, sent to archive by Noel Hanf summer 2007 (see other Hanf cartons); miscellaneous aspects of early BALLOTS/RLIN operations, design, and organizational relations; note related to early RLG interest in a theological program; more on the RLIN systems crisis in 1981-82 (supplements and could be filed with coverage in other cartons); appointment calendars and "controlled correspondence logs" for part of president Richard W. McCoy's tenure and for president William P. Timlake until he became too ill to continue; a few files indicating some of Timlake's focus and exchanges within RLG.

- Pre-incorporation RLG founders meetings, aka "Executive Committee" and "Board of Directors" (those terms emerged in the process of meetings?), 1974.  [Meetings held monthly; first numbered one was "No. 2" in September 1974.  See also Carton 60: am unclear if Cartons 37 and 60 between them hold a complete set of "pre-incorporation" E.C. meetings.]
- Pre-incorporation Executive Committee meetings, 1975: E.C. nos. 9-18
- Executive Committee meetings and board meeting, 1976: E.C. nos. 19-26
- Executive Committee meetings and board meeting, 1977: E.C. nos. 27-36
- Executive Committee meetings and board meeting, 1978: E.C. nos. 37-50 (last meeting covered here held on 19-20 February 1979)
- Origins of long-time federal library use of BALLOTS/RLIN: Exchanges with the Federal Library Committee, based at Library of Congress, and its Federal Library and Information Network (FEDLINK), leading to initial contract for RLIN services, July 1976-August 1982
- RLIN cataloging-system-related miscellany, 1977-1982  [no clear rationale for this file -- could be broken up and refiled more sensibly across other records]
- Computerized invoicing system: First computerized invoicing, in BALLOTS' day -- memo and picture from Cheryl Hulett, March 1978; PLUS: Introduction of RLIN II invoicing -- memo and annotated invoice, from James Michalko, 26 October 1981
- RLIN statistics gathering and reporting: Some samples of early records from Lois Kershner's files, September 1978 - March 1982
- Early announcements of BALLOTS/RLIN connection services and charges: Memos culled from highly miscellaneous file of Lois Kershner's -- focus on communications and computer terminal use; June 1978 - May 1979
- International inquiries into RLIN/RLG: A few samples only, where there seem to have been later, ongoing connections; from Lois Kershner's files, 1978-1982  [Exchanges with Elhanan

Adler, Israel; John T. Ma, then in the Netherlands; Marta Chiba, Australia; Hiroshi Yasuda, Keio University, Japan; and Look Costers, the Netherlands]

- RLIN operations: Early user lists, as BALLOTS became RLG/RLIN, 1979-1980
- RLIN/RLG contract with BCR (Bibliographical Center for Research), inherited from BALLOTS negotiations, August 1977 - early October 1980
- RLG and CLASS (California Library Authority for Systems and Services): Relations/agreements/operations in period of conversion from BALLOTS to RLIN, May 1978 - February 1983
- RLIN/RLG and AMIGOS: Relations with this Southwest services network (associated with OCLC) and libraries in its territory -- early trip reports, relations with University of Texas at Austin's Librarian Harold Billings, etc., from Lois Kershner's files, January-October 1980
- Reaching users/members at conferences: Shards of Lois Kershner's miscellany - (1) List of ARL (Association of Research Libraries) attendees at RLIN meetings during ALA (American Library Association) January 1979 meeting; (2) memo to RLG members offering loan of new RLG exhibit booth for local displays, July 1980
- SCIPIO (online sales catalogs database) origins: Summary and proposal for new SPIRES-based special database, April 1979; External specification for SCIPIO, June 1981; announcement of database availability and copy of user's manual, February 1982
- Policy for special databases (aka SDBs), such as SCIPIO and Avery: Board-approved 2-page statement, February 1980
- Avery Architectural Periodicals Index offered by RLG: Announcement of availability with introduction from user's manual (Avery Supplement to the "Reference Manual to the RLIN Non-Books System"), April 1980
- RLIN Rates Schedule cover memos for fiscal year 1981: Preview from James Michalko, July 1980; actual rates cover memo, 25 August 1980 [At least partially redundant with schedule in Carton 135?]
- RLG User Publications Order/Billing Form (samples), October 1980 - January 1981
- Systems development: Moving from BALLOTS to RLIN Network System File (NSF) and Reconfigured Database (RDB) components -- how to handle searches -- Programmers' notes and design exchanges among Lou Hastings, Jessie Herr, David Richards, Celso Frazao, possibly John Habrovansky, Tony Marshall; 1979 - August 1981
- Systems development: RLIN "Lexical Scanner" -- programmers' notes and code, involving Celso Frazao, Steve Eastman, David Richards, Paula Schwartz; 2 December 1980 - 8 March 1982
- East Asian enhancements to RLIN processing: Helena Gin's file of notes regarding RLG's request for proposal for the computer terminal and responses received, 11 March - 5 May 1981
- Systems development: Acquisitions subsystem -- specifications, research, planning, with lots of gaps, 1979 - January 1981
- Systems development: Authorities subsystem -- incomplete record, January 1980 - June 1981
- A theological library network (TLN) using RLIN: Exchanges with Reverend Dr. Wiltgren, Rome, on a TLN and RLIN's role in it -- any results? (RLG did, especially with the Graduate Theological Union in Berkeley, CA, and members in New York City, consider a theological libraries program for a time); April 1981 - November 1982
- "RLG's financial condition" in 1981: Communications from Ed Shaw, principally to RLG staff, May-July 1981

- Early inter-institutional e-mail systems: RLG conversion to new CONTACT/EMS option (the Public Affairs/AAU/COFHE electronic mail network), supported by Stanford efforts (Dorothy Bender et al.); September 1981 - February 1982
- "Crisis of 1981-1982": Run-up to RLIN II implementation and systems capacity problems -- fairly detailed set of management e-mails to members/users, filed by Lois Kershner, May 1981 - April 1982
- [Some might see strong parallels with 2005 RLIN systems migration aftermath]
- "Crisis of 1981-1982": Early RLIN systems problems and improvements made
- Matrix of member communications distribution -- memo from Lois Kershner, 25 October 1981
- Not-good OCLC relations vis-à-vis RLG members: Three memos from Edward Shaw to the Board/Executive Committee on what OCLC appeared to be doing, August 1981 and January 1982
- Distributed Processing Planning Proposal to Carnegie Corporation of New York [already covered in other cartons?], 22 October 1982
- President Richard W. McCoy: Establishment of "controlled correspondence log," 1983; log kept 17 October 1983 - January 1984 and 16 January 1986 - 3 December 1986; and desk/pocket appointment calendar used 2 August 1985 - August 1986
- Linked Systems Project committee meetings & President McCoy's departure: Preparatory papers for LSP meetings (among Library of Congress, Washington Library Network, RLG, and OCLC), with note from McCoy regarding the end of his term as RLG president at end of 1986; November 1986 - 1 July 1987
- President William P. Timlake: Correspondence with various RLG board members (advice, issues, expectations from Elaine Sloan, Barbara von Wahlde, Richard Dougherty, James Wyatt, Billy Frye -- incomplete record), February-August 1987
- President William P. Timlake: Background he sought/filed on RLG work, February-October [?] 1987
  -- Staff serials routing; RLG programs diagrams; PRIMA; Conoco ILL improvement project; RLIN terminal/PC notes; hardware problems in early 1987; CMDC serials cooperative access project; authorities system issues (exchange with Paul Fasana, NYPL); special databases in the RLIN environment
- President William P. Timlake: Notes to him on various trips, projects, etc. (very slight file) from John Haeger, IFLA, and Harold Shapiro on special committee; March-August 1987
- President William P. Timlake: Same desk/pocket calendar used by Richard W. McCoy from 3 July 1986 through mid-December 1986, apparently -- used by/for Timlake from 2 February 1987 through 31 August 1987 -- with July medical bill from Stanford University Hospital; PLUS "controlled correspondence log" from February through 13 July 1987
- President William P. Timlake: "Progress Reports" to board and staff, early 1987 through 17 July 1987

**LEGAL BOX 38: Corporate Communications – photos**

1986-2003: Group photos of staff and large pages of photos from the RLG Annual Membership Meeting of 2003 (Boston, MA).

- Central staff group photo, November 1986: Poster of individual portraits of 73 staff members; no list of who might have missed getting photographed then
- Central staff group photo, 1992-3 (best guess): in front of 1200 Villa Street, Mountain View, CA headquarters (moved in around October? 1988; moved out October 2003)

- Central staff group photo (looks like quite a few missing?), 1995-6 (best guess): in front of Mayfield Publishing section of the 1200 Villa Street office complex in Mountain View, CA
- Smaller group photos of staff, at departmental or unit level, 1989?-2002
- RLG annual membership meeting, Boston Public Library, 5-6 May 2003: Photos in transparent holders, all taken by Pamela Dewey

## CARTON 39: Member Programs

1975-1991: Assorted files compiled by successive program officers and/or inherited from the Branford, Connecticut RLG offices, touching briefly on most of subject programs (early to mid-1980s), providing a little more on the Shared Resources program (July 1979 - April 1982), and predominantly dealing with the Preservation program (April 1975 - May 1991).

- Programs Department objectives, 1981-1982: Music, Preservation, Public Services, Collection Management and Development; Bibliographic Support Programs (draft); PLUS: Development Division goals for 1981-82 (1 page)
- Law Program: 1 set of meeting minutes, for 1 July 1981
- Medical & Health Sciences Program: Memos regarding the program and a medical libraries network (should fold into other M&HS Program files -- see Carton 36 & Carton 56, for example); August & November 1979; November 1982 (includes "program proposal"); January 1985
- Music Program: Meeting agendas and/or minutes, a bit of correspondence between February 1981 and February 1982; PLUS further intermittent correspondence, 1985 and November 1986
- Shared Resources Program/Public Services Committee: First appointments and meetings 1 and 2 (agendas and minutes) in RLG-based-at-Stanford, July 1979 - June 1980
- Shared Resources Program/Public Services Committee: "Abstract" and minutes of work done in first 5 meetings of the Public Services Committee in RLG-at-Stanford/Edward Shaw era; August 1979 - June 1980
- Shared Resources Program/Public Services Committee: Meeting agendas and minutes, plus other committee communications, January 1981 - April 1982; PLUS 1 committee appointment letter of January 1985
- Preservation Program: Minutes (subject to correction at next meeting) of monthly meetings 1-8 of the Preservation Committee, April-December 1975
- Preservation Program: Minutes of meetings 9-15; January-June, September, and December 1976
- Preservation Program: Minutes of meetings 16-18; January and September 1977 and September 1978  [What was reason for drop-off in number of meetings?]
- Preservation Program: Future of program -- thoughts of David C. Weber, Stanford University Librarian, and preservation proposal to The Andrew W. Mellon Foundation (for the Creation of an Automated Data Base of Preservation Microrecording), October-November 1979
- Preservation Program: "Reconstitution" of program and committee after lapse in 1978-1979; appointments; first meeting minutes (October 1980); and proposal to the National Endowment for the Humanities for development of a coordinated preservation program; January - fall 1980
- Preservation Program: Meeting minutes, program-related correspondence, guidelines and reports, progress on NEH grant; March-December 1981

- Preservation Program: Meetings, correspondence, proposals to National Endowment for the Humanities for Cooperative Preservation Microfilming Project and an RLG Union Catalog of Microform Master Negatives (plus grant press release of October 1982); February-July 1982
- Preservation Program: Press releases related to Cooperative Preservation Microfilming Project, 9 May 1983, 5 August 1983; update on participants [1983?], resulting RLG Preservation Union List, 19 July 1985
- Retrospective Conversion Projects and Carrolton Press: Plans and investigation of Carrolton Press's services (needs more context vis-à-vis programs coordination -- Bibliographic? Preservation?); July 1982 - March 1983
- Preservation Program: Preservation Committee meetings on 22 January 1982, 7 January 1983, and 29 June 1983, PLUS Steering Committee on 7 April 1983
- Preservation Program: Results (attachment to a meeting agenda of this period?) of RLG Preservation Survey distributed in September 1984
- Preservation Program: Two short memos from Richard W. McCoy, January 1985 and May 1986; Patricia McClung's file of Steering Committee and Committee agendas and minutes, June-December 1986
- Preservation Program: Patricia McClung's file of Steering Committee and Committee agendas and minutes, January-September 1987
- Preservation Program: Patricia McClung's file of meeting agendas and minutes, March-October 1988
- Preservation Program: Patricia McClung's file of meeting agendas and minutes, January-November 1989
- Preservation Program: Patricia McClung's file of meeting agendas and minutes, February-November 1990
- Preservation Program: Patricia McClung's file of meeting agendas and minutes, January-May 1991

## HALF BOX 40: Multiple departments – CDs & DVDs

Pre-1980 – 2007:  1. CDs, mostly photos, of staff, board members, visitors to RLG, annual membership meetings, CDs accompanying a computer operations binder.  2. DVDs of RedLightGreen user studies.

- Last round-up of mostly pre-1985 staff photos [conducted in 2011]: On four CD-Rs; should correspond to prints filed in Carton 7 (and a couple in Carton 33) contributed by former staff members Susan Jurist, Lynne Sinclair, Lyn McRae, and Fae Hamilton
- RLG staff members and Board of Directors shots, March 1999 – October 2002: On one CD-R; will have some correspondence with prints in Cartons 7 and 33 – maybe some pictures here that do not have a corresponding print elsewhere
- Various shots taken by Pamela Dewey ca. 2001-2006: On three CD-RWs; include head shots of RLG staff, Board members and some other visitors to headquarters; RLG's move from 1200 Villa Street to Stierlin Court address in Mountain View, 2003; and miscellaneous screen grabs of RLG online services; prints of some of these pictures can be found in Cartons 7 and 33
- Photo archive (from whom?) of wide variety of images: On one CD-RW with a list of short, cryptic file folders pasted in jewel case; appear to be from November 1999 to late 2005
- Usability Works and RLG – SEE ALSO file in Carton 203: Five DVD-Rs of December 2003 user studies for RLG's RedLightGreen undergraduate union catalog Web site

- RLG annual membership meeting 2001, Ottawa, Canada: 9 film rolls on 9 CD, returned from PhotoWorks' Pictures on Disc service; SEE ALSO photos in Carton 33
- RLG annual membership meeting 2003, Boston Public Library: Photos by Pamela Dewey; for prints and negatives, see Legal Box 38
- Board of Directors meeting in Mountain View, CA, February 2004: One CD-R; a number of shots on breaks from actual meeting; includes some staff, and also a staff meeting with David Rumsey (a visitor)
- Members' forum, July 2005 – "Libraries, Archives & Museums: Three-ring Circus, One Big Show?": One CD-R  [NOTE: Can use the Wayback Machine on the Web to find out about this forum in the December 2005 Wayback capture of www.rlg.org, under the succession of links Home: About RLG: Events: Past Events]
- RLG annual membership meeting, June 2006, NYPL, New York (last one): Four CD-Rs; most (maybe ALL?) of these pictures have no correspondence with anything in Cartons 7 and 33 -- basically unseen since they were taken?
- Staff events, 2005-2006: Seven CD-RWs; these correspond to files in Carton 33 and might include a bit more
- "RLG history photos," 1985-2006: One CD-R – put there by Pamela Dewey? (She arrived on staff in 2001); prints of some of these probably also in Cartons 7 and 33
- "Stierlin RLG/OCLC Support Binder, March 2007" [actually post-RLG, but transitional?]; contributed to archives by Judith Bush; Eight pages, mostly diagrams, plus 9 CD-Rs; includes "machine room map" (in Stanford University's Forsythe Hall??) and a November 2005 "SUN Annual Hardware Maintenance List" (from Arachne to Yuri – shows the way RLG programmers named hardware); the CDs are Solaris 8 and 9 programs?

## CARTON 41: Multiple departments

1981-1997: Five program/service guides (listed at end of this entry) in their original binders, plus about 6 inches of programs-related files. (Materials contributed to Corporate Communications for storage in RLG warehouse at time of company move to Stierlin Court, Mountain View in 2003.) Includes an RLG Directory; for other editions of this, see Cartons 88 and 191.

- Membership marketing: 1-page handout (photocopy) of "Why Join RLG" and an explanation of two types of discounted 3-year dues options for members joining in 1993/1994
- New member orientation: Materials for an afternoon session held in conjunction with other event [annual meeting? Programs symposium?] in Palo Alto, CA, 2 February 1994
- Membership perceptions and dues structure: "Report of the Task Force on Membership Principles and Dues Structure to the RLG Board of Directors" and "Response to Survey on Value of Membership from 38 RLG Members / SHARES Executive Group," both January 1997
- ACLS East Asian Library Program: "Automation, Cooperation and Scholarship: East Asian Libraries in the 1980's" -- Final Report of the Joint Advisory Committee to the [American Council of Learned Societies] East Asian Library Program, 1981
  -- See Carton 4 for extensive records of RLG's involvement in this program under John W. Haeger
- East Asian Studies Program: Slight packets of correspondence with National Library of China (PRC), February 1987 - January 1990; National Taiwan University Library, January 1989 - August 1990; and Peking University Library, 1988 - July 1991

- East Asian Studies Program: National Central Library, Taiwan - 3-way correspondence among RLG, Library of Congress, and the NCL regarding records exchange/distribution, April 1987 - February 1991
- East Asian Studies Program: Folder created by Karen Smith-Yoshimura titled "Introduction" [to the program] -- mix of brochures, descriptions, lists, charts, etc. Cover sheet and bulk of contents date from 1989 and 2-3 years before; 20 items in all
  Plus: "RLIN CJK and RLG East Asian Studies Program Selected Highlights, 1990-1991," April 1991
- East Asian Studies Program: Reference/training seminar of 6 April 1990 -- includes agenda, pre-seminar exercises, and extensive "EAPC Reference Seminar Syllabus"
- East Asian Studies Program: Chinese Rare Books Project (to create an international union catalog of Chinese rare books in RLIN) -- Press release on first phase, July 1989; CRBP proposal to National Endowment for the Humanities to cover 1 September 1991 - 31 August 1994, September 1990; first-year grant report, September? 1992; e-mailed press release on project extension (into 1995), August 1993; final grant report, August 1996
- Art & Architecture Program: Assorted guidelines, descriptions, projects, and goals for the AAP from November 1986 to March 1997
- Bibliographic Services programmatic work: Copy of 76-page, softbound Library of Congress report "Towards a New Beginning in Cooperative Cataloging," plus cover memo from Sarah Thomas; Smith-Yoshimura remained an active RLG player in this cooperative cataloging activity through 2006; published 1994
- Law Program: "International Access to Legislative Information: A Preliminary Investigation" -- Papers and Discussion Summary from a Workshop Cosponsored by Harvard Law Library, Law Library of Congress, and RLG, May 1-3, 1991, Washington, DC; edited by Win-Shin S. Chiang and Kathleen Price, 159 pages, softbound, 1992
- RLG user documentation: "Conferral Basics," tan double-folded letter-envelope-sized card for users of "the Conferral electronic bulletin board system … a tool in the RLG electronic mail system" for committee/working group communications, March 1989
- RLG user documentation: "Guide to the RLG Confer V Conferencing System," 35 pages, broadside, May 1993
- Art & Architecture Program publication: "On-Site Access Guide to Art & Architecture Collections" -- 3-ring-bound directory for reference use and reciprocal on-site access for students and faculty at art libraries in the RLG membership, first edition, 1990
- East Asian Studies Program publication: "On-Site Access Guide to East Asian Collections" -- 3-ring-bound directory for reference use and reciprocal on-site access for students and faculty at East Asian libraries in the RLG membership, third edition, 1993
- Law Program publication: "On-Site Access Guide to Law Collections" -- 3-ring-bound directory for reference use and reciprocal on-site access for students and faculty at law libraries in the RLG membership, first edition, 1995
- User training publication: "Using RLIN for Art Reference," 3-ring-bound companion to a training workshop that includes material on 5-inch floppy disks at back of binder, 1991, revised 1992
- Organizational publication: "RLG Directory," 3-ring-bound contact information for corporate officers, RLG board, member representatives, 1992-1993 advisory groups and task forces, grant project managers, selectable member activity contacts [selectable activities], and area specialists; shows how things were sorted following "RLG 92" and the retirement of standing committees; January 1993

**CARTON 42: Member Programs**

1979-1996: Primarily records from the Shared Resources Program/Public Services Committee, inherited by Dennis Massie from Carol Hughes in the late 1990s and boxed up for storage in 2003; PLUS, at back of carton, one folder of Law Program agendas and minutes from mid-June 1990 to end of January 1992.

- Shared Resources Program: Public Services Committee meetings -- Abstract a little over two pages of minutes for meetings on 17 August 1979, 16 October 1979, 18-19 January 1980, 14-15 April 1980, 30 June 1980
- Shared Resources Program: Public Services Committee meeting agenda for 30 June 1980 -- contains minutes for previous meeting of 14-15 April 1980, and some memos to committee before and after the June 1980 meeting
- Shared Resources Program: Public Services Committee meeting agenda for 16-17 October 1980 -- contains minutes for previous meeting of 30 June 1980, and some memos to committee before and after the October 1980 meeting
- Shared Resources Program: Public Services Committee and government documents access -- a few memos plus minutes and follow-up from a "Government Documents Library Discussion Group" meeting on 2 February 1981
- Shared Resources Program: Public Services Committee meeting agenda for 30 April - 1 May 1981 -- contains minutes for previous meeting of 31 January 1981 [no agenda for this found in Carton 42], and some memos to committee before April 1981 meeting
- Shared Resources Program: Public Services Committee meeting agenda for 26-27 June 1981 -- contains minutes for previous meeting of 31 April - 1 May 1981, and some memos to committee before and after the June 1981 meeting
- Shared Resources Program: File originally labeled "PSC stuff related to White Paper" -- paper itself was apparently worked on at the behest of president William Timlake; items here include the Public Services Committee meeting agenda for 6 November 1987 [does NOT include minutes from previous meeting of 23-24 April 1987, however] and other papers on PSC interests and committee brainstorming for future of the Shared Resources Program
- Shared Resources Program: Public Services Committee minutes for meeting of 13-14 April 1989 [no agenda for this meeting found in Carton 42]
- Shared Resources Program: Background provided to Marilyn Roche, incoming acting program officer for the program, on the Public Services Committee, RLIN interlibrary loan statistics, and RLG ILL net-lending among program participants
- Shared Resources Program: Marilyn Roche's file as she dug into Public Services Committee composition, issues, agendas, and goals, summer 1989 - early 1990
- Shared Resources Program: agenda and resulting discussion of RLG Reference Librarian Liaisons on 7 January 1990
- Shared Resources Program: About the program's ILL Advisory Group -- charging the group and appointing members (Marilyn Roche's task), ca. September 1989 - July 1990
- Shared Resources Program: ILL Workstation Development -- Proposal to Department of Education College Library Technology & Grants Program for a $188,513 "RLG Project to Implement an Interlibrary Loan Workstation"; contains resumes for Alan Tucker, Carol Farlow Lerche, and Michael Carroll, 13 January 1989
- Shared Resources Program: ILL Workstation Development -- Design/specification/review work, including "External Design Preliminary State Diagrams," December 1988; "Functional Specification Data Elements Draft," July 1989; Workstation Functional Specification," September 1989; for this last document, "Draft Review Comments and Replies," September

1989; and again, for same document?, "Draft Review Comments and Replies" from a further set of reviewers, January 1990 (all documents by Patricia Harris)

- Shared Resources Program: ILL Workstation Development -- Software overview from Kathy Bales e-mailed to the BibTech Program Committee, describing the PC-based ILL manager application then under development, 5 October 1990
- Shared Resources Program: Interlibrary Loan/Preservation Task Force -- task force's creation and subsequent work, under aegis of Shared Resources Program's ILL Advisory Group/Marilyn Roche, October 1989 - January 1991
- Shared Resources Program: ILL Workstation Development --"Prospero--RLG's Interlibrary Loan Manager Questions and Answers," 3-page flier done for Marilyn Roche, "Prospero Product Manager," 6 March 1991
- Shared Resources Program: RLG ILL Cost Study -- Material on a project done prior to RLG's joint work with the Association of Research Libraries, 1990-1991
- Shared Resources Program: Joint ARL-RLG ILL Cost Study -- Correspondence among the Association of Research Libraries, RLG, and the study participants; shows how project got started and gained support from the Council on Library Resources, August 1991 - April 1993
- Shared Resources Program: Joint ARL-RLG ILL Cost Study -- Project descriptions, updates, results, 1990-1993
- Shared Resources Program: Joint ARL-RLG ILL Cost Study -- "Coding Strategies" (various program print-outs; how useful?), 1992-1993
- Shared Resources Program: Joint ARL-RLG ILL Cost Study -- Supplement to data collection that was also sign off on data by study participants, October 1992
- Shared Resources Program: Joint ARL-RLG ILL Cost Study -- Scatter diagrams, graphs, charts of costs sliced in various ways; dating minimal, but some 1993
- Shared Resources Program: Lead-up to and aftermath of Public Services Committee meeting on 25-26 April 1991 -- focus on role of Shared Resources in the reorganized and refocused "RLG 92; includes letters to president James Michalko from PSC chair Phyllis Jaynes and Stanford president emeritus (and then-RLG-board-member) Richard W. Lyman; April-May 1991
- Shared Resources Program: Following retirement of Public Services and other RLG program committees as part of "RLG 92," SHARES participants held a self-convened meeting in conjunction with the American Library Association annual meeting; this is a report on the meeting of 26 June 1992
  [It may be that RLG had a special meeting with participants in fall 1992 to help decide how to proceed; records not in Carton 42]
- Shared Resources Program: "Historical Law SHARES" file passed from Win-Shin Chiang to Dennis Massie, containing miscellaneous items regarding Law members in SHARES, September 1991 - August 1992
- Shared Resources Program: Survey on members' interlibrary loan operations and assessment of RLG/SHARES services, done by Maxine Reneker (SHARES program officer following Marilyn Roche); survey conducted February/March 1993 and written up May-July 1993
- Shared Resources Program: RLIN Interlibrary Loan Technical Enhancements -- Discussions over 1993, including a January 1993 Patti McClung e-mail that clarifies what happened to earlier workstation (Prospero) and RLG's first contacts with AVISO for an ILL workstation product
- Shared Resources Program: Snippets of transition from program officer Maxine Reneker to Carol Hughes, via Win-Shin Chiang, 1993

- Shared Resources Program: Program-related e-mail correspondence (not everything?) filed by Win-Shin Chiang -- includes "RLG ShaRes" 1992-1993 Activities Report"; May 1992 - October 1993
- Shared Resources Program: Bits and pieces (i.e., samples) of Corporate Communications collaboration with Member Services department, 1994
- Shared Resources Program: ILL Workstation Development redux -- Dealing with AVISO, April 1994 - March 1996 (incomplete)

- Law Program meetings: Agendas and minutes -- plus related e-mails, reports -- filed by Win-Shin Chiang for meetings of 16 June 1990; 4 January 1991; 30 April 1991 - first with WSC as Law Program officer; 20 July 1991; 31 January 1992

**CARTON 43: Corporate Communications**

June 1985 - December 1987: Three-ring binders containing board meetings nos. 32-41 agendas and minutes, as well as Executive Committee meetings & notes, including background on meeting preparations and related memos. With meeting 32, Jennifer Hartzell had become RLG's "corporate affairs officer" in James Michalko's division and involved in preparing for meetings and keeping the corporate record. Leslie Hume continued as the board's assistant secretary through fiscal year 1987; Hartzell was elected assistant secretary at the June 1987 meeting, for fiscal year 1988 and beyond.

- Index to Minutes of RLG Board Meetings: Effort to index actions taken at each Board of Governors meeting from no. 1 (October 1979) through no. 42 (February 1988); some actions may have been missed. (There may have been further entries to index not represented in this print-out, but the effort lapsed over time)
- Board of Governors meeting no. 32, 20-21 June 1985 (Minneapolis, MN) [no Executive Committee materials included]
- Board of Governors meeting no. 33, 3 October 1985 & Executive Committee meeting of 2 October (Ithaca, NY)
- Board of Governors meeting no. 34, 27-28 February 1986 & Executive Committee meeting of 26 February (Stanford, CA)
- Board of Governors meeting no. 35, 12-13 June 1986 (Iowa City, IA) & Executive Committee meeting of 2 May 1986 (Minneapolis, MN) -- plus "Strategic Choices" mailing to board in preparation for meeting no. 35
- Board of Governors meeting no. 36, 5 September 1986 & Executive Committee meeting of 4 September (New York, NY)
- Board of Governors meeting no. 37, 6-7 November 1986 & Executive Committee meeting of 5 November (Providence, RI)
- Board of Governors meeting no. 38, 12-13 February 1987 (Stanford, CA) & Executive Committee meeting of 11-12 February (Palo Alto, CA)
- Board of Governors meeting no. 39, 8-9 June 1987 (Mackinac Island, MI) & Executive Committee meetings of 15 April (New York, NY) & 7 June (Mackinac Island, MI) -- large folder rather than 3-ring binder
- Board of Governors meeting no. 40, 8-9 October 1987 (Philadelphia, PA) & Executive Committee meetings of 24 July (New York, NY) & 7 October (Philadelphia, PA)
- Board of Governors meeting no. 41, 16 December 1987 & Executive Committee meeting of 15 December (New York, NY)

**CARTON 44: President's Office (aka Administration)**

October 1999 - February 2006: paper binders of agendas for board meetings nos. 83-102. Less complete than Corporate Communications binders for same period [see Cartons 32, 48, and 50] and no annotations or notes; may be missing some confidential notes and most handouts. [See also cartons 145 and 147 for corporate secretary/legal counsel's copies of materials for meetings 80, 82-85, 89-92, and 93-96.]

- Board of Directors meeting no. 83, 3-4 October 1999 (Washington, DC)
- Board of Directors meeting no. 84, 25 February 2000 (Mountain View, CA)
- Board of Directors meeting no. 85, 19 June 2000 (Boston, MA)
- Board of Directors meeting no. 86, 28-29 September 2000 (Washington, DC)
- Board of Directors background binder: "1998-1999 Strategic Planning Summary with Background," distributed 7 February 2001
- Board of Directors meeting no. 87, 15-16 February 2001 (Mountain View, CA) -- John Sundell's copy?
- Board of Directors meeting no. 88, 25 June 2001 (New York, NY)
- Board of Directors meeting no. 89, 7-8 October 2001 (Washington, DC)
- Board of Directors meeting no. 90, 15 February 2002 (Mountain View, CA)
- Board of Directors meeting no. 91, 28 June 2002 (New York, NY)
- Board of Directors meeting no. 92, 30 September - 1 October 2002 (Washington, DC) -- plus background/orientation materials for new directors, 17 September 2002
- Board of Directors meeting no. 93, 24 February 2003 (Mountain View, CA)
- Board of Directors meeting no. 94, 20 June 2003 (New York, NY)
- Board of Directors meeting no. 95, 29-30 September 2003 (Washington, DC)
- Board of Directors meeting no. 96, 20-21 February 2006 (Mountain View & Palo Alto, CA)
- Board of Directors meeting no. 97, 18-19 June 2004 (New York, NY)
- Board of Directors meeting no. 98, 5-6 October 2004 (Washington, DC)
- Board of Directors meeting no. 99, 25-26 February 2004 (Mountain View  & Palo Alto, CA)
- Board of Directors meeting no. 100, 17-18 June 2005 (New York, NY)
- [NOTE: For meeting no. 101, fall 2005 (Washington, DC) see Carton 50]
- Board of Directors meeting no. 102, 16-17 February 2006 (Mountain View, CA) -- appears not to include confidential materials about RLG's future acted on by the Board at this meeting
- Board of Directors telephone conference, 28 April 2006: Background for call, which focused on an RLG-OCLC Asset Purchase Agreement and issues to resolve; includes annotated memo sent 11 April 2006 regarding RLG-OCLC negotiating teams' telephone conference of 10 April 2006
- Board of Directors telephone conference, 2 June 2006: Background for and exchanges about preparations for recommendation to members that they approve the planned merger and amend the RLG certificate of incorporation and bylaws accordingly; some material here appears to indicate an 11 May call as well, or at least plans for one
- Asset Purchase Agreement and corporate amendments background to members and returned ballots approving these changes; mid-May 2006
- [NOTE: For Board of Directors final meeting no. 103, June 2006 (New York, NY) see material in Carton 136 (Chief Operating Officer's) and Carton 204.]

**CARTON 45: Member Programs**

1997-1999: Records, largely logistical, for program of workshops carried out in collaboration/contract relationship with Anne Kenney & Oya Rieger of Cornell University's Preservation Department over ca. 2 years. [For this work, SEE ALSO Cartons 58, 88, and 143.] Workbook created by Kenney & Rieger used in workshops, which they taught; background reading, sold separately, was a workbook from an earlier Kenney – Stephen Chapman workshop: "Digital Imaging for Libraries and Archives." See also workbook examples in Carton 58. Neither carton extends to logistical or registration records for final workshops in Canberra, Australia in 1999.

- Preservation & Digitization: Managing Digital Imaging Projects (MDIP): Single spreadsheet for supplies and budget across 5 planned workshops, 6 November 1997
- Preservation & Digitization: Managing Digital Imaging Projects (MDIP): Miscellaneous MDIP workshop preparations, including details of registrations, various logistics, etc. [could weed?] for first event, held at Smithsonian Institution in Washington, DC, 27-29 October 1997
- Preservation & Digitization: Managing Digital Imaging Projects (MDIP): Spate of logistics ephemera for MDIP workshop [only front bits meaningful?] held at University of Chicago, Chicago, IL, 4-6 February 1998
- Preservation & Digitization: Managing Digital Imaging Projects (MDIP): Workshop workbook copy master (one-sided) for event in Chicago, 4-6 February 1998
- Preservation & Digitization: Managing Digital Imaging Projects (MDIP): Heavily weeded [by J. Hartzell] miscellaneous logistics/billing records for two MDIP workshops held at the University of Leeds, UK, 13-15 May and 18-20 May 1998
- Preservation & Digitization: Managing Digital Imaging Projects (MDIP): Workshop workbook copy master (looseleaf with tabs) for two events in Leeds, UK, 13-15 May and 18-20 May 1998
- Preservation & Digitization: Managing Digital Imaging Projects (MDIP): Scattering of e-mails on dates for and interest in [more interest than represented here] MDIP workshop planned for Los Angeles, CA, November 1998 – fell through; pointers given to two events that would be held in Canberra, Australia, in 1999
- Preservation & Digitization: Managing Digital Imaging Projects (MDIP): Workshop evaluation forms (all "excellent" or "good") that are the only evidence in Carton 45 of an MDIP workshop held in Syracuse, NY, May 1999

## CARTON 46: Corporate Communications

June 1993 - September 1995: Assistant secretary's binders of board meetings nos. 61-69; include records of preparation, annotated agendas (with preceding meeting's minutes), supplementary/handout materials, notes taken to prepare summary minutes, and some follow-up notes. May contain background materials filed in anticipation of discussion. Plus two examples of board reference binders (this material gravitated to password-protected RLG Web site in 1997).

- Board of Directors meeting no. 61, 21 June 1993 (Mountain View, CA)
- Board of Directors 1993-1994 reference binder -- annual business calendar, contact information, basic definitions, certificate of incorporation and bylaws, members list including member representatives, finances, current technical environment and technical strategies, staff, basic descriptions, note on other information sources; July 1993
- Board of Directors meeting no. 62, 30 September - 1 October 1993 (Washington, DC)
- Board of Directors meeting no. 63, 2 February 1984 (Mountain View, CA)
- Board of Directors meeting no. 64, 11 & 18 April 1994 (comprising two telephone conferences)

- Board of Directors meeting no. 65, 6 June 1994 (London, England)
- Board of Directors meeting no. 66, 25-26 September 1994 (Washington, DC)
- Board of Directors meeting no. 67, 24 February 1995 (Mountain View, CA)
- Board of Directors meeting no. 68, 21 April 1995 (telephone conference)
- Board of Directors meeting no. 69, 7 July 1995 (Washington, DC)
- Board of Directors 1995-1996 update pages for 1994-1995 reference binder [not found in Carton 46], September 1995

## CARTON 47: Multiple departments

1982-1984: Materials related to RLG participation in MARC format and standards for processing archival collections online and the development/implementation of RLIN AMC (Archival & Manuscripts Control) processing. [See more about AMC in Cartons 52-53, 101, 106, 108-109, 117, and 204.] A Title II-C grant funded the development/implementation in RLIN as a project for RLG, Yale University, Cornell University, and Stanford University (the "pilot libraries" referred to in files here). Carton 47 contains a mix of files from Lynne Sinclair and La Vonne Gallo (who was most likely to have retained and originally archived these files in the early 1990s).

- Archives & Manuscripts computer processing: Yale University's Manuscripts & Archives System Functional Requirements, including Data Elements, Printed Outputs, and Appendices (Draft – used by RLG), 19 November 1981
- Archives & Manuscripts computer processing: Yale University's Functional Requirements for Archives & Manuscripts, 23 February 1982; SAA-NISTF (Society of American Archivists' National Information Systems Task Force) Final Report on Data Elements Used in Archives, Manuscripts, & Records Information Systems, July 1982; and Proposed Revision of the MARC Format for Manuscripts, agreed to by LC (Library of Congress), RLG, NARA (National Archives and Records Administration), ALA-RBMS (American Library Association's Rare Books & Manuscripts division), and SAA-NISTF, 15 August 1982
- Archives & Manuscripts computer processing: RLG External Specifications for RLIN Archival Processing/Online Processing and Batch Requirements, printed 17 October 1983; plus later version of Chapter 10 on RLIN Reports System Output, November 1983
- Archives & Manuscripts computer processing: Various exchanges and documents of the internal Archives and Manuscripts Working Group,* January-March 1983
  *At this time comprised Joan Aliprand, Michael Carroll, Melodye Khattak, Susan Robillard, Sarah Thomas, Alan Tucker
- Archives & Manuscripts computer processing: USMARC Archival and Manuscripts Format, with changes to be published in Update No. 10 later in 1983; with cover note from LC to RLG, January/June 1983
- Archives & Manuscripts computer processing: Coordination task lists for implementation of RLIN Archival Control, April-May 1983; plus e-mail exchanges* between April 1983 and May 1984
  *Among involved RLG staff – includes an overview of Archives & Manuscripts in RLIN and Development in Progress, July 1983
- Archives & Manuscripts computer processing: Closely related to materials in folder for April 1983 – May 1984; apparently put together originally in a separate folder called "AMC General" by Lynne Sinclair?, March 1983 – June 1984
  --Includes proposal for an RLG Manuscripts/Archives Program (March 1983) and a proposed marketing plan (August 1983); indicates involvement of Stanford's University Archivist Roxanne Nilan and associate Maggie Kimball

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- Archives & Manuscripts computer processing: Closely related to materials in folders for April 1983 – May 1984 and for March 1983 – June 1984; found in folder labeled "ARV implementation, 1983," in Lynne Sinclair's handwriting; particularly focused on setup and startup of pilot libraries: Stanford's Green Library Special Collections, University Archives, and Hoover Institution's Archives, Yale University, and Cornell University (two locations); May 1983 – January 1984
- Archives & Manuscripts computer processing: Folder originally titles "AMC Liaison '83" by La Vonne Gallo; contains a few messages from Lynne Sinclair to pilots re liaison role, 3 August – 30 September 1983
  --Gallo wrote on outside [date of "7/3[/84?]" to Jamie Ingram: "We need to combine/reinvite/update info. Here for new memo
- Archives & Manuscripts computer processing: Specifics about AMC (Archival & Manuscripts Control) format tagging; unclear if file originally Lynne Sinclair's or La Vonne Gallo's, November-December 1983
- Archives & Manuscripts computer processing: Lynne Sinclair folder, originally labeled "AMC – Standards/Tagging Questions," 15 August 1982 – 2 February 1984
- Archives & Manuscripts computer processing: File originally labeled "AMC – RRS [RLIN Reports System]" by La Vonne Gallo, apparently; 31 October 1983 – December 1984; plus small batch of e-mails that -- to Jennifer Hartzell, doing 2007 inventory -- appeared unrelated? to the RLIN Reports System, 11-19 June 1984
- Archives & Manuscripts computer processing: La Vonne Gallo working file of "AMC Training Materials, 1/84" – various pieces of input to drafts of training plans
- Archives & Manuscripts computer processing: Archived by La Vonne Gallo in folder she labeled "AMC Training Materials, JLS [Lynne Sinclair], 5/84" – comprises a printout of a Wylbur (Stanford text-editing system) library directory (wyl.bl.jls.amc) and individual training documents stored in the Wylbur AMC library, May-June 1984
- Archives & Manuscripts computer processing: Lynne Sinclair's file originally labeled "Cornell Archives, NYCV/Labor Management [Documentation Center], NYCW" – dealings specifically with AMC-in-RLIN pilot participant Cornell University (doesn't seem comprehensive), 2 June 1983 – 5 January 1984
- Archives & Manuscripts computer processing: Lynne Sinclair's file originally labeled "Hoover Archives, CSUZ" – dealings specifically with this AMC-in-RLIN pilot participant to get Hoover set up for RLIN AMC use, 2 June – 12 December 1983
- Archives & Manuscripts computer processing: Lynne Sinclair's file originally labeled "Stanford Arch[ives], CSUV/Spec[ial] Coll[ections], CSUR" – dealing specifically with AMC-in-RLIN participant Stanford University to get these two departments set up for RLIN AMC use, 21 May 1983 – 26 March 1984
  --includes correspondence with Maggie Kimball at Stanford Archives and a Stanford progress report on the "Title II-C RLIN Manuscripts Project" for July-August 1983
- Archives & Manuscripts computer processing: Labeled "Additional Workforms/Cards" by Lynne Sinclair -- contains annotated but unlabeled, undated examples of preparing/entering records for manuscript collections into RLIN from Stanford and Yale (not sure if Cornell examples included); input to training or discussions in 1983?

## CARTON 48: Corporate Communications

February 2001 – September 2003: Assistant secretary's binders of board meetings nos. 87-95; include records of preparation, annotated agendas (with preceding meeting's minutes), supplementary/handout materials, notes taken to prepare summary minutes, and some follow-up notes. May contain background materials filed in anticipation of discussion.

- Board of Directors meeting no. 87 (no longer in binder), 15-16 February 2001 (Mountain View, CA)
- Board of Directors meeting no. 88, 25 June 2001 (New York, NY)
- Board of Directors meeting no. 89, 7-8 October 2001 (Washington, DC)
- Board of Directors meeting no. 90, 15 February 2002 (Mountain View, CA)
- Board of Directors meeting no. 91, 28 June 2002 (New York, NY)
- Board of Directors meeting no. 92, 30 September – 1 October 2002 (Washington, DC)
- Board of Directors meeting no. 93, 24 February 2003 (Mountain View, CA)
- Board of Directors meeting no. 94, 20 June 2003 (New York, NY)
- Board of Directors meeting no. 95, 29-30 September 2003 (Washington, DC)

**CARTON 49: Marketing & Sales (Corporate Communications**

October 1975 – March 2006: Various RLG newsletters & serial updates, complete publishing runs – BALLOTS Newsletter, RLIN Newsletter, Operations Update, RLIN Focus, RLG Focus, Research Libraries Group Newsletter, Research Libraries Group News, Colloquium, RLG Update, RLGMEM-L postings.

- "BALLOTS Newsletter": vol. 1:no. 1 October 1975; 2:1 March 1976; 2:2 June 1976; 2:3 November 1976; 3:1 February 1977; 3:2 April 1977; 3:3 June 1977; 3:4 August 1977; 3:5 October 1977; 4:1 January 1978; 4:2 May 1978; 4:3 (special ALA edition) June 1978; 4:4 October 1978
- "RLIN Newsletter": Successor to BALLOTS Newsletter -- vol. 1:no. 1 November 1978; 2:1 January 1979; 2:2 March 1979; 2:3 May 1979; 2:4 July 1979; 2:5 September 1979; 2:6 November 1979; --plus article rating both BALLOTS & RLIN newsletters as excellent, "real jewels," in a review of various newsletters published by library networks & utilities
- "Operations Update": Could be considered a successor to RLIN Newsletter -- Issue 1, March 1981 through Combined Issue 63/64, September/October 1992. Schedule varied from monthly to bimonthly to pretty irregular; also, published focus of OpUp expanded over years to include both RLIN and member programs news and uses.
- "RLIN Focus": Successor to Operations Update – Issue 1, April 1993 through Issue 34, October 1998; strict publishing schedule of bimonthly, February, April, June, August, October, December
- "RLG Focus": Continuation of RLIN Focus with name change, reflecting wider-than-RLIN scope of RLG services – Issue 35, December 1988 through Issue 53, December 2001; with Issue 54, RLG Focus became on online, Web-published newsletter, continuing on bimonthly schedule; final publication was Issue 80, June 2006
- "The Research Libraries Group Newsletter": published out of Branford, CT offices, Number 1, September 1977, and Number 2, February 1978 – at this point, various changes led to RLG headquarters, under new president, at Stanford, CA.
- "The Research Libraries Group News": Issue 1, July 1980; 2, September 1980; 3/4, March-June 1981; 5, September 1984 (followed hiatus while RLG did without a writer and news magazine); 6, January 1985; 7/8, May-September 1985; 9, January 1986; 10, May 1986; 11, September 1986; 12, January 1987; 13, May 1987; 14, September 1987; 15, January 1988; 16, May 1988; 17, fall 1988; 18, winter 1989; 19, spring 1989; 20, fall 1989; 21, winter 1990; 22, spring 1990; 23, fall 1990; 24, winter 1991; 25, spring 1991; 26, fall 1991; 27, winter 1992; 28, spring 1992; 29, fall 1992; 30, winter 1993; 31, spring 1993; 32, fall 1993; 33, winter 1994; 34, spring 1994; 35, fall 1994; 36, winter 1995; 37, spring 1995; 38, fall 1995;

39, winter 1996; 40, spring 1996; 41, fall 1996; 42, winter 1997; 43, spring 1997; 44, fall 1997; 45, winter 1998; 46, spring 1998; 47, fall 1998; 48, winter 1999; 49, fall 1999; 50, winter 2000; 51, summer 2000; 52, spring 2001; 53, fall 2001; 54, spring 2002; 55, fall 2002; 56, spring 2003; 57, fall 2003; 58/59, fall 2004, 60, summer 2005; 51, fall 2005; 62, winter 2005; 63, spring 2006 (last issue)

- "Colloquium: News of the RLG Membership": Newsletter published by RLG Member Support & Services under Patti McClung, then the department's director, to focus on "collaborative work in progress"; complete run comprises vol. 1:no. 1, January 1993; 1:2, March 1993; 1:3, May 1993; 1:4, July 1993; 1:5/6, September/November 1993

- "RLG Update": Periodic presidential e-mail updates to the RLG membership (Board of Governors, and after "RLG92" reorganization, to the RLG member representatives). [Carton 24 contains mailings from July 1979 to March 1982 (during Edward Shaw presidency). Carton 49 includes an August-September 1985 e-mail exchange leading to revival of "RLG Update."]
  - From president Richard W. McCoy, updates on 16 September 1985; 24 October 1985; 3 February 1986; a print memo on RLG technical strategy, 24 February 1986; 28 March 1986; 17 July 1986.
  - From president William P. Timlake, after a hiatus [if bulletins sent out by James Michalko/John Haeger in the interval, not captured here], updates on 25 March 1987; 28 April 1987; 2 July 1987; 17 July 1987.
  - From board chair Carlton C. Rochell and [acting president?] James Michalko, updates on 18 March 1988 (plus a 24 March e-mail to internal staff from J. Michalko); 5 May 1988.
  - From acting president James Michalko, an update on 9 September 1988 and an 11 April 1989 announcement of end of RLG Music Program and Medical & Health Sciences Program.
  - From president James Michalko, updates on 26 March 1990; 2 May 1990; 19 June 1990; 26 July 1990; 23 August 1990; 8 October 1990; 28 November 1990; 27 December 1990; 4 February 1991; 29 April 1991; 6 August 1991; 17 October 1991; 2 January 1992; 9 March 1992; 18 May 1992; 26 August 1992; 25 September 1992; 10 November 1992; 22 December 1992; 5 March 1993; 16 April 1993; 15 September 1993 (update for the summer); 3 November 1993; 22 December 1993 (short note about NSF digital libraries granting program); 21 June 1994
  - [Any other such updates e-mailed were not captured in Corporate Communications records. The need/desire for such communications resurfaced late in the 1990s with "RLG Executive Briefing," later "TopShelf," archived in RLG's corporate Web site.]

- "RLGMEM-L": Printouts of a range of postings to RLG's first member listserv, used under Linda West, director of Member Services (later Member Programs & Initiatives, ultimately "Member Programs"); captured are messages from 29 September 1995 to 5 March 1999. Following this, RLG converted to a Lyris list called "RLG-Announce" for postings to members [an archive might be found on the hard drive in Half Box 34].

## CARTON 50: Corporate Communications

February 2004 – February 2006: Assistant secretary's binders of board meetings nos. 96-102; include records of preparation, annotated agendas (with preceding meeting's minutes), supplementary/handout materials, notes taken to prepare summary minutes, and some follow-up notes. May contain background materials filed in anticipation of discussion. Plus: file of several types of board background, including bylaws.

- Board of Directors meeting no. 96, 20-21 February 2004 (Mountain View & Palo Alto, CA)

- Board of Directors meeting no. 97, 18-19 June 2004 (New York, NY)
- Board of Directors meeting no. 98, 5-6 October 2004 (Washington, DC)
- Board of Directors meeting no. 99, 25-26 February 2005 (Mountain View, CA)
- [Board also held an abbreviated, confidential meeting 17 April 2005, in Pasadena, CA, prior to annual membership meeting. This was not numbered or included in June meeting minutes, but handwritten notes and discussion background are filed in the binder for meeting 100, June 2005]
- Board of Directors meeting no. 100, 17-18 June 2005 (New York, NY)
- Board of Directors meeting no. 101, 2-3 October 2005 (Washington, DC)
- Board of Directors meeting no. 102, 16-17 February 2006 (Mountain View, CA)
- [NOTE: For final board meeting no. 103, 15 June 2006 (New York, NY) see Cartons 136 and 204.]
- RLG Bylaws and Other Board Background:
    - RLG Financial Background, distributed to new RLG Board of Directors, FY03-FY04
    - 1998-1999 Strategic Planning Summary with Background (planning for 2000-2003)
    - RLG Bylaws, approved by the member Representatives on 17 March 2005, plus corresponding Certificate of Incorporation
    - "Old" Board Index – "Chronological Index to Motions & Resolutions (approved or rejected) of the RLG Board of Governors in '1$^{st}$' through 43$^{rd}$ Meetings (Oct. 1979 – Nov. 1988) – actually goes up through meeting no. 48, Oct. 1989, but has been found to have some omissions
    - Slides used for orientation of new board members, 2001-2002, 1999-2000
    - Repetition, essentially, of 1998-1999 Strategic Planning background, looseleaf
    - Background on RLG Cultural Materials Alliance and Initiative, 2000-2002

## CARTON 51: President's Office (aka Administration)

Late 1980 – April 1982: Entire carton contains background on and examples of the RLG document control system in its inception and over the first year and a half. Possible source to flesh out other sets of documents from this period; does not succeed as anything like a complete record of "controlled" documents.  [NOTE: Carton 62 provides examples of original control system used prior to the move of RLG administration from Branford to Stanford.]

- Original packing list for Carton 51 (folders were relabeled and reordered in 2007 as part of accession inventory)
- Document control efforts: Memos and lists from Computer Development department, late 1980
- Document control efforts: Memos and printouts from 1975 (Branford Office) and 1980-1981 (Stanford office) on RLG systems for document control
- Document control system: Code 81-1, 26 August 1981, RLG Document Control System (proposed); submitted by Lois Kershner
- Document control system: Code 81-2, 1 September 1981, Agenda for RLG-Stanford meeting on capital contributions and budget; submitted by John Heyeck
- Document control system: Code 81-3, 1 September 1981, RLG August 1981 monthly reports on capital contributions & budget; submitted by John Heyeck
- Document control system: Codes 81-4, 5, 6, 7, 8, 9, 10, 11, & 12, each worksheet cover dated 24 August 1981 -- set of standing and individual program committee charges; submitted by Lois Kershner; PLUS un-document-controlled (no worksheet cover) charge for Medical & Health Sciences Program Committee

- Document control system: Code 81-13, 31 August 1981, Unrestricted budget summary by operating divisions, fiscal year 1981-1982; submitted by John Heyeck
- Document control system: Code 81-14, 8 September 1981, Agenda for Art & Architecture Program Committee meeting of 28 September 1981; submitted by Barbara Brown? (author: Christine Huemer)
- Document control system: Code 81-15, 11 September 1981, Distribution policy for "RLG Collection Development Manual," 2nd edition (including first update to 2nd edition); submitted by Jamie Ingram
- Document control system: Code 81-16, 9 September 1981, Agenda for Collection Management and Development Committee meetings of 28-30 September 1981; submitted by Nancy Gwinn
- Document control system: Code 81-17, Agenda for Committee on Library Technical Systems & Bibliographic Control (BIBTECH) meeting of 30 September 1981; submitted by Tina Kass
- Document control system: Code 81-18, June 1981, "RLG Bibliographic Standards (DRAFT)"; submitted by Ed Glazier
- Document control system: Code 81-19, 11 September 1981, "RLG Bibliographic Standards Draft with Comments of BIBTECH"; submitted by Ed Glazier
- Document control system: Code 81-20, 14 September 1981, 1981-1982 divisional budgets [for General Administration, Program Coordination, Library Systems/Library Operations, Fiscal & Network, and Computer Systems & Services]; submitted by John Heyeck
- Document control system: Code 81-21, September 1981, "RLG Message System Training Folder"; submitted by Jennifer Hartzell
- Document control system: Code 81-22, September 1981, RLG design requirements for preservation support enhancements: microforms; submitted by Nancy Gwinn?
- Document control system: Code 81-23, September 1981, "Operations Update," Issue 6; submitted by Deborah Jakubs
- Document control system: Code 81-24, 31 August 1981, RLG monthly report to Ford Foundation and Carnegie Corporation on revenue, expense, performance, & activity; submitted by John Heyeck
- Document control system: Code 81-25, 25 September 1981, Preservation Committee meeting agenda for October 1981; submitted by Nancy Gwinn
- Document control system: Code 81-26, 25 September 1981, Public Services Committee meeting agenda for 15-16 October 1981; submitted by Barbara Brown
- Document control system: Code 81-27, 30 September 1981, "Planning for a Cooperative Preservation Program in RLG (NEH Grant #RV-20008-81-1285): Interim Report for 1 March – 30 September 1981"; submitted by Nancy Gwinn
- Document control system: Code 81-28, 28 September 1981, "Standards for Use of Existing Copy in the RLIN Data Base"; submitted by Ed Glazier
- Document control system: Code 81-29, 7 October 1981, Financial report on fiscal 1980-1981; submitted by John Haeger
- Document control system: Code 81-30, October 1981, RLG Collection Analysis Project: English Literature – Final Report, WORKSHEET COVER ONLY; submitted by Deborah Jakubs
- Document control system: Code 81-31, 20 October 1981, "Data Elements for the Description of Manuscript and Archival Materials, DRAFT"; submitted by Alan Tucker
- Document control system: Code 81-32, 26 October 1981, "RLG Update," Issue #8; submitted by Lois Kershner

- Document control system: Code 81-33, 30 October 1981, "Interim Guidelines on the Input of Microfilm Records"; submitted by Susan Robillard (other authors: Nancy Gwinn, Alan Tucker)
- Document control system: Code 81-34, 28 October 1981, Minutes of Art & Architecture Program Committee Meeting of 28 September 1981; submitted by Barbara Brown (author: Christine Huemer)
- Document control system: Code 81-35, 30 October 1981, RLG Document Control System, revised; submitted by Lois Kershner
- Document control system: Code 81-36, 29 October 1981, Agenda for Special Committee meeting of 4 November 1981; submitted by/for Edward E. Shaw
- Document control system: Code 81-37, 28 October 1981, "Searching in RLIN II: User's Manual," 1st edition, WORKSHEET COVER ONLY; submitted by Jennifer Hartzell (author: Jim Bourne)
- Document control system: Code 81-38, 29 October 1981, External Specifications for East Asian Character Support Enhancements, Part A (draft); submitted by Alan Tucker
- Document control system: Code 81-39, 13 November 1981, "Tagging Training Folder" 1st edition; submitted by Sarah Thomas
- Document control system: Code 81-40, 13 November 1981, "Cataloging Training Folder," 1st edition; submitted by Elsa Henderson
- Document control system: Code 81-41, 13 November 1981, "Acquisitions Training Folder," 1st edition (replacing "preliminary edition"), WORKSHEET COVER ONLY; submitted by Jennifer Hartzell
- Document control system: Code 81-42, 13 November 1981, "Searching Training Folder," 1st edition (replacing "preliminary edition"), submitted by (Melodye Khattak? Elsa Henderson?)
- Document control system: Code 81-43, 10 November 1981, "RLG Microfilm Master Negatives"; submitted by Nancy Gwinn?
- Document control system: Code 81-44, 19 October 1981, "SPIRES Database Services Programmer's Manual," "first nondraft edition" [written for RLG/RLIN programmers' use]; submitted by David R. Richards
- Document control system: Code 81-45, 29 October 1981, "Acquisitions Field Guide," 1st edition; submitted by Jennifer Hartzell
- Document control system: Code 81-46, 9 November 1981, "Holdings Field Guide," 1st edition; submitted by Jennifer Hartzell
- Document control system: Code 81-49, 20 November 1981, October 1981 RLG monthly report to Ford Foundation and Carnegie Corporation on revenue, expense, performance, & activity; submitted by James Michalko
- Document control system: Code 81-50, 4 November 1981, Minutes of fifth meeting of Special Committee; submitted by Leslie Hume
- Document control system: Code 81-52, December 1981, "Operations Update," Issue 7, WORKSHEET COVER ONLY; submitted by Deborah Jakubs
- Document control system: Code 81-53, 4 December 1981, "Interim Guidelines on the Input of Microform Records" (revised version of document 81-33); submitted by Susan Robillard (other authors: Nancy Gwinn, Alan Tucker)
- Document control system: Code 81-54, 13 November 1981, Revised summary of restricted grant activity for fiscal years 1980 and 1981; submitted by John Heyeck
- Document control system: Code 81-55, 7 December 1981, Quarterly Performance Report on NEH grant RC-1799-81 for an RLG Task Force to Plan the Automated Cataloging of Archival and Manuscripts Materials; submitted by Leslie Hume

- Document control system: Code 81-56, December 1981, "RLG Bibliographic Standards, DRAFT," revision of document 81-18; submitted by Ed Glazier
- Document control system: Code 81-57, 21 December 1981, "RLG Authorities Subsystem General Procedures," DRAFT, revised; submitted by Ed Glazier
- Document control system: Code 81-58, 22 December 1981, Agenda for Committee on Library Technical Systems & Bibliographic Control (BIBTECH) meeting of 21 January 1982, WORKSHEET COVER ONLY; submitted by Tina Kass
- Document control system: Code 81-59, 29 December 1981, November 1981 monthly [financial] reports; submitted by John Heyeck
- Document control system: Code 82-1, 15 January 1982, "RLG Update," Issue #10; submitted by Lois Kershner
- Document control system: Code 82-2, 9 December 1981, Board of Governors Executive Committee Minutes; submitted by Lois Kershner
- Document control system: Code 82-3, 10-11 December 1981, Board of Governors 15th Meeting Minutes, WORKSHEET COVER ONLY; submitted by Lois Kershner
- Document control system: Code 82-4, 11 January 1982, Collection Management and Development Committee meeting agenda for 21 January 1982; submitted by Nancy Gwinn
- Document control system: Code 82-5, 8 January 1982, Public Services Committee meeting agenda for 22 January 1982; submitted by Barbara Brown
- Document control system: Code 82-6, 8 January 1982, Preservation Committee meeting agenda for 22 January 1982; submitted by Nancy Gwinn
- Document control system: Code 82-7, 8 January 1982, Music Program Committee meeting agenda for 1 February 1982; submitted by Nancy Gwinn
- Document control system: Code 82-8, 22 January 1982, "Operations Update," Issue 8, WORKSHEET COVER ONLY; submitted by Deborah Jakubs
- Document control system: Code 82-9, 21 January 1982, "Fiscal Processing in RLIN II: An Overview," version of January 1982; submitted by Joan Aliprand
- Document control system: Code 82-10, 5 February 1982, Art & Architecture Program Committee meeting agenda for 19 February 1982; submitted by Barbara Brown (author: Christine Huemer)
- Document control system: Code 82-11, 5 February 1982, "SCIPIO, An Art Sales Catalog Database" [user documentation], WORKSHEET COVER ONLY; submitted by Elsa Henderson (author: Becky Morton)
- Document control system: Code 82-12, 11 February 1982, Special Committee meeting agenda for 16 February 1981; submitted by? (authors: Edward E. Shaw & Leslie Hume)
- Document control system: Code 82-13, 10 February 1982, Budget forecast materials for special meeting of Board of Governors' Finance & Administration Committee on 17 February 1982; submitted by John Heyeck
- Document control system: Code 82-14, 18 December 1981, November 1981 RLG monthly report to Ford Foundation and Carnegie Corporation on revenue, expense, performance, & activity; submitted by James Michalko
- Document control system: Code 82-15, 19 January 1982, December 1981 RLG monthly report to Ford Foundation and Carnegie Corporation on revenue, expense, performance, & activity; submitted by James Michalko
- Document control system: Code 82-16, 17 February 1982, January 1982 RLG monthly report to Ford Foundation and Carnegie Corporation on revenue, expense, performance, & activity; submitted by James Michalko

- Document control system: Code 82-17, 16 February 1982, Semi-Annual Performance Report on NEH Grant RC-1605-81 to Include East Asian Records in RLIN; submitted by Leslie Hume
- Document control system: Code 82-18, 22 February 1982, "Interim Guidelines on the Input of Microform Records," revised version of document 81-53; submitted by Susan Robillard (other authors: Nancy Gwinn, Alan Tucker)
- Document control system: Code 82-19, 1 February 1982, Summary minutes of 1 February 1982 meetings of Music Program Committee and Subcommittee on Music Cataloging; submitted by Nancy Gwinn
- Document control system: Code 82-20, 1 March 1982, "RLIN II Tables Coordinator's Handbook," WORKSHEET COVER ONLY; submitted by Elsa Henderson/Jennifer Hartzell (author: Shannon Moffat)
- Document control system: Code 82-21, 22 January 1982, Minutes for 22 January 1982 meeting of Public Services Committee; submitted by [Barbara Brown?] (author: Merrily Taylor)
- Document control system: Code 82-22, 30 September 1981, Summary minutes of 30 September 1981 meeting of Collection Management and Development Committee; submitted by Nancy Gwinn
- Document control system: Code 82-23, 21 January 1982, Minutes of 21 January 1982 meeting of Collection Management and Development Committee; submitted by Nancy Gwinn
- Document control system: Code 82-24, 22 January 1982, Summary minutes of 22 January 1982 meeting of Preservation Committee; submitted by Nancy Gwinn
- Document control system: Code 82-25, 19 March 1982, "Operations Update," Issue 9; submitted by Deborah Jakubs
- Document control system: Code 82-26, 8 January 1982, Minutes of 8 January 1982 meeting of Law Program Committee; submitted by [Leslie Hume?] (author: Charlie Harvey)
- Document control system: Code 82-27, 23 March 1982, Minutes of Board of Governors 16th meeting on 18-19 February 1982, WORKSHEET COVER ONLY; submitted by Lois Kershner
- Document control system: Code 82-28, 16 March 1982, February 1982 RLG monthly report to Ford Foundation and Carnegie Corporation on revenue, expense, performance, & activity; submitted by James Michalko
- Document control system: Code 82-29, 16 February 1982, Minutes of Executive Committee meeting on 16 February 1982, WORKSHEET COVER ONLY; submitted by Lois Kershner
- Document control system: Code 82-30, March 1982, "RLG Terminal Manual," 2nd edition, WORKSHEET COVER ONLY; submitted by Jennifer Hartzell (author: Jim Bourne)
- Document control system: Code 82-31, 22 March 1982, "RLG Update," Issue #11; submitted by Lois Kershner
- Document control system: Code 82-32, 16 February 1982, Minutes of Special Committee meeting of 16 February 1982; submitted by Leslie Hume
- Document control system: Code 82-33, 24 March 1982, External Design Specifications for RLIN East Asian Enhancements (DRAFT); submitted by Alan Tucker
- Document control system: Code 82-34, 23 March 1982, Six-month financial report for period ending 28 February 1982; submitted by John Heyeck
- Document control system: Code 82-35, 26 March 1982, "Publications of The Research Libraries Group, Inc.," WORKSHEET COVER ONLY; submitted by Elsa Henderson

- Document control system: Code 82-36, 30 March 1982, Agenda for Committee on Library Technical Systems & Bibliographic Control (BIBTECH) meeting of 29-30 April 1982, WORKSHEET COVER ONLY; submitted by Tina Kass
- Document control system: Code 82-37, 1 April 1982, RLIN Reports System Overview (including pricing) and Questionnaire on anticipated use; submitted by Tina Kass
- Document control system: Code 82-38, 31 March 1982, "RLG Authorities Subsystem: General Procedures (DRAFT); submitted by Ed Glazier [for RLIN General Authorities File – GAF)
- Document control system: Code 82-39, 5 April 1982, RLIN Reports System Questionnaire Examples (simulated listings and how to estimate costs); submitted by Tina Kass?
- Document control system: WORKSHEET COVERS ONLY FOR Code 82-40, March 1982, "RLG Handbook: An Overview of Corporate Activities," by Lois Kersher; code 82-41, March 1982, "Update No. 2, RLG Collection Development Manual, by Deborah Jakubs; code 82-42, April 1982, "ESTC, An Eighteenth-century Short Title Catalog," by Becky Morton; code 82-43, 9 April 1982, "Cataloging in RLIN II: User's Manual," by Melodye Khattak [last 2 submitted by Elsa Henderson & Jennifer Hartzell]
- Document control system: Code 82-44, 20 March 1982, Minutes of Board of Governors' 17th meeting, 20 March 1982; submitted by Lois Kershner
- Document control system: Code 82-45, 20 April 1982, Proposal to NEH (National Endowment for the Humanities) for "An RLG Automated Union Catalog of Microform Master Negatives," for period 1 September 1982 – 31 August 1984; submitted by Nancy Gwinn (other author: Leslie Hume)
- Document control system: Code 82-46, 19 February 1982, Minutes of the 19 February 1982 meting of Art & Architecture Program Committee; submitted by Barbara Brown (author: Christine Huemer)
- Document control system: Code 82-47, April 1982, "Operations Update," Issue 10; submitted by Deborah Jakubs
- Document control system: Code 82-48, May 1982, "RLG Shared Resources Manual," 1st edition (DRAFT); submitted by Jennifer Hartzell (authors included Lynn McRae and Ann Kelcy)
- Document control system: Code 82-49, 30 April 1982, "Acquisitions in RLIN II: User's Manual," 1st edition; submitted by Elsa Henderson (author: Sandra Martensen, contractor [heavily influenced by Joan Aliprand])

**CARTON 52: Multiple departments**

1979-2003: Nearly all examples of user documentation, plus a little marketing material on Diogenes (later Marcadia), all pretty much filed in chronological order; some facets of the RLG-CARL joint "DCRC" service effort; two files on Ariel [SEE ALSO Carton 23 for cross-references to other Ariel materials]. Files in this carton gathered together primarily at time of RLG move from Villa Street to Stierlin Court (October 2003).  [NOTE: The "DCRC" effort produced a mass of archival materials; see also Cartons 128, 134, 1 file in 169, 170, 1 file in 178, 184-186, and 192.]

- User documentation: "RLG Terminal Manual: Zentec 9003 and Zentec ZMS-90 Video Terminals," 48 pp. with photographic illustrations, written by Wayne Davison & Jennifer Hartzell, August 1979
- User documentation: Various cataloging standards/guidelines (in various editions) – "RLG Bibliographic Standards," 18 December 1981; "Approved Retrospective Conversion Projects: Procedural Guidelines for Cataloging," September 1982; "RLG Base-Level

Standards for Books," July 1983; "RLG Base-Level Cataloging Standard for Music," November 1984; "RLG Standards for Use of the AMC [Archival & Manuscripts Control] Format," December 1985; "RLG Bibliographic Standards for Subject Access to Visual Materials Including Form, Genre, and Physical Characteristics," December 1989; Memo regarding use of Steven Hensen's descriptive cataloging guide for archival materials, dated February 1990; "Bibliographic Description of Visual Materials and Subject Access for AV Materials," January 1991; "Standards for SCIPIO Records," April 1999

- User/Marketing documentation: Set of single-sheet overviews or "fact sheets" – "The On-line Avery Index to Architectural Periodicals" (undated); "The RLG Conspectus On-line," January 1984; "ESTC, An Eighteenth-century Short Title Catalog," January 1984; and SCIPIO, The Art Sales Catalog Data Base," January 1984
- User documentation: Variety of fields memory aids ("Recordings" or "Sound Recordings" is missing) – Holdings Fields, November 1982; Archival Control Segment, February 1989; Archival and Manuscripts Control, August 1991; Maps, August 1991; Machine-Readable Data Files, August 1991; Scores, August 1991; Serials, August 1991; Visual Materials, August 1991; Authorities for Art & Architecture Thesaurus, August 1992; Variable Fields in Integrated Bibliographic Format, January 1995
- User documentation: "RLIN Record Segments and the Input Screen," 10 pp., December 1982; "The RLIN ILL (Interlibrary Loan) Subsystem," 12 pp., December 1982
- User documentation: "RLIN Terminal Manual: Zentec 9003, RLG90, RLG40, RLG 84, and IBM PC," 100 pp., written and illustrated by Jim Bourne of RLG with input from Jonathan Lavigne and from Stephanie Williams (Stanford Word Graphics department), February 1984, revised March 1985
- User documentation: "RLIN Archival Control Manual," 87 pp., May 1984
- User documentation: "RLIN Reports System Output for AMC Records," 37 pp., February 1986
- User documentation: "Interlibrary Loan in RLIN II: User's Manual," 139 pp., plus "ILL Field Guide," ca. 46 pp., July 1987
- User documentation: Tabletop tent card for "RLIN PC Terminal Keys and Roman-script Alternate Character Sets," including insertable panels for Cyrillic and Hebrew characters, December 1987; plus set of Hebrew keycap labels, ca. 1987; plus set of transparent, stick-on alternate-character keycap labels, ca. 1990
- User documentation: "Guide to Using CJK Scripts on the PC," 113 pp., written under contract by Susan L. McBain, August 1988, revised July 1991
- User documentation: "SCIPIO, An Art Sales Catalog Data Base," user's manual, 88 pp., March 1989
- User documentation: "RLIN PC Terminal Manual," 91 pp., written by Jonathan Lavigne, September 1989, revised May 1994
- Marketing documentation: "'Documents That Move and Speak' – A Selective Bibliography from the RLIN Database," 19 pp., created by/for Alan Tucker "to illustrate the theme of an International Council on Archives Symposium on the New Media – 'Managing Moving Images and Recorded Sound Archives' (Ottawa, April 30 – May 3 1990)," April 1990
- Marketing documentation: "Government Records in the RLIN Database: An Introduction and Guide," 17 pp., produced by/for Alan Tucker, "to introduce the reader to a new resource," June 1990
- User documentation: "RLIN Searching Guide," flipchart devised for and with users [who even got to specify the un-RLG color], October 1990

- User documentation: "Addition of Citations File to RLIN," memo-form documentation, 7 September 1990; plus "RLIN Citations File (CIT) – CIT/Ei Searching Basics," tall foldover reference card, December 1990
- User documentation: "RLIN Searching Manual," ca. ¾ inches thick (not continuously page-numbered), January 1991 (revision of "Searching in RLIN II" 2$^{nd}$ edition, first published in 1984)
- User documentation: "RLIN System Reference Manual," 20 sections plus index, ca. 3 inches thick, plus binder cover & spine inserts, April 1991
- User documentation: "Guide to Using Non-Roman Scripts [other than CJK] on the PC," ca. 46 pp., written by Melodye Khattak, August 1991
- User documentation: "Non-Roman Supplement to Cataloging in RLIN II," 65 pp., August 1991
- User training documentation: "Using RLIN for Art Reference," 97 pp. plus set of tip sheets, in original 3-ring binder with floppy disk, 1991
- Marketing documentation: "About RLIN" brochure, 4 pp., covering bibliographic and related databases, various services, RLIN e-mail, what is RLG, etc., April 1992
- User service & surveys: "RLIN Service Level Statement," January 1990; "RLIN User Satisfaction Survey," 1990; "RLIN User Satisfaction Survey," 1991; "Compiled Results from 'Institutional Perspectives on RLIN' Survey," October 1993 – plus background and analysis from Liz Chapman
- User documentation: "SCIPIO Cataloging Manual," not continuously page-numbered (short document), written by Ann Leslie Jones, Art Institute of Chicago, January 1993
- User documentation: "Preservation Memory Aid," 4 pp., April 1993; Six figures illustrating bibliographic records for microfilmed materials, 4 pp., ca. 1991?
- User documentation: "RLIN Cataloging Guide," spiral-bound, broadside booklet, 33 pp., August 1993
- Used in RLG/RLIN instruction? (source/function not known at time this inventory was made): "Discovering RLIN: Taking A Closer Look," 277 pp. of record examples from RLG databases organized by topics, annotated "WSC's [Win-Shin Chiang's] personal copy", produced in early 1990s??
  -- Topics: Eleanor Roosevelt; Frank Lloyd Wright; Environmental Law; Enrico Fermi; Dante; Leonard Bernstein
  -- Databases: Research-in-Progress; Archival & Manuscripts Control; Books; Visual Materials; Sound Recordings; Serials; Avery Index to Architectural Periodicals; SCPIO Art and Rare Books Sales Catalogs; Art & Architecture Thesaurus?; Subject Authorities File; Computer Files; Name Authorities File; Eighteenth-century Short Title Catalogue; Scores
- User documentation: Set of letter-envelope-sized foldovers -- "Searching Basics" for: "RLIN," April 1990; "Avery," January 1988; "Conspectus," October 1992; "ESTC," March 1990; "RIPD," December 1989; "SCIPIO," December 1990; also a foldover for "Dial Access to RLIN," June 1992. Plus: set of half-page cards or foldovers, mostly undated (latter 1990s?) on database connection routes – "Direct Dial Access," "Internet Access," etc. Plus: "RLIN Searching Basics" card from 1996
- User documentation: CitaDel Files (aka citation resources databases) – Glossy small binder with "Searching Basics" foldover card and fact sheets for each database: World Law Part 1 (Hispanic Legislation), Foreign Legal Periodicals, Avery Index to Architectural Periodicals, History of Technology, Periodical Abstracts, ABI/INFORM, Dissertation Abstracts, Ei Page One, Newspaper Abstracts, Public Affairs Information Service (PAIS), and Hispanic-American Periodicals Index, produced between February 1992 and March 1993

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- User documentation: Short pieces on RLG terminals – "Logging On and Terminal Use: An RLG/RLIN Pocket Guide," 19 pp., July 1986; "RLIN Terminal for Windows: User's Guide," 48-page booklet, July 1995; fliers announcing versions of RLIN Terminal for Windows PC software, February 1995, December 1995, June 1996
- User documentation: "Eureka! An Overview," spiral-bound 11-page booklet, January 1994; plus "Eureka! Quick Reference Guide," wallet card, 1994
  [Publications writers felt no real need for printed documentation to explain Eureka, given online layout and help features, so Overview is pretty spare; wallet/pocket card was done by Administrative Assistant Matthew Blevins at request of sales & marketing manager, Kris Tague]
- Published article: "Resources for Research and Learning: The Databases of the Research Libraries Group," by Linda P. Lerman and Joan M. Aliprand, pp. 25-38 in "Publishing Research Quarterly," Fall 1995
- User documentation: "Diogenes Start-up Packet" and "Using Diogenes," a mixture that includes marketing materials prepared by RLG and partner Retro Link Associates [Diogenes later renamed Marcadia], 1995-1996
- Marketing/Sales materials: Diogenes Sales Kit and related background prepared by RLG and Retro Link Associates for sales staff use; includes two presentation diskettes, 1995-1996
- User documentation: "The RLIN MARC Record: Description and Interpretation," 84 pp. covering "the data elements contained in RLIN MARC records distributed by RLG," April 1996
- User documentation: "RLIN Indexes and Fields Indexed," 24 pp., self-bound, April 1996 [replaced Chapter 11 of the 1991 "RLIN System Reference Manual," reflecting changes made for MARC format integration]
- Dialog@CARL + RLIN & CitaDel: Jennifer Hartzell's file of historical bits of RLG effort to create and market this joint service with the CARL Corporation, 1996-1998.
- Ariel document transmission system: Jennifer Hartzell's file of bits of Ariel history, from 1984 Fairchild Telefacsimile Cost Study, to Marilyn Roche's 1989 Document Transmission Workstation proposal, to 1990 press release, to 1993 Ariel business plan and PICA memo of understanding, to 2000 effort to share packaging design with Maruzen company in Japan; 1984-2000.
- Ariel document transmission system: Pieces of packaging, marketing brochures, evolving design for product marketing, 1993/94 – 2002
- Ariel document transmission system: Jennifer Hartzell's actions file related to Ariel's sale to Infotrieve (messages sent out to customers and others, handling of corporate Web pages on Ariel), 2002-2003

## CARTON 53: Member Programs – half full

1984-1992: Archives, Manuscripts, & Special Collections Program materials captured for archiving by La Vonne Gallo, from the RLIN AMC "Seven States Project" to a plan for "Research Resources in American Literature" (RRAL).

- Archives, Manuscripts, & Special Collections Program: RLIN AMC "Seven States Project" [followed by the "Government Records Project" (GRP)] – preparations for, including National Archives & Records (NARA) interest in, outlines of project and proposal to the National Historical Publications and Records Commission (NHPRC), correspondence with potential

participants; fell under program officer Barbara Brown's management; contents of this file [all?] from files of Alan Tucker; July 1984 – February 1985

- Archives, Manuscripts, & Special Collections Program: RLIN AMC "Seven States Project" – "Building the Foundations of National Information Systems for Archives and Manuscript Repositories: The RLIN Seven States Project," paper by David Bearman – one of several(?) presented at NAGARA (National Association of Government Archives & Records Administrators) annual conference, 24 July 1987
- Archives, Manuscripts, & Special Collections Program: RLIN AMC Government Records Project – preparations for, proposal to National Historical Publications and Records Commission (NHPRC), planning meetings and minutes, working groups involved; from Alan Tucker's files, 1988
- Archives, Manuscripts, & Special Collections Program: RLIN AMC Government Records Project – "Compendium of Practice, RLG Seven States Project," with Alan Tucker cover memo to 1989 Government Records Project participants, 24 May 1989
- Archives, Manuscripts, & Special Collections Program: RLIN AMC Government Records Project – Launch of project, La Vonne Gallo handing logistics, Steve Hensen as project coordinator, committee and working group exchanges and minutes; 1st third of 1989 – hiatus in records – then a bit on descriptive guidelines work in last third of 1990
- Archives, Manuscripts, & Special Collections Program: NARA (National Archives & Records Administration) – its Intergovernmental Records Project (IRP), its participation in the 1989-1990 RLG Government Records Project, uses of RLIN AMC for IRP work, and NARA membership in RLG – in a short paper "Sharing Information on Intergovernmental Records," by Marie B. Allen; plus the long "IRP Phase 1 Report"; June/December 1990
- Archives, Manuscripts, & Special Collections Program: RLIN AMC Government Records Project – Participant testing of RLIN as a reference tool: guidelines and results from project participants, 1989-1990
- Archives, Manuscripts, & Special Collections Program: RLIN AMC Government Records Project – Final report on Government Records Project, 1 March 1989 – 28 February 1991, submitted December 1991 [appendices in separate folders]
- Archives, Manuscripts, & Special Collections Program: RLIN AMC Government Records Project – "Report on Descriptive Practices for Government Records," Appendix 1 to the GRP final report [December 1991]
- Archives, Manuscripts, & Special Collections Program: RLIN AMC Government Records Project – "Appraisal Practices," Appendix 2 to the GRP final report [December 1991] – CAUTION: loose-leaf, unnumbered pages
- Archives, Manuscripts, & Special Collections Program: RLIN AMC Government Records Project – "Reference Survey," Appendix 3; "Government Records in the RLIN Database: An Introduction and Guide," Appendix 4; and cover sheet only for "The GRP Standard," Appendix 5 to the GRP final report [December 1991]
  --Copies of "The GRP Standard" project newsletter can be found in Carton 19
- Archives, Manuscripts, & Special Collections Program: RLIN AMC Government Records Project – Unformatted, undated, 1-sided printout of RLG GRP "Report on Descriptive Practices for Government Records" – printed by RLG writer Jonathan Lavigne in August 1994 – same as 1991 version, or modified??
- Archives, Manuscripts, & Special Collections Program: Draft proposal for "Research Resources in American Literature" (RRAL), to replace the Modern Language Association's "American Literary Manuscripts" (ALM), 2nd edition of 1977; plus stray notes of La Vonne Gallo, same period?, May 1992

- User/training documentation: "Using RLIN for Archival Reference" – workshop guide with practice scenarios, including material on large floppy disks, developed by La Vonne Gallo, 1st edition, 1991

## CARTON 54: Member Programs

1986-2001: Preservation Program materials gathered by Robin Dale from files kept by Patti McClung and Nancy Elkington; begins with preservation microfilming -- and various published articles & brochures plus several program manuals/guides; several files on RLG program operation signed up for by OCLC, 1989-1991; some of the interactions with the Commission on Preservation and Access (CPA), especially regarding microform masters and microfilm inspection, 1988-1994; ends with 6 files winnowed out and saved from Carton 29, which had been predominantly background on early digital imaging/digital preservation technology pioneers filed by Ricky Erway -- background for an article (was it written?).

- Preservation Program: "Costs Associated with Preservation Microfilming: Results of the Research Libraries Group Study," by Patricia A. McClung, offprint from "Library Resources & Technical Services" [LRTS], pp. 363-374, October/December 1986
- Preservation Program: "The RLG Preservation Program and RLIN System Report," presented by Patricia A. McClung and John W. Haeger at the IFLA (International Federation of Library Associations) General Conference, Brighton, England, 1987
- Preservation Program: Program brochures (pre- and post-"RLG 92") dated April 1990 and July 1993
- Preservation Program: "Consortial Action: RLG's Preservation Program," by Patricia A. McClung, to appear in "Advances in Preservation and Access," vol. 1, pp. 61-70, Westport, CT: Meckler, 1992
- Preservation Program: "Cooperation in Preservation Microfilming: A Consortial Perspective," comments delivered by Nancy E. Elkington, NAGARA (National Association of Government Archives & Records Administrators) Annual Conference, Washington, DC, 16 July 1992
- Preservation Program (and more): "The Research Libraries Group: Making a Difference," by James Michalko, John W. Haeger, et al.; surveys RLG programs and services, with sidebar 10 devoted to "[RLG:] A Pioneer in Collaborative Preservation," by Nancy Elkington and Patti McClung -- in "Library Hi Tech," Issue 46 - 12:2 (1994)
- Preservation Program: "RLG Preservation Manual," in 3-ring binder; 2nd edition, April 1986
- Preservation Program: Results -- "Great Collections Microfilming Project I: Reel Guide" to Cornell University's John M Echols Collection on Southeast Asia, part of the Great Collections Microfilming Project Phase I (GCMP I), bound volume, covering 1988-1991
- Preservation Program: GCMP II (Great Collections Microfilming Project Phase II) -- just a fax of "NEH grants for projects in preservation" that includes a short note on GCMP II, August 1989
- Preservation Program: "APMP Orientation Notebook," compiled by RLG "in support of the Archives Preservation Microfilming Project" -- removed from original cardboard binder; seems drafty, as if Nancy Elkington's working copy; presumably a predecessor to the 1994 "RLG Archives Microfilming Manual"; April-June 1990
- Preservation Program: RLG-OCLC Preservation records data exchange (plus a couple of 1989 memos regarding British Library & Bibliothèque national de France records and RLG), 1989-1991
- Preservation Program: Start and end of OCLC share in & support of RLG's preservation program, June 1989 - December 1991

- Preservation Program: Product flier for "RLIN Preservation Master File, a cumulative record of microform masters for preservation and reference searching on CD-ROM," RLG and Chadwyck-Healey, with projected CD release date of September 1991
- Preservation Program: "RLG Preservation Needs Assessment Package," in 3-ring binder & including small diskette in front pocket for PreNAPP statistical analysis program for PCs [see also Box 25 for software version 1, September 1991]; January 1993
- Preservation Program: "RLG Great Collections Microfilming Project, Phase IV Orientation Notebook," in 3-ring binder, with preliminary sheet outlining agenda for a project management orientation on 16 March -- March 1993
- Preservation Program: Early RLG involvement with CPA (Commission on Preservation and Access -- then headed by Patricia M. Battin), particularly regarding an international scale of bibliographic data for microform records, 1988-1993
- Preservation Program: RLG involvement with CPA (Commission on Preservation and Access) -- background to RLG and its Iron Mountain storage of microform print masters, 1989-1998
- Preservation Program: RLG involvement with CPA (Commission on Preservation and Access) regarding minimum data element requirements and UNIMARC data elements for bibliographic data for international microform masters, June 1990 - February 1992
- Preservation Program: RLG involvement with CPA (Commission on Preservation and Access) regarding microfilm inspection and RLG guidelines, January 1992 - May 1994
- Preservation Program: "Final Report of the Archives Preservation Needs Assessment Field Test" of an instrument produced by CPA (Commission on Preservation and Access) -- test conducted by RLG members in 1993, report issued by RLG's Laurie Abbott in January 1994
- Preservation Program - RLG Symposium: Registration packet plus pre- & post-symposium memos from Nancy Elkington, for "Digital Imaging Technology for Preservation," held at Cornell University, Ithaca, NY, 17-18 March 1994
- Preservation Program: Recognition from SAA (Society of American Archivists): Preservation publication award to RLG and CPA (Commission on Preservation and Access) for their jointly sponsored landmark report, "Preserving Digital Information"; 9 September 1997
- Preservation Program: Productions records from RLG graphics expert/production coordinator Monique Funnié for "Moving Theory into Practice: Digital Imaging for Libraries and Archives," written by Cornell University's Anne Kenney and Oya Rieger, published and sold by RLG; includes Web promotional pages; RLG-Cornell agreement; book design bids and choice of David Peattie, BookMatters; decision to have cover designed by tompertdesign; book printing bids and choice of Sheridan Press; sales and royalty calculations (not entire record), February 1999 - August 2001

Following files culled from Carton 29, packed by Ricky Erway:
- RLG Symposium Proceedings: "Electronic Access to Information: A New Service Paradigm" -- focus on "knowledge services in the digitized world"; 23-24 July 1993, published January 1994
- RLG, Cornell University, & digital preservation/imaging: Cornell Library's own initiatives, referring to RLG for advice, 1991-1993
- RLG, Cornell University, & digital-to-microform conversion: Cornell Library proposal for its own project, including RLG's Nancy Elkington as a technical advisor; project proposed for 1994-1996
- RLG & the "Making of America" digital imaging project: Intermittent set of correspondence and draft proposals, with Cornell as a leading player and RLG intending to be a key agent,

with indirect evidence of RLG being displaced by the new Digital Library Federation (created in May 1995); April 1993 - March 1998

- RLG & digital imaging projects: (Mixed file of shards -- various documents that invoke/involve RLG in some degree) -- "Sample Records from Project AVIADOR" for ALCTS ALA preconference on "Electronic Technologies: New Options for Preservation," June 1993; notes on RLG - Stokes Imaging Project, June 1993; Ricky Erway's "road trip" notes on projects at Cornell and University of Michigan, May 1995
- Preservation Program - RLG Symposium - Proceedings: "Digital Imaging Technology for Preservation: Proceedings from an RLG Symposium Held March 17 and 18, 1994, Cornell University, Ithaca, New York"  [see also registration packet and Elkington memos in earlier file in Carton 54]
- RLG mentioned in ACLS & Getty publications: (culled from material with no mention of RLG) "Research Agenda for Networked Cultural Heritage," product of the Getty Art History Information Program, 1996; and "Information Technology in Humanities Scholarship: Achievements, Prospects, and Challenges - the United States Focus," American Council on Learned Societies Occasional Paper No. 37, 1997

## OVERSIZE FOLDER 55: Marketing & Sales

1997, 2000: RLG design pieces – corporate logo and RLG Cultural Materials artwork.

- Large laminated (or printed on similar surface?) white poster of RLG red logo and full name in special typography, designed in 1997 by John Stoneham; something wrong with production, as type looks pixilated, not smooth, at edges
- Large coreboard poster with metal hanger on back; four-color enlargement of images from RLG Corporate Materials as arranged on black background to create the small "RCM cube" – which could be folded and refolded to show different images; made as early marketing handout – 2000?

## CARTON 56: President's Office (aka Administration)

1977-1983: Facets of early RLG formation and positioning, development priorities and program coordination, various procedures adopted. Set of early papers delivered by RLG leaders, plus various articles. Early file or two on the RLG-WLN-LC Linked Authorities System Project.  A one-sided Edward E. Shaw chronological file, 1980-1982.  Remaining one-fifth of carton is a weeded selection of materials from Carton 59, which contained extensive early materials on OCLC. Focus of items retained is early RLG-OCLC relationships as RLG selected BALLOTS/RLIN system and began operating it. (Almost no early OCLC brochures, price lists, and newsletters kept.)

- RLG libraries and the Ford Foundation: Meeting and support statements from university presidents, 16 April 1979 (file covers ca. August 1978 - June 1979)
- "Quotable quotes" regarding RLG [periodically over the years staff would try to round these up, usually for a membership drive, press release, news article, etc.] -- few, 1980
- Membership expansion: Various memos and steps from August 1978 to 1981 (file is increasingly intermittent) -- includes correspondence and resolution to offer Associate membership and some memos on Special membership (Law and Art, December-March 1981 -- what a Special Member gets)
- Resolution regarding relationships with libraries, networks, and bibliographic utilities: related to early dealings with Washington Library Network (WLN) and OCLC; some additional context included -- passed by RLG board 24 September 1979

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- RLG's own "corporate library": Notes on "RLIN in-house library," November 1978 - April 1979  [Staff efforts to create and maintain a central reference point for books, reports, and serials was always fairly ad hoc.]
- RLIN operations: incomplete sets of Minutes of Operations Meetings, December 1978 - October 1979, and monthly "Network Operations Reports," May-November 1981
- Library Operations Division: Memos and mailings (to RLG Coordinators, RLIN Liaisons, other designated customer groups), December 1980
- RLIN development: Plan of 4 January 1979, plus various updates and tracking schemes; includes reports of Development Group meetings and one confidential memo from John Haeger to Edward E. Shaw, July 1979 - June 1980
- RLG and Stanford's Sponsored Projects Office: One memo from John C. Heyeck to Edward E. Shaw, on RLG's legally separate grant proposals being handled outside SPO, 10 March 1980  [All BALLOTS proposals had gone through SPO]
- Distributed processing: "DRAFT: A Proposal to Develop an Integrated Distributed Processing System," November 1980
- Special Committee: Report from committee of presidents/provosts and table of member capital contributions to RLG, 20 March 1981  [Report overlaps with material filed in other cartons -- not sure about the table]
- External system plans/development relating to RLIN: Scraps from Edward E. Shaw's files, 1981
- RLIN and National Library of Medicine: Material on the possibility -- not fulfilled -- of RLIN software development for NLM's use (as "MEDLARS III"), summer 1981
- Programs coordination: Early/incomplete, pretty one-sided chronological file of John W. Haeger's correspondence as Program Coordination department director, fall 1979 (scant) - April 1982
- Law Program: Memo to Law Program Committee from J. Myron (Mike) Jacobstein, 7 November 1980; minutes from LPC meeting in Washington DC on 1 July 1981
- Program committee charges: "Master set" of charges compiled in August 1981
  -- Comprises General Charges for Standing Committees and Subject Program Committees, plus charges specifically to BibTech (Library Technology & Bibliographic Control), Preservation, East Asian, Music, CMDC (Collection Management & Development Committee), Art & Architecture, and Public Services (Shared Resources Program) -- none included for Law
- RLG committee appointments and roles: Examples (not exhaustive) of appointments to and confirmations of RLG committee rosters, and of roles taken by member staff, 1979-1982
- Staff seating plan in RLG trailers: Diagram and memo from John C. Heyeck, effective 31 October 1981  [Not a long-term arrangement; further moves continued among offices and trailers.]
- Online calendar for RLG meetings & major activities: Memo from James Lender on new Wylbur data set created to provide this information [one of several efforts over years to gather and centralize such information], 3 March 1981
- RLG document control system: Revived effort (the Branford CT office had one) to provide numbered control of all RLG documents issued, 1981  [NOTE: This was problematic; not followed by all departments and discontinued some years later.  See Cartons 51 and 62 for example of both Branford and Stanford efforts at controlled documents.]
- RLG Membership/Organizational Directory: Copy master, January 1983
- Presentation by Patricia M. Battin: "The Library in the Network Environment: The Case for Cooperation," delivered at Louisiana State University, undated (1979/1980?)

- Lecture by Richard De Gennaro: "Research Libraries Enter the Information Age," the 1979 Richard Rogers Bowker Memorial Lecture, published in "Library Journal," 15 November 1979
- Two papers delivered by Edward E. Shaw: "Why a Research Libraries Network," excerpt from presentation given on 24 October 1979 to the Canadian Association of Research Libraries -- excerpt is dated 11 January 1980; plus "The Research Library Within the Research University," given at Association of Southeast Research Libraries on 3 April 1989
- Papers from NEH & RLG-sponsored symposium: "Deaccession in Research Libraries," held at Brown University, including presentations by David H. Stam, New York Public Library; Oscar Handlin, Harvard University; and Marcus McCorison, American Antiquarian Society (plus others); event held 11-12 June 1981
- Various RLG/RLIN articles, reports, brochures: File contains "RLIN Overview," published in "Online Review" by Jan Thomson & Jennifer Hartzell, 1979; "RLIN: The Computerized Bibliographic Network Supporting the Cooperative Programs of RLG," published in "Bulletin of the American Society of Information Science" (BASIS) by Lois Kershner, June 1979; an undated RLIN brochure; "RLG Progress Report," June 1979; "RLIN as a Public Services Tool at Stanford," 1981; "Bibliographic Searching Service" flier, June 1982; "The RLIN ILL [Interlibrary Loan] Subsystem" flier, 28 June 1982; and "Research Libraries -- Automation and Cooperation," published in IBM's "Perspectives in Computing" by David McDonald and Robert Hurwitz, Stanford University Libraries, 1982 (1983?)
- RLG - WLN - LC (pre-)Linked Authorities Project: Discussion of RLG - Washington Library Network proposal to CLR (the Council on Library Resources), with copies of addendum to bring the Library of Congress in on Authorities linking -- full proposal included is "Towards the Formation of a Nationwide Bibliographic Data Base: Forging the Research Libraries Group and Washington Library Network Link," August-September 1979
- WLN - RLG - LC Linked Authority Systems Project: CLR (Council on Library Resources) program officer C. Lee Jones' notes on project (problems with the proposal), 3 January 1980; cover note to first project progress report (but no report), 19 June 1980; four LASP documents -- "Organization and Communication Coordination Plan," "MARC Authority Record Review," "General Description of the Project: Authorities," and "Telecommunications Plan" -- July 1980; plus further correspondence, mostly with CLR, September 1980 - April 1982
- WLN - RLG - LC Linked Systems Project (LSP): "Proposal to the Council on Library Resources for an Authorities Implementation and Bibliographic Analysis," 58 pages, 15 March 1982.  [See Cartons 175 and 176 for more on LSP.]
- RLG-CLR correspondence: Stray bits of communications on topics other than the Linked Systems Project, 1981
- Edward Shaw chronological file: Appears to be a slice of chron filing that touches on all sorts of activities or opportunities, from operations to development to membership to marketing, 13 November 1980 - 27 May 1982
- Carton 56 original packing list: Included when original carton warehoused
- RLG (BALLOTS) & OCLC: Arthur D. Little Report on Future Forms of OCLC Governance, BALLOTS director Hank Epstein's views of report vis-à-vis BALLOTS' future, & receipt of both by Edward E. Shaw as part of BALLOTS Advisory Board, 1977
- RLG (BALLOTS) & OCLC: Just a few items from BALLOTS files of myriad annotated OCLC news sources plus samples of some Hank Epstein - Fred Kilgour correspondence -- evidencing that at this point Edward E. Shaw was in the loop, 1977-1978
- RLG & OCLC: Monitoring OCLC's position vis-à-vis RLIN and RLG -- articles, bootleg OCLC Users Council Minutes, private memoranda, etc., 1979-1980

- RLG & OCLC: OCLC's relations with RLG members, service access, tape loading records, etc. -- mostly correspondence among RLG and OCLC senior staff and RLG library directors, 1981-1982

## CARTON 57: Corporate Communications

October 1995 - February 1998: Assistant secretary's binders of board meetings nos. 70-77; include records of preparation, annotated agendas (with preceding meeting's minutes), supplementary/handout materials, notes taken to prepare summary minutes, and some follow-up notes. May contain background materials filed in anticipation of discussion. Plus one example of board reference binder (this material gravitated to a password-protected RLG Web site in 1997).

- Board of Directors meeting no. 70, 6-7 October 1995 (Washington, DC)
- Board of Directors meeting no. 71, 23 February 1996 (Mountain View, CA)
- Board of Directors meeting no. 72, 21 June 1996 (New York, NY)
- Board of Directors 1996-1997 reference binder -- annual business calendar, contact information, basic definitions, certificate of incorporation and bylaws, members list including member representatives, finances, current technical environment and technical strategies, staff, basic descriptions, note on other information sources; September 1996
- Board of Directors meeting no. 73, 67- October 1996 (Washington, DC)
- Board of Directors meeting no. 74, 28 February 1997 (Mountain View, CA)
- Board of Directors meeting no. 75, 20 June 1997 (New York, NY)
- Board of Directors meeting no. 76, 3-4 October 1997 (Washington, DC)
- Board of Directors meeting no. 77, 23 February 1998 (Mountain View, CA)

## CARTON 58: Member Programs & Product Management

1985-1998: Contributed by Ricky Erway and Jennifer Hartzell from handed-down materials on not-easily-summarized range of projects geared to member collaboration. (Briefly: Library Services conference report, MRDF project final report, AVIADOR, Digital planning & workshops -- especially for preservation (MDIP & DIAP).

- "Library Services in the Age of Telescience: Report of a Conference Sponsored by The Research Libraries Group, Inc." (softbound), Purple Sage Ranch, Bandera, TX, 22-24 November 1985
  --See also Carton 36 for some additional material, including photos taken during sessions
- "Managing A New Library Resource: Results of the RLG Machine-Readable Data File Project in Six Member Libraries": RLG final report on MRDF project, funded by a grant from The Pew Charitable Trusts, involving Dartmouth College, University of Florida, Northwestern University, Cornell University, University of Pennsylvania, and New York University; softbound, 615 pages (known in its day as the "peach doorstop," report contains both project narratives and myriad appendices to them from each participant), May 1989
- AVIADOR (Avery Video Disc Index of Architectural Drawings on RLIN): Brochure and order form, 1991/1993. [NOTE: At back of Carton 58 are 3 actual AVIADOR videodiscs in original packaging.]
- Interdepartmental "Digital Retreat" (to plan RLG's digital agenda and priorities), January 1995
- "Going Digital: Strategies for Access, Preservation, and Conversion of Collections to a Digital Format," hardbound Haworth Press publication of papers selected from the already

published proceedings of five RLG symposia held between 1993 and 1995; issued by Haworth in 1998
- Preservation & digitization: Managing Digital Imaging Projects (MDIP): 2-sided, unbound (with tabs), workbook for first in series of MDIP workshops, 27-29 October 1997, Smithsonian Institution, Washington, DC – see also Carton 45; plus internal cover note with a little background from Linda West, 19 November 1997
- Preservation & digitization: Managing Digital Imaging Projects (MDIP): 2-sided, unbound (with tabs), workbook plus attendee list for second in series of MDIP workshops, University of Chicago, Chicago, IL, 4-6 February 1998 – see also Carton 45
- DIAP (Digital Image Access Project): Correspondence and user documentation, PLUS software for Stokes Imaging Services' Visual Photologue Image Management System and digitized images from DIAP participants, in folder and in small box at back of Carton 58, 1993-1995.  [NOTE: Software is on minitape cartridge, 3.5-inch diskettes, and CDs.]

## FLAT BOX 59: Marketing & Sales & Corporate Communications

1979/80, 1992, 1997: four flat folders of artwork for RLG's first logo and later, various, marketing publications.

Folder 1:
- Finished artwork for four-color cover of RLG databases prospectus titled "Discovering RLIN," mounted on Strathmore (?) poster board; 1992.
Folder 2:
- Presentation for client of RLG logo created by Steven Jacobs, Inc., Palo Alto; handout white-on-white stock, mounted on stiff backing; original glue used to create raised logo has discolored; 1979 or 1980
- Small, 2-color poster incorporating 1997 RLG logo on top of a collage of RLG product logos, non-Roman scripts, images of RLG activities and contents cataloged in databases – mounted on poster board; designed by Hilary Hannon, made for a mailing to member institutions after new logo was created by John Stoneham
Folder 3: Samples of uses of "Eureka girl" artwork designed in late 1990s – 2000
- 2 small easel posters that include product/service logos and key marketing phrases
- Laminated small-easel poster of ad placed in "The Librarian's Yellow Pages" (same design as previous posters, with "As seen in" LYP squib at top
- Another easel poster that is a variation on the same artwork and marketing slogans, with "Now Introducing … AMICO Art Museum Image Library and Archival Resources – Bringing the world's archives to the user's desktop"; 1998, at least
Folder 4:
- RLG Cultural Materials promotional item – mounted, metal-hook-backed, 4-color artwork created to fold into small pyramid that could sit on a counter, desk, etc.; 2001?
- Foam-core boards mounted with 4-color art for 3 successive invitations to an introduction of RLG Cultural Materials (held during an ALA conference in June 2000); actual invitations were presented to recipients online

## CARTON 60: President's Office (aka Administration)

February 1974 - December 1981: Among earliest RLG board and executive committee meeting minutes -- see also Carton 37 -- plus first through fifth meetings of the Special Committee of presidents and provosts.

- Board of Directors' 1974 pre-incorporation meetings: included are minutes for 6 February, 28 March, 22 May, 28 June, and 24 July 1974; agenda plus minutes for 20 August 1974; minutes for 4 September and 10 October 1974; agenda plus minutes for 7 November 1974; and two agendas without minutes for 12 December 1974
- Executive Committee 1974 meetings: Agendas and minutes for meetings -- no. 7 and no. 8? -- on 12 and 18 December 1974.  [NOTE: See also Carton 37, which might (?) have more 1974 E.C. meeting records (1-6?).]
- Executive Committee 1975 meetings: Agendas and minutes for meeting no. 9, on 17 January; 10, on 24 February; 11, on 10 April; 12, on 27 May; 13, on 17 June; 14, on 22 July; 15, on 8 September (2 copies); 16 (at Seven Springs Farm, followed by meeting with "select advisors"), on 8 October; 17, on 3 November; and 18, on 9 December 1975
- [NOTE: For 1975 Board of Directors' pre-incorporation meetings, see Carton 37.]
- Executive Committee 1976 meetings: Agendas and minutes for meeting no. 19, on 9 January; 20, on 12 February; 21, on 13 April; 22, on 21 May; 23, on 9 July; 24, on 24 September; 25, on 15 November; and 26, on 22 December 1976
- Board's 1976 meetings: File includes introduction sheet to formal (incorporated) Board of Directors (pre-"Governors" designation), initiated early in 1976; followed by agenda/preliminaries and minutes for first meeting of new board on 21 May 1976, plus materials for meeting with invited advisors at Seven Springs Farm, 13-14 October 1976 --(See also Executive Committee meeting no. 16, 8 October 1975 for role of advisors)
- Executive Committee 1977 meetings: Minutes only for meeting no. 27, on 14 January; agenda and minutes for no. 28, on 15 March; 29, on 18 April; 30, on 8 June; and 31, on 21 June; minutes only for no. 32, on 11 July; agenda and minutes for no. 33, on 3 August; and 34, on 4 October; minutes only for no. 35, on 10 November; and 36, on 5 December 1977
- Board's 1977 meetings: Agenda and minutes for meeting on 21-22 June 1977 --(Previous meeting was 8 October 1976, and while the next board meeting was to have been in November 1977, it was not held until March 1978)
- Executive Committee 1978 meetings: Minutes only for meeting no. 37, on 12 January, and no. 38, on 17 February; agenda and minutes for no. 39, on 9 March [when RLG selected the BALLOTS system], and no. 40, on 13 April [when it became evident that Harvard would be pulling out]; minutes only for no. 41, on 11 May, no. 42, on 2 June, no. 43, on 20 June, no. 44, on 1 August, and no. 45, on 18 September [Harvard's withdrawal by now completed]; agenda and minutes for no. 46, 13 October [when Edward E. Shaw was elected as RLG's president and CEO, with James Skipper, former president, as vice president -- minutes taken by David H. Stam]; minutes only for no. 47, on 20 November [where Jan Thomson is first listed as secretary -- later to be assistant secretary]; agenda and minutes for no. 48, 14-15 December 1978
- Board's 1978 meetings: Mixture of pages -- agenda and minutes for 9 March 1978 [when board voted on BALLOTS choice]; 24 April Harvard withdrawal letter, signed by Derek Bok; and minutes only for 20 November 1978
- BALLOTS (RLG) "Director's staff": Four weekly meeting agendas, with no attachments, for Edward E. Shaw's senior management group (or at least most of it), 9 May, 15 May, 10 August, and 17 August 1978.  [See more of these, for 1979 – January 1982, in Carton 11.]
- Executive Committee 1979 meetings: Agendas and minutes for meeting no. 49, on 9 January; 50, on 19-20 February; 51, on 20 March; 52, on 16 April; 53, on 29 May; 54, on 8-9 July; 55, on 19 August; and 56, on 23 September 1979
- Board of Governors meeting no. 1 agenda and minutes (Philadelphia, PA), 29-30 October 1979, plus Executive Committee agenda only for 29 October 1979.  [NOTE: A complicated transition, which dispensed with "Board of Directors" arrangement used from 1976 until

October 1979, and also modified the role of executive committee, resulting in this being the first in the board meeting numbering sequence that continued through the board's last meeting (no. 103) in June 2006.]

- Board of Governors meeting no. 2, agenda and minutes (Princeton, NJ), 26-27 November 1979
- Board of Governors meeting no. 3, minutes only (Stanford, CA), 7-8 January 1980
- Board of Governors meeting no. 4, minutes only (New York, NY), 18-19 February 1980
- Board of Governors meeting no. 5, minutes only (New Haven, CT), 31- March - 1 April 1980
- Board of Governors meeting no. 6, minutes only (Provo, UT), 12-13 May 1980
- Board of Governors meeting no. 7, cover memo, bound agenda, and minutes (New Brunswick, NJ), 25-26 June 1980
  [--Introduced division of board into several standing committees; at this stage, these were "Programs and Operations," "Governance and External Affairs," and "Finance and Administration"]
- Board of Governors meeting no. 8, cover memo, bound agenda, and minutes (Fort Collins, CO), 4-6 August 1980
- Board of Governors meeting no. 9, bound agenda and minutes (Baltimore, MD), 28-29 October 1980
- Board of Governors meeting no. 10, bound agenda, minutes, internal preparatory memo from Tina Kass (Berkeley, CA), 16-17 December 1980
- Executive Committee 1981 meetings: [NOTE: Executive Committee not reconstituted after October 1979 Board meeting until 1981.?]  File specifically for first five meetings of "the Executive Committee of the [RLG] Board of Governors"; contains agenda and minutes for first meeting (Chicago, IL), 25 January; minutes only for second meeting (New Orleans, LA), 16 February; agenda and minutes for third meeting (Chicago, IL), 4 June; ditto for fourth (New York, NY), 4 November; and minutes only for fifth meeting (New York, NY), 9 December 1981.
- Special Committee meeting: Primarily RLG presidents and provosts -- bound agenda and minutes for first meeting (Chicago, IL), 26 January 1981  [NOTE: File includes undated (draft?) Letter from Edward E. Shaw on "RLG's financial environment."]
- Special Committee meeting: Unbound, agenda (?) and minutes for second meeting (New Orleans, LA), 16 February 1981
- Board of Governors meeting no. 11, bound agenda and minutes (New Orleans, LA), 17-18 February 1981
- Board's Finance and Administration Committee: "Special meeting" bound agenda plus packet of related preparatory materials (various handwritings on these, primarily James Michalko's) (Stanford, CA), 8-9 March 1981
- Special Committee meeting: Bound agenda and minutes for third meeting (Washington, DC), 13 April 1981
- Board of Governors meeting no. 12, bound agenda plus minutes (includes 20 March 1981 "Report from the Special Committee" letter to RLG presidents -- and more specifics in other attachments) (Evanston, IL), 14-15 April 1981
- Special Committee meeting: Bound agenda and minutes for fourth meeting (Chicago, IL), 4 June 1981
- Board of Governors meeting no. 13, bound agenda and minutes (Stanford, CA), 24-25 June 1981
- Special Committee meeting: Bound agenda and minutes for fifth meeting (New York, NY), 4 November 1981

- [NOTE: NO file for Board of Governors meeting no. 14 found.  Most likely to have been between August & October 1981?]]
- Board of Governors meeting no. 15, bound agenda and 2 copies of minutes (New York, NY), 10-11 December 1981

## CARTON 61: Product Management

1998-2003: Ricky Erway's contribution of files associated with RLG-AMICO (Art Museum Image Consortium collaboration to create first a testbed online access service for AMICO digitized art images and descriptions, and then to expand the resulting "AMICO Library" into production operation in succeeding years. AMICO's directors were Jennifer Trant and David Bearman. (When AMICO dissolved in 2005, RLG negotiated to continue the image database service as CAMIO.) The incomplete files in Carton 61 deal primarily with legal and some marketing issues and include variety of correspondence with/about Art Museum Image Consortium directors.

- RLG's AMICO Library news and promotion [see Carton 17 for cross-references to other cartons with AMICO materials], 1998, 2002, 2003
- Art Museum Image Consortium AMICO Library news and promotion, 1999-2003
- AMICO Library user/subscriber evaluations: Penn State, undated notes; California State University system, report on Web, August 2002
- Art Museum Image Consortium user licenses (versions for universities, museums, etc.), 1998 & 1999
- RLG Service Agreement for AMICO Library subscribers and fitting it into AMICO framework/procedures (correspondence), 1998-1999
- AMICO Library pricing, 1998-2000
- AMICO Library consortial pricing and sales, 1999, 2001
- AMICO Library and potential use by NYLink (New York State libraries consortium), 1999-2001
- AMICO Library subscriber start-up procedures, 1999-2001
- AMICO Library TIFF and tape delivery, memos from 1998, 1999, 2001
- "AMICO Library Preliminary Draft Specifications for Notebook Sharing in Eureka," October 2000
- AMICO Library data receipt (between the Art Museum Image Consortium and RLG), scraps from November 2001 to August 2003
- AMICO Library and United Kingdom user authentication through British (JISC) "Athens" systems, 2000
- Art Library agreement among RLG, Joint Information Systems Committee, and Art Museum Image Consortium for JISC subscription to redistribute to UK users, 1999-2001
- AMICO Library and JISC pricing, scraps between 1999 and 2002
- AMICO Library JISC subscriber's sublicensing -- HEFCE [Higher Education Funding Council for England] agreements, November 2000 - November 2002
- Art Museum Image Consortium and AMICO Library billing (RLG view), October - November 2001
- AMICO Library subscriptions, miscellaneous RLG invoicing records, 2000-2003
- AMICO Library distribution agreement renegotiation between RLG and Art Museum Image Consortium to achieve June 2001 version of agreement
- AMICO Library migration by RLG into RLG Cultural Materials interface (still branded as AMICO Library -- not subsumed), 2002-2004

- AMICO Library and other distributors besides RLG (who had exclusivity at first), ca. 2002-2003
- Art Museum Image Consortium Members Meeting, attended by Ricky Erway, with slight window on AMICO-ARTstor relations, 2003
- AMICO Library Testbed participants -- correspondence/paperwork -- 48 files, all for the 1998-1999 testbed year? (not individually reviewed as part of this inventory)

## CARTON 62: President's Office (aka Administration)

1974-1978: Files that were created in the Branford CT offices and shipped at some point to RLG's Stanford headquarters. Very few meeting minutes; focus is on various studies, specifications, and procedures for RLG collaborative work. All documents in Carton 62 are categorized by an early RLG document control numbering system. A standardized cover sheet on each provides a short abstract describing what the document is and its function. (In a few cases, Jennifer Hartzell sorted these in topic order when accessioning in April 2007).

- Original storage list for President's office materials in Carton 62
- "Report of the RLG Space Committee," status "final," by committee chairman John A. Harrison; first distributed with minutes of the Executive Committee meeting 31, 21 June 1977 -- addresses growth capacity/projects in RLG libraries as of July 1976; RLG/EXEC-77/0002, 22 July 1977
- Meeting minutes of RLG's BIBPAC (Bibliographic Processes and Control Committee), nos. 1-34, 29 May 1974 - 15 November 1977
- BIBPAC document: "The RLG System Design Requirements," status "final," RLG/BIBPAC-75/0001, 26 June 1975
- BIBPAC document: "Status of Desired Data for Determining the Cost of Maintaining RLG Catalogs, 1976/77," status "final," by Peter Graham; RLG/BIBPAC-76/0001, 26 May 1976
- "RLG Survey of Bibliographic Practices; Final Report," status "final," by Heike Kordish (includes large background file; RLG/EXEC-77/0001, 25 February 1977
- BIBPAC document: "The RLG Bibliographic System Design Requirements," status "revised," RLG/BIBPAC-77/0001, 26 July 1977
- BIBPAC document: "RLG Bibliographic Standards," status "draft," RLG/BIBPAC-76/0003, August 1977
- BIBPAC document: "RLG Bibliographic Standards," superseded previous versions, RLG/BIBPAC-78/0001, 1 July 1978
- Serials Task Force document: "RLG Serials Program Manual," status "incomplete" (task force: James Fall, Charles Husbands, John Williamson, Juanita Doares); RLG/STF-75/0001, 10 October 1975
- Systems/Serials document: "RLG Serials Decision System -- General Design," status "final," by Sandra Stone and John Logan (Yale University Library Development Department); RLG/SYS-75/0002, 10 October 1975
- Serials Task Force document: (working jointly with the Collection Development and Preservation committees) "Backfile Coordination after Query Process for Cancellations -- Interim Procedures," status "final," RLG/STF-76/0001, 16 February 1976
- BIBPAC document: "RLG Serials Program/Union List of Serials/Bibliographic Specifications," status "final," prepared by Elizabeth Hofsas and John Knapp; RLG/BIBPAC-76/0002, 27 June 1976
- Serials Task Force document: (working jointly with the Preservation Committee) "RLG Master Copies," status "final," RLG/STF-76/0003, September 1976

- Systems document: "Users Guide to the RLG Serials List" status not assigned, by John Knapp; RLG/SYS-77/0004, 30 July 1977
- Systems document: "Serials Decision System Statistics, 1975 to 1977," status "final," RLG/SYS-77/0005, 19 September 1977
- Systems document/proposal (file 1 of 2): Variety of memos, distribution notes, foundation-specific pages plus full project proposal for "Establishment of Library Network On-Line Access to the Library of Congress MARC Data Base," 15 April 1976 - 15 October 1977, prepared in 1975 for January 1976 submission (distributed to National Endowment for the Humanities, Carnegie Corporation of New York, Andrew W. Mellon Foundation, and Sloan Foundation)
- Systems document/proposal (file 2 of 2): "Establishment of Library Network On-Line Access to the Library of Congress MARC Data Base," status "final," primary submission to NEH; RLG/SYS-75/0003, 14 January 1976
- Systems document: "RLG Batch Job Stream Documentation," status "final," by John Knapp; RLG/SYS-76/0001, 22 March 1976
- STAC (Systems and Technology Applications Committee) document: "The Working Relationship Between the RLG Technical Director [VP for Systems, then John Knapp] and STAC Members," status not assigned, by John Knapp; RLG/STAC-76/0001, 10 May 1976
- STAC document: "RLG Bibliographic System Systems Development Plan," "draft 3," RLG/STAC-76/0002, 22 September 1976
- Systems document: "Cataloging Duplication Study Methodology," status "final," by Peter Graham; RLG/SYS-76/0003, 3 December 1976
- Systems document: "Guide to On-Line Searching and Display of Bibliographic Records Via the RLG Bibliographic System," status "preliminary," by Columbia University Libraries ("terminal users manual for use of RLG/LC Phase I pilot bibliographic system"); RLG/SYS-77/0002, 1 June 1977
- Systems document: "Plan for RLG Cataloging System," status not assigned, by John Knapp (VP for Systems) and Peter Graham (senior systems analyst); RLG/SYS-77/0001, 13 June 1977
- STAC document: "Final Report on Pricing Policy for System Services [RLG bibliographic services]", status "final," prepared by Systems and Technology Applications Committee's Subcommittee on Pricing (Jerome Yavarkovsky, chair; Ronald Diener, James Rizzolo, David Weisbrod); RLG/STAC-78/0001, 26 April 1978
- Systems document: "Final Report on the RLG/LC Pilot Project 'Establishment of Library Network On-Line Access to the Library of Congress MARC Data Base," status "final," by Peter Graham, senior systems analyst; RLG/SYS-79/0001, 31 December 1978
- CDC document: "Guidelines for the Implementation of the Query Process in the RLG Expensive Items Program," status "final," by Collection Development Committee (Maria Grossman, Erle Kemp, George Vrooman, Juanita Doares); RLG/CDC-75/0001, 10 September 1975
- CDC document: "Current Newspapers -- Microfilm Edition," status "final," RLG/CDC-76/0001, August 1976; plus, corrections for New York Public Library holdings from Juanita Doares and L. Lorona, 8 February 1979
- CDC document: "RLG Coordinated Collection Development Program Manual: 2. Policy Statement," status "final," RLG/CDC-76/0002, 1 August 1977
- CDC document: "Categorical Collection Assignments," status "final," prepared by RLG Special Interest Groups [which were?], endorsed by the Collection Development Committee; RLG/CDC-78/0001/1, 14 December 1978

- Preservation Committee document: "RLG Preservation: Program and Priorities," status "final," RLG/PC-75/0001, 10 October 1975
- Preservation Committee document: "Price Formula for Copies of RLG Master Microforms," status "final," RLG/PC-76/0001, 21 January 1976
- Preservation Committee document: "RLG Policy Statement on Microform Masters," status "final," RLG/PC-76/0002, 4 March 1976
- Preservation Committee document: "Preservation Coordinators in RLG Libraries," status "final," RLG/PC-76/0003, 4 March 1976
- Preservation Committee document: "Microfilming Petition," status "final," by Preservation Committee's Serials Task Force; RLG/PC-76/004, September 1976
- Preservation Committee document: "Procedures for Preservation Microfilming," status "final," RLG/PC-77/0001, 14 September 1977
- Shared Resources document: "Shared Resources Program Policy Statements," status "final," prepared by Reader Services Committee; RLG/RSC-75/0001, 1 May 1976
- Shared Resources document: "Draft of Photocopy Policy Statement," "draft," prepared by Reader Services Committee; RLG/RSC-75/0002, 18 November 1975
- Shared Resources document: "Shared Resources Project -- Traffic Analysis Report Programs Design Specifications," status "final," by Peter Graham; RLG/SYS-75/0004, 16 October 1975
- Bibliographic Center document: "National Telephone Reference Service Pilot Project," status "final," description by Christine Andrew (involved, RLG, the Georgia Library Information Network, Indiana State Library, Bibliographical Center for Research, and Southern California Answering Network); RLG/BC-76/0001, 18 August 1976
- Shared Resources document: "SHARP TRAF -- Shared Resources Program Management Data for 1975/76," status "final," prepared by Peter Graham, RLG Office, and Christine Andrew, Bibliographic Center; RLG/SYS-76/0002, 10 November 1976
- Shared Resources document: "Shared Resources Program Management Data for 1976/77 (First Two Quarters)," status "final," by Peter Graham and Christine Andrew; RLG/SYS-77/0003, 18 July 1977
- Shared Resources document: "Shared Resources Program: Data on Message Response Times," status "final," by Peter Graham; RLG/SYS-77/0006, 13 December 1977
- Shared Resources document: "Shared Resources Program: "Further Data on Traffic, 1975-1976," status "final," by Peter Graham; RLG/SYS-78/0001, 2 February 1978
- Shared Resources document: "Shared Resources Program: Reassessment and Inquiry," status "final," by Task Force on RLG Programs (Peter Graham, Christine Andrew, J. E. Fall); RLG/SYS-78/0002, 13 October 1978
- Shared Resources document: "Shared Resources Program Management Data for January-March 1978," status "final," by Peter Graham and Christine Andrew; RLG/SYS-78/0003, 8 December 1978
- Shared Resources document: "Shared Resources Program: Publication Date of Requested Items," status "final," by Peter Graham; RLG/SYS-78/0004, 11 December 1978

**CARTON 63: President's Office (aka Administration) – half full**

1980 (late) - 1982; 1985-1987 intermittent; 1989: Mostly chronological correspondence and specific topics filed by/for James Michalko, first as Business & Finance Manager, later as RLG's acting president and then president and CEO.

- Business & Finance manager James Michalko's 1981 chronological correspondence file (includes October-December 1980)
- Special Committee meeting, New Orleans, LA, 16 February 1981: Print master from James Michalko's files -- check against other filed copy/copies before any deaccessioning of duplicates
- Board of Directors' Finance & Administration Committee special meeting, Stanford, CA, 8 March 1981: Agenda, including errata, notes, and later additions to background, plus a couple of premeeting memos -- check against other filed copy/copies to ensure most complete version is retained
- RLG-Stanford Host Institution Agreement: Two memos regarding its review, from John C. Heyeck to then-RLG-Treasurer Jerald Stevens, Yale University, 12 May 1981
- Change in RLIN II schedule: One-page memo pushing dates for libraries' training in RLIN II out a month or less, from Edward E. Shaw to Board of Governors, with explanation, 15 May 1981
- Special Committee meeting, Chicago, IL, 4 June 1981: Print master from James Michalko's files -- check against other filed copy/copies before any deaccessioning of duplicates
- Executive Committee meeting, Chicago, IL, 4 June 1981: Print master from James Michalko's files -- check against other filed copy/copies before any deaccessioning of duplicates
- RLG and CLASS: Offer of Service Agreement to CLASS and Informatics to cover specific searching services to libraries equipped with Informatics' Mini MARC system (to copy records from RLIN database), 7 July 1981
- Business & Finance manager James Michalko's 1982 chronological correspondence file -- mix of letters and report items, patchy over year (nothing between 20 August and 7 December); plus 1 letter in January 1983
- Staffing/hiring/organization at RLG -- plus "Business & Finance [semi-] decentralization" from Stanford -- complements other staffing and organization files in other cartons; February 1985-late 1986 plus a couple of 1987 memos
- Upgrade from Amdahl 5880 mainframe computer to 5890 and budget impact: Chronology sent by James Michalko to then-RLG-treasurer William Herbster, August 1986 - January 1987
- President James Michalko's January-February 1989 chronological correspondence file (many notes of congratulation on his appointment as RLG president)
- President James Michalko's March-May 1989 chronological correspondence file
- President James Michalko's June-August 1989 chronological correspondence file
- President James Michalko's September-December 1989 chronological correspondence file
- President James Michalko's appointment book for 1989 -- very cryptic entries; first year as RLG president (after previous interim/acting service)

## FLAT BOX 64: Marketing & Sales & Corporate Communications

1989, mid/late-1990s: Extra large staff group photo and series of BxW pre-conference marketing postcards.

Folder 1:
- Large black-and-white all-staff photo taken in front of 1200 Villa Street (Mountain View) headquarters around 1989/90; mounted on hollow core and shrink-wrapped, the photo includes a key to staff present and lists those absent
- Smaller, 4-color version of same photo, not mounted and without key

Folder 2:
- Loosely mounted (originally displayed on RLG office walls), series of black-and-white postcards used in conjunction with upcoming conferences, to prompt registrants to visit RLG's exhibit booth; played off of images from the first third of the 20th century; done in late 1990s, roughly; series included:
  a. "It all adds up!" [RLIN + FTP = savings]
  b. "You need us both!" [Eureka Delivers]
  c. "Eureka – we're on the Web"
  d. "Why wait?" [RLG's got a hot menu and great prices]
  e. "Your booth or mine?" [RLG & Retro Link together provide automated online cataloging]
  f. "Let's dance!" [Steps that will have you dancing with pleasure]

## CARTON 65: President's Office (aka Administration) & Corporate Communications

December 1987 - January 1991 plus two mid-1990s board reference compilations: PRINT MASTERS, some cover memos, minutes for most Executive Committee meetings and for the Board of Governors' meetings no. 42-51, plus update pages for board's Reference Binders for 1994-95 and 1995-1996.

- Executive Committee meeting, Los Angeles, CA, 24 February 1988: Print master of agenda plus minutes; also includes minutes of 15 December 1987 Executive Committee meeting
- Board of Governors' 42nd meeting, Los Angeles, CA, 25-26 February 1988: Agenda print master (version used at meeting may be more complete)
- Executive Committee meeting, New York, NY, 27 April 1988: Minutes only -- look for agenda in another carton
- Board of Governors' 43rd meeting, Stanford, CA, 16-17 June 1988: Agenda print master, including page-numbered background mailed out after initial agenda distribution
- Executive Committee meeting, New York, NY, 15 August 1988: Agenda as mailed out, plus meeting minutes
- Executive Committee meeting, Binghamton, NY, 12 October 1988: Minutes only -- look for agenda in another carton
- Board of Governors' 44th meeting, Binghamton, NY, 13-14 October 1988: Agenda print master with supplementary pages interleaved
- Executive Committee meeting, New York, NY, 17 November 1988: Minutes only -- agenda in another carton?
- Board of Governors' 45th meeting, New York, NY, 17-18 November 1988: Agenda print master, plus "Recommendations for Special Committee" resulting from 45th meeting
- Executive Committee meeting, Mountain View, CA, 5 January 1989: Agenda print master plus meeting minutes
- Executive Committee meeting, Mountain View, 22 February 1989: Agenda print master plus meeting minutes
- Board of Governors' 46th meeting, Palo Alto - Mountain View, CA, 23-24 February 1989: Agenda print master plus 7 February "Agenda Supplement"
- Executive Committee meeting, Cincinnati, OH, 4 April 1989: Agenda print master plus meeting minutes
- Board of Governors' 47th meeting, New York, NY, 15-16 June 1989: Agenda print master followed by Agenda Supplement

- Executive Committee meeting, Philadelphia, PA, 16 August 1989: Agenda print master; minutes of Executive Committee meeting in NYC, 14 June 1989 (was there an agenda??); minutes of Philadelphia meeting
- Board of Governors' 48th meeting, Atlanta, GA, 12-13 October 1989: Cover memo and agenda print master
- Executive Committee meeting, Tallahassee, FL, 13 December 1989: Agenda print master plus meeting minutes
- Executive Committee meeting, Mountain View, CA, 21 February 1990: Agenda print master -- look for minutes in another carton
- Board of Governors' 49th meeting, Palo Alto - Mountain View, CA, 22-23 February 1990: Agenda print master plus cover memo (minus memo attachments) and 6 February Agenda Supplement
- Executive Committee meeting, Mountain View, CA, 11 April 1990: Agenda print master plus meeting minutes
- Board of Governors' 50th meeting, Washington, DC, 7-8 June 1990: Two cover memos (sans attachments), print master for 6 June Executive Committee meeting and also for special board session of 6 June on "What Constrains RLG's Success?"; plus print master for board's 7-8 June agenda (pages 40-44 missing) and Agenda Supplement
- Executive Committee telephone conferences, 13 August and 17 September 1990: Minutes only -- background/agenda referenced; might be found in another carton, particularly in assistant secretary's board files
- Board of Governors' 51st meeting, Washington, DC, 8-9 November 1990: Agenda print master plus summary minutes of 51st meeting
- Executive Committee & Board of Governors' Programs Committee joint session during American Library Association Midwinter Meeting, Chicago, IL, 11 January 1991: Memo and background from James Michalko for "RLG Programs Discussion and Strategy Session" -- look in other cartons for possible reporting on outcomes (at a subsequent board meeting?)
- Executive Committee telephone conference, 22 January 1991: Agenda print master plus meeting minutes
- Board of Directors' Reference Binder, 1994-1995: Set of copied pages of Update to apply to the 1993-1994 reference binder, plus Update print master, August 1994
- Board of Directors' Reference Binder, 1995-1996: Two sets of Update for refreshing the 1994-1995 binder, plus print master (for other-than-preprinted items in binder), September 1995

## CARTON 66: Corporate Communications

February 1988 - February 1990: Assistant secretary's binders for board meetings nos. 42-49 as well as Executive Committee meetings during same period; include records of preparation, annotated agendas (with preceding meeting's minutes), supplementary/handout materials, notes taken to prepare summary minutes, and some follow-up notes. May contain background materials filed in anticipation of discussion.

- Board of Governors meeting no. 42, 25-26 February 1988, and Executive Committee meeting of 24 February 1988 (Los Angeles, CA)
- Board of Governors meeting no. 43, 15-17 June 1988 (Stanford, CA), and Executive Committee meetings of 27 April 1988 (New York, NY) and 15 June 1988 (Palo Alto, CA)

- Board of Governors meeting no. 44, 13-14 October 1988 (Binghamton, NY), and Executive Committee meetings of 24 August 1988 (New York, NY) and 12 October 1988 (Binghamton, NY)
- Board of Governors meeting no. 45, 17-18 November 1988 (New York, NY), and Executive Committee meetings of 17 November 1988 (New York, NY) and 5 January 1989 (Mountain View, CA)
- Board of Governors meeting no. 46, 23-24 February 1989 (Palo Alto, CA), and Executive Committee meeting of 22 February 1989 (Mountain View, CA)
- Board of Governors meeting no. 47, 15-16 June 1989 (New York, NY) and Executive Committee meetings of 4 April 1989 (Cincinnati, OH) and 14 June 1989 (New York, NY)
- Board of Governors meeting no. 48, 12-13 October 1989 (Atlanta, GA) and Executive Committee meetings of 16 August 1989 (Philadelphia, PA) and 11 October 1989 (Atlanta, GA)
- Board of Governors meeting no. 49, 22-23 February 1990 (Palo Alto, CA) and Executive Committee meetings of 13 December 1989 (Tallahassee, FL) and 21 February 1990 (Mountain View, CA)

## CARTON 67: Member Programs & Corporate Communications

Late 1986 - 2005: Programs reports and publications of all kinds.  ALSO: Corporate Communications-filed folders for RLG annual membership meetings from 1992 through 2000; rest of such folders (2001-2006) are in Carton 68.

- Programs report: "Conoco Study in German Literature and Geology," by Jim Coleman (RLG) and Scott Bennett (then at Northwestern University), stapled once, 45 pages, undated [late 1986 - early 1987?]
- Programs publication: "Library Services in the Age of Telescience: Report of a Conference [at Purple Sage Ranch, Bandera, TX, on 22-24 November 1985] Sponsored by The Research Libraries Group, Inc.," spiral bound, 174 pages, June 1986
- Programs publication: "Information Needs in the Humanities: An Assessment," "prepared for the Program for Research Information Management of The Research Libraries Group, Inc." by Constance A. Gould; softbound, two-color, 62 pages, illustrations "reproduced through the kind assistance of the Department of Special Collections and University Archives, Stanford University Libraries," September 1988
- Published article: "Images in the Future for the Research Libraries Group?," by Constance C. Gould, in "Visual Resources," vol. VI, pages 43-51, 1989
- Programs publication: "Information Needs in the Social Sciences: An Assessment," "prepared for the Program for Research Information Management of The Research Libraries Group, Inc." by Constance C. Gould and Mark Handler ("principal authors"); softbound, two-color, 56 pages, illustrations "reproduced through the kind assistance of the Department of Special Collections and Archives, Stanford University Libraries," July 1989
- Programs/services publication: "'Documents That Move and Speak': A Selective Bibliography from the RLIN Database," double-stapled, 19 pages, April 1990
- Programs/services publication: "Government Records in the RLIN Database: An Introduction and Guide," softbound, 17 pages, June 1990
- Programs report: "RLG Programs: 1989-1990 Annual Report [only time a programs-only annual report was produced]," softbound, 46 pages, September 1990
- Programs publication: "Computer Files and the Research Library," results from a workshop held by RLG at Stanford in fall 1989 following up on RLG MRDF (Machine-Readable Data

Files) project; papers by Margaret Johnson, Anita Lowry, Lynn Marko, Katherine Chiang, as well as MRDF project participants' work summaries; softbound, 59 pages, November 1990

- Programs publication: "Information Needs in the Sciences: An Assessment," "prepared for the Program for Research Information Management of The Research Libraries Group, Inc." by Constance C. Gould and Karla Pearce; softbound, two-color, 79 pages, illustrations "reproduced through the kind assistance of the Department of Special Collections and Archives, Stanford University Libraries," March 1991
- Programs publication: "Photograph Preservation and the Research Library," results of a workshop/symposium held by RLG at Stanford in October(?) 1990; papers by Bernard F. Reilly, James M. Reilly, Debbie Hess Norris, Steven T. Puglia, Paula De Stefano, Julia Van Haaften, recap by Patricia A. McClung; softbound, illustrations provided by authors, 56 pages, September 1991
- Presidential/programmatic publication: "Preferred Futures for Libraries: A Summary of Six Workshops with University Provosts and Library Directors," by Richard M. Dougherty and Carol Hughes, with introduction by James Michalko; selfbound, 19 pages, November 1991
- Programs publication: "Technical Processing in Large Research Libraries," report of an "expert group" led by Linda West, that included Emily Fayen, Tia Gozzi, Gerald R. Lowell, Carol Mandel, Lucia Rather, Jennifer A. Younger, and from RLG Kathleen Bales, Ed Glazier, and Lennie Stovel; selfbound, 28 pages, February 1992
- Programs publication/manual: "RLG Preservation Microfilming Handbook," Nancy E. Elkington, editor (using work from three RLG-member task forces); spiral bound with pockets for addenda, 203 pages, March 1992
- Presidential/programmatic publication: "Preferred Library Futures II: Charting the Paths" [a follow-on to "Preferred Futures for Libraries: A Summary of Six Workshops with University Provosts and Library Directors"], by Richard M. Dougherty and Carol Hughes, with afterword by James Michalko; selfbound, 27 pages, February 1993
- Programs publication: "Electronic Access to Information: A New Service Paradigm," "proceedings from a symposium held July 23 through July 24, 1993, Palo Alto, California, edited by Win-Shin S. Chiang and Nancy E. Elkington"; speakers included Douglas E. Van Houweling, Nancy M. Cline, Jerry D. Campbell, Kathryn M. Downing, Robert C. Berring, and Kathleen Price; softbound, 83 pages, January 1994
- Programs publication/manual: "RLG Archives Microfilming Manual," spiral bound, 208 pages, April 1994
- Programs publication: "Digital Imaging Technology for Preservation," "proceedings from an RLG symposium held March 17 and 18, 1994, Cornell University, Ithaca, New York, edited by Nancy E. Elkington"; speakers included M. Stuart Lynn, Anne R. Kenney and Paul Conway, Pamela R. Mason, Peter S. Graham, Don R. Williams, Shari L. Weaver, Peter Hirtle, and Donald J. Waters; softbound, 139 pages, December 1994
- Programs publication: "RLG Digital Image Access Project," "proceedings from an RLG symposium held March 31 and April 1, 1995, Palo Alto, California, edited by Patricia A. McClung"; speakers included Anne R. Kenney, Hinda Sklar, Anthony T. Troncale, Ricky L. Erway, Richard Frieder, Jackie M. Dooley, Steven L. Hensen, Stephen Paul Davis, Sherman Clarke, Jack von Euw, Daniel V. Pitti, Helena Zinkham, and James M. Reilly; softbound, 104 pages, August 1995
- Programs publication: "Scholarship in the New Information Environment," "proceedings from an RLG symposium held May 1-3, 1995, at Harvard University, edited by Carol Hughes with an introduction by Win-Shin Chiang"; speakers included Stanley Chodorow, Toni Carbo Bearman, Hal R. Varian, Terry Martin, Ross Atkinson, Douglas Greenberg, Czeslaw Jan Grycz, and G. Dennis O'Brien (after-dinner speaker); softbound, 76 pages, May 1996

- Programs publication: "Selecting Library and Archives Collections for Digital Reformatting," "proceedings of an RLG symposium held November 5-6, 1995, in Washington, DC," organized by Ricky Erway, with approximately 18 speakers organized into 5 panels; softbound, 170 pages, August 1996
- Programs publication: "Digital Preservation Needs and Requirements in RLG Member Institutions," by Margaret Hedstrom and Sheon Montgomery, selfbound (originally Web-published, then produced for hardcopy mailing), 37 pages, December/January 1998/1999
- Programs/services publication: "Cataloging Guidelines for Creating Chinese Rare Book Records in Machine-Readable Form [adjunct to RLG's International Union Catalog of Chinese Rare Books Project, much-delayed in publication]," English and Chinese versions softbound together, ca. 80 pages, 2000
- Programs publication: "Moving Theory into Practice: Digital Imaging for Libraries and Archives," Anne R. Kenney and Oya Y. Rieger, editors and principal authors; Other authors: Primarily Paula De Stefano, Carl Lagoze and Sandra Payette, John Price-Wilkin, and Peter B. Hirtle, but with smaller "sidebars" from many, including several RLG staff; glossy softbound, 180 pages, ISBN 0-9700225-0-6, 2000
- Programs publication/manual in translation: "Manual do RLG para microfilmagen de arquivos," published with RLG's permission by Projeto Conservaçao Preventiva em Bibliotecas e Arquivos, Rio de Janeiro, Brazil; softbound, 2001
- Programs publication: "Trusted Digital Repositories: Attributes and Responsibilities, An OCLC/RLG Report," Web-published document, 62 pages, May 2002
- Programs publication: "Preservation Metadata and the OAIS Information Model: A Metadata Framework to Support the Preservation of Digital Objects" - "A Report by the OCLC-RLG Working Group on Preservation Metadata," Web-published document, 51 pages, June 2002
- Programs publication/manual: "RLG Guidelines for Microfilming to Support Digitization" - "Supplement to RLG Microfilming Publications," Web-published document, 19 pages, January 2003
- Programs publication (and e-mail announcement): "An Audit Checklist for the Certification of Trusted Digital Repositories" - Draft for Public Comment - from RLG-NARA Task Force on Digital Repository Certification, Web-published document, 65 pages, August 2005

- RLG annual membership meeting, June 25, 1992 (Stanford, CA): Registration-folder materials, various pieces of background/follow-up
- RLG annual membership meeting, June 21-22, 1993 (Stanford, CA): Registration-folder materials, various pieces of background/follow-up
- RLG annual membership meeting, February 2-3, 1994 (Stanford, CA): Registration-folder materials, various pieces of background/follow-up
- RLG annual membership meeting, May 1, 1995 (Cambridge, MA): Registration-folder materials, various pieces of background/follow-up [May 2 was devoted to a Programs symposium]
- RLG annual membership meeting, May 6-7, 1996 (Philadelphia, PA): Registration-folder materials, various pieces of background/follow-up
- RLG annual membership meeting, May 5-6, 1997 (Chicago, IL): Registration-folder materials, various pieces of background/follow-up
- RLG annual membership meeting, May 5-6, 1998 (London, England): Registration-folder materials, various pieces of background/follow-up
- RLG annual membership meeting, April 26-27, 1999 (Los Angeles, CA): Registration-folder materials, various pieces of background/follow-up

- RLG annual membership meeting, May 1-2, 2000 (New York, NY): Invitation plus registration-folder materials and various pieces of background/follow-up)

## CARTON 68: President's Office (aka Administration) & Corporate Communications

February 1983 - May 1986: Records for board meetings nos. 22-33 (incomplete records), Executive Committee meetings, and Special Committee meetings over this period. [NOTE: See also overlapping materials, for meetings nos. 16-28 in presidential Carton 20 and for meetings 14-23 in Noel Hanf's Carton 156.]   ALSO HERE: Corporate Communications-filed folders for RLG annual membership meetings from 2001 through 2006 (the last of these); rest of such folders (1992-2000) are in Carton 67.

- Board of Governors meeting no. 22, 10-11 February 1983 (Stanford, CA): Minutes ONLY
- Board of Governors meeting no. 23, 21-12 April 1983 (Norman, OK): Minutes ONLY
- Board of Governors meeting no. 24, 21-22 June 1983 (Santa Barbara, CA): Agenda print master PLUS minutes for this meeting
- Membership categories and fees: Memos from Richard W. McCoy to Executive Committee (prior to a meeting), 29 August and 27 September 1983
- Board of Governors meeting no. 25, 29-39 September 1983 (Hanover, NH): Minutes ONLY
- Special Committee meeting of 25 October 1983 (Los Angeles, CA): Agenda print master, Richard W. McCoy's copy of agenda, and prior correspondence between McCoy and Harold Shapiro (chair of the committee?), July-September 1983
- Board of Governors meeting no. 26, 1-2 December 1983 (Chicago, IL): Bound agenda copy used at meeting by James Michalko (his annotations), PLUS minutes of this meeting
- Executive Committee meeting of 29 February 1984 (Stanford, CA): Tiny agenda
- Board of Governors meeting no. 27, 1-2 March 1984 (Stanford, CA): Bound agenda copy used at meeting (apparently) by James Michalko, PLUS minutes of this meeting
- Executive Committee, Board's Finance & Administration Committee, and Board's Computer Systems Committee special/interim meetings on 26 and 27 March 1984 (New York, NY): Agendas PLUS minutes for these meetings
- Board of Governors meeting no. 28, 18-19 June 1984 (Dallas, TX): Minutes ONLY
- Special Committee meeting of 27 June 1984 (San Francisco, CA): Agenda print master plus president's secretary Patricia Gratcheff's background on meeting arrangements
- Executive Committee and Board's Computer Systems Committee meeting of 31 August 1984 (Chicago, IL): Agenda and minutes of this joint meeting
- Board of Governors meeting no. 29, 4-5 October 1984 (Stanford, CA): Bound, unannotated agenda, including two insertions of information related to RLG's move to an Amdahl mainframe computer (memos from Richard W. McCoy and Edward E. Shaw), PLUS minutes of this meeting
- RLG's Tenth Anniversary International Conference, October 1984 (Stanford, CA): Richard W. McCoy's less-than-complete file of planning and correspondence over period of December 1983 - January 1985
- Executive Committee meeting of 5 December 1984 (New York, NY): Partial copy? of agenda
- Board of Governors meeting no. 30, 6-7 December 1984 (New York, NY): Bound but unannotated copy of agenda, no indication of actual meeting handouts, PLUS minutes of this meeting
- Board of Governors meeting no. 31, 28 February - 1 March 1985 (Stanford, CA): Bound but unannotated copy of agenda sans any supplementary items/handouts, PLUS minutes of this meeting

- Executive Committee meeting of 19 June 1985 (Minneapolis, MN): Agenda plus copy of Noel Hanf letter to Transtech International Corporation
- Board of Governors meeting no. 32, 20-21 June 1985 (Minneapolis, MN): Agenda print master with errata/supplemental pages inserted, PLUS set of handouts distributed at meeting, PLUS minutes of this meeting (which list all handouts). [This is the first of meetings for which Corporate Communications filed 3-ring-bound version with supplementary materials – in Carton 43.]
- Special Committee meeting NOT held on 28 June 1985 (planned for Cambridge, MA): Bound, filed copy of agenda prepared but not used
- Board of Governors meeting no. 33, 3-4 October 1985 (Ithaca, NY): Agenda print master with supplemental insertions, PLUS minutes for this meeting
- Executive Committee meeting of 2 May 1986 (Minneapolis, MN): Agenda and background pages as mailed out, PLUS a handout (?) from James Michalko

- RLG annual membership meeting, April 30 - May 1, 2001 (Ottawa, Canada): Invitation plus registration-folder materials, with possibly some additional inserts
- RLG annual membership meeting, April 22-23, 2002 (Amsterdam, The Netherlands): Invitation plus registration-folder materials, with possibly some additional inserts
- RLG annual membership meeting, May 5-6, 2003 (Boston, MA): Registration-folder materials (invitation missing), with possibly some additional inserts
- RLG annual membership meeting, April 26-27, 2004 (Washington, DC): Registration-folder materials (invitation missing), with possibly some additional inserts
- RLG annual membership meeting, April 18-19, 2005 (San Marino, CA): Invitation plus registration-folder materials, with possibly some additional inserts
- RLG annual membership meeting, June 16, 2006 (New York, NY): Invitation plus registration-folder materials (may be incomplete?)

## CARTON 69: Corporate Communications

June 1990 - April 1993: Assistant secretary's binders for board meetings nos. 50-60 as well as Executive Committee meetings during same period; include records of preparation, annotated agendas (with preceding meeting's minutes), supplementary/handout materials, notes taken to prepare summary minutes, and some follow-up notes. May contain background materials filed in anticipation of discussion. CAUTION: A number of loose materials are tucked in between pages or sections of agendas, especially for meeting no. 53, June 1991. [NOTE: This covers the period of the 1991-1992 "RLG92" reorganization.  For other material related to RLG92, see Cartons 31, 49, 88, 128, 143, 154, 188, and 191.]

- Board of Governors meeting no. 50, 7-8 June 1990 (Washington, DC) and Executive Committee meetings of 11 April 1990 (Mountain View, CA) and 6 June 1990 (Washington, DC)
- Board of Governors meeting no. 51, 8-9 November 1990 (Washington, DC) and Executive Committee meetings -- two conference calls, on 13 August 1990 and 17 September 1990, plus normal meeting on 7 November 1990 (Washington, DC)
- Board of Governors meeting no. 52, 7-8 March 1991 (Mountain View, CA) and Executive Committee meetings -- one joint strategizing discussion with the board's Programs Committee on 11 January 1991 (Chicago, IL), one conference call on 22 January 1991, and normal meeting on 7 March 1991 (Mountain View, CA) -- proposal for "RLG 92" reorganization

- Board of Governors meeting no. 53, 13-14 June 1991 (Washington, DC) and Executive Committee meetings on 18 April 1991 (New York, NY) and 12 June 1991 (Washington, DC) -- action on "RLG 92" reorganization
- Board of Directors meeting no. 54, 4 October 1991 (Washington, DC) and final Executive Committee meetings -- conference call of 25 June 1991 and normal meeting of 25 July 1991 (Chicago, IL)
- Board of Directors meeting no. 55, 31 January 1992 (Mountain View, CA)
- Board of Directors meeting no. 56, 10 April 1992 (Washington, DC)
- Board of Directors meeting no. 57, 24 June 1992 (Mountain View, CA) -- in conjunction with first annual meeting of reorganized RLG
- Board of Directors meeting no. 58, 16-17 October 1992 (Washington, DC)
- Board of Directors meeting no. 59, 12 February 1993 (Mountain View, CA)
- Board of Directors meeting no. 60, 12 April 1993 & 26 May 1993 (two telephone conference calls treated as one "meeting")
- RLG 92: Package (excepting sample cover letter) of material prepared for a "Meeting of Potential RLG 92 Sponsoring Members" and The Andrew W. Mellon Foundation, 17 April 1991 (New York, NY)

[Cartons 70-78: See note preceding Carton 1 above.]

**CARTON 79: Multiple departments**

1976-2004: From Member Programs department, President's office (aka Administration), and Marketing & Sales (Communications); diverse files that range over program and systems projects between 1999 and 2005, plus a few marketing/identity items; also some late-1970s/early 1980s marketing materials. PLUS: RLG corporate seal used by assistant secretary as needed.  Not in chronological order.  ALSO: Some materials saved by CFOs John Sundell and Molly Singer related to financial audits, some grants, and the RLG-CIMI relationship, FY1991-1998.  [NOTE: For more on CIMI, see Carton 92's summary.]

- All-staff briefings (aka "mind melds"), 2002-2004, from Linda West's files (lacks some handouts). (Good source for progress on program and systems projects, RLG work priorities.)
- Ariel disposition (sale) steps, 2002: H. D. Brous & Co., bound confidential offering memo to prospective buyers; lists of potential buyers; and November 2002 RLG Board call regarding sale to Infotrieve.
- Customer relationship management processes and new system selection (Onyx), 2001-2003. (Includes process diagrams showing software in use at RLG.)
- Database (and systems) migration milestones, timelines, & issues, May 2003.
- Goals Statement and Needs Assessment, 1988-1991. (Preparation for RLG Special Committee of presidents and provosts; good scan of where RLG was, what plans were, at the beginning of 1998.)
- Insurance coverage, 1999 & 2000.
- LookSmart Distribution Agreement for RLG content, 2005 (for term of 2 years).
- Maruzen (Japan) and RLG work on National Diet Library hit-rate study, 2000.
- NSF (National Science Foundation) program announcements, RLG interests – information technology research 2001 (FY2002).

- Alvin Pollock: Sale of EAD-to-HTML conversion software to RLG, 1998. (For use in RLG Archival Resources database service.) (EAD = Encoded Archival Description Document Type Definition for online finding aids markup.)
- RLG Cultural Materials briefing to Fidelity Foundation, August 2003.
- Employee orientation: RLG products and services, May 2001.
- Positioning and branding work (Robin Stavisky, New Ventures Marketing), 1991-1992 (aka "RLG92").
- RLG branding studies, conducted by Azimuth Consultants, 2000-2001.
- RLG Strategic Communications Plan, developed with Azimuth Consultants, 2004-2005.
- "Trusted Digital Repositories: Attributes and Responsibilities, An RLG-OCLC Report," issued by RLG in Mountain View, CA, May 2002.
- Union Catalog on the Web project (UCW, aka RedLightGreen), Advisory Group, September 2001.
- UCW (Union Catalog on the Web, aka RedLightGreen) "Get It" trademark search, 2002.
- "RLIN" plastic bag used in exhibit booths, displaying first RLG "flying books" logo, early 1980s? (logo by firm of Steve Jacobs in Palo Alto, CA; bag design by RLG VP John W. Haeger).
- RLG nametags worn by exhibit booth staffers, at annual meetings, etc., early 2000s; also RLG exhibit suite small direction sign, early 2000s.
- RLG databases laminated, illustrated flip cards – limited-edition special handout, based on an RLG 24-month calendar design, created to marketing manager Kristin Tague's order for including in annual negotiation packets to RLG's large "fixed-price contract "customers, ca. 2003. (Nearly all such customers were also member institutions.)
- RLG corporate seal, in protective case, in use from 1976 to June 2006.

From financial officers' files:
- Miscellaneous cover letters to audited financial statements, FY1991-1996.  [See Carton 135 for a complete set of these statements, but not all cover letters.]
- FY93 KPMG auditors engagement letter.
- FY94 audit work papers (some): correspondence & staff actions; August-December 1994.
- Chinese Rare Books Project (CRBP): reports on progress and costs, January-August 1994.
- Andrew W. Mellon Foundation "Operational" grant award letter, June 1994.
- Follow-up items after 26-27 September 1994 Board of Directors meeting, dated October 1994.
- Effect of FASB (Financial Accounting Standards Board) rulings on RLG financial presentations: Molly Singer to board's Budget & Audit Committee, June 1996 – February 1997.
- CIMI audited financial statements and RLG agreement to provide financial services for CIMI (Consortium for the Computer Interchange of Museum Information), 1997-98.

**CARTON 80: President's Office (aka Administration)**

1986-2002: Mixed set of files generally organized by entity rather than RLG activity/interest; roughly covers C-T but not the only presidential carton identified solely by alphabetic range – SEE ALSO Cartons 81 (G-H), 86 (H-M), 87 (B-C), 90 (R-W), 91 (N-P), and 93 (A-F).

- Set of bound, audited RLG financial statements, many with cover letters, some with notes to client from auditors, from FY1986 (9/85-8/86) through FY2003, but missing FY1998 &

FY2000. Includes OMB A-133 audits for FY1991, FYs1992-1993, & FY1994, required as part of National Endowment for the Humanities (NEH) grant reporting.

- CIMI (Consortium for the Computer Interchange of Museum Information), 1996-2000: 12/1998 RLG support agreement; audited financial statements for FY1997 (9/96-8/97), FY1998, FY1999, & FY2000. (More CIMI files in other cartons.)
- CPA-CLR (Commission on Preservation & Access – Council on Library Resources) – RLG relations, 1996 (correspondence between Nancy Elkington & Deanna Marcum, plus note from Marcum to James Michalko).
- Gladys Krieble Delmas Foundation funding for RLG's FAST (Finding Aids SGML-markup Training) project, 1996.
- Dozen foundation approaches from RLG for RLG Cultural Materials support, May 2002.
- JISC (Joint Information Systems Committee, UK entity) Content Working Group, RLG proposal to, for Global Immigration digitization project, July 1998.
- Thomas J. Long Foundation, approach for funding RLG's Ariel version 3 development (not granted), 1999.
- Henry Luce Foundation, grant to RLG for converting from Wade-Giles to Pinyin Romanization in the RLG bibliographic databases and for non-Roman scripts display in the RLG Eureka search interface, 1999.
- Andrew W. Mellon Foundation, RLG's interests in metadata harvesting initiatives, 2000.
- Andrew W. Mellon Foundation, JSTOR initiative: RLG's interest in for document supply as part of the PICA-RLG WebDOC project (not achieved), 1995.
- Andrew W. Mellon Foundation, RLG's use of preservation grant interest funds for related projects, 1992-93. (These were: Preservation Needs Assessment; Shared Resources Technical Development; Electronic Conferences; Local WLN Conspectus Software collaboration; Ariel software development; Photograph Preservation Task Force; plus residue to support general RLG operations.)
- NCAIR (National Center for Automated Information Research), support for RLG's "Studies in Scarlet" coordinated digital collection: proposal, grant award, progress reports, plus related fund-raising efforts and project background, 1995-98.
- NSF (National Science Foundation), proposals to for NSF's Digital Libraries Initiative, Phase 2 (DLI-2): from CIMI, University of Michigan (RLG member), and particularly RLG ("Third Dimension: Digital Access to Records of Material Culture") (not funded), 1998-99.
- Pew Charitable Trusts, updating letter to, from vice president John W. Haeger, 9/1999.
- Phillip Morris Companies, approach to for RLG Cultural Materials support, 2001.
- Rockefeller Brothers Fund, letter exchange with vice president John W. Haeger, 1998.
- Rockefeller Foundation, approaches for RLG Cultural Materials support, 2000 & 2002.
- RLG Board's bound Summary of 1998-99 Strategic Planning (for 2000-2003).
- RLIN Services and Rates Study, Phase 1 (by the "Herbster Commission," led by then-RLG-treasurer William G. Herbster), 1987.
- Alfred P. Sloan Foundation, approach for support of RLG's History of Science & Technology database, 1998. (Later this database expanded to the History of Science, Technology, & Medicine.)
- John Ben Snow Memorial Trust, RLG – Syracuse University proposal, grant award, progress reports, for a project to represent Syracuse archives in the RLIN AMC (Archival & Manuscripts Control) file, roughly 1990-95.
- C. V. Starr Foundations, RLG proposal for CHARLIN (Chinese Research Libraries Information Network), funded but later undoable, 1986-89. (See "Aspen Project" for more on the setback—inability to create a "portable RLIN.")

- TIIAP (Telecommunications & Information Infrastructure Assistance Program, US Department of Congress), RLG proposal for "Bringing Primary Resources into the Information Infrastructure" (online coding and linking finding aids to RLG bibliographic records) – funded, 1995.

## CARTON 81: President's Office (aka Administration)

1986-2002: Portion of alphabetized run of subset of presidential files – "Garage-Host." To identify other alphabetically organized presidential cartons, see Carton 80 summary.

- Garage Technology Ventures (regarding RLG Cultural Materials), 2002.
- GEAC, Massachusetts, 1993, 1996.
- GEAC, France, 1996.
- Gensler Associates RLG consulting, 2001.
- Getty "Communicating Culture" Conference, October 1998.
- Getty & RLG, 1998.
- Getty AHIP (Art History Information Program) & RLG, 1997.
- Getty AHIP (Art History Information Program) & RLG, 1996.
- Getty AHIP (Art History Information Program) & RLG, 1995.
- Getty AHIP (Art History Information Program) brochures & updates, 1992-1995.
- Getty AHIP (Art History Information Program) & RLG, 1994.
- Getty AHIP (Art History Information Program) "Initiative on Electronic Imaging" Conference, March 1994.
- Getty & RLG, 1986, 1991-1992.
- Solomon R. Guggenheim Museum, 1991. (Slight)
- Hand Press Book Database content, 1998. (An RLG database created with and for CERL: Consortium of European Research Libraries.)
- HEFCE-funded (UK) retrospective conversion plans, 1995.
- Host Institution Agreement between Stanford University and RLG, December 1994 – August 1995.
- Host Institution Agreement between Stanford University and RLG, September 1988 – August 1993.

[Carton 82: See note preceding Carton 1 above.]

## CARTON 83: President's Office (aka Administration)

1984-January 2005: Variety of projects and initiatives, largely through the filter of grants sought (not always obtained) to support work on expanding RLG union catalog, developing RLIN CJK, recasting the consortium at the beginning of the 1990s ("RLG 92") and moving into new types of information service to a wider audience; multiple foundations appear in these records.

- Rigler-Deutsch Index of pre-Long-Playing Sound Recordings: Addition of data to RLIN (partial file on topic, but data was added), November 1985-March 1991
- China's Academia Sinica Library: Exchanges with RLG and role in RLIN CJK scripts development, plans for "CHARLIN," and more, filed by John W. Haeger; file 1 of 2, June 1984 – December 1987

- China's Academia Sinica Library: Exchanges with RLG and role in RLIN CJK scripts development, plans for "CHARLIN," and more, filed by John W. Haeger; file 2 of 2, January 1988 – January 1991
- Chinese Rare Books Project: Background related to submissions and approval of proposal to the National Endowment for the Humanities (NEH), filed by Karen Smith-Yoshimura; includes proposal reviewers' assessments; mid-1987 – December 1988
- Chinese Rare Books Project: Proposal to National Endowment for the Humanities (NEH), project to run July 1988 to December 1989; submitted October 1987
- Chinese Rare Books Project: Proposal to National Endowment for the Humanities (NEH), project to run September 1993 to August 1995; submitted December 1992
- East Asian Collections RLIN Recon (retrospective conversion) project: Proposal to National Endowment for the Humanities (NEH), project to run September 1990 to August 1992; submitted August 1989
- Project to convert RLIN CJK to Pinyin transliteration and access through Eureka: Intermittent correspondence regarding Henry Luce Foundation grant for this work, 1999-2002
- "RLG 92" three-year enabling grant: Proposal to/grant from the William and Flora Hewlett Foundation, including related correspondence and reports; July 1991 – June 1995
- AMIS (Archives & Museums Information System) project: Partial record [nothing for 1991-1992], focused on efforts to fund AMIS development; includes failed proposal to the US Department of Education under the "Library Technology and Cooperation Grants Program"; 1993-1994
- Grants and fund raising status, two overviews by John W. Haeger, February-March 1994
- Unrestricted grant from the Andrew W. Mellon Foundation for "costs of instituting operational economies and of broadening services": Proposal, related correspondence with William Bowen and Richard Ekman (one 1991 memo included regarding earlier "RLG 92" Mellon grant), plus grant results; projects included moving administrative functions in-house (away from Stanford); replacing private telecommunications network with Internet-protocol-based (IP) services; expanding membership (CURL—Consortium of Research Libraries—brought in at this time); and digital collections development ("Studies in Scarlet"); March 1994 – August 1999
- INION-RLG collaboration leading to Russian Academy of Sciences database in RLG's CitaDel (Citation Resources) offerings; includes funded proposal and reports to IREX (International Research and Exchanges Board) in Washington, DC; January 1994 – March 1996
- CitaDel/RLG Citation Resources: "CitaDel Midcourse Analysis," originally in binder – report from consultant Lindy Carll with information gathered, plus notes on effort from John W. Haeger, James Michalko, Kristin Tague, Win-Shin Chiang, Connie Gould, Joan Aliprand, Jim Coleman, David Richards; December 1994 – February 1995
- Multiproject support from the William and Flora Hewlett Foundation: Two-year proposal, grant, and correspondence regarding funds used for RLG's Diogenes (later renamed Marcadia) copy cataloging service, extensions of Eureka, Z39.50 connection to RLIN, expanded Latin American data, "Studies in Scarlet," and the Arches Archival Server and Testbed; June 1994 – December 1997
- EAD (Encoded Archival Description) and RLG work on finding aids: Assorted brief papers and memos from Anne Van Camp and Nancy Elkington (then based in Europe) – should be melded with other related material in other cartons; June-October 1997
- Tentative grant prospects: Slim file of John W. Haeger exchanges with Carnegie Corporation of New York, 1999-2000

- National Library of Lithuania recon (retrospective conversion) project: "Proposal to Catalog Hebrew and Yiddish Books" – Vilnius Task Force in cooperation with Yeshiva and Princeton universities and the national library – successive e-mails and proposal drafts (inconclusive on project/proposal); July 1998 – May 2000
- Cultural Heritage – Cultural Materials Initiative: Early work and initial funding from the Ford Foundation, preceded by earlier Ford Foundation relationship (final repayment of Ford's 1980 loan to RLG); May 1994 – June 1999
- Cultural Heritage – Cultural Materials Initiative: Small funding request for equipment to the Ludwick Family Foundation – turned down; May-October 1999
- Cultural Materials Initiative: Funding proposal to the Harcourt General Charitable Foundation, grant award, and a status report; August 2000 – October 2001
- Cultural Materials Initiative: Design/technology approach—single letter from James Michalko sent to Intel Corporation, April 2001
- Cultural Materials Initiative:  Funding proposal to Eastman Kodak Company, Rochester, NY and San Jose, CA – turned down; July-November 2001
- Cultural Materials Initiative:  Funding proposal to The Brown Foundation, Inc., Houston, TX – turned down; September-November 2001
- Cultural Materials Initiative:  Multipage overview sent to [?] Jay Last – a prospective funder or fundraiser? 14 December 2001
- Cultural Materials Initiative: Funding proposal to the William Randolph Hearst Foundations, San Francisco, CA – turned down; March-April 2002
- Cultural Materials Initiative: Funding proposal for service, to HP/Compaq, Houston, TX – no indication of response; June 2002
- Cultural Materials Initiative: Funding inquiry to J. M. Kaplan Fund, New York, NY, plus brief turn-down (3-page file); June 2002
- CIMI (Computer Interchange of Museum Information) consortium and RLG financial management for: Single award letter for Intel Corporation grant to support CIMI's "Mobile Computing in Museums" research; 12 March 2001
- Book vendors' online records in RLIN (RLG union catalog database): Letters to vendors requiring modified contracts with the implementation of "RLIN21 [which was actually delayed until 2005], including earlier contract history with Blackwell North America – no indication of vendors' responses; May 2004
- Trove.net (public access to RLG Cultural Materials content): Backgrounder to RLG staff in preparation for discussing Trove.net at the ALA (American Library Association) annual convention – single 2-1/2-page e-mail from Ricky Erway; June 2004
- RedLightGreen (originally "RLG Union Catalog on the Web") and Ted Hill Associates: Phases of consultant's business and market analysis for RedLightGreen – includes invoices for phases 1 and 2; contract outlining 3-4 phases; 17-page "opportunity analysis" for Phase1; notes and slides from August 2004 Phase 1 meeting; note from James Michalko on deliverables in Phase 2; and a "relevant case history"; July-December 2004
- RedLightGreen (RLG union catalog on the Web): Feedback by early users and notices in the press and on blogs; work with OPAC (online public access catalog) system vendors and Yahoo to improve RedLightGreen and benefit them at the same time; September 2003 – April 2005
- Turning RLG Archival Resources into ArchiveGrid (and more): Background/context and proposals to NHPRC (National Historical Public Records Commission)—not funded—and to the Earhart Foundation—funded; includes one November 2005 progress report; January 2002 – November 2005

- Search engines and RLG: Notes, correspondence, and contract from James Michalko related to explorations with Earthlink, Google, consultant Raymond Williams (to set up discussions with LookSmart and close to a dozen others); far from comprehensive; mid-2004 – early 2006
- Leadership in the library standardization arena: Bits of information about an invitational "standards summit" convened by OCLC, RLG, CNI (Coalition for Networked Information), and ALA (American Library Association) on 26 January 2005

[Carton 84: See note preceding Carton 1 above.]

## CARTON 85: President's Office (aka Administration)

1976-2002: Begins with set of folders alphabetical by RLG member institution; also some non-member institution folders touching on various collaborative explorations, still roughly alphabetical; ends with set of five folders on CLR/CPA/CLIR/DLF interactions.

- Art library special members and a 1981 special-member assessment: Correspondence between John W. Haeger and six art members, November 1981
- General-membership dues discounting for members of IRLA (Independent Research Libraries Association): Memo from John W. Haeger outlining offer and recap of same information to IRLA directors from Werner Gundersheimer (head of Folger Shakespeare Library and then-president of IRLA); January 1992
- Member evaluations (by University of California, Santa Barbara, University of Southern California, and University of Toronto) of FRANCIS and PASCAL databases for RLG (as part of CitaDel, aka RLG Citation Resources service); March-April 1996
- Member - Columbia University: Correspondence and information exchanges between RLG and various parts of Columbia; 1980 to August 2000
- CURL (Consortium of University Research Libraries, British Isles): Decision to join RLG, issues, use of RLIN, Michalko visit to UK, etc.; May 1993 – December 1994
- CURL (Consortium of University Research Libraries, British Isles): Relations, exchanges, activities among RLG, CURL, and British Library (regarding retrospective conversion) – includes CURL member focus group, CURL strategic plan, loading CURL data into RLIN/RLG union catalog, RLG's representative in the UK, FY1996 and FY1998 fixed-price service contract or discussions, continuing Michael Smethurst relationship; 1994 (just), 1995-1999 (just)
- CURL (Consortium of University Research Libraries, British Isles): Mentions of RLG-related activities in CURL annual reports for 1996, 1997, 1998, and 1999
- CURL (Consortium of University Research Libraries, British Isles): RLG service contacts and invoicing – CURL contract for FY1999; FY 2000 invoice and cover letter; questions about standard service agreements (individually signed by CURL members), August 2002; fixed-price contract for FY2003;notes on service use, 1999, 2001, 2004 [RLIN21 Web browser]
- Member (through Stanford University) Hoover Institution: Hoover-RLG NEH- (National Endowment for the Humanities) –funded project to add Rosarkhiv records to RLIN (RLG union catalog) – "Enhancing Access to Russian Archives"; performance reports of October 1995, February 1996; final report of September/October 1997; June 1996 grant extension memo; Charles Palm rebuttal to J. Arch Getty's negative review of the Hoover project in May/June 1996 issue of the AHA (American Historical Association) journal "Perspectives"; cost-sharing/final accounting with RLG in early 1998

- Member – Johns Hopkins University: Correspondence and documents from JHU's membership, including library's 1990 study of membership value and its RLIN/OCLC comparison; October 1980 – October 1990
- Member – Los Angeles County Law Library: Correspondence regarding RLG support to LACo Law in its participation in state-library-funded Project ASIA ("Asian Shared Information and Acquisitions"), July 1981 – February 1983; plus LACo Law's special membership and RLG Law Program entry, May-November 1982
- Pre-membership – Linda Hall Library: Correspondence regarding membership; talk by James Michalko at LHL's information system launch ("LEONARDO"); October 1993 – July 1995
- Member – Metropolitan Museum of Art: Correspondence beginning with idea of special membership (slight file); December 1980 – January 1993
- Member – New York Public Library: Correspondence with RLG on various aspects of membership; August 1980 – March 1996
- Member – Princeton University: Correspondence as an RLG member, RLIN user; November 1976 – May 1994
- Member – University of Chicago: Correspondence and documents from UC membership and RLIN use; July 1983 – November 1991
- Member – University of California, Davis: Acceptance of membership and miscellaneous correspondence on RLG and RLIN; July 1983 – September 1988
- University of California, Riverside (not a member): Contractual correspondence regarding work with Henry Snyder on the ESTC/North America project and RLG database; January 1994 – June 1999
- Member – University of California, Santa Barbara: Correspondence related to membership; March 1982 – July 1996
- Member – University of Hawai'i, Manoa: Membership and RLIN CJK use – correspondence; November 1984 – September 1994 (nothing between 1986 and 1994, however)
- Member – University of Iowa: Slim file of correspondence up to end of membership, starting with September 1987 memo, then dating March 1994 – May 1998
- Member – University of Pennsylvania: Single memo from Penn's Richard De Gennaro to RLG president Richard W. McCoy regarding RLG and non-Roman scripts development; August 1984
- Chadwyck-Healey and RLG interactions: Agenda for one meeting at RLG [refile with more on C-H in other carton(s)?]; January-March 1998
- Pre-membership – Deutsches Bibliothek: Correspondence, from developing Z39.50 gateway to possible membership (achieved); April 1995 – October 1999
- Deutsches Bibliothekinstitut: A little inconclusive correspondence [relationship to DB?]; October 1993 – February 1997
- Deutsches Forschungsgemeinschaft: Interactions with, including John W. Haeger 1998 presentation on RLG's archival initiatives (slides and notes for a paper); November 1998 – February 1999
- European Register of Microfilm Masters: Two memos about National Library of Poland's register to be loaded into RLIN (RLG union catalog); October and November 1995
- Otto Harrassowitz: A few items on Harrassowitz (book vendor) records in RLIN and digitizing for library data such as finding aids; August 1997 – June 1998
- "Humanity 2000": Information about a proposed international project of interest to the CIMI (Computer Interchange of Museum Information) consortium, Getty Art History Information Program, and RLG; November-December 1994

- ICYT (Instituto de Informacion y Documentacion en Ciencia y Technologia): Two letters from John W. Haeger regarding collaboration in document delivery; July and October 1991
- Ingenta: New organization in the UK for academic journals online, interested in collaboration with RLG – correspondence (three items); November and December 1998
- Istituto Museo di Storia della Scienza: Lead-up to and signed agreement with to incorporate IMSS's BISS (Bibliografia Italiana di Storia della Scienza) records into the RLG History of Science and Technology database (slim file); December 1990 – April 1996
- Ministerio de Defensa, Madrid, and Fundacion Juan March, Madrid: RLG's interest in loading specified records (e.g., Iberoamerican maps cataloging pre-1700); also a Biblioteca Nacional letter (four letters in all); July-December 1994
- NFAIS (National Federation of Abstracting and Indexing Services): One letter explaining RLG's decision to withdraw; May 1994
- National Library of Canada: Slim file on Z39.50 connections between NLC's AMICUS and RLG's RLIN; 1995
- National Library of Ireland: RLG and Dynix / RetroLink Associates interest in (slim file); May-July 1994
- Peking University Library: Two letters [should go into a PUL file in another carton, most likely] – includes information about Internet connection with RLG; June 1996 and December 1999
- REBUS/SIBIL (Réseau des Bibliothèques utilisant SIBIL/Système informatisé pour Bibliothèques): Background on European library network and system created in Lausanne, arrangements for visit to RLG, potential for including SIBIL records in the "EuroSTC" file [ESTC database?] – Genevieve Clavel's first contacts with RLG?; July 1990 – March 1992
- REBUIN (Red de Bibliotecas Universitarias) (Spain): RLG's interest in loading (or Z39.50 connecting to?) REBUIN records – inconclusive record of correspondence by Jack Kessler (consultant), Connie Gould, John W. Haeger; fall 1994 – April 1995
- RLG services diagram: "RLG Products/Services in the Academic Information Environment" – undated, produced by which department?; likely from 1994
- Translink: Rob King's explorations, as consultant to James Michalko, of acquisition possibilities for RLG – specifically Silver Platter – plus some other areas for Translink research; May-October 1998
- RLG and CPA (Commission on Preservation and Access): Work on digital archiving requirements (plus some information on RLG and Cornell's own efforts) – background from 1994 to 1996
- RLG and CPA (Commission on Preservation and Access): CLR (Council on Library Resources) and CPA support prospects for RLG's "FAST Track" initiative (workshops for Finding Aids SGML Training); March-October 1996
- RLG and CPA/CLIR (Commission on Preservation and Access & subsuming organization, Council on Library and Information Resources): Varied correspondence topics other than joint preservation task force; Finding Aids SGML Training program; Digital Library Federation; April 1993 – October 1998
- DLF (Digital Library Federation, under aegis of CPA) and RLG: Background and efforts to collaborate; May 1995 – mid-1997
- DLF (Digital Library Federation), CLIR (Council on Library and Information Resources), and RLG: Efforts to coordinate/collaborate – a mixed bag of records; June 1997 – May 2002

**CARTON 86: President's Office (aka Administration)**

1990-2005: Portion of alphabetized run of subset of presidential files – "Hong Kong – Museum." To identify other alphabetically organized presidential cartons, see Carton 80 summary.

- CJK-EACC (Chinese, Japanese, & Korean – East Asian Character Code) Development: Letter from Hong Kong University of Science & Technology, 1998.
- Host relationship: RLG and Stanford changes, 1990-1994. (See also files in Carton 81, for the periods 9/1988-8/1993 and 12/1994-8/1995.)
- ICCU (Istituto Centrale Per Il Catalogo Unico Delle Biblioteche Italiane), data contribution to RLG, 1997-2002.
- IDC (Inter Documentation Company), use of RLG-RLIN records, 1997-1998.
- ESTC: IESTC (International Committee for the ESTC) meeting, November 2000. ("ESTC," originally for "Eighteenth-century Short Title Catalogue," was redubbed, at least as an RLG database, to "English Short Title Catalogue" when it's coverage expanded beyond the 18$^{th}$ century. The altered name is more limited than the contents, however.)
- IEEE (Institute of Electrical and Electronics Engineers, Inc.) Computer Society, RLG membership, 2002-2004.
- IFLA (International Federation of Library Associations and Institutions): RLG membership records, 1997-2005.
- ILL (Interlibrary loan) redesign, 1995 (under program officer Carol Hughes) & 1999.
- INION (Institute of Scientific Information in Social Science of the Russian Academy of Sciences), as data provider to RLG, 1988?-1999.
- Informix Software, letter of acknowledgment regarding its transfer to IBM, May 2001.
- ISM (Information Systems Management Corporation),  access to RLG databases, 1993-1997.
- Infotrieve, Inc. and RLG "Prospero Settlement," 2003. (See also Carton 140).
- INIST (Institut de l'Information Scientifique et Technique), relations with RLG (citations database provider), 1990-1997.
- JETRO-IDE (Japanese External Trade Organization – Institute of Developing Economies), meeting with RLG, 1999.
- Kluwer Academic Publishers & RLG-PICA (Netherlands) WebDOC Project, 1996.
- LIBER (Ligue des Bibliothèques Européennes de Recherche), 1991-1993.
- Library of Academia Sinica (Chinese Academy of Science) & RLG Memorandum of Understanding, 1998. (For discussions on Ariel software, data exchange, data provision.)
- Lilly Project (Theological Libraries), request to VP John W. Haeger for supporting "essay."
- Ludwigsburg Kolloquium, 1998. (VP John W. Haeger follow-up letters to 2 German University Libraries met there.)
- Luna Imaging & RLG Cultural Materials, January – June 2000.
- Maruzen (Japan) & RLG: multiple folders:
    - Questions about RLG-OCLC combination, June 2006 (1 document).
    - Keio Orientation to RLG (copied to RLG's Karen Smith-Yoshimura), February 2003.
    - Coordination (RLG consultant Natsuko Furuya, Kristin Tague, and Susan Taylor), 2001-2003.
    - 2000-2002.
    - Meeting at RLG with new Maruzen CEO, May 2001.
    - 1997-1999.
    - Proposal to RLG for remarketing RLG services and supporting users in Asia, 1996.
    - Background on UTLAS/ISM connections to Maruzen operations, ca. 1993.
- Minolta – RLG nondisclosure agreement related to Ariel, March 1998.
- Museum Licensing Cooperative business plan, 1997.

## CARTON 87: President's Office (aka Administration)

1983-2005: Portion of alphabetized run of subset of presidential files – "Bavarian – Chinese." To identify other alphabetically organized presidential cartons, see Carton 80 summary.

- BSB (Bavarian State Library; Bayerische Staatsbibliothek), 1990-91, 1997, 1998.
- BnF (Bibliothèque nationale de France), 1989-1993, 1995-2000, 2002 (4 folders in all).
- Brazilian Bibliodata Network – Fundaçao Getulio Vargas, 1997.
- British Library, 17 folders:
    - Correspondence, 2003-2005.
    - Correspondence, 2001-2002.
    - Correspondence, 1999-2000.
    - "e18" Trial, 1999.
    - ISTC in RLIN (RLG Union Catalog), 1997-1998.
    - Correspondence, 1997-1998.
    - Correspondence, 1995-1996.
    - Venture with RLG ("Global Record Supply") conclusion, 1995-1996.
    - Venture with RLG, 1994-1995.
    - Venture with RLG, 1991-1995.
    - Retrospective conversion (recon), 1995.
    - International Conference on Scholarship & Technology in the Humanities: Networking and the European Heritage (Elvetham Hall), 1994.
    - David Russon visit to RLG, 1994.
    - Stuart Ede correspondence re Venture with RLG, 1993-1994.
    - Correspondence, 1993-1994.
    - BL Document Supply Centre, 1992-1994.
    - Databases loading, 1989-1996.
- Bridges Memorial Art Library, 1997 & 2002.
- British University Film and Video (BFUVC) & Andrew Philips, 2000.
- Brown University, membership study & withdrawal from RLG, 1994.
- Brown University, RLIN CJK & recon project participation, 1983-1984.
- Carnegie Corporation, 2000 (1 letter).
- Casalini Libri, vendor's in-process records supply to RLG/RLIN, 1995.
- Chicano Database (CDB), 1995 (1 letter).
- Chinese Academy of Sciences (Academia Sinica), 1996-1999.

## CARTON 88: Multiple departments

1976-2006: Extremely disparate mix of files; these could be integrated into other cartons if arrangement of entire archives were being attempted. (Original contents of Carton 88 were melded with like materials into Carton 134, and Carton 88 received files "left over" at end of inventory process.)

- Donors and granting organizations for RLG, 1976-1998: Single-sheet list of foundation names, followed by a spreadsheet on gifts, grants, and contributions received each year and from whom, followed by "Investment Income Test" (of qualification under Section 509 (a) (2); last two created by Marc Israel in October 2000

- Informational flier – "The Research Libraries Group, Inc., Selected Facts, October 1979": Referred to in Ed Shaw's 1979 correspondence to RLG Board of Governors (in another folder in Carton 88); a snapshot of members and "participants," governance, programs, committees, a year's worth of grants, central staff organization, database size and content, system capabilities, 1980-81 development program, network [user] support, technical environment; 4 pages
- Early news releases: (1) RLG – Stanford press release, 27 April 1978 -- RLG board's decision "to use Stanford's computer-based bibliographic processing system, BALLOTS"; (2) RLG news release, 16 October 1978 – "significant changes in RLG's structure and executive officers" [formation of RLIN out of BALLOTS and election of Stanford's Edward E. Shaw as RLG's second president, making first president, James Skipper, the vice president]; (3) ten-year goals of RLG; for more early news releases, see also Carton 5 and Carton 7
- President's correspondence – Edward E. Shaw:  Five letters from RLG's second president in 1979, plus 14 February 1980 memo to RLG officer John Heyeck (delegating authority during month-long presidential absence; for other Shaw correspondence, see also Carton 15
- Use of RLIN online bibliographic records by RLG and by contributing institutions: Exchange of e-mails on the subject between Richard Kolbet, Assistant University Librarian for Technical Services, University of Iowa, and RLG legal counsel and board secretary, Noel E. Hanf, November 1980 [might belong in Carton 188?]
- RLG financial plan and loan/prepayment agreements, February 1981: (1) form letter to members dated December 1980, to use in confirming their prior year's use of RLIN services (details not attached); (2) form letter to members that went with a 1981-1986 budgets document; (3) agreements either [?] for loans to RLG or long-term prepayment for RLIN services to be consumed
- Presidential resignation, 22 April 1982: Remarks to the board of governors about RLG and offer of resignation [accepted] by Edward E. Shaw, 2 pages; see also Carton 24 and Carton 37
- President's correspondence – Richard W. McCoy: (1) May 1983 short note to Rowland Brown, OCLC president, regarding cooperation; (2) August 1983 draft of a grant request to Digital Equipment Corporation for "support of scholarship in East Asian Studies" in the form of free licenses to run DECNET communications software on RLG CJK terminal clusters; see also Carton 105
- Programs staff – Barbara Brown: April 1985 letters exchange with Christine Borgman (UCLA Graduate School of Library and Information Science) that indicates when/where Brown moved from RLG Programs to head a university library (Washington and Lee University) – started new position in July 1985; see also Carton 39 [a better place for this folder]
- Staff input on presidential choice [to succeed William Timlake], 2 May 1988: Single memo outlining discussion with Sterling J. Albrecht, RLG board chair, with Barbara Lindeman, Gail Jack, and Jennifer Hartzell
- Computer Company press release, 27 December 1988: "Authority Control Services available to RLIN users through agreement with The Computer Company" [at special rates; no indication of how much or little this agreement was used, or how long it lasted]
- Book vendor cataloging – addition to RLIN: November 1996 snippets of RLG discussion with Yankee Book Peddlar [originally in James Michalko's presidential files?]

- President's contacts with community – James Michalko: Mailings signed by James Michalko about RLG events, prospects, and services, with attachments; three, dated March 1988, December 1988, and 19 October 1990; see also "Presidential Updates" in Carton 49
- RLG budget/skill set/salary equity issues – re 1992 layoffs: Single draft memo from James Michalko to Robert Street (then Stanford's "administrative liaison for RLG"), July 1992
- Host Transition Project – developing RLG's own staff benefits program:  Work with KPMG Peat Marwick LLP to survey central staff and line up human resources project manager(s) to implement a program based on staff input and KPMG's model for a benefits plan as reviewed by RLG; includes KPMG engagement letter, survey, results of survey, plus open forums and outline of program implementation by Smith – Jennings; 28 October 1994 – mid-June 1995; see also related material in Carton 128 and Carton 167
- RLG audited financial statements – 31 August 1999 and 1998: Originally in assistant secretary's files and should have been in Carton 135 with the rest of that set of statements
- "RLG Directory, October 1981": Index to members and types of members, the board of governors, committees, and central staff (departments and individuals); donated to RLG archives by University of Toronto's Faculty of Information [nee "library school"?]; includes one page on members from 16 November 1981.   SEE ALSO next entry, Carton 41 (1993) and Carton 119 (1979 draft).
- "RLG Directory," July 1987: 197 pages, loose-leaf, two-sided – index to members, governors, committees, programs, and RLG central staff; donated to RLG archives in 2010 by Sara Timby – complements directories of 1979, 1981, and 1992-93
- Moving from Stanford/Palo Alto to Mountain View: One of presumably more memos to staff on handling changes (in mail, addresses, etc.) from "Elsa Henderson for the Move Working Group," October 1988; PLUS invitation delivered to former RLG staff member to new offices opening on 9 December 1988; SEE ALSO Carton 119
- Central staff in Mountain View, 1990-ish: Room assignments, floor plan for 1200 Villa Street two-story building
- 1992-1993 RLG "FY92" transition work:  22 December 1992 agenda and background memo [from John Haeger] for RLG Commission on Member Dues and Fees meeting on 15 January 1993; new dues and fees to be implemented in fiscal year 1994 (as of 1 September 1993); see Carton 69 for more materials.
- 1993-1994 "RLG Board of Directors' Reference Binder," produced 20 July 1993: Cover memo plus unbound (but tabbed) contents; includes description of April-August 1993 RLG member-development program that involved board work; Tabs: Calendar; Board Members; Definitions; Bylaws; Members; Finances; Technical; Staff; Descriptions [of RLG programs, RLIN, other products and services]; and Other (1992 RLG Prospectus and 1993 Catalog of projects and activities)
- RLG Central Staff organization chart: Three versions – 29 July 1999, 22 October 1999, and "early October 2005" [still in some flux]; SEE ALSO Carton 119
- "RLG New Employee Orientation," 16 May 2001: Booklet addressing RLG purpose, programs, products, and NOT offices, organization, other mundane matters; contains slide printouts for RLG Overview (18 pages), SHARES (6 pp.), The AMICO Library (5 pp.), Citation Resources (10 pp.), ESTC/HPB (13 pp.), Library Resources/Union Catalog (6 pp.), Archival Resources (7 pp.), Ariel & RLG's ILL Manager (8 pp.), and CMI [Cultural Materials Initiative] Demo (21 pp.)
- "RLG Employee Product & Services Orientation Day": 31 May 2001 agenda plus 13 handouts [originally in binder, it appears], which include a 30 May 2001 central staff organization chart, RLG price lists, and slides on Member Programs, The AMICO Library, Archival Resources, Citation Resources, ESTC/HPB, Library Resources/Union Catalog

- Southern institutions' interest in RLG: Georgia Historical Society (undated) and University of Georgia (1992), and a 1997 inquiry from University of North Carolina [RLG members in these states were Emory University, Georgia State Archives, and Duke University]
- Membership prospecting snippet: University of Pittsburgh, January 1995
- Collection Management and Development Program, February – March 1989: Working group on CD-ROM contracts checklist (Scott Bennett, Florence Doksansky, Peggy Johnson, Randy Olsen) – cryptic exchange between program officer Annette Melville and legal counsel Noel E. Hanf on this work [see also Carton 153, where this really belongs?]
- Digital Preservation Report, 1 November 1995: Letter response to "Draft Report of the Task Force on Archiving of Digital Information," to task force chair Don Waters from Betty Bengtson, chair of ARL's Preservation Committee; really belongs with other papers associated with this report cosponsored by RLG and CLR; see also Carton 17
- Shared Resources (SHARES) Program, 1989 – 1996: (1) James Michalko sends draft PSC [Public Services Committee] White Paper ("services in 2000") to the board, March 1989; (2) Jim Coleman's copy of [RLG's?] "ILL/Document Delivery Strategy," May 1994; (3) Background on ARL NAILDD (North American Interlibrary Loan Document Delivery) Project, with which RLG collaborated, August 1994; (4) SHARES Roundtable agenda for 19 January 1996; and (5) Linda West's annotated slide printouts on RLG's strategy for 1996-2000 and its impact on SHARES, 19 January 1996; related to/see also Carton 31
- RLG-member law library activities, 1996-2000: Agendas and related materials for RLG Law Roundtables held annually; part of a longer record; plus one agenda for the following-day RLIN Law Forum, 1997 (Roundtable for members, Forum for users); related to/see also Carton 16, Carton 41, maybe Carton 180
- CETH – RLG/RLIN relationship, August 1992 – October 1996: Nature of connection in 1990s between RLG and the Center for Electronic Texts in the Humanities (CETH)? John Haeger's partial records as a member of CETH's Advisory Board; subset of mailings from Susan Hockey, CETH Director
- RLG pricing for IRLA members, 1991-1996, passim.; 2002: Reductions in RLG membership dues and some RLIN charges for RLG member institutions that belonged to the Independent Research Libraries Association; related to "RLG92" reorganization – SEE ALSO Carton 69 for more on RLG92
- Member Programs – "Road show talk," 1993-1994: (1) Patti McClung's script for presentation during member site visits, 14 pp., unnumbered, 7 January 1993; (2) slides (printouts) used by McClung and Nancy Elkington on trip to the Library of Congress, 12 October 1994
- Exploring RLG – LC collaboration in image management and services, between 1996 and 2000: A follow-on to other efforts in the late 1990s (specifically MESL – Museum Education Site Licensing) and in light of RLG's "Arches" work (on digital collections online, information delivery, etc.); file contains several reports and e-mails by Carl Fleischauer, Library of Congress, Ricky Erway, RLG, and others at LC over December 1996 through early January 1997; PLUS, "Proposed basis for LC … in RLG's Cultural Materials Initiative, 31 August 2000
- RLG & Berkeley-Columbia "Digital Scriptorium" – discussions from July 1996 to May 2001: Exploration of how RLG might be a distribution vehicle for the two-university project to create "Digitized Images of Medieval Manuscripts and Tools for Their Analysis" – with RLG's focus on the evolving RLG Cultural Materials Service and experience with ESTC and HPB; file begins with Digital Scriptorium proposal to the Mellon Foundation and ends, inconclusively, with functionality exchanges between Berkeley, Columbia, and RLG; SEE ALSO Cartons 93 and 211.

- RLG "Managing Digital Imaging Projects" workshops, 1997-1999: Designed and taught by Cornell (Anne Kenney and Oya Rieger) under contract to RLG; (1) Initial announcement, August 1997; (2) specifics about a separate Cornell "digital imaging" workshop, December 1997; arrangements for the RLG workshop held in Canberra, Australia, October-December 1998; RLG workshop evaluations from event held in Ottawa, Canada, December 1999; SEE ALSO Carton(s) 45, 58, and 143.
- New York Times article referencing RLG 1998 digital issues study: "Books to Bytes: The Electronic Archive; Research libraries grapple with task of preserving the digital present," by Katie Hafner, pp. D1 and D5, Thursday, 8 April 1999; SEE ALSO Carton 54 and Carton 67 (where RLG study is filed)
- Digital museum/art records – REACH, VISION, AMICO projects: E-mail update from then-RLG-program-office Katherine Martinez to REACH and VISION participants, February 1998; at least one other file in this carton, and SEE ALSO Carton 177
- Cultural Heritage/Materials architecture plans, 1999-2001: Small collection saved by RLG's Ricky Erway of architectural diagrams and descriptions about the hardware and software framework for the RLG Cultural Materials service, done by David R. Richards and others, fall 1999 and April 2000; PLUS articles from "RLG Focus" newsletter, issue 52, October 2001; much more on Cultural Materials in other cartons – SEE Carton ??? for cross-references.
- Internal reporting on visit to OCLC, October 1999: Memos from James Michalko and others at RLG on exploratory discussions about plans/interests of RLG and OCLC, and how to follow up with some collaboration and sharing out of work
- Programs Department's 2005 RLG Marketing Plan: Draft of annual marketing plan along lines established by RLG's new director of Marketing & Sales, Karen Carbonnet; heavily annotated by someone [Ricky Erway? or ??]
- End of RLG Cultural Materials (and Trove.Net), early 2007: What happened to this effort after 2006 -- 8-page document to Cultural Materials Alliance participants about the post-OCLC-merger termination, with observations on RLG Cultural Materials' history, how it performed, things learned, and what can come next; 5 February 2007
- RLG Internet milestones, 1988-1994: Historical chart and short descriptive list done by Bruce Washburn for possible use by RLG writer Richard Kohn, 30 March 1994; begins in 1988 with RLIN available on Internet via Telnet, and goes on to Ariel, Z39.50, Eureka, and the RLG corporate Web site
- RLG Web site – earliest work, 1994: Set of "blueprints" and initial Web page drafts, 28 February 1994, and short memo on style guide for RLG Web elements, 14 March 1994; Web site first went public in early April 1994
- RLG Web site and exhibit booth redesigns, 1997: Web site -- six items on a "quick paint job" (which lasted for more than 6 years), done by Claudia and Michael Tompert to incorporate the new RLG logo and color scheme designed by John Stoneham the same year; see example of look of redone site in the Wayback Machine on the Internet; PLUS: a couple of items on a new background created for RLG's conference exhibits booth; the new booth incorporated an elegant image provided by the Frick Library of an art librarian/researcher at the computer surrounded by material types, later known to staff as "Eureka girl"
- RLG Web site – home page ("site directory") changes, end of 1997 to early April 2004: Intermittent print-outs filed away showing changes to the site as reflected at the home page level (up to the major Web redesign installed around 8 April 2004); PLUS: sample of this page's html as of 15 December 1998
- RLG Web site – major makeover begun at end of 2001: RLG request for information to various Web design groups, and responses received, December 2001 – 18 January 2002

- RLG Web site – major makeover, selection of contractor, 18 January – 25 July 2002: Selection of Nectarine Design; includes their RFI response/proposal identifying several phases of the project; specifics of Phase I (Research and Analysis) proposal; final Phase I invoice
- RLG Web site – major makeover, Phase I, 27 February – 3 June 2002: Products – report on research, analysis, and recommendations, final requirements chart, and various RLG memos during process
- RLG Web site – major makeover, Phase II, 11 June 2002 – 26 March 2003: Design of new site – begins with memo on modifications in Phases II through V, mostly geared to costs foreseen, since everything was more complex and took longer than estimated; Nectarine documents on aspects of design (spilled over into development phase in 2003)
- RLG Web site – major makeover, Phases III-IV, most of 2003:  Trailing wrap-up and continued design/graphics with Nectarine, plus protracted, iterative work on functionality and site organization under separate contract with programmer, Martin McGee; MUCH more paper generated during this project than has been retained here, in the course of getting a site that satisfied RLG's needs and expectations.
- RLG Web site – major makeover, final development/implementation, late 2003 – December 2004: Some items from pre- and post-launch work; includes script for verbal staff announcement, final exchanged with Nectarine Design and Martin McGee; again, this and the Phase III-IV folder scarcely indicate the amount of work put in by RLG's communications unit, the Systems department's technical writers (MANY pages were created or extensively updated and rewritten), and supportive in-house programmers
- RLG Web site – post major makeover, 2004-2005: Prolonged effort to solve issue of addressing RLG "member communities (legacy of earlier years plus new types of members) – never fully realized as envisioned in new Web site
- RLG Web site – new site "CMS User Guide," last updated 2005: Communications unit manager's copy of internal guide to using the corporate Web site's purpose-built content management system – written by Lydia Lee with input from other writers and Web workers; pages NOT numbered; need to be kept in order
- RLG Web site adjunct – staff-only RlgStaff Directory pages, December 2005: single-sheet guide to portion of corporate Web server housing old/new pages outside of the actual corporate Web site and its content management system (CMS)
- RLG Web site – made-over site as of 18 December 2005: Printout of complete inventory of Web pages in hierarchical order; includes the location of pages not visible in the production Web site, because they are draft or test pages, internal CMS guide pages, or the mostly password-protected Board of Governors Web page (these cannot be viewed in the Wayback Machine)
- RLG Web site – WebTrends tracking, November 2004 – January 2006: Handful of items on using WebTrends software to interrogate/report on uses of the corporate Web site
- RLG Web site – January 2006 considerations: "Some needs, possibilities, considerations in changes to the RLG Web site," Jennifer Hartzell's 12 pages of notes for the new Corporate Communications manager, Jim Lucas, as JLH retired; also, some background from other RLG staff contributed over 2005, some organized by major Web "sections"
- RLG-OCLC agreement to combine/merge, spring [northern hemisphere] 2006: Initial announcements and FAQs about the changes, plus some library media reactions; May-June 2006 (period prior to final RLG Board of Directors meeting and annual Membership Meeting, both held in Mid-June; change took effect July 1, 2006
- Creation of RISO as part of RLG-OCLC merger, 2006: Legal and logistical transition from The Research Libraries Group, Inc. (RLG) to The Research Institutions Support

Organization (RISO), with a small RISO board to serve a transition oversight role during the five-year period from 1 July 2006 to 30 June 2011; six documents

- RLG-OCLC merger, initial programs planning, 2006-2008: Sampling of early communications about RLG member programs within OCLC; four printouts, ending with announcement of the 2$^{nd}$ Annual RLG Partners meeting, at a point when "a tremendous amount had been [collaboratively] accomplished"
- Post RLG-OCLC merger – product/service transitions, November 2006: Brief status and plans for ArchiveGrid, CAMIO, the Eureka Databases, RedLightGreen, RLG Cultural Materials (and Trove.net), RLG's ILL Manager, RLG technical services, and the RLG Union Catalog; PLUS additional information on the Eureka Databases transition into FirstSearch and the ILL Manager's future
- Conclusion of five years of "RLG Partnership" within OCLC, 2011: Announcements in March and April reporting on successful transition/merger in the initial five-year period, leading to a new "OCLC Research Library Partnership" and programs; also a memo from James Michalko and a resolution of satisfaction, thanks, and appreciation to the former RLG Board of Directors from the current OCLC Board of Trustees, 24 June 2011; Michalko notes that RISO and the RISO board were dissolved at their last meeting

## CARTON 89: President's Office (aka Administration)

1988-2005: Portion of alphabetized run of subset of presidential files – "ABES - Brooklyn." To identify other alphabetically organized presidential cartons, see Carton 80 summary.

- ABES (Agence Bibliographique de l'Enseignement Superieur), reseller of access to RLG databases, 1999-2000 (John W. Haeger).
- Academic Images Cooperative (AIC), 2000 (James Michalko).
- Adobe Systems, digital preservation (James Michalko), 2002.
- American Library Association (ALA), RLG membership in, 2002-2004.
- American Council of Learned Societies (ACLS), 1992-1005.
- AMICO (Art Museum Image Consortium): voluminous files about the AMICO Library service and RLG's dealing with David Bearman and Jennifer Trant, 1997-2002. (Multiple folders, roughly organized by year.)
- Apex Data Services, Inc. – Folger Colloquium, November 2002.
- Association of Research Libraries (ARL), 1996.
- Auto-Graphics, reseller of RLG databases access, 1997.
- Azimuth Consultants, RedLightGreen contract, 2003.
- Bibliographic files in RLG, restricted data agreements, 1989-1998.
- Biblioteca Nacional (de Portugal), 1996.
- Biblioteca Nacional (de Espana), 1988-1999 (includes various agreements).
- Bibliotheque Municipale de Lyon, 1995-2002.
- Brooklyn Museum of Art, Museum Archives Initiative, 2000.

## CARTON 90: President's Office (aka Administration)

1982-2006: Portion of alphabetized run of subset of presidential files – "RecomMind - WLN." To identify other alphabetically organized presidential cartons, see Carton 80 summary.

- RecomMind, Inc., "Union Catalog on the Web" (later "RedLightGreen") project role (including contracts with RLG), 2001-2004.

- Retrolink (subdivision of Ameritech/Dynix) & RLG negotiations over "Diogenes" (later "Marcadia") joint automated copy-cataloging service using RLIN RLG Union Catalog records, 1993-1997.
- Rosarkhiv (Russian Archives) – Hoover Institution – RLG project for Rosarkhiv cataloging in RLIN (RLG Union Catalog), 1991-1996.
- SAA (Society of American Archivists) Distinguished Service Award to RLG, 1994.
- K. G. Saur Verlag, deals with RLG for Saur CDs drawing on RLIN (RLG Union Catalog) data, 1994, 1996-1999.
- SCIPIO (Sales Catalog Index Project Input Online), 1982 & 1983 (contract).
- SCIPIO (Art & Rare Book Sales Catalogs) database user feedback on pricing (1 item), December 1997.
- SCRAN (Scottish Cultural Resources Access Network), Nancy Elkington visit & report on, 1998.
- SeaDragon Software (formerly Sand Codex LLC), agreement with RLG to cooperate on digital image navigation technology, 2003-2006.
- SLS (Information Systems) Ltd. (UK) as RLG records access remarketer/reseller, 1992-1996.
- State Library of Queensland (Australia), "thank you for our visit to RLG" letter, 1996.
- "Studies in Scarlet" Coordinated Digital Collection Project: seeking funders, 1995.
- Swiss National Library 1994 proposal for a Swiss Information Network, 1994 (by Genevieve Clavel).
- TRANSTECH & RLG agreement for TRANSTECH technology used in RLG CJK (Chinese-Japanese-Korean scripts input & display) workstations, 1995.
- UMI (originally University Microfilms): RLG approach to collaborate through lash-up of RLG's CitaDel citation databases service and UMI's ProQuest Direct services, 1995.
- Voltaire Foundation (UK), John Haeger letter to regarding Foundation's "c18" (18$^{th}$ Century Online) project, 1997.  Related to RLG – British Library "e18" trial of ESTC (English Short Title Catalogue).
- Wien, Charlotte: Thesis sections on testing RLIN for Arabic script retrieval, 1997.
- Wiggin & Dana (formerly Wiggin & Dana), law firm: 1 services brochure, 1999.
  (Firm provided RLG legal services and counsel from before incorporation in 1975 through merger with OCLC and creation of The Research Institutions Support Organization, Inc. [RISO] in 2006.)
- WLN (Western Library Network, originally Washington Library Network) – RLG – ARL (Association of Research Libraries) sharing of Conspectus methodologies and services, 1992-1993.
- WLN (Western Library Network), New CEO and RLG's possible collaboration with, 1996 (incomplete record).

## CARTON 91: President's Office (aka Administration)

1987-2005: Mixed files generally organized by entity rather than RLG activity/interest. Basically is also a portion of alphabetized run of subset of presidential files – mostly but not all "N – P." To identify other alphabetically organized presidential cartons, see Carton 80 summary.

- [RLG] Cultural Materials service: seeking sponsors, 2000.
- ESTC database-related … Oxford project, no date.
- FAST (Finding Aids SGML-markup Training) Project, CPA (Commission on Preservation and Access) grant, 1996-1997.

- NACSIS (National Center for Science Information Systems, Japan) – RLG exploratory meeting, 1998.
- National Diet Library (Japan) correspondence, 1999 (mostly).
- NHA (National Humanities Alliance), RLG membership in, 2002-2005.
- NIH-NLM (National Institutes of Health – National Library of Medicine), bibliographic records in RLIN (RLG Union Catalog), 2000.
- NIH-NLM (National Institutes of Health – National Library of Medicine), preservation data in RLIN (RLG Union Catalog), 1994.
- NII (National Institute of Informatics, Japan), RLG meeting with, November 2005.
- NINCH (National Initiative for a Networked Cultural Heritage), RLG membership in, 1996-2002.
- NISC (National Information Services Corporation): Path to a final version on CD-ROM of the Medieval & Early Modern Data Bank (MEMDB), 1991-1997.  (MEMDB was a project within RLG's experimental Program for Research Information Management [PRIMA].)
  (Likely to include actual CD-ROM.)
- NLA (National Library of Australia), RFP for networked services, March 1997.
- Octavo & RLG memorandum of understanding, 2000-2002. (Possibility of Octavo digital services for members; maybe content in RLG Cultural Materials; maybe licensing Octavo software; maybe joint developments, etc.)
- U. of Oxford: "Scoping the Future of the University of Oxford's Digital Library Collection," funded by the Andrew W. Mellon Foundation, [unclear if dated].
- Oxford University Press, correspondence about OED Online, 1994-1998.
- PACSCL (Philadelphia Area Consortium of Special Collections Libraries): thank-you letter to RLG conference speaker (James Michalko), 2003.
- PC program for RLG staff – draft notes from 1980s? [Undated; JLH doubts a staff PC-access program was ever instituted in this form.]
- PICA Center for Library Automation (Netherlands) & RLG: shared work plans, 1987-1997. Includes:
  - Ariel developments;
  - Z39.50 communication;
  - WebDOC project document delivery plans;
  - and more.
- PICA Center for Library Automation (Netherlands) & RLG: WebDOC agreements, 1993-1996.
- PICA Center for Library Automation (Netherlands) & RLG: WebDOC & "Arches" project descriptions [undated?].
- PICA Center for Library Automation (Netherlands) & RLG: WebDOC trademark in US, 1996-1997.
- PICA Center for Library Automation (Netherlands) & RLG: Last years of relationship, 1998-2002 (different strategies and directions).
- Plumb Design contracts for work on Union Catalog on the Web (later RedLightGreen) project, 2001-2002.
- Primary Source Media, correspondence with John W. Haeger, 1997-1998.
- PRIMARY WORLDWIDE, human resources consultant agreement, 2004.
- Project prospectus drafts, 1998, for:
  - Government Archives—Conversion of Finding Aids Project;
  - Global Immigration—A Digital Collections Project;
  - Enhanced Searching (with Getty thesauri);
  - Digital Access to Material Culture;

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- Interlibrary Loan and Document Delivery Workstation.
- PRO (Public Records Office, UK) Correspondence re PRO's Current Guide records and RLIN, 1996.
- Puvill Libros: *Example* of RLG "Vendor In-Process Records License Agreement," for records added to RLIN (RLG Union Catalog), 1995.
- RLG 1981 member loans, subsequent forgiveness/write-offs: *Example* (Northwestern University, 1995).

## CARTON 92: President's Office (aka Administration)

1994-2000: CIMI (Consortium for Computer Interchange of Museum Information, 1994 - 1998: RLG's involvement in and business support arrangement. Doesn't cover dissolution of CIMI in 2003. (See also http://www.oclc.org/research/activities/past.htm -- "Earlier RLG Programs work"). [NOTE: One or more folders on CIMI are in Cartons 9, 80, 83, 85, 92, 100, 102, 126, 135, 141, 186, 188, 212.]

- Note found in Jim Michalko's handwriting: "16 Oct. 2000 – Tony Gill [former program officer] has the 1993 & 1994 CIMI files."
- Financial matters, 1994-95.
- Vouchers & payables, 1995.
- Invoices, 1995-97, 2000.
- CHIO (Cultural Heritage Information Online) proposal to NEH (National Endowment for the Humanities), 1995.
- Mostly financial support transition planning, from MCN (Museum Computer Network) to RLG, 1995.
- Executive Committee meetings, 1996.
- CIMI 1996 ("all else," chronological, very overlapping).
- Financial support transition documents, 1996-1997.
- Signed Principles of Cooperation, 1996.
- CIMI 1997 (large folder).
- CIMI 1998 (small folder).

## CARTON 93: President's Office (aka Administration)

1980-2004: Portion of alphabetized run of subset of presidential files – "ARL-AAU - Furuya." To identify other alphabetically organized presidential cartons, see Carton 80 summary.

- ARL – AAU (Association of Research Libraries – American Association of Universities) Research Libraries project Interim Reports, 1993.
- CERL (Consortium of European Research Libraries), 1993 (thin).
- CNI (Coalition for Networked Information) fall meeting, James Michalko talk, 1993.
- CNI (Coalition for Networked Information) READI program, 1992.
- CNI (Coalition for Networked Information) Task Force meetings, fall 1995 – spring 1997 (twice yearly).
- Conseil Superieur des Bibliothèques, 1992, 1995.
- Continuum (became Corbis), 1993, 1995.
- Council on Library and Information Resources (CLIR) annual reports & brochure, 1997-2001; plus Digital Library Federation (DLF) brochure & annual report, 1998-1999.
- Deutsche Bibliothek (DDB) paper, 1994.

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- Digital Preservation Coalition (DPC), UK, 2002-2003.
- Digital Scriptorium proposal work, 1996.
- Direccion de los Archivos Estatales (Madrid), 1994-1995.
- Direction des Archives de France and Delmas Foundation, 2000-2001.
- Direction des Archives de France correspondence, December 1995 – October 2000.
- Dougherty, Dru, assistance in RLG-Spain negotiations, 1994.
  (Related to an item in the Direccion de los Archivos Estatales folder.)
- Dues and fees history (RLG's), to January 1999.
- Duncan Systems, Maruzen, and RLG Memorandum of Understanding, 2000 (access to RLG databases by Maruzen).
- Ecole Superieure des Beaux-Arts, 1993.
- Electronic Commerce Technologies (EPR), 1996.
- Electronic Scriptorium, 1994.
- Engineering Information Network prospects, 1992.
- ESTC (initially "Eighteenth-century Short Title Catalogue," later "English" STC), 1994-2000.
- European Commission on Preservation and Access, 1995.
- European Commission on Preservation and Access, Telematics for Libraries, 1991-1994 (projects), 19984-1998 (programme).
- L'Européenne de Publications Electroniques (EPE), 1995.
- European Register of Microform Masters (EROMM), 1995-1996.
- Exordium Group consultation on Union Catalog on the Web (later RedLightGreen) sponsorship, 2001.
- Fathom, Inc., 2000, 2003.
- Federation Internationale d'Information et Documentation (FID), 1989.
- Folger Shakespeare Library, 1980-1996.
- Foundations follow-up, 2000.
- "Foundations Funding for the Humanities" (report – not RLG's), 2004.
- Foundation outreach project, 1991.
- Friedrich-Ebert Stiftung Library, 1996-1997 (2 notes).
- Furuya (Natsuko Furuya) consultancy, correspondence & reports, 1998-2001.
- Furuya (Natsuko Furuya) consultancy, contracts & invoices, 1998-2004.

[Carton 94: See note preceding Carton 1 above.]

**CARTON 95: President's Office (aka Administration)**

1978-2005: Folders concerning organizational issues such as early budgeting, strategic planning, member dues and principles, populating the board of directors following "RLG 92," a branding study, an organization/facilities assessment, and the work of two major board commissions on membership and fiscal structure (work roughly equivalent to the earlier "RLG 92" transformation) … plus a few unrelated files: the Cultural Materials Initiative technical review, a bit on database migration as viewed from 2001, Molly Singer's consulting role in 2004.

- Early budgets preparation and performance: Budgeting drafts and fiscal reports from Associate Director of Business and Finance's (Cheryl Hulett's) files -- folder left out when other materials were reboxed but originally might have been in a carton with other such early files of Hulett and/or John C. Heyeck; late 1978 – June 1981
- Strategic Planning, post-"RLG 92": Mid-Decade Planning Report – Peter Graham's comments on John W. Haeger's draft, plus "first report"; March and April 1993

- Membership Dues and Principles Task Force: Files of Linda West, who convened and coordinated work of group comprising Eleanor Heishman, Jack Perry Brown, Marianne Gaunt, Carole Moore, and Margaret Otto; August 1996 – March 1997
- Board/RLG policy for cash and investments: February 1995 Board-approved policy and Chief Financial Officer Molly Singer memo on proposed revisions, 9 December 1996 – see subsequent Board meeting minutes for outcome … February 1997 or a bit later?
- Board Nominating Committee for 1998 elections: David Stam, committee chair; materials used, but no ballots or outcomes included; December 1997 – February 1998
- Board of Directors: Curricula vitae of directors serving as of 1998 – Nancy Allen, Ellen Dunlap, Lila Goff, Michael Janeway, Stanley Katz, Brian Knez, Paul LeClerc, James Michalko, Carole Moore, Paul Mosher, Martin Runkle, Robert Scott (treasurer; Noel Hanf, secretary, not in this file), Elaine Sloan, David Stam, Sarah Thomas [any missing?]
- Board Nominating Committee for 1999 elections: Carole Moore, committee chair; materials used, and earlier ballots, but no 1999 results (incomplete); October 1998 – March 1999
- Board Nominating Committee for 2000 elections: Martin Runkle, committee chair; committee formation and candidates identification, but no election results; January-March 2000
- Board Nominating Committee for 2001 elections: Peter Graham, committee chair; communications and work, including consideration of some bylaw amendments, but no ballots/outcomes; February-March 2001
- Board Nominating Committee for 2002 elections: Ellen Dunlap, committee chair; materials used in work and resulting ballots – not marked with outcomes; February-March 2002
- Board Nominating Committee for 2003 elections: Thomas Leonard, committee chair; some materials used in work, including ballots, but outcomes not shown; December 2002 - May 2003
- Board Nominating Committee for 2004 elections: Karin Trainer, committee chair; materials related to group's work, but no final ballots or results; January-March 2004
- Board Nominating Committee for 2005 elections: Carol Mandel, committee chair; some of materials used in work, but not ballots or outcomes; January-March 2005
- Branding study and report from Azimuth Consultants: (George Jurkowitz, principal) Includes James Michalko's written notes and a bit on study follow-up; June 2000 – February 2001
- Cultural Materials Initiative: Technical review meeting – agenda and list of invited participant experts from RLG members; 8 January 2001
- Organization and facility assessment: Study by Gensler Consulting; (begun in April?) 2001
- Database migration [what finally happened in 2005]: Presentation to RLG staff ("GenStaff") plus diagrams by Jack Grantham, director of Customer and Operations Support; September 2001
- Presidential letters of recommendation/support: Slim and very incomplete file of letters by James Michalko [a few more may exist across other cartons]; September 2003 – January 2006
- Board Commission on Membership, 2003: Formation of group, issues development, member interviews and analysis, follow-up; work done with help of Azimuth Consultants (George Jurkowitz) – see also folder for 2004; April-December 2003
- Board Commission on Membership, 2004: Completion of group's report and recommendations to the Board, followed by presentation to membership and start in developing lower dues for FY2005 and after; January-June 2004
- Financial planning/support consultation services from Molly Singer: Contract and several invoices for consultant work following departure of former Chief Financial Officer, John Sundell; February-August 2004

- Board Commission on Fiscal Structure, 2003: President James Michalko's file of work done by consultant Steve-Anna Stephens with RLG's senior management and commission members – not full record, and some items undated – and see also folder for 2004; July-December 2003
- Board Commission on Fiscal Structure, 2004: President James Michalko's file of work done by consultant Steve-Anna Stephens with RLG's senior management and commission members – not full record, and many draft items undated; see also folder for 2003; January-August 2004
- Relationship management for members: Part of follow-on to the two Board commissions' recommendations (slim, partial file); March-May 2005

## CARTON 96: President's Office (aka Administration)

1978-1982:  1. General early correspondence from RLG senior management (president and directors.  2. Information on financial matters.  3. Folders on bylaws and host institution agreement with/ Stanford (possibly duplicative with materials in other cartons).

## CARTON 97: Marketing & Sales & Corporate Communications

1977- 2006: Early reports and plans; 1980s briefing books compiled by Lois Kershner; some of the marketing brochures and stationery designs produced in corporate/marketing writing unit. (Examples of brochures and the like appear throughout the archive.)

- "The Research Libraries Group: Proposals for Cooperation Among the Libraries of Columbia, Harvard, and Yale Universities and The New York Public Library": December 1973, by Joseph A. Rosenthal, 161 pages, softbound; a study, with recommendations that "presents a firm justification for establishment of [RLG]"; a foundational and historically valuable document
- "The Research Libraries Group, Inc.": Single-sheet description, perhaps from a Branford, CT office RLG newsletter; guessing ca. 1976/77
- RLG grants and other funding: Amounts and sources, 1976-1991 (single sheet)
- "[RLG] Request for Proposals for an Automated Bibliographic Control System," August 1977; rather faint photocopy with annotations by staff at BALLOTS (Bibliographic Automation of Large Library Operations using a Time-sharing System – developed at Stanford); BALLOTS was one of the RFP recipients and was RLG's ultimate choice
- "A Plan for the Development of a Research Libraries Information Network": RLG, 29 October 1978, revised and abridged 4 January 1979; 51 pages plus 12-page appendix on the "Foundation[s] Library Committee -- a very useful sidelight on early developments
- "[RLG] Review of Business and Financial Plan for 1978-79 to 1985-86 – CONFIDENTIAL," May 1979; prepared by Peat, Marwick, Mitchell & Co.; ca. 50 pages, mostly numbered
- "[RLG] Progress Report June 1979": iii + 70 pages
- "The Research Libraries Group, Inc. Business Plan," 26 May 1980: v + 163 pages (mostly numbered)
- "RLG Corporate Handbook: An Overview of Corporate Activities": March 1982, created by Lois Kershner; good source of policies and background, 1979-1982; not bound but still tabbed; unpaginated but ca. 1-1/2 inches thick
- "RLG Factbook 1983-1984": Created by Lois Kershner; unbound but still tabbed; unpaginated but ca. 1-2 inches thick; very useful compilation on many facets of RLG

- "RLG Program Briefing Book," February 1985: Compiled by Lois Kershner? – material about ten programs (counting ESTC as a program activity; good snapshot of what was then going on or planned
- RLG brochure samples, 1979-2002
- RLG program brochures, 1980s-1990s
- RLG services (products) brochures, 1979?-2006
- "RLG Performance in FY92 and Priorities for FY93": mid-1992 slide printouts from report given at 1992 RLG annual membership meeting; elliptical, but summarizes information that can be found in Board meeting agendas?
- Evolution of RLG logo and "business systems" (stationery, design elements), 1976-2006
- RLG ads and promotions – samples (not complete), 1993-2004
- RLG's ILL Manager: Samples of packaging and messages, based on Tompert Design's work; 2000-2003

## CARTON 98: Member Programs

1978-1983: Retained in RLG archival storage for years before repackaged as part of donated archive: RLG & Library of Congress's Network Advisory Committee files, January 1978 – October 1983. Covers series of studies/reports, decisions outside of RLG proper, setting the national context/agenda for participants. Was a formative period for BALLOTS - RLIN - RLG as national entity. RLG representatives appearing in these files include presidents James Skipper and Edward E. Shaw, Vice President C. James Schmidt, and department director Tina Kass.

## CARTON 99: Finance & Administration

1999-2003: Materials filed by CFO & division director John Sundell (2000-2004). Partly concerning strategic planning and the last office move to Stierlin Court in Mountain View; PLUS miscellaneous background on project developments and customer issues.

- Gensler Consulting, bound "RLG Organization & Facility Assessment" (part of strategic planning - should be reflected in RLG Board materials of the time), mid-2001.
- RLG's Ariel document transmission software and its sale to Infotrieve at the end of 2002, ca. dozen folders.
- 4 folders on process of location selection & move to RLG Stierlin Court offices in 2003.
- Miscellaneous partial folders on RLG systems and project developments, and customer issues, none later than 2003. These are:
  - RLG financial systems;
  - Systems & Database Migration planning;
  - Technical services;
  - Union Catalog on the Web ("RedLightGreen") project;
  - Authentication server;
  - RLG & VTLS;
  - RLG & TLC (The Library Company);
  - FY2001 service pricing point;
  - Eureka search interface upgrades;
  - Member Programs' Digital Repository Testbed Project;
  - International interest in EAD (Encoded Archival Description DTD for finding aids online);
  - RLG order processing;
  - CURL (Consortium of University Research Libraries) as customer.

**CARTON 100: Finance & Administration**

1996-2003: Materials filed by CFO & division director John Sundell (2000-2004). Touches on range of services and collaborative activities in this period.

- Sundell's learning notes & RLG background.
- CIMI (Consortium for the Computer Interchange of Museum Information) relation to RLG, 1996-2004.
- Sundell staff-to-project "relative effort" studies, 2000-2003.
- Specific papers, 2000-2003, on:
  RLG's Z39.50 client gateway,
  Marcadia automated cataloging service,
  RLG Archival Resources database,
  Records in RLG databases from the British Library's ISTC file.
- RLG Cultural Materials Initiative (CMI) and RLG Cultural Materials database (RCM), 1999-2003.
- Shift to Onyx customer relationships management system, 2001-2003.
- Mellon Foundation-funded project for "Union Catalog on the Web" (UCW) that became the "RedLightGreen" service ( some reports and proposals), 2001-2003.
- Preparations for RLG systems and databases migration off mainframe computer, 2003 (accomplished in 2005).
- RLG directors' work on "strategic framework/balanced scorecard" planning and management, mandated by the RLG board's Fiscal Commission.
- Proposal to LC NDIIPP to preserve political Web archives (unfunded), 2003.
- 2003-2004 pricing discussion (with 1997 background).

**CARTON 101: Member Programs**

1982-1989: Long-Term Serials Project work, RLIN AMC work [for more, SEE Carton 47 cross-references], Authorities dataflow.

- From Collection Management & Development Program & Committee, collaborative work on "Long-Term Serials Project (LTSP)" for Chemistry, Mathematics, & Business, 1988-1989.
- 1992 RLG Preservation Microfilming Handbook errata sheets.
- 1982 staff working group on RLIN AMC (Archival & Manuscripts Control) project.
- 1982 RLIN Authorities dataflow diagrams.

[Carton 102: See note preceding Carton 1 above.]

**CARTON 103: Member Programs**

1982-2002: Program proposals for preservation microfilming and Chinese Rare Books, plus several unfunded proposals in the mid-1990s to 2002.

- 1982 to NEH (National Endowment for the Humanities) for "Automated Union Catalog of Microfilm Master Negatives" (in RLIN).
- 1989 to NEH for "Art Serials Preservation Project (ASPP) - see also carton 109. / 1989 to NEH for "Archives Preservation Microfilming Project" background - see also carton 109.

- 1999 to NEH for "Chinese Rare Books Project" (CRBP), 1993-95
- 1993 notes & checklists on grants management.
- 1994 to NEH for "Whole Discipline Preservation Program" (bound proposal); not funded, see also cartons 107-108.
- 1997-98 "Global Immigration" proposal materials - 2 folders; see also carton 104.
- 1998 to NSF (National Science Foundation) for "Digital Access to Material Culture, not funded.
- 1999 tender to UK JISC (Joint Information Systems Committee) for "Digital Image Delivery Service (not funded?).
- 2002 to IMLS (Institute of Museum and Library Services) for East Asian Digitization Project (not funded?).

## CARTON 104: Member Programs

1980s-1990s: Projects & proposals – government records, preservation microfilming, finding aids in EAD, and some unfunded projects.

- 1980s NHPRC*-funded ("NHPRCII") Government Records Project practices report (unpublished?) - see also cartons 103, 108-109, 116-117. (*National Historical Publications and Records Commission.)
- 1992 "GCMP4" NEH-funded Great Collections Microfilming Project phase IV - see also carton 109.
- 1997 RLG RFP for finding aids EAD (encoded archival description) conversion service.
- 1997 proposal to NEH and 1998 to IMLS (Institute of Museum and Library Services) for "Global Immigration" project (not funded).
- 1998 proposal to NEH for "Hybrid Preservation Conference" (results?).

## CARTON 105: President's Office (aka Administration)

1982-1986: Range of subjects from files of then-RLG-president Richard W. McCoy (RWM). This carton includes RLG-OCLC relations; 1985 strategic planning; notes on many RLG organizational and system developments.  These are clearly "fragments that remain," not any kind of complete representation of this president's activities and concerns.

## CARTON 106: President's Office (aka Administration)

1978-1987: Range of surviving material from different periods – Edward E. Shaw, Richard W. McCoy, CLASS correspondence; an RLIN AMC training folder; member activity in 1986; an 1987 RLG-DIALOG gateway.

- President Edward E. Shaw correspondence, 1978-79.
- President Richard W. McCoy correspondence, 1986.
- RLG-CLASS (California Library Authority for Systems & Services) correspondence, 1977-83 (Note with Carton 106 says that the CLASS files were used as a reference during a termination of CLASS's contract to broker RLG services. This may have happened more than once? -- the last time being in 1989.)  For more on CLASS, see cross-references given in description of Carton 15.
- 1986 RLIN AMC (Archival & Manuscripts Control) training folder.
- Member activity, 1986.

- RLG gateway with DIALOG, 1987.

**CARTON 107: Member Programs**

1992-1994: Preservation-related – preservation microfilming workshop and "Whole Discipline Preservation Program" (see also Carton 103).

- Agenda for 1992 RLG preservation microfilming workshop.
- Program officer Nancy Elkington's work papers on proposal to NEH for 1994 "Whole Discipline Preservation Program."
- "Whole Discipline" participants' backup to appendices in final proposal. See also cartons 103 & 108 for proposal (not funded).

**CARTON 108: Member Programs**

1979-1994: Programs & projects – Archival developments in RLIN and as a program, government records, some more on Whole Discipline Preservation Program project (see also cartons 103, 107).

- Archival & Manuscripts Control (AMC) developments in RLIN and the evolution of members' Archives, Manuscripts, and Special Collections (AMSC) program, 1979-1993. (Includes some files on "Resources for Research in American Literature (RRAL) that was funded in 1993 as "Primary Sources [or "Research"?] in American Literature.)
- "NHPRCII Government Records Project," 1986-1991 - see also cartons 104, 109, 116-117.
- "Whole Discipline Preservation Program" project (not funded) - see also cartons 103, 107.

**CARTON 109: Member Programs**

1984-1994: May have been packed up by program officer & manager Nancy Elkington – 1984-1992 NEH-funded coordinated microfilming preservation projects; two NHPRC-funded government records projects; archives programmatic/project files (see also carton 108); and 1993-1994 member recruitment.

- (1) Files on 1984-1992 NEH-funded coordinated microfilming preservation projects:
  1984 Cooperative Preservation Microfilming Project (CPMP).
  1990 Art Serials Preservation Project (ASPP) - see also carton 103.
  1990 Archives Preservation Microfilming Project (APMP) - see also carton 103.
  1988 Great Collections Microfilming Project, phase I (GCMP1).
  1989 Great Collections Microfilming Project, phase II (GCMP2).
  1992 Great Collections Microfilming Project, phase III (GCMP3).
  1992 Great Collections Microfilming Project, phase IV (GCMP4) - see also carton 104.
- (2) Files on 1986-1990 NHPRC-funded "Seven States" and "Government Records" projects ("NHPRCII") for archival records - see also cartons 108, 116, 117.
- (3) RLIN AMC and AMSC program /project files, 1991-94 - see also carton 108.
- (4) Member recruitment, 1993-94.

**CARTON 110: Member Programs**

1980s-1990s: Historical files on RLG resource-sharing program & projects, stored by SHARES program officer Dennis Massie (DXM) in 2003; see also cartons 111 and 113.

- RLG resource-sharing & public services program and committee, 1980s-1990s: SHARES Executive Group (SEG) files.
- Ariel vs. fax cost study.
- Rethinking SHARES net lending.
- ILL workstation development.
- Statistics.

## CARTON 111: Member Programs

1970s-1990s: Mixed: SHARES program officer Dennis Massie's archives plus unrelated other RLG systems/services material. (Stored in 2003.)  Contents:  1. SHARES/ILL files - see also cartons 110 & 113.  2. Bound reports & documents on BALLOTS, RLIN, and RLG, 1970s-1980s.

## CARTON 112: Member Programs

1971-1990s: Related to second half of carton 111 contents – 1971-1990s RLIN "prehistory," features, developments; lots on RLIN CJK (implementation of Chinese, Japanese, and Korean scripts in RLIN). Stored in 2003.

## CARTON 113: Member Programs

1984-1997: Historical files stored in 2003 by SHARES program officer Dennis Massie (DXM: Some on Public Services Committee/SHARES Program and some on RLIN interlibrary loan (ILL) developments; files include a cost study, the Serials Access Initiative (SAI), and RLG's ILL workstation.

## CARTON 114: Marketing & Sales & Corporate Communications

1980s-2000s: Marketing/morale objects produced for prospective service customers, RLG programs-participating members, and RLG's own staff.

## CARTON 115: Marketing & Sales & Corporate Communications

1980s-2000s: Marketing materials for the RLIN Eureka (end-user) search interface & databases and for the RLG Cultural Materials database. PLUS: Giveaways created for various RLG annual membership meetings and professional conference exhibits (American Library Association, etc.).

## CARTON 116: Source unclear – either Member Programs or Finance & Administration

1984-1991: Proposals & projected/resulting services, listed as "Foundation: Project: Year." Not comprehensive.  See also Carton 117 and others.

- William and Flora Hewlett Foundation: Retrospective Conversion (Recon): 1984.
- Fairchild Foundation: ILL Fax Project: 1984.
- Lilly Endowment: RLIN Chinese-Japanese-Korean (CJK): 1985.
- WM Keck Foundation: GeoInformation:1986. Ford: Interlibrary Loan (ILL): 1986.
- Carnegie Corporation: Network Server: 1987.
- Department of Education Title II-D: ILL Workstation: 1988 (not funded).
- Dept. of Education Title II-D: ILL Workstation: 1989.

- Andrew W. Mellon Foundation: Oxford Text Archive: 1989.
- NEH (National Endowment for the Humanities): East Asian Recon: 1989 (not funded).
- NEH: AMSC (Archives, Manuscripts, Special Collections) Recon PS-21903-90: 1990.
- Dept. of Education Title II-D: Academic Software Catalog: 1991 (not funded).

## CARTON 117: Source unclear – either Member Programs or Finance & Administration

1984-1990: Proposals & projected/resulting services, listed as "Foundation: Project: Year." Not comprehensive.  See also Carton 116 and others.

- NEH (National Endowment for the Humanities): AMC (Archival Manuscripts & Control) Retrospective Conversion RC-20976-84: 1984.
- NHPRC (National Historical Publications and Records Commission): Seven States Project 85-147: 1985.
- NHPRC: Government Records 89-046 Supplemental: 1990.

[Carton 118: See note preceding Carton 1 above.]

## CARTON 119: Multiple departments

1976-2006: Mix of strategic planning, annual reporting, major organizational changes, many successive organization charts, and staff information news bulletins and handouts. [See photographic materials in Carton 7 and Legal Box 38 for more on individual staff.]  Contributed by staff across divisions.

- Grant proposal to the Carnegie Corporation for Online Access to the Library of Congress (LC) MARC (Machine-Readable Cataloging format) database, 1976.
- Correspondence with RLG Board from John Heyeck and Edward E. Shaw on RLG and financial issues, 1980-1981.
- Crisis management, hardware & response-time issues, 1981-1982, plus 1984 followup.
- Financial rescue of RLG & RLIN, 1982.
- RLG (Member) Presidents Meeting, September 1986.
- Strategic Planning in 1985-1986.
- "RLG92" Transition Plan – Jack Grantham document and related memos, 1991.
  (More on this appears in Chronology materials in Carton 119. "RLG92" was shorthand for the changes made in RLG membership structure, governance, and program/systems agenda in 1991 and after, working with the RLG Board of Governors and launching the smaller, elected RLG Board of Directors as part of this.)
- Strategic Planning in 1989 for 1990-1993: "Strategic Technical Plan."
- Annual Reports, 1975-1983 plus notes on later sources of information (in brochures or the RLG News magazine).  (RLG did not consistently issue a separate, stand-alone annual report every year.)
- Member Recruitment Program players, 1993-1994.
- Strategic Planning in 1995-1996 for 1997-2000.
- Strategic Planning in 1999-2000 for 2000-2003. (See also bound summary for Board's reference in Carton 79.)
- RLG 25$^{th}$ Anniversary letter, 2000.
- Chronology (materials for) of RLG staffing and organizational changes, 1978-1988.
- Chronology (materials for) of RLG staffing and organizational changes, 1989-1992.

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- Chronology (materials for) of RLG staffing and organizational changes, 1993-2006.
- Some RLG-used acronyms, undated.
- RLG Publications Lists, 1983-1996, plus some publications fliers from 2000.
- RLG offices and moves, 1980-2003. (See also Carton 15 for early move from Branford, CT to Stanford.)
- Staff directories and lists, 197?-2006.
- Staff arrivals and departures, 1980-?.  [SEE ALSO Lennie Stovel's partial, recreated table for staff tenures, filed in Carton 7.]
- Staff at Play, 1980-2006. [NOTE: If not retained in archives as part of processing, please return to Jennifer Hartzell, hartzell-martin@comcast.net.]
- "RLG Employee Handbook," 2004. (Final version?)
- "RLG Employee Information Binder" (unbound, sample), 1998-1999.
- "RLG Administrative Policies and Procedures Handbook" (unbound), 1995.
- Staff monthly meeting notes (aka "Blue Notes" for color of paper originally used), 1989-1997. (Subsequent notes were issued online only; Lotus Notes was the primary medium.)
- RLG All-Staff Briefings (aka Mind Melds), 2002-2005. (See also overlapping files from Linda West in Carton 79.)

## CARTON 120:  Computer Systems (aka Development)

1982-2000: Predominantly internal systems documentation, such as manuals by RLG programmers for themselves or for Operations staff, functional, external, or internal specifications for systems in development, or memos about/presentations on new systems; included here are RLIN services and issues, the mid-1980s RLIN accounting system, Unicorn data conversion, Lyris mailing lists, RIC Contact File, Problem Management System, Linked Systems Project, "RLG92" database review, Batch Retrospective Conversion (BRCON), character set handling -- including East Asian (CJK) sets, a little about an "ideal recon service" dubbed "ORCAS," Authorities Assistant, and RLG Authentication Server.

- Internal systems documentation: "RLIN Display Services Programmer's Manual," iv + 39 pages, loose-leaf, 14 September 1982
- Internal systems documentation: "RLIN Display Services Programmer's Manual," iv + 47 pages, loose-leaf, updated from 14 September 1982 to 9 January 1992
- Internal systems documentation: "RLIN System Services Programmer's Manual" ("system services comprise procedures allowing PASCAL programs to access operating system [specifically, Orvyl] functions not provided by the PACAL runtime environment"); by David Richards, vi + 21 pages; first done in 1982(?) and then revised in 1984 by Brian Cox and Jessie Herr; version dated 12 December 1984
- Internal systems documentation: "RLIN PASCAL Environment Programmer's Manual," by Brian Cox and Jessie Herr, viii + 57 pages (contents page at back of manual), 1984, revised January 1986; PLUS: Further revisions of same manual, with Dick Guertin also credited, viii & 67 pages, 1996-1997
- Internal systems documentation: "RLIN Communication Protocols" ("describes the interface between the RLIN-programmed terminal and the PDP-11 front-end communications processor"); revised by Steven Eastman, based on version done in 1980; loose-leaf, ii + 33 pages, October 1986
- Internal systems documentation: "SPIRES Database Services Programmer's Manual for Orvyl," by David R. Richards, Steven J. Eastman, Michael D. Pobuda; vii + 190 pages; appears to be version produced in May 1993 (copyright dates given are older); PLUS:

"SPIRES Database Services Programmer's Manual, Revision 2," by David R. Richards; iv + 121 pages, copyrighted 1981, 1982, but dated 30 May 1984

- Internal systems documentation: "SRAACD: RLIN SMF Accounting System, Vol. 1," PLUS cover memo from to Dick Lagerstrom (RLG staff) from Guy Scharf, president of Software Architects, Inc. (SAI, in Mountain View); results of a project to rewrite/tailor/shrink the existing SRAACT accounting system used on RLG's 5860 mainframe computer; has additional material interpolated and pages are often annotated; 1st of 2 large files of this specific document; September 1985 plus later interpolations
- Internal systems documentation: "SRAACD" RLIN SMF Accounting System, Vol. 2" (see cover memo and project statement in Vol. 1 file); version of accounting system produced by Software Architects Inc. to shrink and improve the previous SRAACT system used by RLG; appears to be entirely code printouts with little annotation – one of these, RLGACT (Activity Reports) has a second, later printout inserted, with heavy mark-up in this section; 2nd of 2 large files of this specific document; September 1985 – March 1986
- Internal systems documentation: "Unicorn-based Conversion Programming" (programmers' guide to a system that enabled table-driven conversion processing of data in a variety of formats to add files to RLG's union catalog [later, to other databases as well?], first developed by RLG in 1983-1984); by Sherman Ting, Kitty Shih, and Jessie Herr; 219 pages, revised March 1989 by "sbr" [Sandy Rockowitz?]; PLUS: "UNICORN: A User's Guide," 42 pages, July 1998; and UNICORN Training Exercises 1 and 2, July 1998
- Internal systems documentation: "Lyris Manual" (complete [?] user/administrator manual for mailing-lists operation program adopted by RLG [when?] to replace use of Listserv software[?]); loose-leaf, viii + 248 pages, unmarked in any way; copyrighted 1996-1998
- Internal systems documentation: "Dataloads Analyst Operations Manual," 1997; PLUS: Related 1998 memos from Joe Altimus, training-oriented
- Internal systems documentation: "The RLIN Information Center CONTACT File – Instructions for Record Retrieval and Data Entry" (user's guide to a SPIRES subfile [created by Bruce Washburn?] used from at least 1987 until the 2005 migration off the RLG mainframe and the systems on it; after introduction of the Onyx Customer Relationships Management Systems in the 2000s[?], CONTACT was used for reference rather than input); revised version of December 1989
- Internal systems documentation: "Instructions for Using the Problem Management System" (system first created by programmer Jan Habrovansky in the BALLOTS-to-RLIN era, at least as recalled by Jennifer Hartzell in 2008; PMS was used pretty much until 2005 when RLG finished migrating off its mainframe); 6 pages + a couple short examples of system's use; version ca. 1989-1990
- Internal systems documentation: "ITPS [Integrated Technical Processing System – internal name for RLIN] – Promotion to Production [from pre-production to production system]," by Michael Sanderson, 2 pages, 21 March 1995
- Linked Systems Project (also documented in other cartons): "LSP / WLN-RLG-LC Linked Authorities Systems Project / Authorities Group / LSP External Design: 'Intersystem Component,'" loose-leaf, iv + 118 pages, with document identifier "LASP-39a"; 26 February, revised 27 August 1982 – PLUS: 4-page set of revisions from 28 February 1983
- RLIN East Asian Searching: "Project Proposal – Eliminating Aggregation Obstacles in Romanized Chinese Phrase Searching and Word-division/Aggregation Obstacles in CJK Phrase Searching," Karen Smith-Yoshimura, 6 pages + staff e-mail exchanges, November 1989; PLUS: "'Off the Aggregator' – Eliminating Various Problems in Chinese Phrase Searching," a project description, Joan Aliprand, DRAFT, iii + 12 pages, February 1990
- More RLIN East Asian Searching: Two outlines in very formalized layout, by Joan Aliprand; the second is a revision of the first [?] that is also titled differently – (1) "Off the Aggregator:

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Eliminating Various Problems in Chinese Phrase Searching," DRAFT, 11 pages, 6 February 1990; and (2) "Aggregation/Word-Division Modifications to Phrase Indexes: Eliminating Problems in Romanized Chinese and CJK Vernacular Phrase Searching," 15 pages, 19 March 1990

- "Set-Processing Service" Post Implementation Review: E-mails from Lenore Jones on input to the "post mortem"; file does not include actual report on the Set Processing project, however; April 1990
- "RLG92" RLIN database review & recommendations: Set of reports, e-mails, and diagrams on ways [not adopted] to reduce the growth rate and costs of the RLIN database (later renamed the RLG Union Catalog); May-September 1991
- "RLG92" technical review project: Work and recommendations of a joint Development [Systems] and Operations group (the "Secondary Clustering Improval/Reduction Discussion" [SCIRD] Group) to study identifying and removing unnecessary Secondary Cluster information in the growing RLIN database; conclusion in memo of 1 October 1991 was not to undertake the work recommended; June – October 1991
- RLIN Batch Recon Service: Creation of "BRCON" – Preliminary memo on function, design, and schedule, draft from Walt Crawford, December 1986; revised Functional Requirements for PC-based Recon (called "RPCON" at this point), by Walt Crawford, July 1987; series of RLIN II Change Requests for the BRCON PC "subsystem," February 1989 – April 1990; user's manual, "The RLIN Batch Retrospective Conversion Service," 3$^{rd}$ edition, including BRCON Field Guide, April 1990; and undated diagram of "screen transitions"
- RLIN Batch Recon Service: Creation of "BRCON 2" – Copy of April 1992 user's manual with flagged areas of change; draft of "BRCON Enhancements Functional Specification (Version 4), by Cecil Bloch [CJB's documents always include some history or context for the service involved], April 1991; cover memo for the "BRCON 2 User's Manual" and BRCON 2 Field Guide, June 1991; 3 subsequent short items on facets of BRCON and its use by RetroLink Associates (RLA), 1992
- RLIN and other character sets: Folder of tables, charts, memos, and publications on character set translations between "RLIN MARC," LC MARC REBCDIC-to-LCASCII, the NISO "Extended Latin Alphabet Coded Character Set for Bibliographic Use" (1992), and the ISO "Latin Alphabet No. 1" (1987); used by Karen Bendorf? Dating roughly 1981-1992
- RLIN non-Roman character set handling: Basic Cyrillic ASCII, RLIN EBCDIC, and normalized EBCDIC values; about 9 pages annotated in Joan Aliprand's hand; undated
- RLIN non-Roman character set handling: "External Specifications for the Non-Roman Character Support Enhancements – Arabic: Post-Review Version," xii + 180 pages with many annotations and interpolated materials; unbound from original binder -- keep pages in order found.  Overall, June 1990 – at least 1997
- Origins of project that became Diogenes/Marcadia automated copy cataloging system??: Three or four memos and diagrams on an "ideal recon service," dubbed "ORCAS: Ongoing and Retrospective Cataloging Automated System"; involved John Eilts, Jack Grantham, and Systems Development managers; no indication of where this went or if it was background to the later Marcadia service … maybe not? February 1991
- RLIN Tables System / Database: Review comments annotated on "Converting the Tables Subsystem to ITPS [Integrated Technical Processing System], Functional Requirements," Draft, including Kathy Bales' responses to reviewers, 19 January 1993 – 30 March 1993
- Internal systems documentation: [RLG Union Catalog] "Clustering Specifications – BKS, MAP, MDF, REC, SCO, SER, VIM – MDF Revision," iii + 53 pages, Susan Oros, Joan Aliprand, Ed Glazier, April 1995; PLUS: Same document, same length, added title "Format Integration Revision," DRAFT, Ed Glazier, December 1995

- SCIPIO database: Conversion [from SPIRES?] into RLIN ITPS ["Integrated Technical Processing System" – internal programmer terminology] – file kept by Kathy Bales; many small items, annotated e-mails, post-conversion clean-up issues, hand-written undated pages; ca. January – August 1997
- Authorities in RLIN: (1) "Browsing in Authorities, with emphasis on X50 and X51 fields in Authority data, a comparison of HDG file [exact-heading entries] vs. HP index [heading phrases] to display results," undated; (2) "Authority Record Generator (ARG) [working name; when implemented, was released as "Authorities Assistant"] Specification," DRAFT, Ed Glazier, September 1998
- RLG Authentication Server: Requirements, What Exists, Problems, Proposed Solutions – four handwritten lists and diagrams by David Richards [early slides?], June 2000

**CARTON 121: Computer Systems (aka Development) & Member Programs**

1980-2004: Twelve folders of material (mostly surveys) concerning the 1983, Carnegie-funded "Study on Distributed Processing" in RLG member institutions; planning and tracking of various Systems (Development) projects planning and tracking; 3 folders on staff organization & review; 9 folders on the multiyear 2 (DBS) project; a few folders on mid-1990s strategy, Z39.50, AMC systems code (2003), and RedLightGreen; and 10 folders on RLG systems migration off the mainframe (variety of aspects) – last 4 from 2004. [SEE cartons 26, 134, and 199 for more on DBS.]

- Carnegie-funded Distributed-Processing Study: Materials used in compiling results of March 1983 member survey, 2 preliminary reports to RLG Board from John Schroeder, plus minimal drafting of organization for a report on the study; March-June[?] 1983
- Carnegie-funded Distributed-Processing Study: "Member Survey, Carnegie Study on Distributed Processing," RLG, loose-leaf, v + 110 pages, March 1983
  -- this copy was filled in by University of California, Davis, Libraries, and is followed by "Comments on Survey Questions and Answers," UC-Davis, 6 May 1983, plus "Davis Computing Plan, 1980-1985," 59 pages, and supplement "Library Data Processing," 19 pages, June 1981
- Carnegie-funded Distributed-Processing Study: Member survey returned by Cornell University Libraries, together with staff comments and two documents on acquisitions/fiscal-processing concerns at Cornell; March 1983
- Carnegie-funded Distributed-Processing Study: Member survey returned by Dartmouth College Library, May 1983, plus "The Kiewit Network – a High-Speed Campus Network," from Dartmouth's Kiewit Computer Center, 23 June 1982, and "An Online Catalog for the Dartmouth College Library," by Emily Gallup Fayen, ca. 1982-83
- Carnegie-funded Distributed-Processing Study: Member survey returned by University of Iowa Libraries, May 1983; cover memo references an enclosed copy of "'Recommendations' from the University's Information and Communications Technology Task Force in response to question 12 (page 103)" – but no copy found in this folder
- Carnegie-funded Distributed-Processing Study: Member survey returned by Johns Hopkins University Library, March 1983; plus update from JHU to survey section 3.5, November 1983; plus "Requirements for an Automated Library System for the Milton S. Eisenhower Library, Johns Hopkins University," 31 January 1983
- Carnegie-funded Distributed-Processing Study: Member survey returned by Los Angles County Public Library – appears to be filled in by Dorothy Weiss and Elizabeth Higbie – March 1983

- Carnegie-funded Distributed-Processing Study: Member survey returned by Los Angeles Public Library, filled in by Mariko Kaya, Diana de Nayelle, Wendy Romano, Edward E. Asawa, Barbara Parks; March 1983
- Carnegie-funded Distributed-Processing Study: No filled-in member survey, but instead a summary of the findings and recommendations of a Peat, Marwick, Mitchell & Company review of the library automation plans of the University of Minnesota, Twin Cities, Libraries, involving RLIN, April 1980 – plus "Request for Proposals for an Automated Library System," from University of Minnesota, Twin Cities, 27 September 1984
- Carnegie-funded Distributed-Processing Study: Member survey returned by the New York Public Library, May 1983
- Carnegie-funded Distributed-Processing Study: Member survey returned by University of Oklahoma Libraries, March 1983; plus Oklahoma's online circulation system specifications of 1980
- Carnegie-funded Distributed-Processing Study: Joint response by University of Wisconsin and University of Chicago libraries (and the UW data center) "to the [RLG] Request for Information for the Carnegie Study on Distributed Processing"; complicated loose-leaf, variously paginated response that does not seem to reflect the member survey done as part of this study – did RLG send out some other kind of RFI? August 1983
- Systems paper: "Linking RLIN and Local Systems," Lennie Stovel, 7 pages (140.1-140.7 -- suggests it was part of a larger document, most likely an RLG Board agenda or an extended report on the rise of local systems and how a central system could respond), 24 October 1985; Stovel paper ALSO refers to an earlier paper titled "RLIN Support for Linked Local Systems," by David Richards, dated 9 June 1985 [not found]
- Systems paper: "A Technical Overview of RLIN," v + 62 pages, with some intended revisions/updates annotated by David Richards; version of September 1993
- Systems development managers' brainstorming/retreat on uniform, realistic, effective ways to carry out development; background from various managers to the discussion; no outcomes included in this folder; March-May 4, 1990
- Systems development lists of completed projects, annual, compiled by David Richards and others, covering 1990-1996, 1998, 1999; includes annual progress on Database Server/Phoenix over 1993-1998
- Systems (Development) Division tracking memos: "Time Reporting Systems," October 1989; several "Development Project Status" reports to RLG Board, 1990; "Customer Service Representatives on Project Teams," January 1990; "Active Development Projects," May 1990-July 1991; "Revised Group Assignments," June 1990; "Division Regrouping," August 1991; "Software Maintenance Management Responsibilities," July 1990 – August 1991 and November 1994, January 1996, and December 1997; "Development Project Staffing," March and June 1991
- Human resources unit -- classification review: Policy, roles, time frame, process, factors to consider; 10 February 1992
- RLG staff organization and reorganization: "Historical Summary" [sort of oral history] of [staff] "coordinators and their responsibilities other than library assignments and training," by Karen Smith-Yoshimura, covering 1970 – ca. 1983, with trends noted and observations; done at a point of major reorganization, November 1985
- RLG staff organization and reorganization: Various memos and charts at departmental and central staff levels, dated 1981, 1982, 1984, 1985, 1988, 1989 (then nothing until…) January 2005

- Database server project: Three background papers concerning "DBS" plans and project – "RLG Strategic Technical Plan," 13 October 1989; "Functional Requirements for an RLIN Database Server," 17 April 1989; and "RLIN Database Server," 18 September 1990
- Database server project: "Rewrite [and updating] of the client/server protocol specification," excising Aspen [the Amdahl operating system development project -- which RLG had intended to build on – that Amdahl canceled in late 1980s] and attaching the "Pascal type declarations that the DBS server and client are using," by Mike Sanderson; undated, but received by Lennie Stovel on 6 March 1991
- Database server project: Two reports from MSB Computing Environments [Carole Farlow Lerche] on the "Phoenix Database Server" implementation [Phoenix chosen as new approach to work that "burned up" when Amdahl canceled its Aspen operating system project to which RLG was committed] – report on first 2 milestones, December 1990, and on fifth milestone, January 1993 [nothing in this folder for milestones 3 and 4]
- Database server project: "RDS [RLIN Database Server] Database Definition Manual," DRAFT, loose-leaf, vi + 108 pages, by Sanford [Sandy] Rockowitz, Minaret Software, for RLG; revision 0.1, 30 June 1994
- Database server project: "Database Manager Internal Design Document for Phoenix," loose-leaf, iii + 58 pages, with history of revisions since October 1992, by Steven J. Eastman, 18 January 1995
- Database server project: Addressing need for a revamped batch-products facility as part of the DBS project; diagram and execution code for then-operational processing run, plus e-mail describing process and what could be done differently once DBS was in production; March-August 1996
- Database server project: Testing DBS through its "ad hoc interface [AHI]," aka Phoenix [so did "Phoenix" mean the same thing as "DBS," or was it a partial realization?] – demo and regression tests; PowerPoint overview and "Deviations for Component AHI-core"; from Lennie Stovel's files; November 1996 – June 1997
- Database server project: Iterations of the "Phoenix Operations Manual" plus a "Phoenix Console Manual" and a "Phoenix RIC [RLG Information Center] Module Manual"; these include how Phoenix related to RLIN, SPIRES, and "the Wright brothers" [Stanford's Orvyl, Wylbur, and Milten programs]; April 1995 – October 1998
- Database server project: Descriptions of various aspects of Phoenix as it was developed – perspective on records treatment, February 1995; modified proposal for work queue development, August 1996[?]; dataset names and prefixes, undated; Phoenix source code management (management tools), June 1996[?]; Creating Phoenix database from an Orvyl one, August 1996; "The Phoenix Life Cycle Environment," March 1999; more on Phoenix tools, May 1999; logging on disk rather than tape, March 2001
- Strategic directions, 1996-2000: Nine-page statement for RLG staff, version 1.2, 23 October 1995
- Unicode [a single uniform character standard for international information systems]: History and RLG involvement in Unicode over period from 1987 to January 1991, plus two RLG PowerPoint talks by Joan Aliprand, March & May 2003
- RLG Cultural Materials: "RCM Architecture," Jui-wen Chang, 7 pages, April 2002
- Z39.50 server: "Technical Architecture," October 1991; "Z39.50 Update (Extended Service)," draft exploration / considerations, November 2002
- Systems code [unidentified; save by Judith Bush – significance?]: 8145 lines of code for GQ.RLG.XPAMC_XMLP4, file HN.AMC.PAMC, record name RDB01, as of 4 February 2003

- Union Catalog on the Web (UCW / RedLightGreen: PowerPoint update and several technical specifications, from Judith Bush's files; includes RedLightGreen "Metrics and Reporting High-Level Work Plan" from Ted Hill Associates; May-October 2004
- Systems migration into DB2 and off mainframe: Memo recommending that RLG choose IBM's DB2 Universal Database, plus its WebSphere application server, running on a Sun Solaris platform [reasoning given for DB2 rather than choosing Oracle, Informix, or Sybase]; 2 pages, from David Richards and Bill Washington, 20 April 2000
- Systems migration off the mainframe: "Possible RLG Union Catalog Database Enhancements," 4-page summary of discussion by Karen Smith-Yoshimura's RLG [Member] Strategy Focus Group on primary cluster members, display of other records in a cluster [records grouped by edition], indexing and retrieval, plus some other points; 20 August 2002
- Systems migration off the mainframe: "RLG 'Technical Services Migration,'" 4-page overview indicating feedback from members and intended for a revised Web page for members and other users, by Karen Smith-Yoshimura, 7 February 2003
- Systems and data migration off the mainframe: Roundup of each division's functional concerns, decision points, concerns, etc. to be dealt with in the migration timeline-and-dependencies forecast; memos included from Customer Operations and Support (COS), Finance and Administration (F&A), Integrated Information Services (IIS – later become Product Management), Member Programs and Initiatives; may not be the final versions of these memos that were used in a "mini-retreat" on 12 May 2003
- Systems migration off the mainframe: Two aspects of the RLG Union Catalog – (1) Format Identifiers in Record IDs in the RUC," by Joe Altimus and Ed Glazier, discussions and recommendations for the migrated catalog, 14 March 2003; and (2) "A Brief Analysis of Holdings in the RUC and Possible Mapping Options [in RLIN21 client as well as in migrated database?]," by Linda Driver, 7 April 2003
- Systems migration off the mainframe: Authorities, 4 documents – (1) PowerPoint printout "Authorities: Pre-migration introduction to authority records and their processing at RLG," Ed Glazier, 25 February 2003; (2) "[Browsed Headings] Sequencing Options and Examples," Joe Zeeman, 4 August 2003; (3) "Differences between pre-migration RLIN and [RLIN21] technical processing client in the Name and Subject authority files," Ed Glazier, 27 August 2003; and (4) Browsed Headings Display Examples to illustrate paper (3), Lenore Jones, 29 August 2003
- Systems migration off the mainframe: Two reports by Larry Pay of IBM's DB2 UDB Data Management Consulting Services, consulted by RLG's Systems division in implementing and debugging DB2 for RLG's purposes – (1) "Database Health Check and Performance Tuning," indicating response-time challenges, DRAFT, 5 September 2003; and (2) "Database Architecture Review," indicating dependency on a not-yet-supported aspect requiring action by Solaris, DRAFT, 15 May 2004
- Systems migration off the mainframe: "Project Nexus" -- PowerPoint by Carl Jones, contracted manager for this project, focused on getting several internal systems integrated and migrate-ready: the Onyx customer relationship management system, various accounting and tracking systems, and an extensive reports system; 6 May 2004
- Systems migration off the mainframe: Pre-migration work on and release of the RLIN21 Windows-based cataloging client PC software – estimates of time needed to develop and release, late 2002; test plan elements, April 2004; PowerPoint on "RLIN21 Rollout and Technical Services Transition," May 2004; internal memo on install program, May 2004; and draft article for June "RLG Operations Update" (published online), titled "RLIN21 Windows Client Debuts!," May 2004
- Systems migration off the mainframe: Member responses [from the Technical Services Strategy Advisory Group convened by Karen Smith-Yoshimura] to "RLG Survey for RLIN21

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[migration version of RLIN] and Z39.50 Client Users" [specifically, about RLIN21 display of secondary-cluster-member data and data exported via Z39.50]; one of several migration-related surveys, this was sent out on 26 September 2004 and the responses asked for by 18 October 2004

## CARTON 122:  Multiple departments

1981-2000: Publications for RLIN users and other RLG services users, plus a number of specifications and other documents related to interlibrary loan.

- RLG user publication: "Holdings Field Guide, loose-leaf, xii + 71 pages, "published from text stored in a SPIRES (Stanford Public Information Retrieval System) database created and maintained by Lynn McRae of RLG SPIRES Services"; 1st edition, November 1981
- RLG user publication: "RLIN II Card Profile Handbook," loose-leaf, viii + 207 pages (Part I: Card Profile Description; Part II: Card Profile Questionnaire Instructions," plus 7 appendices and a glossary); 2nd edition, November 1982; PLUS: DRAFT version of earlier work, "RLIN Catalog Card Profile Questionnaire: Description and Instructions," vi + 111 pages, followed by filled-in samples forms A-I, 1979
- RLG user publication: "RLIN II Tables Coordinator's Handbook," loose-leaf, 1st edition, xi + 157 pages, followed by iv + 115-page "Tables Field Guide" (Field Guide includes May 1990 revised pages); "this handbook describes the 13 tables that make up the Tables subsystem and gives instructions for creating and maintaining entries in those that are under control of your library"; by Shannon J. Moffat, 1st edition, March 1982
- RLG Programs publication: "The RLG Conspectus Online – User's Manual," by Deborah Jakubs, loose-leaf, vi + 34 pages, 1st edition, October 1982
- RLG user publication: Miscellaneous change/update memos to users (about 10) – subset of many more issued over the years; memos usually updated contents of a range of user publications and were issued prior to individual updating of each separate manual or guide; June 1983 – 1992
- RLG user publication: "RLG CJK Terminal Cluster Site Preparation Guide and Ordering Instructions," loose-leaf, iv + 43 pages, 1st edition, April 1983; PLUS: Single-sheet update to this publication, November 1984
- RLG user publication: "RLG CJK Input Manual," softbound, viii + 124 pages and updates filing record sheet, by Karen S. Smith-Yoshimura, illustrated by Jim Bourne, including foldout replica of the RLG CJK terminal keyboard (updated to April 1984); 1st edition, June 1983; PLUS: Loose-leaf version, same manual, but dated May 1983
- RLG user publication: "RLG Archival Control Manual," by technical writer Melodye Khattak, loose-leaf, viii + 87 pages, May 1984; PLUS: "Form Terms for Archival and Manuscripts Control," compiled by Thomas Hickerson and Elaine Engst, Cornell University, 6 pages, February 1985
- RLIN Overview and Technical Elements: "The RLIN System: A Conceptual Overview," versions of September 1984, June 1986, and June 1989, up to 13 pages, including diagram. PLUS: "A Technical Overview of RLIN," versions of April 1986 and September 1993, 44/62 pages, more diagrams
- RLG user publication: "RLG Terminal Manual – Zentec 9003, RLG90, RLG40, RLG84 terminals and IBM PC," loose-leaf, vii + 100 pages with updates filing record; 3rd edition, revised October 1984, March 1985, and September 1985
- RLG user publication: "Guide to Using Non-Roman Scripts on the IBM PC," by Jonathan Lavigne, loose-leaf, vi + 22 pages, May 1986

- RLG user publication: "Site Preparation Guide for the IBM PC Used as a Full-Face RLIN Terminal" [full-face meant over a leased-line connection that permitted data transmission by the screenful, as opposed to line by line (necessary over a dial-up connection), loose-leaf, iv + 37 pages, 3rd edition, October 1986
- RLG user publication: "Interlibrary Loan in RLIN II (ITPS) Field Guide" [ITPS was internal usage for "integrated technical processing system], "preliminary edition" [entries in alphabetical order without page numbers], loose-leaf, about 100 pages, 16 January 1987; PLUS: "ILL Changes to Tables Field Guide," preliminary edition, 16 January 1987
- RLG user publication: "Interlibrary Loan in RLIN II: User's Manual" and "ILL Field Guide," both loose-leaf, 2nd edition, July 1987; PLUS: subsequent "ILL Field Guide Cheat Sheet," October 1987; 1995 memo on Fields database from Ed Glazier; 3 ILL-related articles from the "RLIN Focus" newsletter, 1996-1997; printout from RLG Web of "What's New for RLIN ILL," July 1997; and two further memos on fields and barcodes, Ed Glazier and Kathy Bales, respectively, November 1987 and August 1998
- RLG user publication: "RLIN PC Terminal Manual" [intended for data entry/update using "full-face" transmission mode, not searching-only in dial-up "line-by-line" mode], by Jonathan Lavigne, loose-leaf, vi + 56 pages, 1st edition, November 1987
- RLG user publication: "RLIN PC Terminal Manual," loose-leaf, 91 pages, 3rd edition, revised, August 1991; PLUS: "Using the RLIN PC Terminal Program," 6-panel pocket card, September 1992
- RLG user publication: "The Medieval and Early Modern Data Bank Handbook," by Martha Carlin, Rutgers University, softbound, 8 inches x 5-1/2 inches, 52 pages; for software and data distributed on PC diskettes ["MEMDB" was a part of RLG's late 1980s – early 1990s exploratory Program for Research Information Management – PRIMA]; December 1988
- RLG user publication: "Catalog Card Profiling Guide" ( "A catalog card profile is necessary for producing cards from RLIN records … the completed forms guide … in coding the program that generates your cards"); loose-leaf, iv + 58 pages, September 1989
- Promotional flier for an interlibrary loan workstation, "Prospero": Lavender single sheet that uses service name with a quote from Shakespeare's "The Tempest" [earlier Ariel software for document transmission over the Internet also quoted from this play; Prospero never got to production release?]; January 1991
- Marketing brochure for ultimately achieved interlibrary loan workstation "ILL Manager": glossy multicolor foldover, June 1999; PLUS: "ILL Manager Online Help," a loose-leaf, tabbed printout, undated but with a couple of screen captures made on 23 April 2002
- RLG – ARL Joint Study: "ARL/RLG Interlibrary Loan Cost Study," … "A Joint Effort by the Association of Research Libraries and the Research Libraries Group," by Marilyn M. Roche, RLG, published by ARL; softbound, 64 pages, June 1993
- RLG user publication: "RLG CJK Local Dictionary," loose-leaf, xxvi (Introduction) + 127 pages, version G, September 1993; PLUS: Update memos for versions H (8 June and 31 August 1974), I (28 June and 19 July 1985), and J (7 March 1986)
- RLG Program Manual: "RLG Shared Resources (SHARES) Manual," 21 pages, 5th edition (revised and updated from the 1992 4th edition), May 1996
- Online help for users: "RLIN Terminal for Windows" (PC-based processing system) – 2 complete [?] printouts of the online help for version 5 [?]; 2nd printout is annotated with further corrections and additions; completely undated, but sometime in the 2000s?
- RLG user publication: Publications updates – "H Software Enhancements to CJK Terminals," 12 pages, 27 January 1984, plus "Latest system changes – supplement to CJK publications [for M software version]," 1 page, 28 June 1985

- RLG paper: "RLIN East Asian Character Code [REACC] and the RLIN CJK Thesaurus," by Karen Smith-Yoshimura and Alan Tucker, 29 pages including diagrams and examples, May 1985
- RLG user publication: "CJK Thesaurus Reference Sheet," 2 pages, February 1987
- RLG user publications update: "RLIN Changes Affecting CJK Users, Resulting from Cyrillic Implementation," 4 pages, 2 May 1986
- RLG user publications: Two memos on new workstation [IBM PC] replacing older CJK-cluster terminals – "RLIN MSW [Multiscript Workstation] System Configuration Guide," 2 pages, 26 August 1988; and "Summary of Multiscript Workstation Changes to CJK," 1-page memo plus 9-page summary and 3-page MSW software evaluation form, 10 October 1988
- RLG user publication: "Guide to Using CJK Scripts on the PC," loose-leaf, x + 113 pages, 1st edition, August 1988, revised July 1991; PLUS: Separate stapled "Update Number 1 (July 1991)" with 2-page cover memo, 16 August 1991
- RLG user publication: "Guide to Using Non-Roman Scripts on the PC," stapled in corner, viii + 37 pages, 3rd edition [covers Arabic, Cyrillic, Hebrew – CJK scripts are dealt with in separate guide], August 1991
- RLG user publication: Cover memo and "tented" (3-sided) RLIN keyboard aid – "RLIN PC Terminal Keys and Roman-Scripts Alternate Character Set" (has sides for Hebrew and Cyrillic characters, but Arabic not yet included), December 1987; PLUS: Cover memo that includes form for "Comments on RLIN User Documentation," 26 January 1989
- RLG user publication: "RLIN Indexes and Fields Indexed," self-bound, 24 pages, includes Union Catalog bibliographic files, authority files, Art & Architecture file, interlibrary loan, and CJK Thesaurus; April 1996
- RLIN-based interlibrary loan: Sets of miscellaneous notes and diagrams regarding RLIN ILL; some undated, others ranging from 1987 to 1998 – used by programmers/analysts (Mike Sanderson's files?)
- RLIN-based interlibrary loan: Mostly undated contents of Systems division binder of code printouts on the capture and generation of interlibrary loan statistics from RLIN ILL; statistics were provided to users and members (does this include the RLG Shared Resources program's net-lending calculations??); code very sparsely commented; 1988-1989
- Interlibrary Loan Workstation ("Prospero"): "Interlibrary Loan Workstation External Design Preliminary State Diagrams," stapled in corner, 36 pages, December 1988
- Interlibrary Loan Workstation ("Prospero"): "Interlibrary Loan Workstation External Specification User Interface," Draft, loose-leaf, viii + 246 pages; November 1989
- Interlibrary Loan Workstation ("Prospero"): Summary of changes made to November 1989 version of the ILL workstation external specification, 14 December 1989; PLUS: "Overview of ILL Workstation / RLIN Process Flow," 20 December 1989 [about 12 pages total]
- Interlibrary Loan Workstation ("Prospero"): "Interlibrary Loan Workstation Functional Specification Draft Review Comments and Replies," 33 pages, January 1990
- Interlibrary Loan Workstation ("Prospero"): "Interlibrary Loan Workstation External Specification Data Elements," Draft, loose-leaf, 111 pages; "November 1989" is crossed out and replaced by handwritten "February 1990"
- RLIN-based interlibrary loan: Implemented version of "External Specification for RLIN Interlibrary Loan (ILL) Online Processing and Batch Requirements," from Steve Eastman's files; unbound, 121 pages, 15 January 1992
- RLIN-based interlibrary loan: "External Specification for RLIN Interlibrary Loan (ILL) Online Processing and Batch Requirements, Implemented Version," loose-leaf, 99-pages one-sided, 22 September 1997

- Resource sharing through online ILL: (1) JEDDS ILL Architecture, diagrams, and code from David Ripp, July 1998; (2) New strategies, July 1998-1999 (Linda West); (3) "Semi-specs" from Linda Driver for ILL Manager Patron database, patron-initiated requests for ILL Manager (General), and Eureka [RLG search system] requests for ILL Manager; February 1999
- Interlibrary loan workstation ("ILL Manager"): A few miscellaneous items – Memorandum of Understanding, RLG-OCLC, March 1990; ISO ILL Protocol Testing, June 1999; specifications for "ILL Form for Group Transactions," April 2000; James Michalko [RLG president] to Jay Jordan [OCLC president] on delays in testing the OCLC ISO-ILL gateway, August 2000; special coverage of new means for ILL in "American Libraries," November 2000

**CARTON 123: Marketing & Sales**

1998-2005: Apart from a series of folders on branding efforts from June 1998 to May 2001, files are a small subset of files left behind by Pamela Dewey after the RLG-OCLC merger; these range over AMICO, RLG Cultural Materials, RedLightGreen, annual service pricing negotiations with large member-users, and less than a dozen remnants of preparations for exhibiting and meetings held in conjunction with major professional conferences (primarily those of the American Library Association).

[These folders pre-dated Pamela Dewey; might be from Susan Yoder's files.]
- Branding: Adjusting names of RLG information sources/databases -- Work to drop older names and find a more descriptive family of new names, focusing on "Resources from RLG"; June 1998 – May 1999
- Branding: Locating and contracting with George Jurkowich, Azimuth Consultants – for study and recommendations on "RLG branding and brand architecture, naming and name architecture, and competitive positioning"; background and contract, June – 2 November 2000
- Branding: Background and work papers from Azimuth study, centering on steps to accomplish, work done with RLG staff, and particularly questionnaires for interviews with members, data contributors, purchasers, critics; October – November 2000
- Branding: Draft and Final Report, plus presentation (includes diskettes); reactions to Azimuth Study and Recommendations; December 2000 – January 2001 (also presented to RLG Board of Directors in February 2001)
- Branding: Follow-up on Azimuth recommendations following February 2001 RLG Board meeting – background and contract extension with Azimuth / George Jurkowich for an "implementation project"; February – May 2001

[From this point on, materials come from Pamela Dewey's files]
- AMICO marketing and subscriptions: Scraps of activity [could be more useful if moved/combined with related information in other cartons?]; May 2002 – April 2003
- AMICO turned into CAMIO: Packet [includes letter, overview, brochure, service agreement] sent to RLG's AMICO subscribers on 26 May 2005
- RLG Cultural Materials – marketing to subscribers: Plans for "subscriber packages" mailing (information plus giveaways); October-November 2002
- RLG Cultural Materials in the UK: Proposal to JISC (Joint Information Systems Committee) for higher-education nationwide access to RLG Cultural Materials; response to a JISC call for proposals; partial background; October- November 2003

- RLG Cultural Materials and Fathom: Scraps of background on a possible collaboration "opportunity" (that came to nothing) with Fathom, a new kind of online knowledge resource from Columbia University [might find more in Carton 93]; April 2003
- RedLightGreen: Business model exploration with Exordium Group ["Sponsorship strategists for the IT industry"] – Phase I report to RLG from Exordium for the project then called Union Catalog on the Web, plus e-mail exchange with James Michalko; January 2002
- RedLightGreen – usability studies: idbias and RLG staff efforts – a little from a mid-2002 idbias evaluation using students; background from a March 2003 usability techniques seminar; draft user scenarios by Merrilee Proffitt and Bruce Washburn, March 2003; and draft "Top-Line User Interface Review for RedLightGreen" by idbias, October 2003
- RedLightGreen marketing: Preparation of ads for campus newspapers for a demonstration and promotion of the free RedLightGreen Web site service; October – early November 2003
- RedLightGreen and Ted Hill Associates: Assorted items on work in developing take-up / sponsorship of RedLightGreen; earliest date from late 2003, last from March 2005
- Annual fixed-price agreement for CURL (UK-based Consortium of University Research Libraries): Notes from fiscal year 2003 [September 2002 – August 2003], followed by more for fiscal year 2004; late 2002 and August 2003 – April 2004
- Annual fixed-price agreements: Fiscal year 2004 offers to large members/users in North America – background for a "Digital Resources Package" (comprising The AMICO Library, RLG Archival Resources, and RLG Cultural Materials); mostly 2nd half of calendar 2003
- Revenue plans and procedures: Fiscal year 2005 – some background and various service revenue charts (some from fiscal year 2004 at back of folder); summer 2004
- Annual fixed-price and/or RLIN flat-fee agreements: Fiscal year 2005 – background for offers in a transitional year when RLG was redoing its systems and moving everything off the old mainframe computer; March – August 2004
- Annual fixed-price agreement for CURL members: Some background for fiscal year 2005; May-November 2004
- Annual fixed-price agreements: Fiscal year 2006 – background (last year of RLG, which merged into OCLC in June/July 2006); 2004 – September 2005
- Annual fixed-price agreement for CURL members: Fiscal year 2006 – scrappy background; February – November 2005
- RLG at 2001 American Library Association Annual Conference: Follow-up contacts [and there should be more in other cartons on the RLG Cultural Materials reception held at this conference]; June-July 2001
- RLG at 2002 American Library Association Midwinter Conference: Preparations for exhibiting, plus a bit from ALA summer 2001; January 2002
- RLG Cultural Materials Alliance Forums in conjunction with ALA: Materials and preparations (partial) for member meetings in July 2002 and January 2003, held at the location of American Library Association conferences
- RLG at 2003 American Library Association Midwinter Conference: Preparations / information to staff about services to be marketed/discussed; late 2002 – January 2003
- RLG Art & Architecture Group: 2003 Annual Meeting agenda and some reports given; March 2003
- RLG internal all-staff briefing, 19 May 2003: Agenda and some background handouts [should be more in RLG Programs / Linda West's files in other carton(s)]
- RLG at 2003 American Library Association Annual Conference: Preparations for summer conference; mid-2003
- RLG Art & Architecture Group: 2004 Annual Meeting agenda and related materials; April 2004

- RLG at 2004 American Anthropology Association conference: Some of the preparations, including a free courtesy-use period of access to pertinent RLG databases; August-October 2004
- RLG at 2005 ARLIS conference: Some preparations, including design of postcard sent to registrants prior to Art Libraries Society event; late 2004 – early 2005
- ArchiveGrid reactions at 2005 SAA conference: Notes after the Society of American Archivists meeting on reactions to the redesign underway for RLG Archival Resources; 30 August 2005

[Cartons 124-125: See note preceding Carton 1 above.]

**CARTON 126:  Corporate Communications & Member Programs**

1974-2005: Published articles about RLG; staff-written articles about RLG; remarks and articles by RLG president James Michalko; a folder of assorted short projects lists from 1978 to 1991 ("Avenue A" included); a folder on RLG 10th Anniversary materials; and 33 folders on the creation and expansion of "CJK" – Chinese, Japanese, & Korean scripts-processing and retrieval in RLIN.

- Articles about RLG – not staff-written: Includes variety of media (New York Times, various journals, university newsletters – see list below); from 1974 (announcement in NYT of RLG's founding) to 2005 (announcement of RedLightGreen free Web service):
    − New York Times, 24 March 1974, p. 59: "Four Major Libraries Combine Research Operations," by Eric Pace
    − Stanford Report[?], 1979[?]: "Major libraries unite to ease information explosion," by Andrew Hill
    − EDUCOM Bulletin, summer 1980, pp. 26-31: "Research Libraries in the Network Environment; the Case for Cooperation," by Patricia Battin
    − New York Times, 12 August 1980: "Traditional Library Use Threatened," by Edward B. Fiske
    − Perspectives in Computing, Vol. 2, No. 4, December 1982, pp. 4-11: "Research Libraries – Automation and Cooperation," by David R. McDonald & Robert Hurowitz
    − EDUCOM Bulletin, Vol. 19, No. 1, spring 1984, pp. 15-19: "The Research Libraries Group's Multilingual Technology," by Russell G. Fischer (plus copy of 12 Sept. 1983 RLG press release, "First Chinese Record Enters RLIN Database")
    − Documentation Newsletter, Cornell University Libraries & Archives, Spring 1984 (entire issue): "Nationwide Access to Archival Information," by Elaine Engst
    − New York Times, 25 February 1985, p. 8: "Torrent of Print Strains the Fabric of Libraries," by Colin Campbell
    − Journal of Library Administration, Vol. 8, No. 2, summer 1987, pp. 35-40: "Internal Uses of the RLG Conspectus," by Anthony W. Ferguson, Joan Grant, & Joel Rutstein
    − Information Today, ca. 1991[?], p. 55, incomplete: "RLG's Document Transmission Workstation: LIR Is First Electronic Library," by Nancy Melin Nelson
    − Penn Libraries News, No. 6 spring 1990: [untitled] issue devoted to direct searching of the RLIN database by University of Pennsylvania by faculty & students, with anecdotes
    − Database, October 1990 reprint: "RLIN Special Databases: Serving the Humanist," by Fred Muratori
    − Wilson Library Bulletin, April 1991, pp. 84-87: "Library to Library [about Ariel document transmission]," by Mary E. Jackson

- Ford Foundation Report, December 1991, p. 20 & pp. 22-24: "Investing for Social Gain: Reflections on Two Decades of Program-related Investments" – project profile of Research Libraries Group included
- Computers and the Humanities, 1992 (26), pp. 175-180: "Humanists at the Keyboard: The RLIN Database as a Scholarly Resource," by Stephen Lehmann & Patricia Renfro
- Information Technology and Libraries, March 1995, pp. 17-29: "Access to Information: a Comparative Study," by Stephen Perry & Lutishoor Salisbury
- Journal of Interlibrary Loan, Document Delivery & Information Supply, Vol. 10, No. 4, 2000, 134 pp.: "Ariel: Internet Transmission Software for Document Delivery," 12 contributors, edited by Gary Ives
- DRAFT Introduction to Technical Services, 7th edition: Chapter 4, "Cooperation/Consortia and Technical Services," by Sheila Intner – with lots of review comments e-mailed from Jennifer Hartzell
- Searcher: The Magazine for Database Professionals, April 2005, pp. 14-23: "RedLightGreen and Open WorldCat; Changing the World of Academic Search," by Davis Mattison

- Articles about aspects of RLG – staff-written: Ranges from 1979 to 2004; see listing below:
  - Bulletin of the American Society for Information Science, Vol. 5, No. 5 (June) 1979, pp. 20-21: "Research Libraries Information Network; The Computerized Bibliographic Network Supporting the Cooperative Programs of the Research Libraries Group, Inc.," by Lois M. Kershner
  - Online Review, Vol. 3, No. 3 1979, pp. 281-296: "RLG's Research Libraries Information Network: bibliographic and information services," by Jan Thomson and Jennifer Hartzell
  - 11-page paper originally presented at the 13th Annual Seminar for Academic Computing Services (8-11 August 1982) in Snowmass, Colorado: "The Research Libraries Information Network," by Susan Jurist
  - Information Technology and Libraries, March 1983, pp. 34-46: "The WLN/RLG/LC Linked Systems Project," by Wayne E. Davison
  - Judaica Librarianship, Vol. 3, No. 1-2, 1986-1987, pp. 5-16: Column "Alef Bit" – "Hebrew on RLIN," by Joan M. Aliprand (reprint ends with 2-page article from The Research Libraries Group News, Iss. 10, May 1986: "RLG Introduces Cyrillic," by Hilary Hannon
  - Libraries and Electronic Information reprint, undated [1988-1989]: Chapter 3, "The Research Libraries Group," by David Richards
  - Library Acquisitions: Practice & Theory, Vol. 13, 1989, pp. 447-452; reprint of paper delivered at the American Library Association's annual conference that year: "Network Strategies," by Joan Aliprand [speaking to the integrated technical processing portions of RLIN]
  - Judaica Librarianship, Vol. 5, No. 1, spring 1989 – winter 1990, pp. 12-20: "Hebrew on RLIN – An Update," by Joan M. Aliprand; reprinted back-to-back with non-staff article on pp. 22-25, "Hebrew Online: Current Issues and Future Concerns – a View from the Field," by Rosalie Katchen, Brandeis University
  - Library Hi Tech, Issue 40, Vol. 10., No. 4, 1992, pp 59-80: "Arabic Script on RLIN," by Joan M. Aliprand
  - Advance copy of an 11-page article to appear in Journal of Academic Librarianship; publication data unknown, paper undated [ca. 1992?]: "A Comparison of Campus Priorities: The Logical Library in an Organized Anarchy," by Carol A. Hughes [became RLG staff member after this was written; already involved with RLG]

- Information Technology and Libraries, June 1993, from "Special Section: Z39.50 – Two Perspectives; pp. 227-237: "RLG's Z39.50 Server: Development and Implementation Issues," by Lennie Stovel, Rich Fuchs, and Jui-wen Chang
- Library Hi Tech, Issue 46, Vol. 12, No. 2, 1994, pp. 7-32: "The Research Libraries Group: Making a Difference," by James Michalko and John Haeger, with sidebars by Karen Smith-Yoshimura, David R. Richards, Constance Gould, James W. Coleman, Walt Crawford, Lennie Stovel, H. Thomas Hickerson [Cornell University], and Nancy Elkington & Patricia McClung
- Computers in Libraries, Vol. 14, No. 1, January 1994, Special Section on Databases, pp. 16-20: "Eureka™ Opens New Door to RLG's Scholarly Resources," by Hilary Hannon
- Publishing Research Quarterly, fall 1995, pp. 25-38: "Resources for Research and Learning: The Databases of the Research Libraries Group," by Linda P. Lerman and Joan M. Aliprand
- Spectra, Winter 1997, pp. 40-46: "The Dublin Core Metadata Element Set: Useful Tool or the Emperor's Newest Clothes?," by Tony Gill
- Report produced for ALA as part of a task force, 1998, 39 pages: "Audio Preservation: A Selective Annotated Bibliography and Brief Summary of Current Practices," by Robin Dale and others
- Interlending & Document Supply, Vol. 27, No. 4, 1999, pp. 148-153: "The changing nature of international resource sharing: risks and benefits of collaboration," by Nancy E. Elkington & Dennis Massie
- Relay, The Journal of the University College and Research Group, No. 49, 2000, pp. 17-18: "SHARES, RLG's Shared Resources Program," by Dennis Massie
- International Cataloguing and Bibliographic Control, Vol. 30, No. 1, January/March 2001, pp. 5-7: "CIMI Consortium – The Organization of Museum Intelligence," by Angela Spinazze, Paula Willey, and Tony Gill [RLG staffer]
- Advances in Librarianship, Vol. 27, 2004, pp. 1-23: "Consortial Actions and Collaborative Achievements: RLG's Preservation Program," by Robin L. Dale

Articles by James Michalko, RLG president: Ranges from 1989 to 2003 (not exhaustive):
- Remarks made at an American Library Association pre-program event, summer 1989, 6 pp.: "Costly Boundaries: Costs, New Technologies, and Bibliographic Utilities"
- Remarks made at a colloquium held in Paris, "l'Avenir des Grandes Bibliothèque [The future of national libraries]," 30 January – 2 February 1990, 8 pp.: "Networks and the Research Library of the Future – the RLG/RLIN Example"
- Speaking notes for a presentation to the Rare Books and Manuscripts Section of ALA, 28 June 1992, 10 pp.: "Today's Libraries Face Tomorrow's Scholars: Faults and Fissures"
- Journal of Library Administration, Vol. 19, No. 3/4, 1993, pp. 11-22: "Higher Education, the Production Function, and the Library"
- Speaking notes for the annual conference of NAGARA (National Association of Government Archivists and Record Administrators), 16 July 1992, 7 pp.: "Future Development of National Information and Research Networks: Where Do Government Archives and Records Fit In?"
- Library Hi Tech, Issue 46, Vol. 12, No. 2, 1994, pp. 7-32: "The Research Libraries Group: Making a Difference," by James Michalko and John Haeger, with sidebars by Karen Smith-Yoshimura, David R. Richards, Constance Gould, James W. Coleman, Walt Crawford, Lennie Stovel, H. Thomas Nickerson [Cornell University], and Nancy Elkington & Patricia McClung

- New Library World, Vol. 101, No. 1153, 2000, pp. 6-11: [Feature article:] "Equilibrium and opportunism: information strategies and the new environment"
- Slides and speaking notes for conclusion of IATUL (International Association of Technological University Libraries) 2002 conference, 6 June 2002, Kansas City, MO, 15 pp.: "Cyber-research: Find the Library"
- Ubiquity interview with James Michalko, transcript, revised 11 February 2003, 7 pp.; covers what RLG is, why, embracing technology, working with the computer science community, language computing, Goggling compared with library services, thoughts about partnerships with computer/Internet companies, copyright and fair use, morale and energizing ideas
- Conference Report on "Strategies for a European Area of Digital Cultural Resources," 15-16 September 2004, pp. 100-106: "Organising Digitisation in the United States"
- Encyclopedia of Library and Information Science, 2003, pp. 2508-2512: entry on "RLG (Research Libraries Group)" [ghost-written by Liz Chapman and Jennifer Hartzell]

- Development projects: Assorted short project lists from 1978 to 1991 – "Avenue A" from Tina Kass [1978-1979?]; one from May 1980 plus September 1980 revision; e-mail update to RLG Board of Governors from president William P. Timlake, March 1987 (announces creation of RIC [RLIN Information Center], worth including in collation of Timlake's time with RLG); fiscal year 1991-1993 3-year goals description, June 1990; Timeline Gantt chart report on Systems managers' projects with staff initials and project labels, April 1990; "RLG92"-driven RLG prospectus listing programmatic projects at pages 14-19, September 1991
- RLG 10th anniversary "International Conference on "International Conference on Research Library Cooperation": This marked the first of several anniversary observations (the others were the 20th, 25th, and 30th, based on RLG's year of incorporation, 1975); includes program, list of participants, budget & expenses, copy of all papers delivered except that of Marcus McCorison [was the total result formally published?]; October 1984
- CJK – Choice of hardware (computer terminal) vendor: [Extensive array of brochures, specifications, etc. for systems not chosen discarded]; file retains basic brochures on TransTech and its Sinoterm workstation; mostly undated, but basically from 1980?
- CJK – Contract with TransTech International Corporation for "device development by TransTech, plus manufacture of equipment for entry and output in RLIN of bibliographic records" composed in whole or in part of Chinese, Japanese, and Korean characters; 3 subsequent items (from/to Patricia Battin, Kathy Chan, Noel Hanf) on progress under / modifications to the contract; November 1981 – March 1985
- CJK – Chinese characters computer recognition and processing: Work in 1979 led by Library of Congress on nonroman data in MARC (Machine-Readable Cataloging) format; very useful (for the history) article about developments in Chinese-character library automation in the "Library of Congress Information Bulletin," Vol. 41, 26 March 1982; RLG's brochure (a photocopy) "East Asian Studies," August 1982; planning meeting for "computer recognition and processing of Chinese characters" held by US National Academy of Sciences with the Chinese Academy of Sciences – planners were ACLS (American Council of Learned Societies), NAS, and the Social Science Research Council's "Committee on Scholarly Communication with the People's Republic of China"; fliers about conferences in China & Japan, April & October 1983
- CJK – Status meetings held by John Haeger to manage the CJK development and introduction process: Minutes from a single "around-the-table" status meeting attended by staff responsible for various parts of the full effort; 21 January 1983

- CJK – RLIN CJK terminal costs and how to recoup: Five letter exchanges between TransTech and RLG, involving John Haeger, Gary Wang, and Peter Kang; January 1983 – March 1984
- CJK – Varied correspondence between RLG and TransTech, 1984-1985, bit of 1987 (see also folders in specific topics between the two organizations)
- CJK – Rates offered to Library of Congress under LC-RLG Cooperative Agreement: March 1982 background page, standard RLIN rates for September 1984 – August 1985, James Michalko's calculation of reduced rates for LC, two sheets on cataloging statistics for CJK work and LC's share; July 1984 – June 1985
- CJK – Press release on first use of CJK in RLIN and reports to the Ford Foundation, Andrew W. Mellon Foundation, and National Endowment for the Humanities on work from April 1980 through August 1984: press release of 12 September 1983, Final report late 1984 [?], note from John Haeger on using up a Mellon grant on the CJK Thesaurus & more in January 1985, final [?] financial report to Mellon August [?] 1985; plus, "RLIN/CJK: The First Year," by James Reardon-Anderson, C.V. Starr East Asian Library, Columbia University, March 1985
- CJK – TransTech, CLSI (CL Systems, Inc.), and RLG discussion & agreements: CLSI & TransTech's desire to make use of elements of the RLG CJK terminal programming; correspondence with John Haeger; assessment of what they wanted by programmer Kitty Shih; legal aspects handled by RLG counsel & corporate secretary Noel Hanf – ends with executed agreement and terms, includes specifications, code, drafts of agreement, brochures/descriptions of CLSI's LIBS100 local libraries system; September 1984 – December 1985; plus news note on results, December 1986
- CJK – Lilly Endowment support: Final report "on the $90,000 used in 1985 to support the initial cost of the universities of Illinois and Wisconsin in the East Asian Studies Program of the Research Libraries Group, Inc."; March 1986
- CJK – Hong Kong Urban Council visit, correspondence, interest in Aspen [see more on Aspen project in other cartons]: Smallish file that progresses from seeing RLIN CJK demonstrated at RLG to considerable interest in how the Aspen operating system as envisioned could open up "local RLIN" use in Asian; January 1983 – May 1986
- CJK – First use of RLIN CJK system and equipment in the British Library: Material (including assessments by BL staff, including an article published in "Bulletin of the European Association for Japanese Studies" No. 25, June 1986) on BL's trial use of RLIN CJK and subsequent interest in use of the next-generation "MSW" (Multi-Script Workstation); January 1985 – September 1987
- CJK-MSW – A PC-based terminal for both CJK and other character sets: Requirements, exchanges with TransTech and with interested parties, evolution into designation "Multi-Script Workstation," first announcements of availability, finalizing the keyboard; NOTE: There is an actual CJK keyboard from 1994 in the RLG archives; February 1986 – February 1989
- CJK/Multi-Script Workstation (MSW): Preparations for a one-sheet color brochure in collaboration with TransTech Corporation; this file doesn't include the result, which was [?] a one-color flier in shades of blue on thin white glossy stock; February 1989
- CJK – RLG's step to trademark: A few letters among RLG's lawyers, Henriette Avram at the Library of Congress, Marsha Wagner at Columbia University, and a few academics to clarify for the US Patent and Trademark Office the basis for RLG's rights to register "CJK" (RLG was able to do so, but over the years did not vigorously promote or defend its rights to the term); May 1987

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- CJK – Updates (often in the "Operations Update" newsletter): Varied tools/ways in which Karen Smith-Yoshimura kept internal RLG staff, members, and users updated on developments, features, milestones, etc. in RLIN CJK capabilities; here, the most frequent medium was an e-mailed "CJK Update" sent to the "cjkupdate" mail group; January 1985 – early 1987
- CJK – usage statistics and studies: Early records of East Asian/CJK cataloging done and totals by institution, usually monthly; created/kept by Karen Smith-Yoshimura (statistics came from RLIN database management, especially via Karen Bendorf); some analysis and conclusions reported from time to time; shared by Karen S-Y in memos, e-mail updates – and, after the period represented here, in Web site and an annual "RLG Covers the World" handout; January 1985 – November 1987 (not complete for this span)
- CJK – REACC (the RLIN East Asian Character Code): Slim file of specific requirements for an internationally suitable code for bibliographic records, and a little on the "RLIN CJK Thesaurus database for lookup and maintenance of characters"; includes Karen Smith-Yoshimura's mailing to Henriette Avram at the Library of Congress on the differences between REACC and CCCII (Chinese Character Code for Information Interchange); March 1985 – July 1989
- CJK – RLG & the 2nd Asian-Pacific Conference on Library Science, Seoul, Korea, 1985: RLG focused on the East Asian Character Code – file contains paper by Karen Smith-Yoshimura and Alan Tucker, delivered by Karen S-Y, trip report on her discussions, observations, and follow-up, plus a packet of character code issues/background sent to Professor Chen-Chau Yang, National Taiwan Institute of Technology, before the Seoul conference; March and May 1985
- CJK – RLG & Academia Sinica (Chinese Academy of Science): John Haeger's trip to CAS and to 3 other places – Tsinghua University, Peking University, and National Library of China; report focuses on Academia Sinica and RLG's CJK future; October-November 1985 (with a more process-focused advance note from January 1985)
- CJK – Mid-1980s visits of National Library of China delegations to RLG: Minimal materials on visits in late April 1985 and again in November 1986 [RLG's interest in their CCCII? (Chinese Character Code for Information Interchange)
- CJK – At 1986 IFLA pre-conference "Automated Systems for Access to Multilingual and Multiscript library materials": John Haeger was on the planning committee for and RLG participated in this International Federation of Library Associations event – both he and Alan Tucker spoke; RLG also held an invitational meeting on issues in REACC (RLIN East Asian Character Code), and this file includes meeting preparations, invitees, and papers; August [?] 1985 – November 1986 [follow-up]
- CJK – International Committee on Character Set Coordination: Set up as an outcome of RLG's REACC meeting held in conjunction with the IFLA conference & preconference in Tokyo, August 1986?; slim file on exchanges of John Haeger and Henriette Avram of the Library of Congress with directors at National Central Library, Taiwan, Central National Library, Korea, and National Library of China (who demurred at Taiwan's inclusion) [-- what about Japan?]; November 1986 – June 1987
- CJK – One or more British Library – School of Oriental & African Studies – China and/or Japan Library Group Colloquia on Resources for Chinese and/or Japanese Studies: Two invitations, apparently, for events one year apart, with provisional agendas; slim file, with no evidence that RLG attended; 1st one was in August 1987, if it happened; RLG did not attend the 2nd in 1988 (while the search was underway for a new RLG president); September 1986 – April 1988
- CJK – NACSIS "First International Conference on Scholarly Information Network – East Asian Applications and International Coordination": Role of RLG in preparing for and

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collaboration-exchanges with Library of Congress, NACSIS, OCLC, UTLAS; positions taken; at least one pre-conference; 2 RLG papers delivered there [draft only – where are final versions?]; comment papers; lots of content on where things stood, how folks saw the future; conference held 8-11 December 1987 in Tokyo, file contents dated February – November 1987

- CJK – "Second European-American Conference on Exchanges in East Asian Studies": Held at Columbia University; John Haeger participated in a panel on "Library and Information Exchange," but nothing in this slim file of invitations, attendees, and agenda shows what RLG had to share or took away from this scholarly event; July – September 1988 (event held 8-9 September in New York City)
- CJK – Fourth (Bi-national) US – Japan Conference on Libraries and Information Science in Higher Education: "Strengthening the US – Japan Library Partnership in the Global Information Flow -- Modest file of arrangements for conference and for Japanese delegation's visits in the US (RLG on their agenda); John Haeger's paper, "Unfinished Business: Computers, Libraries, and East Asian Studies" NOT found in this file, but was published in subsequent "Proceedings" [?]; event at Wingspread Conference Center, Racine, WI (organized by Theodore Welch, Northern Illinois University's library director, 3-6 October 1988; file dates October 1987 – May 1989
- CJK – Announcement of International Symposium on Standardization for Chinese Information Processing in Beijing, 21-24 March 1989: Single item, "ISO/IEC JTC1/SC22 N504"; no RLG involvement or reaction given, no outcome noted; 4 May 1988
- CJK – MultiScript Workstation-related: Korean librarians' visit – Preparations for discussions with four "high-level professionals" traveling under a UNESCO study grant; did any further contacts ensue? File was John Haeger's; November 1988 – March 1999
- CJK on RLG- (RLIN-) produced catalog cards: Library of Congress Request for Proposals to provide a "catalog card production system to produce Chinese, Japanese, and Korean bibliographic records [what came before and after this?]; August 1988
- CJK – Chinese Rare Books [cataloging in RLIN] Project (CRBP): Four notes (letters/e-mail) on the idea of this project (1985), on an initial contact with Dr. Sören Edgren (before he came to Princeton and the project – 1988), and on a CRBP committee meeting held at the Library of Congress (1989); slight file, would be better refilled in a carton with more substantive CRPB records; 1985-1989
- CJK – Correspondence within member/user community and RLG, 1981-1988: Exchanges too slight or off-topic to place in other more specific folders (this kind of file did exist already in pre-inventoried carton); includes 1981-1982 background on Akira Miyazawa – otherwise pretty light fare
- CJK – Correspondence outside the member/user community, 1985-1989: Primarily comprises replies to information inquiries, which are most often about using RLIN CJK (or its capabilities) or joining RLG; some of the responses indicate where both topics stood at the time the letter was written

[Carton 127: See note preceding Carton 1 above.]

## CARTON 128:  Multiple departments

1985-2004: Some RLG & OCLC presidential relations; 1987-1988 "Herbster Commission" services & pricing study [SEE ALSO Cartons 32, 80, 135, 129]; a bit on 3 RLG presidents; several strategic planning folders; a bit on RLG-CLASS relations [SEE Carton 15 description for cross-references to other materials]; resumes for some members of RLG's elected Board of Directors; 2 "Host Transition Project folders, mid-1990s; a dozen folders on RLG-CARL attempted joint services

[primarily "DCRC" – SEE Carton 52 description for cross-references to other materials]; examples of selling database services, including large member/user "fixed price option"; examples of relations with member institutions, including site visits and a sour end to Brown University's membership; RLG's anthropology citation databases; and RedLightGreen marketing.

- RLG-OCLC relations & correspondence at presidential level: Subsets of the total [JLH thinks]; 1985-1986; 1987-1988; 1991-1992
- Pricing history – "Herbster Commission" services & rates study: Conduct and results of a high-level charge to a group including the chief financial officers of 6 member universities, chaired by William G. Herbster (RLG treasurer and Cornell University's CFO) to review and resolve limitations and inequities in RLG's pricing principles for its services – a successful effort reflected in the 1988-1989 (fiscal year) rates publication; April 1987 – May 1988, plus short note pointing to other material from the April 1988 RLG board's Executive Committee [SEE Carton 66 for this meeting]
- Three RLG presidents: (1) search and decision for 5th president, William P. Timlake, 1986-1987; (2) Timlake's resignation owing to illness, and a short obituary notice, 1987-1988; (3) search and decision for 6th president, James P. Michalko, 1988-1989 [held position from 1989 into 2006, when RLG merged into OCLC]; (4) short note from 1st president, James Skipper, to Jim Michalko, 11 May 1995; [-- 2nd president was Edward E. Shaw, 3rd (interim) was Patricia Battin, 4th was Richard McCoy].  ALSO: James E. Skipper 2005 obituary notice.
- Strategic planning – technical area: Just 2 items – (1) Agenda with observations for members of the Strategic Technical Planning Committee (STPC) meeting "Workshop on the Market Place" (5 pp.), looking to 1992-1995 and beyond, dated 12 September 1988; (2) 5-pp. "RLG Strategic Technical Plan," outlining directions determined in work with the STPC; October 1989
- Multiyear strategic & tactical planning/action cycle: Set of papers that followed up on mission & goals defining done in late 1980s: "Translating RLG's Mission into Action" -- fiscal years 1991-1993 3-year goals and fiscal year 1991 objectives [prepared for the June 1990 RLG board meeting agenda/minutes]; RLG's "Marketing Priorities," August 1990; materials for board committees -- "RLG Programs discussion and strategy session"; printout of RLG senior managers' sorting of "development projects' strategic importance" [in Jack Grantham's handwriting] done after board discussions; February 1990 – February 1991, with background from late 1980s
- RLG interest in providing access to online publications: "Options for the Mounting of Electronic Publications: A Report to The Research Libraries Group," prepared by Information Systems Consultants, Inc., Washington, DC – loose-leaf, paged by sections (5 of these including 27 pages of appendices, for about 60 pp. total); part of strategizing related to the CitaDel document delivery services and push for full-text availability?; May-June 1991
- Strategic planning – bibliographic processing: "Report of the RLG President's Commission on Technical Processing [as term used in libraries] in the 1990s" – iv + 19 pp., 1-sided, 16 October 1991; folder also contains charge to the group of member-library cataloging/technical services directors chaired by Linda West (then an RLG Visiting Associate; later became a director on the RLG staff), distribution notes and cover memo, and feedback on report from Peter Graham making some good points; June 1991 – July 1992
- RLG and CLASS – relationship/contract termination: 1-1/2 inches of material similar to the contents of Carton 158 [file of RLG secretary Noel Hanf], focused on the final year(s) of RLG business dealings with the California Library Authority for Systems and Services (CLASS); begins with "CLASS/RLG Service Agreement of 1 September 1987" and ends with

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dissolution of CLASS as of 31 December 1995 [SEE Carton 15 description for cross-references to material in other Cartons]

- RLG board members after "RLG 92" reorganization: Curricula vitae for some of those who served after the RLG board was elected by the membership, but not a complete set covering fiscal 1991 to 2006; includes Millicent (Penny) D. Abell, Nancy Allen, Edward Barry, Edwin Bridges, Jerry Campbell, Reg Carr, Nancy Cline, David Cohen, John D'Arms, Richard De Gennaro, Ellen Dunlap, Lila Goff, Joan Gotwals, Peter Graham, Vartan Gregorian [? was on earlier President's special committee, rather?], Peter Homulos, Carole Huxley, Michael Janeway, Stanley Katz, Paula Kaufman, Paul LeClerc, Ray Lester, Peter Lyman, James Michalko, Charles Miller, Carole Moore, Paul Mosher, Roger Moss, Dennis O'Brien, Trudy Peterson, Jerome Rubin [never made it to a single meeting], Martin Runkle, Chris Rusbridge, Robert Scott, Elaine Sloan, Michael Smethurst, David Stam, Winston Tabb

- Strategic planning – focus for RLG in the mid-1990s: Charge to member group (the "Mid-Decade Planning Group"), group's first report to James Michalko, that report's transmission to RLG 1993 Annual Meeting attendees, and a follow-up discussion paper (reflecting further discussion and input at three kinds of member meetings) presented in the RLG Board of Directors agenda for the meeting of 10 October 1993; focused on "Preservation & Distribution of Digital Resources" and "Comprehensive Database of Digital Resources"; October 1992 – September 1993

- "Host Transition Project": Preparing for greater independence from Stanford University's support & administrative services, looking to achieve service improvements while changing infrastructure expenses; role in this effort of the Andrew W. Mellon Foundation grant applied for; April-June 1994

- "Host Transition Project": Recommendation to RLG board, action proposal to board, status report to board's Budget & Audit Committee; staff benefits package survey towards designing an RLG (rather than a Stanford University) program, summary report of benefits survey and staff open forums; managed by Molly Singer (Chief Financial Officer) with James Michalko and RLG's auditors KPMG; January 1994 – January 1995

- RLG & the British Library: Market Research Report done by the BL's John Baker on "Retrospective Conversion and the Supply of Records in the United Kingdom" – with a view to offering RLIN services in the UK; June-October 1990

- RLG & CARL – Gateway to CARL UnCover article search & delivery service: Marketing/service decision taken in 1990 to give RLIN users and especially RLG's members for shared resources/public services access to full-text delivery while encouraging use of RLG's Ariel software for online delivery over the Internet; file traces problems, disappointing take-up, and growing sense of competition as RLG developed its CitaDel document search and delivery service; in this file, baton passes from Marilyn Roche to Win-Shin Chiang for these matters; RLG ended the gateway effective January 1993; August 1990 – January 1996

- DCRC (DIALOG@CARL + RLIN & CitaDel): Win-Shin Chiang's file on consortial pricing for the new service, including various examples of this practice consulted by WSC; January – March 1997

- DCRC (DIALOG@CARL + RLIN & CitaDel): Kristin Tague's file of materials related to the service agreement (plus materials filed on the agreement by Win-Shin Chiang April-October1997), the nature of the service (Powerpoints), and an RLG-member promotional subscription program for the new service; October 1997 looking towards 1998

- DCRC (DIALOG@CARL + RLIN & CitaDel): Win-Shin Chiang's file of price quotes for consortia (not RLG's members) -- includes OhioLink, PICA, VIVA, FCLA, Colorado Alliance of Research Libraries – but not deals concluded with each consortium [look to another carton?]; March-December 1997

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- DCRC (DIALOG@CARL + RLIN & CitaDel): Win-Shin Chiang's file on DCRC service usage reports -- formatting & contents; exchanges with CARL and internally; October-November 1997
- DCRC (DIALOG@CARL + RLIN & CitaDel): Win-Shin Chiang's file of exchanges with counterpart CARL coordinators, plus internal e-mails, during the service "relaunch" (after earlier problems with CARL contents from KRI?); October-December 1997
- DCRC (DIALOG@CARL + RLIN & CitaDel): Win-Shin Chiang's file of exchanges with internal staff and with CARL staff on "DCRC transition" [from service trials to production operations and billing?]; includes reports on users' perceptions from site visits made by Lorna Corbetta-Noyes and Gregory Whitfield; November 1997 – January 1998
- DCRC (DIALOG@CARL + RLIN & CitaDel): Win-Shin Chiang's file of members agreeing to January-August 1998 service subscription (mostly on the basis of trials in 1997); December 1997 – January 1998
- DCRC (DIALOG@CARL + RLIN & CitaDel): Win-Shin Chiang's file of members declining a 1998 service subscription (mostly on the basis of trials in 1997); December 1997
- DCRC (DIALOG@CARL + RLIN & CitaDel): Win-Shin Chiang's file of members whose possible 1998 subscription to the service was not yet confirmed or rejected; December 1997 – January 1998
- DCRC (DIALOG@CARL + RLIN & CitaDel): Win-Shin Chiang's materials on results of promotions to subscribe RLG members for 1998 service use; November-December 1997
- DCRC (DIALOG@CARL + RLIN & CitaDel): Win-Shin Chiang's file on setting up members' DCRC user accounts for use in 1998; December 1997
- Selling CitaDel (Citations Access & Document Delivery service): Sample of selling CitaDel database subscriptions, plus Ariel delivery over the Internet – to Claremont Colleges; August 1993
- Selling RLG database subscriptions: Sample of selling RLG database subscriptions over seas – to CAUL (Council of Australian Research Libraries); relationship began in 1993 [?] and was ongoing thereafter; this file belongs to Gregory Whitfield during the time he handled the account; March 1994 – June 1999
- Selling "fixed-price option" to large member-users: Examples of offering a fixed price for all use made of various RLIN/RLG services, based on institution's past and anticipated future use; John Haeger, Carol Mandel, Gregory Whitfield July-September 1997 exchanges for Columbia University (fiscal year 1998), plus earlier example for Dartmouth College (fiscal year 1994), involving Wayne Davison, John James, Karen Smith-Yoshimura, and John Haeger to Margaret Otto
- Effects of new Eureka "user-oriented" search interface on libraries' operations: Splitting search use -- through Eureka by end users (and reference librarians?), still in the RLIN interface for technical processing staff (and some reference staff?); some confusion in how to buy and set up for, addressed in a memo by Lennie Stovel, 3 September 1993, and exchanges with Syracuse University, November 1993
- Member staff's RLIN studies and documentation: Samples – (1) Syracuse University's 1993[?] study of using RLIN to find cataloging copy for problematic materials not found in OCLC; (2) overview of Syracuse Library's "SUMMIT" databases, including the RLIN "catalog of catalogs" and citation databases; February 1994, 1996
- Member site visits made by RLG staff – mid-1990s examples: Some reporting on various types of visits (culled from not-retained folders on members' RLG database subscriptions) – Boston University, February 1992; Syracuse University, November 1993; Cornell University, 1993, 1994, 1996; Art Institute of Chicago, November 1993; Boston Public Library,

December 1993 & October 1995; Boston College, May 1994; Boston Library Consortium, December 1993, with sample of follow-up; Brigham Young University, January 1994

- When member relations go sour – final months of a member: Sample of exchanges with Brown University, culled mostly from file left by RLG sales associate Judy Gee, including the issue of OCLC vs. RLIN costs; July 1993 – July 1997
- RLG anthropology citation databases: Anthropological Literature (ANL), Anthropological Index – Royal Anthropological Institute (RAI), and Anthropology *Plus* (combination of the first 2); fact sheets, help text, and a press release; 2003
- RedLightGreen – Marketing: (1) "Marketing Project Final Report," done by Azimuth Consultants (George Jurkowich), 27 pp. + 6 appendices, August 2003; (2) printout of Powerpoint presentation on same; resulting "Marketing Plan" by Azimuth, 19 pp., August 2003; (3) news item published at Columbia University Libraries, September 2003; (4) schedules for setups for "RedLightGreen Coffee Week" [3-7 November 3-7 2004] at four members, as well as advance ad placements, October 2003; (5) paper, "RedLightGreen as a Research Tool at Fondren Library [Rice University]," December 2004

## CARTON 129: Member Programs & Corporate Communications

1982-2005: Lots of Art & Architecture Program material: SCIPIO and Avery Index developments, Art Serials Preservation Project, RLG & the Getty Art History Information Program, Art & Architecture Group minutes and annual meetings. Followed by: some Mid-Decade Planning follow-up projects; working with members in 2nd half of 1990s; Encoded Archival Description (EAD) and a bit on Encoded Archival Context (EAC); folders on 2003-2004 member metadata symposia; ca. 7 folders on RLG Cultural Materials; RLG-OCLC publication "Data Dictionary for Preservation Metadata"; 2 folders on communications about the 2005 systems/data migration; "road maps" for programs and products in 2005-2006.

- SCIPIO database & its owners: Contract between RLG & 3 partners – Metropolitan Museum of Art, Art Institute of Chicago, & Cleveland Museum of Art – for the origination of SCIPIO (Sales Catalog Index Project Input Online), content coming from the 3, 1982; further exchanges with the owners on copyright/disclaimer notice in the online database, 1987; how owners brought in more SCIPIO contributors, 1987; charging adjustment to owners after RLG changed its rates structure [see the "Herbster Commission," Carton 128], 1988; review of SCIPIO union list published in hardcopy by G. K. Hall, 1988; and steps to expand access and contributions to SCIPIO, leading to termination of the 1982 contract, 1990-1992
- SCIPIO Coordinators & RLG staff: Some of the correspondence between RLG and the owners' designated SCIPIO Coordinator; includes letters from Lou Adrean at Cleveland Museum of Art and Annette Melville, and then Trevor Hadley at the Metropolitan Museum of Art and James (Jim) Coleman, plus a number of SCIPIO meeting agendas and minutes, plus some information on other collaborations between the RLG program officer and the SCIPIO Coordinator; February 1987 – February 1991
- SCIPIO Training Workshop, March 1998: Background in the form of a page about the changes in SCIPIO when it was converted from a "Special Database" into a standard selectable database through the RLIN, Eureka, and Zephyr (Z39.50) interfaces, an annotated set of SCIPIO Eureka search examples, and a set of post-workshop evaluation forms; February-March 1998
- Avery Index to Architectural Periodicals database: Getting Avery out of RLG's earlier "Special Databases" structure (it was created in 1982 in SPIRES, outside of the RLIN architecture) -- considerations for how to proceed, starting with efforts under the Getty Center AHIP (Art History Information Program, which undertook a collaboration with RLG);

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plans to make Avery a selectable citations database; plans for the Avery Authorities File; those involved (in this file) included Joseph Busch, Getty, Kathy Bales & Jim Coleman, RLG, and Ted Goodman, Avery Library at Columbia University; August 1990 – September 1991

- Art Serials Preservation Project: National Endowment for the Humanities-funded AAPC (Art & Architecture Program Committee) project to preserve over 100 late 19th- and early 20th-century art serials titles on microfilm; copy of approved proposal for October 1990 – September 1992; dated September 1990
- Art Serials Preservation Project: Communications between NEH (National Endowment for the Humanities) and RLG on amounts initially released to the funded project and extensions in the award ending date: first out to June 1993, then for some supplemental funding out to same date; and finally extending the ending date to January 1994; plus the 1990-1994 final report on the project, dated 10 April 1994
- Art Serials Preservation Project: Follow-up to make resulting microfilms generally accessible; rooted in original proposal, steps taken by RLG Programs staff with the project participants and the ultimate films distributor (OCLC's Preservation Resources division); 1990 – May 1999
- RLG & Getty AHIP (Art History Information Program): Possible collaboration on a "Distributed Database Initiative (DDI)," with data from Getty & RLG members and compilation and distribution through RLG; includes a working group report; May-October 1995
- AAG (Art & Architecture Group) Annual Meeting minutes, 1995-2004: Not-quite-complete run of minutes in the last decade of this group's existence (there were two more meetings in 2005 and 2006); minutes are printouts from RLG's Web site run off 23 March 2005 [more may still exist in an archival section of the OCLC RLG Programs site]
- AAG (Art & Architecture Group) Annual Meeting, 26 April 1996, Miami: No agenda, but material on RLG's "Strategy for 2000" goals & objectives, together with AAG look at its own mission, goals, and projects within the RLG community; some notes from the April 1996 meeting (a bit skeletal); and a draft of AAG goals and projects to be update for 1996-1998; March-May 1996
- AAG (Art & Architecture Group) Annual Meeting, 4 April 1997, San Antonio, TX: Miscellaneous meeting preparations (clipped together) plus agenda packet (loose pages) that include "Bylaws" [AAG only group to have created bylaws? so NOT right-brain] and revised Goals & Projects for 1996-1998, plus an art-community list of acronyms and abbreviations; also, the arrangements for a "primer" on information technology and network connectivity that Jim Coleman put on for AAG on 5 April and the Powerpoints he used in his talk; February-April 1997
- AAG (Art & Architecture Group) Annual Meeting, 6 March 1998, Philadelphia: Agenda packet plus handouts (complete?) – separate from the "RLG Special Forum on Art Museum Documentation" held 2 months later in London
- "RLG Special Forum on Art [Museum] Documentation, 7-8 May 1998, London: Presentation scripts, slide copies, notes, etc.; includes Katie Keller's presentation and a diskette [or is this a disk for the AAG meeting in March 1998?], National Art Library (V&A Museum) initiatives, notes for James Michalko's presentation; rather incomplete for any other speakers
- "RLG Special Forum on Art [Museum] Documentation, 7-8 May 1998, London: Preparations for the forum and a few meeting evaluations, some staff notes, and thank-yous to speakers [this forum also had an RLG Web site presence – still accessible through the OCLC Web site?]
- AAG (Art & Architecture Group) interest in SHED project: Idea of creating a shared database cataloging art exhibition catalogs; folder contains a possibly unrelated early article about an effort at University of California – Santa Barbara (January 1975), two articles – one from

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Germany, the other from the National Art Library, UK (1999), and notes from an AAG subcommittee on planning a new Shared Exhibition Database service, May 1999

- AAG (Art & Architecture Group) Annual Meeting, 26 March 1999, Vancouver: Some preparatory background for the meeting, plus an e-mailed agenda (slim file); January-March 1999
- AAG (Art & Architecture Group) RLG mail list, rlgart-l@lists.rlg.org: Communiques from/about the AAG, news of RLG's initial release of The AMICO Library database of digital images (probably not all the postings over this time period?); November 1998 – January 2000
- AAG (Art & Architecture Group) Annual Meeting, 30 March 2001, Los Angeles: Annotated agenda and materials for meeting, sign-in sheet, and notes (longhand) taken at meeting by Tony Gill (RLG's AAG liaison); March 2001
- AAG (Art & Architecture Group) Annual Meeting, 26 March 2002, St. Louis: Catering plan (1 sheet), sign-in sheet, agenda & background for topics, some completed meeting evaluation forms, and notes taken by Kitty Chibnik (Columbia University Avery Library) and (longhand) Tony Gill (RLG liaison); February-March 2002
- AAG (Art & Architecture Group) Annual Meeting, 21 March 2003, Baltimore: Agenda and background packet; plus flip chart transcription & notes (3pp.) from a strategic planning session conducted by Susan Allen (RLG board member, from Getty Center); March 2003
- AAG (Art & Architecture Group) Annual Meeting, 15 April 2004, New York, NY: Minutes published in RLG's Web site plus one background item: "2004 RLG Cultural Materials Report"; April[-August?] 2004
- AAG (Art & Architecture Group) Annual Meeting, 2 April 2005, Houston: Agenda page and some of the background/reports – incomplete file; April 2005
- AAGSC (Art & Architecture Group Steering Committee) minutes: From conference calls and actual meetings [?], 1 November 2002, 8 January 2003, 3 February 2003, 26 November 2003, 1 April 2004, 13 May 2004, 17 June 2004, 5 August 2004, 16 September 2004, 14 October 12004, 13 January 2005, 3 February 2005; late 2002 – early 2005
- SHARES (Shared Resources Program) & AAG (Art & Architecture Group): Two lists considering RLG members with art & architecture holdings in and NOT in SHARES; October 2003 & undated
- Projects coming out of Mid-Decade Planning – "Arches" & "WebDOC": Series of papers on a "digital archival server" project and the "testbed environment" that would include more functionality – includes 2 "concepts and issues" papers, background and draft functional requirements, a set of diagrams, and a 3-page description relating WebDOC and the Arches infrastructure; plus, a packet of information about RLG-PICA [Dutch bibliographic network] collaboration on WebDOC; May 1994 – December 1996
- RLG new-member orientation, 1995: Materials used in meeting held in conjunction with the 20th-anniversary Annual Meeting held at Harvard University, Cambridge, MA; 15 new-member participants registered, 8 of them from the UK/Eire; May 1995
- Strategic planning for 1996-2000: Three items – published 8-page pamphlet "RLG Strategy for 2000," partial draft of "RLG Financial Strategy 1996-2000," and a 1-page "Strategic Financial Planning Process and Timetable" (revised) for board and staff members; January-September 1996
- Communications with members, users, the public (in early 2000s?): Spreadsheet of contact categories in the RLG Corporate Information Management system (CIM) that preceded the Onyx relationships system; compilation of who actually used categories that had been created in CIM

- Delmas Grant for finding aids EAD conversion: Tony Gill's call for proposals by members in the art community [but not limited to Art & Architecture Group?] of their finding aids to be converted and added to RLG Archival Resources under funding from the Gladys Krieble Delmas Foundation, using Apex Data Services, Inc.; plus, his acceptance [?] of aids proposed by the Art Institute of Chicago, Winterthur, National Gallery of Canada, Museum of Modern Art, Smithsonian Archives of American Art, Folger Shakespeare Library, Nelson-Atkins Museum of Art; November-December 1999
- "RLG Best Practice Guidelines for Encoded Archival Description" (EAD): Created by the RLG EAD Advisory Group, Web-published, 22 pages (12 sheets with cover/copyright page), August 2002
- "Encoded Archival Context" (EAC): Proposal from University of Michigan with Margaret Hedstrom (Michigan) and Daniel Pitti (University of Virginia) as principal investigators, and subcontract for RLG to cover areas of data modeling, data contribution, and testbed design and hosting (led by Anne Van Camp and Tony Gill); November 2000 [Something came out of this, but no testbed or hosting at RLG's end, at least through RLG's merger into OCLC]
- Members Symposium – "Ready to Wear: Metadata Standards to Suit Your Project," 12-13 May 2003, New York City: Agenda sheet, background references sheet, speaker biographies, list of expected (registered) attendees, introductory slides, and Günter Waibel's "Mixing and Matching" slides with his narrative notes
- Members Forum – "To Have and to Hold: Metadata and Institutional Digital Repositories," 7 April 2004, Stanford, CA: Agenda, attendees, Powerpoint handouts for presentations by Merrilee Proffitt, Robin Dale, Guenter Waibel, Dawn Talbot (University of California – San Diego), Corey Keith (Library of Congress), Catherine Candee (California Digital Library), Jerry Persons (Stanford University)
- RLG Cultural Materials (RCM): From Kristin Tague's files, background on special database promotions for RCM and RLG Archival Resources in spring/summer 2003 – individual use by American Anthropological Association, Organization of American Historians, and American Historical Association members, and institutional use of the same databases
- RLG Cultural Materials (RCM): UK usage statistics – sample reports (from Kristin Tague's files) of usage under a 10-simultaneous-user subscription shared among members of CURL (Consortium of University Research Libraries, UK/Eire); May(-June) 2003
- RLG Cultural Materials Alliance (CMA) – Description Advisory Group: Minutes of conference calls as guidelines were revised and expanded; January 2003 – December 2004
- RLG Cultural Materials Alliance – Description Advisory Group: Work papers for developing/finishing "Descriptive Metadata Guidelines for RLG Cultural Materials"; begun when Tony Gill was the RCA-DAG liaison; inherited by Günter Waibel, whose files are saved here; September 2003 version of guidelines plus pieces of further writing and editing done (many bits undated); very "work in progress" with the results appearing in other folders in Carton 129; September 2003 – spring 2004
- "RLG Cultural Materials Descriptive Metadata Guidelines": Draft of 15 October 2004 and review comments from Helena Zinkham, Library of Congress, Patricia [?] and Murtha Baca ("great stuff"), Getty Center, and Eliza Lanzi, Smithsonian Institution; October-November 2004
- "Descriptive Metadata Guidelines for RLG Cultural Materials": Finished document, Web-published, ii + 64 pages, January 2005; product of Cultural Materials Alliance Description Advisory Group
- RLG Cultural Materials Alliance – Instructional Technology Advisory Group: Charge to and formation of this group, initial work timeline, questionnaire to campuses used in faculty interviews, various backgrounders on visual image use studies (California Digital Library,

"Educause Quarterly" article, Luna Insight assessment, Penn State study), steps in interviewing faculty at 2-3 campuses (Stanford and University of California, Berkeley – also USC or ??), findings, resulting image use scenarios and critiques, AND short final report put up on RLG Web site; mid 2003[?] – February 2005

- RLG-OCLC Web Publication: "Data Dictionary for Preservation Metadata: Final Report of the PREMIS Working Group" [PREMIS = Preservation Metadata: Implementation Strategies]; looseleaf, x pages + 7 sections and footnotes page; May 2005
- Communications posted about the 2005 systems/data migration, once underway: Files kept by Jennifer Hartzell of updated versions of the Web site's "Post-Migration Service Updates" page she maintained in consultation with a "migration communications" group from 1 March (when migrated services went live at midnight following the end of February) to about 1 September (or later?) 2005  [-- Many other Web pages were created/updated/withdrawn and otherwise involved in the migration's multi-month aftermath]
- Internal work on communications about the 2005 systems/data migration aftermath: File kept by Jennifer Hartzell of internal meetings and decisions – mix of hand-scrawled and e-mailed notes – over the period from at least 2 March to at least September 2005
- Annual Programs and Services Action Planning: "Road Maps" for programs and products in fiscal year 2005-2006 (Jennifer Hartzell's copy, taken out of binder, tabs retained); May 2005 – January 2006

## CARTON 130: Finance & Administration

2000-2004: CFO John Sundell's files on grants and donors.

- Carnegie Corporation, John Sundell & John W. Haeger visit to, 2000.
- Contracts & library content, John Sundell's miscellany, ca. 2000?
- Corporate sponsorships, John Sundell's working/background file, 2000-2001.
- Corporate sponsorship prospectus for RLG Cultural Materials, 2001.
- Gladys Krieble Delmas Foundation, proposal, resulting grant, progress reports and correspondence for Encoded Archival Description (EAD) conversion of finding aids into RLG Archival Resources database by Direction des Archive de France (DAF), 2001-2002.
- Gladys Krieble Delmas Foundation, proposal, resulting grant, progress reports and correspondence for working group for Encoded Archival Context (EA), 2000-2001.
- Gladys Krieble Delmas Foundation, final report to on RLG-members finding aids encoding project, 1998-2000.
- Fidelity Foundation, RLG Cultural Materials proposal, "anonymous" grant, and progress reports, 2001-2003.
- Financial history: RLG income sources, FY1989 – FY1998/99.
- Ford Foundation, proposals to and grants for RLG Cultural Materials, 1999-2004.
- Foundation approach for re-doing the 1988-1990 RLG "information needs assessments" (single memo), 2000.
- Foundations in California, 2000-2001. [No need to retain?]
- Foundations, List of, 2000. [No need to retain?]
- Fund raising, John Sundell role, 2000.
- Grant prospecting for RLG Cultural Materials – Paul Sharpe, Consultant, 2000-2004.
- Harcourt Foundation grant for RLG Cultural Materials (scrap of information), 2001.
- ILL (Interlibrary Loan) Manager software: rollout in 2000 and subsequent SHARES Program-driven changes, 2000-2003.

- Henry Luce Foundation, proposal to digitize East Asian cultural materials (turned down), September 2000.
- Andrew W. Mellon Foundation, Union Catalog on the Web (later RedLightGreen) project: proposal background miscellany (deployment phase), October 2003.
- Andrew W. Mellon Foundation, Union Catalog on the Web (later RedLightGreen) project: grants, reports, and correspondence for three phases (planning, implementation, deployment), 2001-2004.
- Andrew W. Mellon Foundation and RLG's interests, 2000-2002.
- Potential grants – foundation leads, John W. Haeger and John Sundell miscellany, 1997-2003.
- Potential grantors exploration, 2000.
- Potential grant sources – results of refined Web search, 2000.
- Potential grant sources – 3 folders of larger Web search results, 2000.
- Pricing comparison data: OCLC & networks, 2002-2003.
- Starr Foundation, proposal to digitize East Asian cultural materials (turned down), 2000.

[Cartons 131-132: See note preceding Carton 1 above.]

**CARTON 133: Computer Systems (aka Development)**

1979-2005: Folders from David R. Richards, Director of the Computer Systems Department. A few folders on the systems development process, ranging from 1979 to 1999; RLIN performance problems in the early 1980s; various system development needs and thinking, including processing limitations, non-Roman/Latin character set developments, collaboration with PICA, managing digital objects, ILL Manager, Systems' part in RLG revenue and dependencies (2004-2006).

- System development process: Materials originally in 3-4 separate folders on a topic revisited periodically (some would say never mastered by RLG); 1979-1999
- Systems development and project management: Set of 1979-1980 papers and memos from John Sack, followed by 2 from Tina Kass in 1980 & 1981, and one prepared jointly in 1984 by Glee Cady, Alan Tucker, and John W. Haeger; topics
- System development process: Post-implementation reports (aka post-mortems), presumably a subset of a longer-running series; (to whom did these routinely go outside of systems? -- not announced to staff in general); November 1989 – March 1993
- Systems – dataloading process & roles of Operations and Development (Systems) departments: memos from Jack Grantham and Kathy Bales; January 1992
- RLIN performance problems, early 1980s: Report commissioned from William Y. Arms that validates the basic system design, describes the specific problems after the introduction of RLIN II in September 1981, proposes solutions, and takes up "miscellaneous topics" (including communications with RLG member institutions); 17 March 1982
- RLIN development needs from Orvyl: Exchanges over developments and limitations before and after the RLIN II launch; part of a much longer negotiation for greater Orvyl capacity and capabilities to support the expanding size of RLG databases; December 1979 – October 1982; February 1984 – July 1987
- Searching interface: Brainstorming towards what became the Eureka end-user interface to RLG databases – notes from a Searching Enhancements Group, plus the group's "RLIN User Interface Development Proposal"; August-September 1990
- RLG membership in the Internet Society, October 1998

- "Research & Development Division": As labeled by Dave Richards, a folder of miscellany on organizational, personnel, divisional changes; includes exchanges with departmental directors C. James Schmidt and James Michalko, with a little from director John Haeger as well; 1984-1992
- RLG's SPIRES requirements: Memo requesting an enhancement to the Stanford SPIRES system to "potentially improve disk space storage and reduce disk IO (input-output) for all SPIRES applications" (including RLG's largest SPIRES file, Books); sent by David Richards, 22 June 1995
- Non-Roman/Latin character sets font development – roles of Bigelow & Holmes and Monotype: Development of extensive character range in Lucida font over ca. 6 years off and on, for use in RLG Terminal for Windows software; includes contract, much detailed correspondence (with RLG staff member John Eilts as well); B&H subcontracted with Monotype Typography Inc. for Hebrew & more, and RLG contracted directly with Monotype in 1999; fall 1994 – August 2000
- Non-Roman/Latin character sets font development – role of Decotype: Sublicensing Arabic fonts from a firm headed by Thomas Milo and based in Amsterdam, for use in the RLG Terminal for Windows software; includes contracting/licensing exchanges and requests/responses on font adjustments; May 1995 – October 1997
- Non-Roman/Latin character sets font development – role of Bitstream (and Unicode): Exchanges as part of RLG's licensing "a Chinese, Japanese, and Korean (CJK) language subset of Bitstream's Cyberbit Unicode World typeface"; file ends with the departure from Bitstream of the account manager (Chris Thorne) with whom RLG worked, and final outcome of work done not documented in this folder; 10 February 1997 – 22 April 1998
- Digital time-stamping for libraries use in digital preservation and management: Peter Graham points RLG management to the work of Stuart Haber and Scott Stornetta (then at Bell Communications Research; later will be at Surety Technologies and will work with RLG); December 1992 – February 1993
- Information Discovering and Delivery for End Users – RLG & PICA (Netherlands library automation organization) memorandum of understanding: Online information discovery and delivery for end-users was a key RLG strategic effort from 1995 on, and the MoU includes a vision of what the two organizations want to do collaboratively to achieve a discovery & delivery system; includes diagrams and description of how the user will operate; October 1995
- URNs, Handles, PURLs: Three papers on Universal Resource Names, Handles (the term used in developments by the Corporation for National Research Initiatives, CNRI), and Persistent Uniform Resource Locators (the term used in developments by OCLC) – specifically, slides by William Y. Arms, a draft discussion paper by OCLC's Stuart Weibel and RLG's Ricky Erway, and an OCLC "Introduction" to PURLs; 1995-1996
- Digital objects management work among RLG, Surety Technologies, and CRNI (Corporation for National Research Initiatives): Collaboration on managing "digital objects" securely – part of RLG's strategic development work towards an Archival Server ("Arches") infrastructure, parts of which were used for the Studies in Scarlet digital collection project, The AMICO Library of art images and documentation, and RLG Cultural Materials; folder contains a mix of memos, memoranda of understanding, articles, agreements, LC's work on its National Digital Library Project, development progress updates, acquiring a naming authority for AMICO, standard development … but does not give a clear account of where this project work ended up; 1996 – 1999
- RLG's ILL Manager developments – RLG & VTLS: Attempt to jointly develop and integrate RLG's ILL Manager and VTLS's VIRTUA systems – record of part of this process (which failed); might be a bit more on VTLS in Carton 99; January 2001 – November 2002)

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- RLG revenue & dependencies, fiscal year 2004 (1 September 2003 – 31 August 2004): David Richard's copy of this senior management document, with notes on the required development, database support, and other miscellaneous review comments from the Systems management group; July-August 2003
- Agenda & related materials for fiscal year 2005 road map meetings: Background material for annual planning exercise – includes Member Account Plans for major member-users (Stanford University and 13 others out of a larger set); folder came from Bruce Washburn, then part of the Systems department; August-September 2004
- RLG priorities road map for fiscal year 2005 (1 September 2004 – 31 August 2005): David Richard's copy
- RLG priorities road map for fiscal year 2005 – post-mid-year review: David Richard's copy
- RLG systems & database migration (off the mainframe computer): Consolidated priorities document – David Richard's master copies; June & July 2005
- RLG priorities roadmap for fiscal year 2006 (1 September 2005 – 31 August 2006): David Richard's copy

**CARTON 134: Computer Systems (aka Development); President's Office (aka Administration)**

1. 1981-2005: Folders from Steven J. Eastman, first half of carton.  Systems documentation, some for users, some for programmers, mostly written by programmer-analysts, including RLG's uses of SPIRES and other Stanford software, Database Services, Database Server (DBS) / Phoenix development and implementation, and the 2005 Authentication Server. [SEE Carton 121 for cross-reference to other sources on DBS.]   FOLLOWED BY:
2. 1993-1998: Folders from James Michalko, president, and John Haeger, vice president.  Various exchanges on possible collaborative activities and RLG's position, including international contacts; some consultants (Reed Byrum, Mark Fredenberg [AccountTemps], Natsuko Furuya, Jack Kessler, James Maloney, Catherine Murray-Rust, Hans Rutimann; and 3 folders about DCRC [SEE Carton 52 for cross-references to other DCRC materials.]

- Systems/user documentation: "RLIN II Tapes: Changes from Previous Practice and RMARC Extensions to MARC Content Designation," by Walt Crawford, 24 June 1981
- Bibliographic standards: "RLG Bibliographic Standards, 18 December 1981; "RLG Base-Level Standard for Books," July 1983; "RLG Base-Level Cataloging Standard for Music," November 1984; "RLG Standard for Use of the AMC [Archival & Manuscripts Control] Format," 1985
- Non-PASCAL RLIN programming routines: COMP, ORVDMP, CSECT – header descriptions only (complete code not retained); 1983-1984
- Systems documentation: "RLIN System Services Programmer's Manual," 21 + vi pages (table of contents comes at end), by David R. Richards, 1982, revised by Brian Cox and Jessie Herr, 12 December 1984
- PASCAL programs used in RLIN: Complete code not retained, rather, an incomplete set of header descriptions for AMPDBRAK, AMPDBUG, DLOUT, FILECOPY, LEXSCAN, LKEDCOPY, SYS, SYSBP, SYSSVR, TRANSFER, VAMCOPY; 1984-1988
- Operators used in SPIRES/RLG database services: Two papers – "Relational Operators," collected from "Explain" by Jessie Herr, 20 December 1982; "The PROP Operator" (short for Propagate – works in a FIND command), 2 January 1986
- [dbs]UserProc – "procedures that are needed by any PASCAL application program that uses [RLG-SPIRES] database services to access RLG bibliographic files": Proposed change

to disentangle UserProc from applications programs by making it into a separate utility, with explanation and coding/JCL involved; by Michael Carroll, 18 April 1988

- Systems documentation: "SPIRES Database Services Programmer's Manual," iii + 191 pages and an index, by David R. Richards, Steven J. Eastman, and Michael D. Pobuda; 1981-1987, 1989 (this is 10 May 1989 version)
- IESxport – Facility in RLG bibliographic records export/import programs to convert from RLIN internal format to MARC format: "Programmer's Notes," 17+16+2 pages stapled together, 28 February 1991
- RLG Aspen operating systems project: Table of contents only for SPIRES DSECTS documentation, with "lengths & displacements for Aspen version of SPIRES"; 1987-1992
- SPIRES file services documentation: A "byproduct of an RLG project to convert SPIRES to use as a database server" – table of contents and preface by Sanford Rockowitz only; 1992 (information as of ca. 1987)
- Systems documentation: "SPIRES Database Services (for Phoenix) Programmer's Manual," vii + 172 pages, including index, plus a hand-drawn diagram of indexes, records, and files, by David R. Richards, Steven J. Eastman, and Michael D. Pobuda; last revised by Steve Eastman on 16 May 1991
- Internal RIC/NOC [RLIN Information Center/Network Operations Center] documentation: Chapter 8 ("Diagnostics") from "P-Series Software, Version 16 February 1989," together with Steve Eastman e-mail regarding newer, E[xtended]-Series release of the RLIN PC terminal software and a new diagnostic program that goes with it, SENSE.EXE; 14 August 1989
- Internal user documentation: "Using PC-Samson v. 4.0 (for RLG central staff)," 2+ pages, from Clif Baker, 13 August 1991; plus copy of Stanford Data Center's "PC-Samson 4.0 Release Notes and User Guide," 5 December 1990
- RLIN overseas connectivity: E-mail description from Bruce Washburn, June 1991
- Working with Stanford's Orvyl system: Explanatory memo from Jim Nisbet to Steve Eastman and Keith MacLaury, 10 June 1991
  -- Points to complex Orvyl source code; NOT retained from this file was Stanford Data Center Orvyl, Pascal, and Wylbur execs documentation of 1984-1990
- Debugging in an Orvyl Environment on an IBM System/370 computer: Odd assemblage of pages from unidentified document(s)/source(s)
- "RLG Database Services Test Program (for Orvyl) Programmer's Manual," by Steven J. Eastman; i + 23 pages plus index; 1981-82 (this version printed out on 28 August 1992)
- "SPIRES Database Services Programmer's Manual for Orvyl" (for RLG's uses), by David R. Richards, Steven J. Eastman, and Michael J. Pobuda; vii + 194 pages plus index; 1981-1993 (this version printed out on 27 April 1993)
- Database Services (DBS): Motley set of e-mails and program printouts/reports related to bug fixes and updates to RLG Database Services; heaviest for 1990-1992, then a few items across 1996, 1997, 1999, 2002, 2004 (plus plenty undated)
- [SPIRES] Diagnostic codes and meanings: Untitled, unpaginated, undated information that covers S0 to S902 – 46 pages total; printed out by Steve Eastman on 11 May 1992
- Contents of wyl.br.mdp.dbsidoc Wylbur library: "RLG DBS Search Machine Implementation Discussion"; then brief descriptions of routines accessing SPIRES subfiles; "RLG DBS Internal Documentation – Search Algorithm Discussion" and 2 diagrams; maybe these are part of a larger document being created by Mike Pobuda and others – printed out by Michael J. Pobuda on 9 June 1992
- Contents of wyl.br.mdp.lib Wylbur library: Library members named fadeout, fcheck, history, indxlook, kdmnote, locknote, rbfindxl, rebuild, superbks, and systodo [kdm & rbf = Keith MacLaury and Rich Fuchs]; includes various memos from Mike Pobuda on work after the

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Aspen operating system project failed; perhaps a slight window into Mike P.'s ongoing links with RLG Systems after the point he became ill -- no longer worked in office; some documents related to other files in this carton; material printed out by Michael J. Pobuda on 9 June 1992

- "Regular Expressions" (in programming – semantics and syntax), by Steven J. Eastman; i + 6 pages plus index; 1981-1993 (this version printed out on 8 April 1993)
- "RLIN Pascal Environment Programmer's Manual," by Brian Cox, Jessie Herr, and Dick Guertin; ix + 67 pages; 1st produced 20 January 1984, this revised version from 15 May 1997
- Two printouts of "A test program for a 2-3 Tree Insert routine," written by Steven J. Eastman, built on earlier sources (Brian Cox and Celso Frazao's names appear for 1980) – printed out on 18 December 1992 and 18 February 1998; plus 2 sheets of predicted versus actual and measured "tree" and "leaf" sizes, undated; plus memo on 3-2/2-3 trees from Sanford Rockowitz, 8 February 1993
- "Functional Requirements for an RLIN Database Server"; 4 pages, 17 April 1989
- "RLG Database Server, Deliverable IV, Contract Number PR6821"; ii + 107-page design specification [while it is worded in present tense, seems most likely that the Phoenix Monitor and its adjuncts did not yet exist]; by MSB Computing Environments (Carol Farlow and Robert Lerche), with some annotations; 3 July 1990
- Database server/Phoenix topics and e-mail: Several years' e-mail exchanges on how this would be implemented; writers include Steve Eastman, Rich Fuchs, Michael Carroll, Sandy Rockowitz, Dave Richards, Bill Kiefer, Keith MacLaury, Dick Guertin, Ken Hetzel; 15 February 1991 – 21 April 1999 plus one 2001 e-mail
- "SPIRES Database Services Internal Design Document for Phoenix," by Steven J. Eastman; iii + 7 pages on Concepts, Phase I, and Phase II; 30 September 1992
- Implementation of the Phoenix Database Server: Reports to David Richards from Carol Farlow Lerche, MSB Computing Environments, on 5 milestones in implementing Phoenix, plus final milestone report from Ken Hetzel, working for MSB; 6 December 1990 – 24 August 1994; plus: MSB Computing Environments' proposal for and results of Phoenix benchmark tests, 21 July 1994 and 27 March 1995
- Phoenix Database Server/Monitor: Use of "hiperspaces" – short notes from Carol Farlow and Robert Lerche, Ken Hetzel, and Steve Eastman; August 1991, March 1994
- Phoenix Record Manager key augmentation: Short pieces on this subject; 1996
- Phoenix Database Server/Monitor: Phoenix and Suzan [Stanford system] "threads" – notes and e-mail on threads and how Phoenix handles them, and Suzan's role in this; March-August 1996
- "RLG Data Manager Test Program (for Phoenix) Programmer's Manual" by Steven J. Eastman; i + 25 pages, 20 May 1996; followed by versions of 21 May and 22 May 1997, with title changed to "RLG Data Manager Test Program Module (for Phoenix)"
- Phoenix [Database Server/Monitor]: Tools and internal documentation [small pieces] from Richard Guertin and later Steve Eastman – contents of wyl.br.phx.bexec Wylbur library and other files stored under the br.phx account; includes "The Phoenix Life Cycle Environment"; August 1996 – March 1999
- "Phoenix Operations Manual," by Steve Eastman; versions of 9 June, undated, 1 July, and 1 October 1998, with various annotations; plus: "RLG Phoenix Operation Notes," single-sheet (2 copies), 2 September 1998
- "Phoenix Console Manual," 2 versions: 1st with Lennie Stovel's review comments, mid-September 1998; 2nd dated 30 September 1998; by Steve Eastman per Lennie S.'s comments

- "Phoenix RIC [RLG Information Center] Module Manual," by Steve Eastman [one surmises]; 18 pages, 13 October 1998. [-- From page 8: "Can I have a bagel with that? Toroidal pastries (bagels and doughnuts) are always appropriate with a RIC module thread. Warning: While using toroidal pastries it may appear to other users as though your RIC module thread is 'hung.' It's probably best to exit the RIC module when you are not using it."]
- Internal systems user documentation: "RLG's Authentication Server Training Manual": 44 pages, 2-sided on folded 8-1/2"x11" sheets not stapled in spine; 4 March 2005

End of Eastman Systems files, beginning of Michalko/Haeger's President's Office files:

- RLG, university presses, and electronic publishing: Copies of interim and final reports on the scholarly electronic landscape, commissioned by RLG vice president John W. Haeger, late 1993– October 1994; for fuller background on consultancy, but not what happened after it, see "Consultants – Kenneth Arnold, New Century Communications," in this carton
- RLG and Academic Press [see also "Academic Images Cooperative" in Carton 89]: Some exchanges between November 1996 and July 1998 involving John Haeger, James Michalko, and Academic Press directors; ranged from document delivery to AMICO [museum art images and documentation online] and RLG's image expectations
- American Historical Association: Slight file of John Haeger exchanges with Sandra Freitag, Executive Director of AHA, regarding means to publish and disseminate scholarly monographs/historical studies; AHA worked out joint proposal with Association of Research Libraries (ARL), included here; final letter from Sandra F. and Duane Webster, ARL's executive director, invited RLG to become a partner in "HSDN" – "Historical Studies Data Network," pending funding applied for; no evidence that RLG did so; September 1996 – September 1998
  -- Plus: Exchanges on electronic publishing of scholarly work, between Robert Darnton, incoming AHA president, James Michalko, and John Haeger, May-June 1998
- Association of American Publishers, Professional/Scholarly Publishing Division: James Michalko/RLG staff positions vis-a-vis key issues of shared interest, and concerns about intellectual property rights and fair use; tensions between AAP and research libraries [file far from complete]; April 1994 – August 1995
- Archivo General de Indias, Seville: Reports to John Haeger from consultant Hans Rutimann on an Archivo project, "Columbus"; file silent on further contacts between Haeger and the Archivo's director after an initial letter from Haeger; August 1994 – November 1995; see also the file "Consultants – Hans Rutimann" in this carton
- Association for Asian Studies – Bibliography of Asian Studies (BAS): Connie Gould's file of dealings with AAS on prospect of offering access (subscriptions) to BAS through RLG's CitaDel/Citation Resources service, May 1991 – May 1994; plus a brief exchange between John Haeger and John C. Campbell of AAS on this topic, June 1996. [This was an ongoing desire/intention of RLG's Product Management staff that never reached fruition -- ultimately overtaken by the diversion of Systems resources to RLG's systems/databases migration off the mainframe (Based on J. Hartzell conversation with Sharon Vaughn-Lahman in 2005.)]
- Bibliothèque de Documentation Internationale Contemporaine (BDIC): Some background on BDIC's nature and on efforts by John Haeger to engage them in RLG/RLIN; [unlike a peer organization, the International Institute of Social History in Amsterdam, BDIC did not affiliate with RLG]; November 1995 – September 1998
- Bibliothèque Nationale de France (BNF): a slice of correspondence between (primarily) Serge Salomon and John Haeger – part of a longer relationship of RLG and BNF fostered by Haeger; January-August 1994

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- Blackwell North America, Inc.: Slim file of James Michalko's, containing two license agreements between BNA and RLG for BNA records in the RLIN/RLIN Union Catalog database; December 1995 – June 1996
- Centro de Tecnología Electronica y Informatica (CETEI): Beginnings of RLG's relationship with this Mexican services provider to Mexican universities, in order to sell access to RLG products and services, such as Ariel document delivery and citation databases; mostly material from Jack Grantham, filed for James Michalko; March 1995
- Consultants – Kenneth Arnold, New Century Communications: Ideas for conduct of, and final report on, a survey and recommendations to RLG regarding "University Presses and Electronic Publishing" – actual reports are also filed separately in this carton; late 1993 – October 1994
- Consultants – Reed Byrum, Byrum & Leonard Communications: Byrum worked with James Michalko and others at RLG to develop and distribute RLG's "Strategic Directions 2000" (goals and activities over 1996 – end of 1999); more material on RLG strategic directions over the years is filed in other cartons; November 1995 – January 1996
- Consultants – Mark P. Fredenburg (AccountTemps): Hired by Molly Singer and John Haeger to assist RLG in a possible joint venture with the British Library; a slight supplement to other, extensive files on the RLG – British Library explorations and negotiations in cartons 87, 149, 166, and 185; October 1994 – January 1995
- Consultants – Natsuko Furuya: Part of larger record [in other cartons] of work by/relationship with this multiyear consultant/agent for RLG in East Asia; this file covers April-June 1998 and includes a proposed contract from Furuya and a Japan trip report she submitted in July 1998
- Consultants – Jack Kessler: Hired by John Haeger in 1994 – no contract in this folder to clarify his charge, but began by reporting monthly on prospects for RLIN in/with western European research libraries – notably Spain and France; August 1994 – February 1995 [Kessler was retained beyond this time frame and worked on areas overlapping with Connie Gould -- who was undergoing medical treatment at the time]
- Consultants – James J. Maloney: Contracted to help find and evaluate a single vendor to handle all aspects of document supply as part of RLG's CitaDel (citations and document delivery) service; file seems incomplete – no final report or decisions included; September-October 1995
- Consultants – Michael L. Mogin, Mogin Associates: Slight file that only indicates who Mogin and his company were (mergers and acquisitions broker) and that he was interested in assisting RLG/James Michalko in a possible Dialog operations acquisition; December 1997
- Consultants – Catherine Murray-Rust: Contracts for and resulting report on an "RLG Marketing Study" to "inform RLG management and staff about customers and potential customer needs" related to RLG's new services marketing – specifically, for "museum object records and the finding aids service"; December 1997 – May 1998
- Consultants – Hans Rutimann: Portion of what was a larger set of exchanges with Rutimann, mostly with John Haeger, as part of an ongoing Rutimann role in representing / gathering data for / advising RLG, primarily in western Europe and especially regarding unique/rare data, electronic publishing, people to be in touch with; 1993/94 – 1996
- DCRC (DIALOG @ CARL + RLIN & CitaDel): Exchanges, contracts, announcements over 1996 up to revised contract of 1 October 1997; traces upward arc and beginning of rapid descent in service viability; 1st of 3 folders in this carton – for more, see also cartons 170, 184-186, and 192; February 1996 – October 1997

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- DCRC (DIALOG @ CARL + RLIN & CitaDel): Steps through termination of RLG-CARL contract; 2nd of 3 folders in this carton on the venture's unraveling – for more, see also cartons 170, 184-186, and 192; October 1997 – March 1998
- DCRC (DIALOG @ CARL + RLIN & CitaDel): Termination of joint RLG-CARL venture; 3rd of 3 folders in this carton on the same topic from start to finish – for more, see also cartons 170, 184-186, and 192

## CARTON 135: Corporate Communications

1975-2006: Folders from Jennifer Hartzell, with contributions from Madelyn Homick (President's Office and the RLG Board's final assistant secretary).  Series of documents for RLG incorporation, not-for-profit status, state registrations, bylaws, showing various amendments; RLG annual audited financial statements from 1977 to 2005 [there are some additional cover letters for these in Carton 79]; CIMI audited financial statements for 1997 and 1998; RLG membership fees background; services price lists, 1977 [pre-RLIN] to 2006 (and memo on 2007); Board of Directors election materials, 1991 (first one) to 2005.

- RLG certificates of incorporation and related IRS/California State documents used to obtain property tax exemptions: Noel Hanf to Barbara Lindeman; 1 December 1975 – 18 March 1991
- RLG status under the Internal Revenue Service code: Papers (probably incomplete file) on RLG's tax-exempt classification – 509(a)(3), 509(a)(2), or 501(c)(3); changes from "pre−RLG 92" organization to "RLG 92" corporation; 1976-1998
- RLG business/doing-business-as: Business registrations in New York and the United Kingdom [California is in another file in Carton 135]; doing-business-as-RLG registrations in New York and California; 1983, 1997, 2003
- RLG registration & annual charitable organization reports in New York State; 1987-1993
- RLG legal filings with Connecticut Secretary of the State: (RLG was incorporated in Connecticut) – biennial reports, amended certificate [more must exist in other cartons]; 1993, 1994-95, 2001-2002, 2005
- RLG bylaws and certificate of incorporation – older versions (some items missing): February 1987 – April 2001
- RLG bylaws and certificate of incorporation: Versions last approved and amended by RLG Member Representatives (after approval by Board of Directors), 17 March 2005
- Legal services to RLG in 2005: Letter from Noel Hanf, Wiggin & Dana, to Grant Thornton (RLG's auditors) concerning legal services to RLG in fiscal year 2005 (1 September 2004 – 31 August 2005), 23 December 2005
- RLG audited financial statements – June 1977 & June 1978; plus RLG Annual Report for 1976-1977 [all Branford Connecticut operations, prior to RLG's move to Stanford]
- RLG audited financial statements – August 1979, 1980, 1981, 1982; after move from Branford to Stanford
- RLG audited financial statements – August 1983, 1984, 1985, 1986
- RLG audited financial statements – August 1987, 1988, 1989, 1990
- RLG audited financial statements – August 1991, 1992, 1993, 1994
- RLG audited financial statements – August 1995, 1996, 1997, 1998
- RLG audited financial statements – 1999 [SEE ALSO Carton 2 for a possible additional 1999 & 1998 document], 2000, 2001, 2002; All done by Grant Thornton, to whom RLG switched from KPMG (earlier, Peat, Marwick, & Mitchell)

- RLG audited financial statements – 2003, 2004, 2005 [-- might exist in another carton. It would have been done after RLG and OCLC merged in mid-2006]
- CIMI (Computer Interchange of Museum Information) Consortium: Audited financial statements (RLG acting as financial host organization, James Michalko on CIMI board), done by KPMG for 1997 and 1998
- RLG membership dues and fees: Background, 1975 – 2004
- Stanford BALLOTS Services Price List (prior to adoption by RLG and recreation as RLIN); 1976-1977
- Services Price List, 1977-1978: EMPTY PLACEHOLDER FILE – perhaps prices for this service year appear in BALLOTS or RLIN Newsletter in Carton 49
- Services Price List, 1978-1979: EMPTY PLACEHOLDER FILE – perhaps prices for this service year appear in RLIN Newsletter in Carton 49
- RLG User Services Price List, 1979-1980 (fiscal year 1980)
- RLG User Services Price List, 1980-1981 (fiscal year 1981): EMPTY PLACEHOLDER FILE – Another place to look for missing prices might be in RLG board meeting agendas
- RLG User Services Price Lists, 1981-1982 (fiscal year 1982)
- RLG User Services Price Lists, 1982-1983 (fiscal year 1983)
- RLG User Services Price Lists, 1983-1984 (fiscal year 1984)
- RLG User Services Price Lists, 1984-1985 (fiscal year 1985) – plus "Notes on Policies & Services"; notes included from this year on
- RLG User Services Price Lists, 1985-1986 (fiscal year 1986)
- RLG User Services Price Lists, 1986-1987 (fiscal year 1987) – plus memos on rate change in April 1987 and estimating service usage for fiscal year 1988
- RLG User Services Price Lists, 1987-1988 (fiscal year 1988) – plus earlier memo on members' payment options for fiscal year 1988
- RLG User Services Price Lists, 1988-1989 (fiscal year 1989) – preceded by previews of new pricing structure in fiscal year 1989 (resulting from the "Herbster Commission" work) and followed by mid-year rates adjustment
- RLG User Services Price Lists, 1989-1990 (fiscal year 1990) – plus subsequent adjustment memos
- RLG User Services Price Lists, 1990-1991 (fiscal year 1991)
- RLG User Services Price Lists, 1991-1992 (fiscal year 1992) – includes 22 March 1991 coming prices news release, actual lists with cover memo (July 1991), and "Typical Costs for RLIN Use: Searching Only" – a single-sheet handout from February 1992
- RLG User Services Price Lists, 1992-1993 (fiscal year 1993) – includes Molly Singer's advance notice memo of 11 March 1992, cover memo of 13 July 1992,a full collected lists
- RLG User Services Price Lists, 1993-1994 (fiscal year 1994) – includes 1 March 1993 advance memo from Karen Smith-Yoshimura, her 13 July 1993 cover memo, full rates, order forms for members and non-members, and "Rates for Eureka Access to RLIN & CitaDel Files, 1993-1994" which is dated in winter/spring 1994 with no indication if anything changed midyear or this was just an extract from a larger document
- RLG User Services Price Lists, 1994 -1995 (fiscal year 1995) – includes 1 March 1994 advance memo from Karen Smith-Yoshimura, a single sheet on members' dues and participation fees, the rates mailing request form showing how this information was distributed, the June 1994 price lists cover memo from Karen S-Y, the price lists themselves, and the 15 August 1994 news release that emphasized free searching for library school classes
- RLG User Services Price Lists, 1995-1996 (fiscal year 1996) – includes 21 April 1995 rates preview from Karen Smith-Yoshimura; 15-page June 1995 paper on RLG's network

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transition (from private X.25 network to Internet Protocol [IP] network) to be completed by end of fiscal year 1996; 7 July 1995 cover memo to prices from Karen S-Y; softbound full price lists; a separate list for nonsubscription search only buyers; and 3 kinds of order form (one a new "Internet Access Order Form")

- RLG User Services Price Lists, 1996-1997 (fiscal year 1997) includes 2 start-up forms from fiscal year 1996 –"Request for RLIN Products or Services" and "Request for Search Service"; then, 15 March 1996 preview memo from Karen Smith-Yoshimura; 15 July cover memo and full prices booklet; separately printed "Subscriptions and Document Delivery" prices; separate prices for nonsubscription searching; and 2 kinds of order forms
- RLG User Services Price Lists, 1997-1998 (fiscal year 1998) – includes 20 March 1997 preview memo from Karen Smith-Yoshimura; mailing request form showing production and distributions of materials; 16 July cover memo from Karen S-Y; full prices booklet and reprinted file subscription rates; and order forms
- RLG User Services Price Lists, 1998-1999 (fiscal year 1999) – includes 6 March 1998 preview memo from James Michalko; internal note on 1 June 1999 record export price changes; mailing request form; 10 July 1998 cover memo from James M.; full prices booklet; May and October 1998 versions of special subscription rates for RLG Special/IRLA members; and order forms
- RLG User Services Price Lists, 1999-2000 (fiscal year 2000) – [any March 1999 preview memo is missing from this folder]; includes mailing request form; 6 July cover memo from James Michalko; full prices booklet; subscription prices for RLG Special/IRLA members; 2 order forms
- RLG User Services Price Lists, 2000-2001 (fiscal year 2001) – includes 7 March 2000 preview memo from James Michalko; letters sent 17 April 2000 by Wesley Taoka on higher-than-average price increase for the Bibliography of the History of Art (BHA) database; prices mailing request form; 29 June 2000 cover memo from James M.; full prices booklet; offprint of search block/single-search prices; subscription prices to RLG Special/IRLA members; 2 order forms
- Policy on "Individual Scholar Accounts" (ISAs) for access to RLG databases; Short memo from John Haeger to Chief Financial Officer John Sundell on proposed changes in ISAs for fiscal year 2002; January 2001
- RLG User Services Price Lists, 2001-2002 (fiscal year 2002) – includes 9 March 2001 preview memo from James Michalko; 25 April 2001 SOLINET process for selected OCLC products for fiscal year 2002; prices mailing request form; 2 July 2001 cover memo from James M.; full prices booklet; subscription prices for RLG Special/IRLA members; 2 order forms; AND 17 July 2001 memo from John Sundell explaining new terms for RLG's "Individual Scholar Access" (ISA) forms
- RLG User Services Price Lists, 2002-2003 (fiscal year 2003) – includes 21 March 2002 preview memo from James Michalko; 22 May 2002 further-changes-to-ISA-accounts memo from John Sundell; prices mailing request form; 14 June 2002 cover memo from James M.; full prices in new, small-booklet form; standard-sized order forms; mailing request and 25 June 2002 explanation for subscription prices offered only to RLG Special/IRLA members; revised, online price lists and order forms for January-August 2003
- RLG User Services Price Lists, 2003-2004 (fiscal year 2004) – Includes 28 March 2003 preview memo; 16 June 2003 cover memo; printout of full online prices; 2 types of order form; and subscription prices offered only to RLG Special/IRLA members
- RLG User Services Price Lists, 2004-2005 (fiscal year 2005) – Includes March internal e-mail on the problems with online access to full pricing [could mean loss of competitive advantage], and ways around this; 5 March 2004 preview e-mail and print memo from

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James Michalko; 25 June 2004 cover memo from James M.; full prices booklet; and subscription prices offered only to RLG Special/IRLA members

- RLG User Services Price Lists, 2005-2006 (fiscal year 2006) – Includes 11 May 2005 [very late] preview memo from James Michalko; 1 July 2005 cover memo from James M.; full prices booklet and order forms; subscription prices offered only to RLG Special/IRLA members
- RLG User Services Price Lists, 2006-2007 (fiscal year 2007) – Includes only 6 December 2005 note from Jennifer Hartzell on the logistics of annual replacement of online prices booklets and order forms; 16 December 2005 write-up from Jennifer H. of annual process for price setting and distribution; and 28 March 2006 e-mailed preview memo from James Michalko [NOTE: At the end of June 2006 RLG merged into OCLC; the fiscal year 2007 rates would have come from Dublin, Ohio as OCLC prices – not included in this folder]
- Board of Directors [First] annual election, 1991: Cover memo, ballot, and relevant bylaw excerpts from Noel Hanf, Wiggin & Dana, to member representatives, send 12 August 1991; and election results as 6 September 1991 e-mail and 9 September 1991 letter; also, sample of thanks to those willing to serve, in a 15 August 1991 letter from James Michalko
- Board of Directors election, 1992: 20 May 1992 cover memo and ballots, plus short biographies of candidates, from Noel Hanf, Wiggin & Dana – election results were marked on these filed ballots; also, internal memo to staff about the process and 22 June 1992 results memo from Jennifer Hartzell to successful candidates
- Board of Directors election, 1993: Noel Hanf's 18 May 1993 cover memo with brief biographies of candidates and ballots for voting – election results marked on these; 27 May follow-up e-mail to voters from Paul Mosher, then chair of the board; 16 June results memo to successful candidates from Jennifer Hartzell; 25 June thank-you to Margaret Otto from Paul Mosher, for service on the first elected board for a one-year term [Initially, terms were staggered from 1 to 3 years with a plan to arrive at standard terms over a few years]
- Board of Directors election, 1994: Missing cover memo with ballots and election outcome [See Carton 186 for Noel Hanf's 1994 election materials]; 16 December 1993 thank-you from board chair Paul Mosher to Nominating Committee chair Charles Miller; updates to member representatives voting list, exchanged between RLG and Wiggin & Dana, 28 April 1994; and brief biographies of candidates in June 1994 election
- Board of Directors election, 1995: 3 March 1995 samples of "thanks for agreeing to stand" memos to candidates from James Michalko; rosters of General- and Special-member voters; and Noel Hanf's 4 April cover memo, candidate biographies, and voting ballots – with results marked on them
- Board of Directors election, 1996: Combined 21 March 1996 roster of General- and Special-member voters; 17 April memo (sample) to all candidates from Paul Mosher, then board chair; 11 April cover memos, ballots, and brief biographies from Noel Hanf; missing General-member ballot [See Carton 186 for Noel Hanf's 1996 election materials]; 3 May results memos to candidates from James Michalko
- Board of Directors election, 1997: 3 December 1996 rosters of General- and Special-member voters and 10 April 1997 voting materials from Noel Hanf, Wiggin & Dana – results marked on these
- Board of Directors election, 1998: 8 April 1998 voting materials from Noel Hanf, Wiggin & Dana, for changes to RLG's bylaws (which were approved), biographies for board candidates, and DRAFTS of ballots actually sent – marked later with the election results
- Board of Directors election, 1999: 1 April 1999 voting materials from Noel Hanf with results indicated after the process

- Board of Directors election, 2000: 27 March 2000 rosters of General- and Special-member voters, and 4 April voting materials from Noel Hanf, Wiggin & Dana, with results indicated after the process
- Board of Directors election, 2001: 2 April 2001 voting materials from Noel Hanf, Wiggin & Dana, for both bylaws changes and board candidates; after voting by 27 April, results marked on these forms
- Board of Directors election, 2002: 21 March 2002 voting packets from Noel Hanf, Wiggin & Dana, for both General and Special members; after results tallied on 19 April, results marked on these forms
- Board of Directors election, 2003: 14 April 2003 voting materials from Noel Hanf, Wiggin & Dana; results, tallied on 5 May, are marked on the ballots
- Board of Directors election, 2004: 5 April 2004 voting materials from Noel Hanf, Wiggin & Dana, with results of 26 April market on the ballots; also, resolutions of appreciation sent to Ellen Dunlap and Karin Trainer at the conclusion of their terms on the board [NOTE: Normally, these texts appear in board meeting minutes; it was a standard procedure to recognize directors at the end of their terms with a resolution and modest gift]
- Board of Directors election, 2005: [NOTE: Earlier in fiscal year 2005 (2004-2005) the corporate amended the bylaws, voting out the General/Special membership distinction following a study done in 2004 on RLG membership] 21 March 2005 cover memo, short candidate biographies, and a single all-members ballots from Noel Hanf, Wiggin & Dana, with results marked on it; also, Web site page on the board members from fiscal year 2005
- Board of Directors election, 2006: No election held before the June 2006 members annual meeting, after which RLG merged with OCLC  [SEE the agenda and minutes for Board of Directors meetings nos. 101-103 in Cartons 136 and 204.]

## CARTON 136: Finance & Administration

1999-2006: Folders from John Sundell and Molly Singer, from different tenures as director of the F&A department, RLG Assistant Treasurer, and (at least in Singer's case), Chief Financial Officer. Files include pricing models and issues, various Board meeting materials, board Budget & Audit Committee materials, consultancy in mid-2000s with Steve-Anna Stephens (The Catalina Center) and work on RLG's "strategic framework" of that period, Singer's concerns on RLG 2005 tensions and dysfunctions; last two folders contain Singer's agenda and notes from final board meeting and RLG fiscal year 2006 scorecard.

- RLG pricing models: John Sundell's file, grappling with simplification of multiple models [in advance of a new systems basis for billing, among other things] Lots of undated handwritten notes, including manager interviews; no resolutions indicated in this folder; September 1999 – April 2002
- Board of Directors meeting no. 83, 3-4 October 1999: John Sundell's copy of the agenda
- "Status of FY01 Budget/Revenue Projections": Memo to Budget & Audit Committee members Brian Knez and Robert Scott from John Sundell, related to work of the committee between board meetings of June and September/October 2000; 4 August 2000
- RLG board materials, 1998-2001: Strategic planning background from 1998-1999 used by the board then [Molly Singer then still RLG's chief financial officer], plus materials used by John Sundell [who came after Singer left, in the second half of 1999] for the June and October 2001 board meetings
- Board of Directors meeting no. 90, 15 February 2002: John Sundell's copy of agenda plus his notes and handouts

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- Board of Directors meeting no. 91, 28 June 2002: John Sundell's copy of agenda plus his notes and handouts
- Budget & Audit Committee: John Sundell's file/notes for first meeting of Board of Directors and its Budget & Audit Committee in fiscal year 2003 --September/October 2002
- Board of Directors meeting no. 92, 30 September – 1 October 2002: John Sundell's copy of agenda plus his preparations and handouts; August-September 2002
- Board of Directors meeting no. 93, 24 February 2003: John Sundell's copy of agenda plus his notes on the financial report topic 4 and a 10 February 2003 e-mail to Treasurer Bob Scott
- Rethinking pricing – 2003 formation of Board of Directors Fiscal Commission: John Sundell's file on background plus start-up of the board commission intended to rethink RLG's fiscal (planning) structure; Steve-Anna Stephens, consultant to this effort, brought in through RLG Treasurer Robert Scott; early 2002 (background – August 2003.  [-- See also later materials in 2003-2004 (up to 2005?) elsewhere as part of this commission's work, which led to a new RLG strategy framework that stressed scorecard assessing, roadmaps, etc. etc. -- That is, over time it seemed to be much more than fiscal strategy or tactics.]
- Rethinking membership – 2003 formation of Board of Directors Membership Commission: [More on this in other cartons] Two items on this commission, for which George Jurkowicz was the consultant and Linda West, director of Member Programs & Services, the internal staff lead supporting the commission; July 2003
- Board of Directors meeting no. 95, 29-30 September 2003: [NOTE: completely unmarked copy of no. 94 agenda (20 June 2003) not retained in this carton] John Sundell's copy of agenda plus his handouts and various preparatory materials; September 2003
- Board of Directors meeting no. 97, 18-19 June 2004: Molly Singer's copy of agenda plus slides, handouts, and agenda cover memo; no annotations [NOTE: No file found in this carton for meeting no. 96 (20-21 February 2004), at which Molly Singer was appointed Acting Assistant Treasurer (and de facto head of the Finance & Administration department) following John Sundell's departure]
- Board of Directors meeting no. 98, 5-6 October 2004: Molly Singer's copy of agenda plus notes made by Singer and by Jennifer Hartzell
- Budget & Audit Committee: Molly Singer's files and notes for fiscal year 2005 (September 2004 – August 2005)
- Consultants – Steve-Anna Stephens (The Catalina Center): Molly Singer's file of work towards the end of 2004, reorganizing with the dissolution of the Operations department, and other organizational changes [makes a sort of opening bookend for Singer's "2005 dysfunctions folder"?]; August-October 2004
- RLG scorecard on strategic framework for fiscal year 2005: Molly Singer's work file, July-August 2005
- RLG strategic framework revisions: [Original framework done in summer 2004] Molly Singer's file on updates from the fiscal year 2005 (September 2004 – August 2005) framework, to prepare for fiscal year 2006[?]; August-September 2005
- RLG fiscal year 2006 strategic framework – completed revisions: Molly Singer's file of "final update" for the September 2005 – August 2006 fiscal year, signed off on by the Board of Directors in October 2005; plus preceding versions of the framework (input to Singer's revisions for the board); fall 2004 – summer 2005 (northern hemisphere seasons)
- Board of Directors meeting no. 99, 25-26 February 2005: Cover memo and agenda, containing some notes made by Molly Singer on page 28, plus a handout on "RLG Action Scenarios" (to survive)

- Board of Directors "pre-Annual-Meeting" meeting, NOT in the numbered sequence, 17 April 2005: Confidential meeting on RLG futures – Molly Singer's copy of meeting background packet, plus follow-on notes sent to the board by James Michalko on 1 May 20.  [Input to discussions with OCLC board to follow.]
- Board of Directors meeting no. 100, 17-18 June 2005: Molly Singer's copy of agenda plus preparatory/background papers, including OCLC-RLG Memorandum of Intent to explore combining
- Board of Directors meeting no. 101, 2-3 October 2005: Molly Singer's copy of agenda plus her notes and handouts related to OCLC-RLG merger discussions to date
- RLG tensions and dysfunctions in 2005: Molly Singer's file on efforts to get issues out and seek resolutions without further polarizing RLG departments [by this time in the multi-year effort to prepare for and complete the migration of RLG systems and databases off the mainframe into a new set of systems, staff were burdened with a heavy array of old and new baggage; September-December 2005
- Board of Directors meeting no. 102, 16-17 February 2006: Molly Singer's unmarked copy of agenda, nothing else [This was the last board meeting prior to the announcement to RLG members of the intended RLG-OCLC merger.]
- Board of Directors meeting no. 103, 15 & 17 June 2006: [Annual Meeting held on June 16] Molly Singer's copy of agenda of last RLG board meeting, plus her notes/related background and some resolutions of appreciation
- RLG's fiscal year 2006 scorecard (September 2005 – August 2006): Molly Singer's file on performance against the fiscal year 2006 strategic framework; July 2004 – February 2006

[Cartons 137 & 138: See note preceding Carton 1 above.]

## CARTON 139: Computer Systems (aka Development)

Late 1960s - 2000: Folders from various computer systems development staff, including library systems analysts – 3 files on the NYPL cataloging manual that influenced RLIN II systems design; specifications and timeline from RLIN II development at end of 1970s; later specs for RLIN authorities, cataloging, card production, holdings data; Systems staff training files; "JEDDS ILL" development; standards collaboration with OCLC.

- New York Public Library Cataloging Manual, late 1960s-1977: Folder 1 of 3 – Contents and Section 1, "Cataloging Worksheet ('Bibliographic record')"; influenced RLIN II system design; filed by Charles Stewart at RLG's Stanford offices
- New York Public Library Cataloging Manual, late 1960s-1971: Folder 2 of 3 – Contents and Section 2, "Authority File ('Authority record')"; influenced RLIN II system design; filed by Charles Stewart at RLG's Stanford offices
- New York Public Library Cataloging Manual, late 1960s-1979: Folder 3 of 3 – Contents and Section 3, "Cataloging Rules (Entry and Description)"; Section 4, "Classification and Subjects"; Section 5, "Miscellaneous"; and Section 6, "Serials (Special Aspects) [limited distribution]"; influenced RLIN II system design; filed by Charles Stewart at RLG's Stanford offices
- RLIN II development: Timeline and subsequent catalog conversion of users [from RLIN I to RLIN II?]; 22 July 1980 – 14 October 1982; GOOD record of this period, set down AFTER things were done or happened; includes when some staff arrived and left

- System specifications: Folder 1 of 3 – RLIN "External Specifications for the Network Acquisitions Subsystem Part A / On-Line Acquisitions Processing," vii+110 pages, copyright 1980, printed out 5 September 1980
- System specifications: Folder 2 of 3 – RLIN "External Specifications for the Network Acquisitions Subsystem / Guide to Fields / In-Process Unit," 81 pages, dated 5 September 1980
- System specifications: Folder 3 of 3 – RLIN "External Specifications for the Network Acquisitions Subsystem / Guide to Fields" for Book Fund File (27 pages) and Currency Conversion Table (5 pages), dated 5 September 1980
- System specifications: RLIN "External Specifications for the Network Acquisitions Subsystem / Part A – On-Line Acquisitions Processing" ["without fiscal control" added to title in Joan Aliprand's handwriting]; vii+130 pages, "Printed 20 April 1981" but copyrighted 1980; some annotations throughout by Joan A. as part of need to update
- System specifications: "External Specification for RLIN Authorities (AUT) / Name Authority File (NAF), Avery Reference File (ARF), and SCIPIO Authority file (SCA) (and some of SAF [Subject Authority File] and AAT [Art & Architecture Thesaurus])," 214 pages, "incorporates versions of late 1985 …[to] 8-98"; August 1998
- System specifications: "External Specifications for RLIN Authorities (AUT) – Subject Authority File (SAF) Online Processing and Batch Requirements," xi+105 pages, "version of 11 March 1987, revision 2"; by JoAnn Stewart, Library Systems Division; PLUS: "RLIN Authorities Field Guide – RLIN –Specific Fields,' iv+15 pages, August 1988
- Systems/user documentation: "RLIN Authorities Field Guide, RLIN-Specific Fields," iv + ca. 14 pages [but any RLIN fields there may have been between alphabetically between "INS" and "ST" are missing....], 12 August 1988; PLUS: "RLIN Authorities Update 1998: Authorities File Definition: Fixed Fields – NAF, SAF, SCA," 18 pages, and "RLIN Authorities Update 1998: Authorities File Definition: Variable Fields," 33 pages
- System specifications: "Authority Record Assistant (ARA) Specification" [not the final name for this enhancement?]; 31 pages plus cover memo from Ed Glazier, "version 3/99"; March 1999
- System specifications: Folder 1 of 3 – RLIN "External Specifications for the Network Cataloging Subsystem – Online Processing and Batch Requirements," iv+155 pages, printed 8 January 1981
- System specifications: Folder 2 of 3 – RLIN "External Specifications for the Network Cataloging Subsystem – Online Processing and Batch Requirements," iv+261 pages, revised, printed 6 July 1982
- System specifications: Folder 3 of 3 – RLIN "External Specifications for the Network Cataloging Subsystem – Online Processing and Batch Requirements," iv+261 pages, revised, printed 6 July 1982 with updating annotations [Joan Aliprand's?]; PLUS: June 1981 version of specifications' appendices B and D filed at end (see Spec. introduction for why the removal)
- System specifications: Folder 1 of 2 – "Specifications for Card Production Program," Parts I (Card Format), II (Printing Fields in Book Format), III (Printing Fields in Serials Format), IV (Printing Cards in Music Format); created 22 May 1980, printed 6 June 1980; PLUS: Guide to Columbia University Library's card profile, created 20 April 1980
- System specifications: Folder 2 of 2 – "Specifications for Card Production Program" -- Parts V (Printing Fields in Maps Format); VI (Printing Fields in Films Format); VII (Printing Fields in Manuscripts Format) – "not implemented – see AMC" – plus a 23 September 1983 "AMC WLDCARD Changes" paper; "An Analysis of the Differences between the Serials and Books Specifications"; VIII (Local Information) from spring 1980; [nothing found as Part IX or X]; XI

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(Parsing and Sorting the Call Number); and XII (Sorting); – all created or revised between 1979 and 1981 except as noted

- System specifications: Folder 1 of 2 – Catalog card program (WLDCARD) code – some loose notes, "LINKMAP" (1995), "ADDNOTES" (1984), "CARD 4" (1995), "CARD 5 (1995), "CARD 6" (1984), "DOERROR/ERRDATA" (1984), "FINDFLD/FINDSUB" (1984), and "OUTLINE" (1985) (last includes 2 printouts from 1981 and 1982 with "ON LINE" written on them)
- System specifications: Folder 2 of 2 – Catalog card program (WLDCARD) code – "PARSE" (1984), "WLDCARD" (1985), "WLDINIT" (1984), "WLD031" (1981 and 1983), "PRINTV" (1987), "TAPEV" (1987), plus "MARCER" (1993)
- System specifications: USMARC holdings data in RLIN – five items: (1) "Change Request 447 – Storing USMARC Holdings Data," 5 pages, last revised 24 January 1991; (2) "USMARC Holdings Format in RLIN / Phase II: Display on FULL and PAR[tial] [screens] / Specification and Test Plan," ii+60 pages, by Ed Glazier, 4 October 1994; (3) Memo from Ed G. on "Holdings Format, Leader/05, /06, /17 – default values," 7 August 1998; (4) Memo from usmarc@loc.gov [Library of Congress] on "Update No. 3 to the USMARC Format for Holdings Data," 29 December 1998; and (5) Memo from Ed G. on "USMARC Holdings Format Update," 5 January 1999
- Systems staff training – import/export services: (1) Cover note and exercises for a week's training by Joe Altimus and Karen Bendorf, 9 June 1997; (2) "IES Import: DR [Development Resources] Staff Training Notes," ii+20 pages, blue paper, June 1997; (3) "IES Import: Programmer's Notes," 16 pages, 28 February 1991; (4) "IES Export: Programmer's Notes," 17 pages, 28 February 1991; (5) "IES Programmer's Notes: Rules Syntax Summary," 2 pages, 15 October 1987
- Systems staff training – uses of SPIRES in RLG: "SPIRES for Dataloaders, A User Guide," ii+41 pages, by Karen Bendorf, October 1997; explains what SPIRES was, and how and when RLG staff used it, focusing on "specific activities and commands used in the dataload development process"
- Systems development – program copyrighting: "JEDDS ILL" software package – draft cover letter from David Richards, plus first 25 pages of source code (header files) and last 25 pages (implementation files), to be sent to the Register of Copyrights at the Library of Congress, Washington, DC, in order to register copyright for an interlibrary loan software package [JEDDS = "Joint Electronic Document Delivery Software"] developed for a partnership of the National Library of Australia (NLA), the National Library of New Zealand, and the United Kingdom's Joint Information Systems Committee, Electronic Libraries Programme (JISC); letter draft dated 22 October 1998
- Systems development – standards collaboration by RLG & OCLC: Four-page note from Anne Van Camp of RLG Member Programs, for internal use, on seven areas of actual/potential needed coordination: Dublin Core/Metadata; CORC (OCLC's Cooperative online Resource Cataloging tool set); Wade-Giles/Pinyin conversion; ILL (interlibrary loan) interoperability; preservation conversion projects; reference and digital archiving; and long-term retention of digital materials; 10 January 2000; PLUS print-out of 9 Web pages on CORC; filed by Systems manager Lennie Stovel

## CARTON 140: Finance & Administration

1994-2003: Some of CFO John Sundell's files, including content from before his arrival at RLG in 2000. Majority of these are related to Ariel (document-transmission-on-the-Internet) software. [NOTE: For more on Ariel, see list of cartons in Carton 23 summary.]

- Ariel and ILL Manager: Post-Ariel-sale contract work by RLG for Ariel's buyer, Infotrieve, Inc., 2003.
- Ariel post-sale settlement with Infotrieve regarding Prospero competition (open-source software at Ohio State University), 2003.
- Ariel sale to Infotrieve: Post-closing correspondence and payouts, 21 January 2003 – 2004.
- Ariel sale to Infotrieve: Disposition of scanners on loan to RLG for testing and development, 2002-2003.
- Ariel sale to Infotrieve: Pre-closing correspondence, 2002 – 20 January 2003.
- Ariel sale to Infotrieve: Closing documents, January 2003.
- Ariel sale to Infotrieve: EscrowTech material (more in other folders), 2002-2003.
- Ariel sale to Infotrieve: Drafts of closing documents, 2002-2003.
- Ariel sale: Engagement of H. D. Brous to assist with locating buyer, achieving sale, 2001-2002.
- Ariel software, donation of to institutions, 2002.
- Ariel distributors and ordering procedures, 2001-2002.
- Ariel distributor Cenfor International (Italy), correspondence, 2002.
- Ariel and Fretwell-Downing (UK)'s license to use RLG's JEDDS ILL module to interface F-D system with Ariel, 2002. [JEDDS = Joint Electronic Document Delivery Software, a partnership, of the National Library of Australia (NLA), the National Library of New Zealand, and the United Kingdom's Joint Information Systems Committee, Electronic Libraries Programme (JISC). RLG had earlier contracted with them to provide various Ariel developments.]
- Ariel and MIMAS (UK) distribution, post JISC-JEDDS arrangements, 2001-2002. [MIMAS = the University of Manchester Computing division, which among other services to UK libraries managed COPAC, CURL's public online catalog. (CURL = Consortium of University Research Libraries). RLG and MIMAS had various working relationships.]
- Ariel and UK-JEDDS distribution, RLG-JISC (Joint Information Systems Committee) arrangements, 1999-2001.
- Ariel and Odyssey (Atlas ILLiad product), 2000, 2002-2003.
- Ariel, PICA (Netherlands), and OCLC, 1998 and 2000. (See also other PICA files in Carton 91.)
- Ariel and Relais (competing product?), relations, 1994-2002.
- Ariel development and miscellany, 2000-2001.
- Ariel trademark (RLG's) vis-à-vis Ariel Corporation, 1995, 1997, 2001-2002.
- Foundation Directory Online – tool used by John Sundell [see also Carton 1, 2000.
- Bill and Melinda Gates Foundation: Public Access Portal RFP (declined by RLG), 2001.
- Harcourt General Charitable Foundation: proposal to, grant from, and some reporting to for RLG Cultural Materials (see also Carton 130). [ca. 2001; failed to inventory dates.]
- Institute of Museum and Library Services: RLG's interest in, proposal to digitize East Asian cultural materials (not funded), 2000-2002.
- Henry Luce Foundation: material on 1998-2000 grants for Wade-Giles to Pinyin conversion of RLG Union Catalog and original scripts display in the Eureka search interface; also RLG-provided information about ILL Manager software; also proposal to digitize East Asian cultural materials (not funded), 2000-2001.
- NEA (National Endowment for the Humanities), RLG's interests in for funding "Scholar's Workspace" in RLG Cultural Materials (not realized), 2000-2002.
- NSF (National Science Foundation), RLG's interests in for function (METS work and more), 2001-2002. [METS = Metadata Encoding and Transmission Standard.)

**CARTON 141: Member Programs; President's Office (aka Administration)**

1999-2006 (Member Programs); 1990-2003 (President's Office – CIMI): First portion of carton continues Preservation Program files that wouldn't fit into Carton 143 -- a mix of materials from Nancy Elkington's and Robin Dale's folders from the digital preservation era.  Second part of carton is James Michalko's print files on RLG's involvement in the Consortium for the Computer Interchange of Museum Information (CIMI) -- from CIMI's creation under the aegis of the Museum Computer Network (MCN) until the halt to CIMI operations and the termination of the consortium about 13 years later.  [NOTE: For more on CIMI, see Carton 92 summary.]

- Programs – Digital Imaging: "Workshop on Technical Metadata Elements for Image Files, 18-19 April 1999" – sponsored by NISO (National Information Standards Organization), CLIR (Council on Library and Information Resources), and RLG; background, results, papers, and handouts from the workshop
- Preservation Program: 1999 strategic planning for digital preservation work – but also for Archives & Manuscripts, SHARES, Law, and other Programs initiatives; workbook format used for structured process in thinking about concrete steps on 3 key RLG business areas: Access to Primary Sources, Digital Archiving, and New-Generation Resource Sharing; February-May 1999
- Preservation Program: Publication "Moving Theory Into Practice: Digital Imaging for Libraries and Archives," by Anne R. Kenney and Oya Y. Rieger – advance orders, means for handling orders, and fulfillment [see Carton 67 for this softbound publication]; December 1999 – May 2000
- Preservation Program: Reviews of "Moving Theory Into Practice: Digital Imaging for Libraries and Archives," published by RLG in 2000, and "Guides to Quality in Visual Resource Imaging," Web-published in July 2000 by DLF (Digital Library Federation), CLIR (Council on Library and Information Resources), and RLG; both in the journal "Microform and Imaging Review," summer and fall 2000
- Preservation Program: Planning for a digital archiving service for RLG Cultural Materials contributions – "Digital Archive Testbed Project 2001/2002"; led to explorations with JP Morgan of their i-VAULT! Service; not a complete file (and work did not continued beyond the testing phase – may be more information in another carton); July 2001 – July 2002
- Preservation Program: RLG-OCLC joint preservation activity, reported briefly in a summary of OCLC's Digital Preservation Symposium at the ALA (American Library Association) 2001 annual meeting, where RLG program officer Robin Dale spoke; plus notes on two areas of joint work: preservation metadata and attributes of a trusted digital repository, from "OCLC Newsletter," September/October 2001
- Digital Preservation in the United Kingdom: Robin Dale's file (from Nancy Elkington?) of proposal and successes of ERPANET (Electronic Resource Preservation and Access Network), Seamus Ross, University of Glasgow, director; suggests that RLG advised/attended in some stages, but essentially a development outside of RLG's own activities; August 2001 – January 2005
- Preservation Program: Material about the creation of a supplement to RLG microfilming publications – guidelines for creating preservation microform that is more amenable to scanning, by Janet E. Gertz and Lars Meyer, Columbia University, under contract to RLG; the actual guidelines not in this folder, but they WERE published later (ca. 10 pages); May-August 2002
- Preservation Program: Web-published joint work product – "Trusted Digital Repositories: Attributes and Responsibilities / An RLG-OCLC Report," vi + 62 pages (including glossary), RLG, Mountain View, California, May 2002

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- Digital Preservation: RLG membership in the United Kingdom's Digital Preservation Coalition; RLG-OCLC joint receipt of DPC's 2005 Digital Preservation Award for the work of their PREMIS (Preservation Metadata Implementation Strategies) Working Group; (see final PREMIS publication in another carton) January 2003 – November 2005
- Digital Preservation: RLG proposal, "AT RISK: Political Web Archives," submitted to the NDIIPP (National Digital Information Infrastructure and Preservation Program) at the Library of Congress – was not funded; November 2003
- Preservation Program: Announcement letter to the RLG-OCLC PREMIS (Preservation Metadata Implementation Strategies) working group members of intent to bestow the Society of American Archivists' 2006 Preservation Publication Award to the "Data Dictionary for Preservation Metadata: Final Report of the PREMIS Working Group," published in May 2005; letter dated 15 May 2006 [See actual award in Carton 54]
- Digital Preservation: Scant information on a Library and Archives Canada meeting -- "Building a Digital Preservation Infrastructure" [in Canada" – at which Robin Dale spoke; [it was a long-held RLG desire to engage LAC in RLG programs]; 12 May 2006
- CIMI (Computer Interchange of Museum Information), 1990: Four sheets – (1) "CIMI / Computer Interchange of Museum Information Project," describing project's initiation in 1988 by the MCN (Museum Computer Network)'s board of directors "in response to a perceived need for the coordinated development of a common standard for the communication of museum information," plus the nature of the "CIMI Committee (ca. 12 in 1990?), the nature of the committee's work, intended coordination with other working groups, and the plan of CIMI work for 1991 and beyond (very briefly – October 1990; (2) a "List of [16] Participants and Invitees" to the first (?) CIMI meeting – 8-9 October 1990; (3) a follow-up memorandum to the new committee from John Perkins, CIMI project manager – 23 October 1990; and (4) a further memo from John Perkins about agreement to make Lynn Cox, MCN's new executive director, the "responsible official for CIMI, and to make David Bearman the CIMI project director – 20 November 1990. NOTE: CIMI is not yet a consortium; and RLG's Alan Tucker is a committee member
- [NOTE: NO file found in this carton for RLG-CIMI records in 1991]
- CIMI (Computer Interchange of Museum Information), 1992: Contains (1) a letter from RLG president James Michalko to John Perkins, CIMI project manager, confirming RLG's intention to sponsor "continuing Computer Interchange of Museum of Information" work and asking for an invoice from the Museum Computer Network of $10,000 – 28 August 1992; (2) a 5-page report from Kathy Jones Garmil, president of MCN, David Bearman, and Andrew Roberts, titled "The Future Management of CIMI: Recommendations by the MCM CIMI Committee," that also summarized the nature of the project's first two years – October 1992; (3) several letters between MCN presidents and James Michalko as JPM was appointed to a newly organized CIMI Committee – October-November 1992; and (4) a list of the reorganized committee's members (Alan Tucker no longer listed – this was now the "CIMI Management Committee?) – undated
- CIMI (Computer Interchange of Museum Information), 1993: Under 1 inch of papers, including (1) "CIMI [Management] Committee Workplan, November 1992-1993," plus budget, 15 March 1993; (2) e-mail about a 24 March 1993 committee meeting; (3) "Standards Framework" for CIMI by David Bearman and John Perkins, V + 61 pages, with context, CIMI history, and recommendations; (4) James Michalko's notes for an introduction at some gathering, in which he summarizes why RLG cares and about and has invested in MCN (Museum Computer Network) and CIMI; (4) a completed CIMI Consortium Prospectus, with some prospecting for new members – June-December 1993; and (5) a memo from John Perkins to James Michalko and Peter Homulos (two primary CIMI member-sponsors) about actually forming the new consortium – 13 December 1993

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- CIMI (Computer Interchange of Museum Information), 1994: Contents concern the establishment of a Consortium for the Computer Interchange of Museum Information; consortium management/governance and workplan; [indirectly] several CIMI applications for grant monies; the 11 May 1994 Memorandum of Understanding concerning MCN's (Museum Computer Network's) 3-year hosting and financial administration relationship with CIMI – signed by James Michalko as CIMI Executive Committee principal [chair?] – but containing further memorandum markup by MCN in June 1994 [where is final version?]; and discussions of CIMI-RLG activity coordination
- [NOTE: NO file found in this carton for RLG-CIMI records in 1995]
- CIMI (Computer Interchange of Museum Information), 1996: Five items – (1) e-mail from James Michalko to RLG's Director of Finance, Molly Singer, about preparing for RLG to take on the hosting/financial administration role for the CIMI consortium that MCN (Museum Computer Network) had previously had; (2) "The CIMI Profile: Z39.50 Application Profile Specifications for use in Project CHIO," draft version 3, 35 pages, May-June 1996 – CHIO (Cultural Heritage Information Online) was a demonstration project using the CIMI Z39.50 profile to search and retrieve museum information held in digital forms; (3) "CIMI Service Agreement," an executed document succeeding the earlier CIMI-MCN hosting memorandum of understanding – dated December 1996 although the three signers, RLG, CIMI Executive Committee, and MCN, actually completed the agreement on 1 January 1997; (4) audit statements for MCN that incorporate CIMI as a restricted fund, fiscal year 1995 and draft fiscal year 1996; and (5) 26-page executive summary [sic] TIIAP [US Department of Communications' Telecommunications and Information Infrastructure Assistance Program] Grant Final Report on CIMI CHIO Project
- CIMI Executive Committee: Meetings of 5 September and 28 October 1996 – slip file (see also "CIMI 1996" file folder in this carton)
- CIMI Membership Meeting: 29 October 1996
- CIMI (Computer Interchange of Museum Information), 1997: Continued Z39.50 work under project leadership of William E. Moen (see also "CIMI 1996"); work towards a CHIO-II testbed (NOTE: not funded – see "CIMI 1998" file folder); CIMI budgets and financial performance for 1997; activity/plans in several areas – mostly from CIMI consortium Web pages – Metadata Working Group and CIMI Metadata Testbed Project, CIMI Integrated Information Management Project, more
- CIMI Executive Committee: Meetings of 18 February, 10 April, and 10 November 1997 (see also "CIMI 1997" file folder in this carton)
- CIMI (Computer Interchange of Museum Information), 1998: Full copy of not-funded-in-1998 proposal to NEH (National Endowment for the Humanities) for "CHIOII" Practical Access to Cultural Heritage Information," June 1997; "1999 Proposed Program of Work (3-page memo to the CIMI Executive Committee from John Perkins), 8 October 1998; a few brief notes in late 1998
- CIMI Executive Committee Meeting, 4 February 1998
- CIMI Executive Committee Meeting, 23 October 1998: Four pages, comprising e-mailed agenda and a response to it from Guy Hermann, Mystic Seaport Museum
- CIMI (Computer Interchange of Museum Information): "The Digital Museum: Creating Exhibition Experiences from Databases," a Smithsonian Institution proposal to the NSF (National Science Foundation) Digital Libraries Initiative, Phase 2, that was made in collaboration with CIMI and University of California, San Diego; intended to cover 1 January 1999 – 31 December 2002 (but was rejected by NSF-DLI2 in 1998?)
- CIMI (Computer Interchange of Museum Information), 1999: End-of-1998 "CIMI 1999 Program of Work" and "CIMI 1999 Budget Narrative"; James Michalko's sheet of quick

notes from a 19 January 1999 conference call; CIMI 1999 accounting calendar; a few CIMI expenses and income budget pages, 31 March – May 1999; James Michalko quick notes from "CIMI – DC trip" – undated; "Teaching Museums About Metadata: A Proposal for International Dublin Core Training Workshops," prepared by CIMI for the Getty Grant Program (see separate file folder in Carton 141 on this proposal), 28 April 1999; revised "CIMI Principles of Cooperation," May 1999; executed 1-2 page agreement from CHIN (Canadian Heritage Information Network) to subvene CIMI publications for the benefit of museums; conference call material on "CIMI – Membership, Development, and Program Portfolio Planning," 16 April 1999l; CIMI audited financial statements for fiscal years 1999 and 1998 (Grant Thornton, auditors), December 1999; CIMI response letter to audited financials (although no "findings" that would call for a response appeared in the statements?), 23 December 1999

- CIMI (Computer Interchange of Museum Information): Proposal to/grant from the Getty Grant Program – "Teaching Museums About Metadata: A Proposal for International Dublin Core Training Workshops," 26 pages, 28 April 1999; submission cover letter to the GGP on CIMI's behalf from James Michalko, 3 May 1999; acknowledgment and granting letters from GGP's Charles J. (Jack) Meyers, May-August 1999; final report on the workshop series by Angela T. Spinazze, 8 January 2000; separate (from report) evaluation of a CIMI Institute Workshop, "Helping People Find What They Want: Implementing Dublin Core in Museums," 8 September 2000
- CIMI Executive Committee Meeting, 15 May 1999 – slim file
- CIMI Executive Committee Meeting, 15 October 1999
- CIMI (Computer Interchange of Museum Information): Glossy printed brochure – "The Organization of Museum Intelligence – a 2-pocket folder with a series of sheets on CIMI program, plans, benefits, membership; undated (as usual for CIMI), but text on sheets indicates produced in late 1999? For the 2000/2001 time frame
- CIMI (Computer Interchange of Museum Information), 2000: Slim file of a few letters from CIMI Executive Committee Meeting members, January-May 2000; a letter requesting a no-cost extension to 31December for the Getty-funded CIMI Dublin Core workshops, July 2000; and Draft v1 of RLG's Tony Gill's short article titled "The CIMI Side of RLG" (where did this appear? RLG Operations Update newsletter?)
- CIMI Executive Committee Meeting, 26 January 2000
- CIMI Executive Committee Meeting, 3 November 2000
- CIMI (Computer Interchange of Museum Information), 2001: CIMI membership meetings in 2001 – information from Web site, particularly the meeting of 26-27 January 2001; CIMI-MCN cosponsorship of the 2001 MCN (Museum Computer Network) Annual Conference; Intel Corporation small grants(s?) to support CIMI's "Mobile Computing in Museums," March 2001-September 2002; proposals from the American Museum of the Moving Image and the National Historical Museums in Sweden to participate in CIMI's Handscape Project, ca. April 2001; "Handheld Mobile Computing in Museums," a 27-page survey paper, no mention of CIMI, by Susan Amirinian, 2001; slight material on CIMI "team"/staff meetings in June 2001; brief item on getting aid from CHIN (Canadian Heritage Information Network) to support Canadian "metadata repositories" creation; brief item about getting more aid from the Getty Grant Program to support the "CIMI Institute"; and several memos/papers that for the most part address CIMI's financial position and challenges, June-October 2001
- CIMI Executive Committee Meeting, 24-25 January 2001
- CIMI (Computer Interchange of Museum Information): "Principle of Cooperation," 6 pages, distributed to CIMI members to sign at the end of 2000 – about 10 executed copies, followed by an exchange among John Perkins, James Michalko, and Wiggins & Dana's

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Mary Norris on how to reword this document to avoid members having to re-sign it every year; January-July 2001
- CIMI Executive Committee Meeting, 17 January 2002
- CIMI (Computer Interchange of Museum Information) and Others: "A Second International Meeting on National Digital Content Creation Strategies," 18 March 2002 – event held at The Brookings Institution that followed up on a July 2001 meeting in London;  the gathering – a plenitude of organizational names, acronyms, and aspirations – had been "conceived and realized as a partnership between UKOLN [United Kingdom Office for Library [[and Information]] Networking], re:source, inc. [also in the UK], and CIMI"
- CIMI (Computer Interchange of Museum Information), 2002: Ways of explaining CIMI's work and organizing the Web site – miscellaneous papers and diagrams
- CIMI (Computer Interchange of Museum Information), 2002: Budgeting – statements and narrative – variety of pages in progress
- CIMI Member and Executive Committee meetings: 31 October – 2 November, and 4-5 November 2002
- CIMI Executive Committee meetings; Teleconferences of 9 June and 21 August, and committee meeting of 14 October 2003
- CIMI (Computer Interchange of Museum Information), 2003 – the End: Series of letters as CIMI and its investor-members continued to wrestle with reinvigorating the consortium's program and shaping the consortium's agenda to address insufficient budget; the last two items in this file spell out the end of CIMI's operations and the end of the consortium

## CARTON 142: Customer & Operations Support (1/2); President's Office (aka Administration)

1983-2004:  1. First half of this carton appears to be folders inherited/retained by Jack Grantham, RLG's director of Computer (and Customer) Operations after RLG moved from Stanford to Mountain View.  It includes a folder on RLG-WLN relations, followed by folders that progress from the RLG-Stanford Host Institution Agreement through a series on RLG's Stanford data center service agreements and preparations for systems/database migration off the Stanford-housed mainframe computer.  This migration also resulted in reorganization and layoffs that ended the Operations department per se, when many of its mainframe-oriented functions were no longer required. (Other functions were absorbed into the Systems Development department.)  Therefore, the final material in this series is almost coeval with the end of Grantham's department). FOLLOWED BY: [2. Material from James Michalko's files on the beginnings of the RLG Cultural Materials Initiative (Service), 1999-2002.

Customer & Operations Support files:
- RLG & WLN under 3 different Western Library Network directors: Exchanges with WLN (née Washington Library Network) on areas of collaboration – (1) exchanges of retrospective-conversion cataloging records, between C. James Schmidt and Bruce Ziegman, and later James Michalko and Ron Miller, 1989-1992; (2) discussion of shared catalog-card printing, RLG's doing WLN's, between Jack Grantham and Ron Miller – looks inconclusive – didn't happen?, July-August 1991; (3) discussion of RLG as possible host for WLN services, between Jack Grantham and Paul McCarthy (2 memos) – nothing came of this?, May 1996
- Stanford Host Institution Agreement, revised 18 September 1983: Agreement that updated and extended a 20 February 1979 agreement [see Carton 192 for 1979 version] focusing on RLG and Stanford Data Center expectations and obligations, signed by RLG president Richard W. McCoy and Stanford University vice president for business and finance William Massy; 9 pp. including Exhibit A and Exhibit B (list of Stanford computer programs and 1976 University of California license giving Stanford use of the UC BIBCARD programs for

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printing catalog cards from Stanford's library processing system (BALLOTS, later to become RLIN)

- Stanford Host Institution Agreement, revised 14 September 1988: Agreement that updates and extends the 18 September 1983 agreement; changes flagged in left margin and ALSO has some faint annotations that seem unlikely to have been made?; 10 pages PLUS 17 pages of Exhibits as follows: A – Office Space ("dating from 1983"), B – Indirect Cost Algorithm ("updated in 1988"), C – untitled list of RLG peripheral hardware [it seems], as of September 1983; D – 18 September 1983 License [Host] Agreement; signed by James Michalko, acting RLG president and William Massy, Stanford's vice president for business and finance
- Stanford data center service agreement, 1990: "Stanford Data Center Agreement for Provision of Dedicated Computer Services to the Research Libraries Group for FY89-90," executed and fully signed on 1 April 1990 [6 months after James Michalko first signed it], 5 pages
- Stanford data center service agreement, 1991: "SDC/RLG FY90-91 Dedicated Service Agreement / Services to be Provided," 4 pages, executed early October 1990; PLUS, some related e-mail exchanges before and after this agreement was completed; PLUS a draft document of 54 unnumbered pages that looks like a production of Jack Grantham [who joined RLG in 1990], titled "RLG Service Level Agreement" and defining "the level of service, by all levels of personnel and systems operation, to be delivered to RLG," with many signoff steps, all undated – seems never to have been used, but perhaps gives an idea of scope of services?
- Stanford data center service agreement, 1992: "Agreement for Provision of Dedicated Computer Services to the Research Libraries Group for FY91-92," 4 pages, not signed by SDC director until 3 February 1992 and with no signature from James Michalko for RLG; PLUS some background to the fiscal year 1992 (September 1991 – August 1992) negotiations (e-mails, costs to date, etc.)
- Stanford data center service agreement, 1993: "Agreement for Provision of Dedicated Computer Services to the Research Libraries Group for FY92-93," 4 pages, executed by SDC director and RLG president by 10 December 1992 (more than a quarter into the fiscal year 1993); PLUS set of October 1992 e-mails and calculations for the agreement being negotiated
[NOTE: no evidence in this carton of an executed agreement for fiscal year 1994 --]
- Stanford data center service agreement, 1995: E-mails and discussion, plus a 22 March 1995 version of the "Information Technology Systems and Services [renamed SDC] Agreement for Provision of Dedicated Computer Services to the Research Libraries Group for FY94-95," signed by ITSS's director of operations, systems, and services, Paul Beirne, but not yet by RLG president James Michalko; e-mails cover 20 January – 25 May 1995, and agreement seems to have been finally executed after 25 may, but no final copy found in this folder or carton
- Stanford data center service agreement, 1996: FY95-96 dedicated services agreement became particularly problematic to develop while RLG and Stanford were in the midst of changing/ending the larger Host Institution Agreement  (see more material on this in other cartons) and trying to determine who would provide computer services in the future -- Stanford or another?; e-mails indicate some of the steps and considerations, and there was a temporary extension of fiscal year 1995 terms into fiscal year 1996; final  9+ pages FY95-96 agreement was signed at the end of January 1996
- Stanford data center service agreement, 1997: Lots of background surrounding the FY96-97 agreement plus various hardware changes [the return from an Amdahl to an IBM mainframe?], dating from 1 February to 18 December 1996; PLUS "Information Technology

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Systems & Services Agreement for Provision of Dedicated Computer Services to the Research Libraries Group for FY96/97," 7 pages, signed by Paul Beirne and James Michalko, 24 January 1997

- Stanford data center service agreement, 1998: "Information Technology Systems & Services Agreement for Provision of Dedicated Computer Services to the Research Libraries Group for FY97/98," 7 pages, signed by Paul Beirne and James Michalko, 29 August 1997; PLUS some exchanges that seem more concerned with hardware than the service agreement, 14 January – 23 December 1997
- Move to IBM 9672 R44 CMOS Processor (Mainframe) in 1998: "RLG Purchase Requisition Package / RLG IBM CPU, Maintenance, and Software / 48 months / 23 June 1998" – some material in the 1998 service agreement folder may relate to this; PLUS "Placement Report" for 9672-R44 slots, 3 pages, 8 June 1998, "Stanford (RLG) 9672-R44 Install Systems Assurance Folder," vi + 88 pages, 18 June 1998, and "Term Lease Supplement," 7 pages, 25 June 1988
- Stanford data center service agreement, 1999: "Information Technology Systems & Services Agreement for Provision of Dedicated Computer Services to the Research Libraries Group for FY98/99," 9 (unnumbered) pages, signed by Paul Beirne and James Michalko, 11 September 1998; PLUS a bunch of e-mail exchanges on operational matters and lead-up to new agreement, 5 January – 8 September 1998 – and a note on subsequent ITSS billing, December 1998
- Acquiring an IBM Enterprise Disk Storage System: Reasons for (new service directions, stability over period of growth) and installation of, June-September 1999; PLUS sourcing/acquisition exchanges, June-October 1999
- Upgrading RLG's server environment: "Endeavor* Change Proposal: A Desirable Production Environment" – proposal for a dual system with NSF (Network File System) file-sharing architecture, cloning Endeavor on new "Explorer" platform; 22 pages, by Wes Ramirez, 6 August 1999
  * Sun Enterprise 3000, RLG's then-current production Web server
- Stanford data center service agreement, 2000: "Information Technology Systems and Support / Computing Systems and Services / Service Level Agreement / Research Libraries Group / September 1, 1999 [FY1999/2000]," 20 pages, signed by Paul Beirne and James Michalko (page 9), 5 January 2000 – under explanatory cover note to Wiggin & Dana from RLG's new chief financial officer, John Sundell; PLUS a bunch of exchanges leading up to this agreement, 23 July – 21 December 1999
- Stanford data center service agreement, 2001: Signed, final copy for FY2000/2001 not found in this carton, but this folder has lead-up and negotiations plus Jack Grantham's "Final 'Working' Copy" of the Information Technology Systems & Services "Computing Systems and Services Service Level Agreement for Research Libraries Group, September 1, 2000 – August 31, 2001"; folder contents date from 27 January to 31 August 2000
- Moving toward new technology platform – DB2 and beyond: Packet of background on RLG's directions and needs, 7 November 2001; PLUS, looking at external Web hosting services and more (alternatives to Stanford data center), 12 December 2001
- Stanford data center service agreement, 2002 – AND mainframe migration in future: "Information Technology Systems and Support / Computing Systems and Services Service Level Agreement for Research Libraries Group," FY2001/2002, 19 pages, signed by Sandra Senti and James Michalko on 5 September 2001; PLUS e-mail from Jack Grantham to Paul Beirne and others about RLG's future needs/plans, in which he notes that, like Stanford, RLG intends to migrate off of Stanford mainframe/related software and RLG's own mainframe computer; he sets the target date around August 2003 and lists what hardware and systems may replace the current architecture; 21 September 2001

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- Stanford data center service agreement, 2003: "ITSS Technology Strategy & Support / Service Level Agreement for Research Libraries Group, September 1, 2002 – December 31, 2003," 15 pages, signed on page 9 by Sandra Senti and James Michalko, 2 October 2002; PLUS some exchanges leading up to agreement that include planning ahead to systems/mainframe migration – AND a new organization chart for ITSS; April – September 2002
- Stanford data center service agreement, 2004: "Research Libraries Group, Inc. Service Level Agreement from Information Technology Systems and Services, December 2003" [FY2003/04], 27 pages, signed by Sandra Senti and James Michalko, 14 December 2003; PLUS materials created to make case and plans for RLG's new systems architecture and expenditures to migrate off mainframe and Stanford systems, June-December 2003
- Possibly unrelated documents/agreement with IBM, 2002-2003 [?]: (1) IBM "Proposal to provide relocation services" for RLG, 6 pages, referring to reinstallation of a 2105-E20, dated 20 August 2002; (2) IBM proposed statement of work over 1 February 2003 to 31 January 2008 for a list of "eligible machines," E20-R44 (14 in all), 6 pages, 20 December 2002; (3) IBM-modified RLG purchase order terms – for WHAT is not clear, 17 March 2003; (4) executed (signed) version of item (2), as of 24 April 2003; (5) pages from IBM and Dynamic Systems on software, etc. package for RLG – something to do with coordinating IBM and SUN acquisitions?, 30 October 2003
- Getting off the mainframe – preparing for systems migration: Material from Jack Grantham's files from 2004 on steps to identify, acquire, and install new hardware/software environment (does not include Systems or other departments' additional efforts in overall project), January-September 2004
- RLG "License for the Use of Eduserv Athens Agent Software" 18 June 2004: 9 unnumbered pages granting use of an authentication and authorization program [until RLG could develop its own authentication server as part of the migration effort??], signed by Wayne Davison and Lyn Norris (Athens manager), 26 July 2004
- Stanford data center service agreement, 2005: UNSIGNED version of RLG service level agreement from Information Technology Systems & Services for FY2004/05, dated 3 September 2004, 24 pages; it could be possible [?] that final version isn't in this folder because Jack Grantham left RLG in the Operations department layoff made possible by the anticipated migration off the mainframe in 2005

President's Office (aka Administration) files:
- Cultural Heritage (later "Materials") Initiative: Work leading up to the CHI/CMI "launch meeting" of a core set of members, on 8-9 November 1999; ideas and planning among the institutions, RLG staff, and board members; July-November 1999
- Cultural Heritage (later "Materials") Initiative: Launch meeting of 8-9 November 1999 – contents of binder provided to attendees, plus copies of Powerpoint slides used on 8 and 9 November
- Cultural Heritage (later "Materials") Initiative: First communiqués following 8-9 November 1999 launch meeting; work on crafting a "statement of intent" for initial partners prior to a more widespread letter to the RLG membership; letter to all RLG members; 19 November – 21 December 1999
- Cultural Materials Initiative: Early external communications – through the RLG Web site, some early mailings, and briefings to a larger community (an incomplete record in this file); January-February 2000
- Cultural Materials Initiative: Initial, academic market plans – slides used in RLG board meeting discussion, plus a much shorter set of undated slides; board pages retained in order found in folder: 23, 22, 21, 29, 19, 18, 24-58

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- Cultural Materials Initiative – Alliance Policy Group: Formation of the Cultural Material Alliance (those members committing to participate in the initiative) Policy Advisory Group, which first met on 24 March 2000
- Cultural Materials Initiative Alliance: Agenda and Powerpoint slides used at the first meeting in 2000 of initiative participants (the Cultural Heritage Alliance); 30 April 2000
- Cultural Materials Initiative – plans for fiscal 2001: A mix of papers, not complete, on service development, implementation, finances, apparently in relation to RLG's annual fiscal year planning, this for September 2000 – August 2001; materials of February-September 2000
- Cultural Materials Initiative – Technical Review Committee: Invitation to experts to review and critique the RLG Cultural Materials "preview 2" system, dated 18 October 2000; annotated and clean copies of materials for the committee's meeting on 8 January 2001; copy of Powerpoint slides used in the meeting; draft and final (?) meeting notes after the event, including a Staff Response to the comments received
- Cultural Materials Initiative – Ford Foundation Grants: Material from a final report on a Ford $150,000 planning grant and on through a set of proposal exchanges leading to a $200,000 design and development grant in October 2001; materials date from October 2000 to November 2001
- Cultural Materials Initiative -- Content: Slim set lists and a memo or two; nothing here specifically referring to the Alliance Content Advisory Group; April 2000 0 November 2001
- Cultural Materials Initiative – Consultants: Exploring consulting help on the sponsorship/support model and fund raising for the new service; background only for Alice Sachs Zimet (Arts & Business Partnerships LLC), no date; exchanges – which didn't lead to an agreement – with Marilyn Bancel, Vice President for The Oram Group, Fund-Raising Management Counsel, July-August 2000
- Cultural Materials Initiative – Consulting with Paul Sharpe: Beginning of a multi-year consulting arrangement with Paul Sharpe for fund raising, marketing to potential investors/sponsors, etc; initial contract and work statement plus extensions, October 2000 – August 2005; development of a "leave-behind" brochure for potential sponsors, including bound, tabbed, color-illustrated (with photocopies) result; initial prospecting; finally, a more pedestrian overview from almost a year later (did this come from Sharpe?); October 2000 – December 2001
- Cultural Materials Initiative – Alliance Policy Group: RLG Cultural Materials service and content licensing agreements, 2 April 2001
- Cultural Materials Initiative – miscellaneous 2001: Samples of planning and presentations to introduce the "coming" Academic service, previewing in the fall with actually availability in January 2002; a few technical aspects addressed in this folder; needs complementary contents from other cartons to flesh out; February – October 2001
- Cultural Materials Initiative – Interface developments: Bits of the process of reviewing a preview of the RLG Cultural Materials service interface; looks as if would be more useful if interpolated with related material in other cartons; March 2001
- Cultural Materials Initiative Alliance: Spreadsheet of Alliance member institutions, designated contacts, and members of five advisory groups – Policy, Surrogates, Content, Description, and East Asian; 4 October 2001
- Cultural Materials Initiative Harcourt Grant: Three-page, interim status report from RLG's Susan Yoder on a $250,000 award from the Harcourt General Charitable Foundation; 11 October 2001
- Cultural Materials Initiative – Alliance Policy Group: Policy Advisors' meeting of 22-23 July 2002

**CARTON 143: Member Programs**

1982-1999: Entire carton concerned with RLG's Preservation Program activities and plans. Contents come from Patti McClung, Nancy Elkington, and Robin Dale (who inherited a number of files from earlier program officers, particularly Nancy E.  [NOTE: overflow of Programs Preservation folders (less than 1/2 carton) moved into Carton 141.]

- Preservation Program: Preservation (backup) of RLIN data – RLIN backup dumps on magnetic tape for offsite storage; Preservation Program Committee interest; a variety of materials gathered in 1982 about services and guidelines; perhaps most appealing, an 11 August 1978 printout of "SCIP [Stanford Computer Information Center] Campus Facility Tape Library Procedures," by Ron Sax [who spent decades in RLG's Computer Operations department], Ruth Chase, and Larry Rosen that includes the "Tape Offsite Storage System," aka TOSS
- Preservation Program – National Underground Storage (NUS): Microform master storage for RLG members – early discussion (1975-1976), Nancy Gwinn's research into and establishment of this program activity, one of the longest-running Preservation Program services; 1 December 1975-16 December 1983
- Preservation Program – National Underground Storage (NUS): Maintenance and expansion of the storage program for master microfilms from RLG cooperative projects; member storage of their other/own microform masters; 18 January 1985 – 17 June 1995
- Preservation Program – History: From a folder labeled "Pres History" that may have come from Nancy Elkington – begins with summary of seven cooperative microfilming projects from "CPMP [Cooperative Preservation Microfilming Project] I" to Art Serials, 1983-1992; a series of news releases, September 1988 – October 1991, and a call for proposals for GCMP [Great Collections Microfilming Project] IV, 21 February 1992; a summary of participants and the scope of projects from GCMP I to GCMP IV, 1983-199?; also includes Elkington memo on proposed instructional videos on microfilming – not pursued?? – 25 July 1999
- Preservation Program – Committee Correspondence, 1984: [More may exist in other cartons] Includes assignment of the program to Patti McClung (taking over from Barbara Brown) on 16 April 1984, and a reprint of Nancy Gwinn's paper at the 3rd National Conference of ACRL, Seattle, 4-7 April 1984, titled "A Nationwide, Coordinated Preservation Program – Its Time Has Come"; otherwise, folder represents more process than content?
- Preservation data elements in the MARC [Machine Readable Cataloging] format: Bits of work on this set of elements, especially field 583, from May 1986 to May 2004; RLG collaboration with Library of Congress and MARBI, from Ed Glazier to Susan Robillard Oros to RLG's Preservation Program participants and program officers, and ultimately to the last RLG preservation officer, Robin Dale; not enough in this folder to give a good overview/history – look for "583" in other folders/cartons?
- Preservation Program – RLG Conspectus scope notes: Background and examples from program officers Patti McClung, James Coleman, and Nancy Elkington, including Conspectus user guides, a 4-page sample of preservation scope notes, and an undated set of Conspectus category IDs, grouped by Conspectus division; February 1988 – January 1993
- Preservation Program – "Snowbird" (Colorado) conference of spring 1989: some of the background work done towards this program participants meeting, plus some notes on what was done there; incomplete without such items as the agenda packet and minutes

- Preservation Program Information Packet: An extensive set of materials that appear to have been prepared to inform recipients about the program as of late 1990; includes brochures on RLG membership and accomplishments in 1989, reports on the program in 1989 and 1990, issues of the RLG News magazine featuring preservation (1986, 1989, 1990), press releases about two grants, charges to Preservation task forces, and agendas plus minutes for the Preservation Committee meetings of 7-8 May and 5-6 November 1990; also, the agenda for RLG's "Symposium on Preservation of Photograph Collections in Research Libraries," 4-5 October 1990 (resulting publication not in this folder)
- Preservation Program – expansion: memos and assignments, thoughts about how to develop broader participation in the program, in two fragmented batches: 19 January – 4 April 1989 and 5 March – 6 Decemb34 1994
- Preservation Program  -- Various "facts": Originally in a binder labeled "Preservation Facts," this file begins with some timelines of program accomplishments from 1980 to 1991, plus plans for 1989 to 1993; followed by NEH (National Endowment for the Humanities) Planning Grant final report on creating an RLG cooperative preservation program, 16 May 1983; followed by materials about the RLG Master Negative Recon Project, 1982-1984, the first RLG Cooperative Preservation Microfilming Project (Phase I), 1983-1987, a bit on the CPMP Phase II, 1986-1989, and the East Asian Microfilming Project, 1986-1988; a call for proposals for a Music Scores Filming Project  (not funded?), November 1986; and a brief report on the Preservation Program for the fiscal year September 1990 – August 1991 (coming just as RLG disbanded the old program committees as part of the reorganization dubbed "RLG92"); finishes with two articles: "Cooperation in Preservation Microfilming: A Consortial Perspective, by Nancy Elkington, 16 July 1992, and "Consortial Action: RLG's Preservation Program," July 1992
- Programs – fiscal years 1992 and 1993: Subset of memos and calculations on the costs and value to members of the "RLG Preservation Microfilming Handbook," "CADS" (Collection Access and Delivery Services) – recast/new ways of offering public services/shared resources support?; "SAI" (Serials Access Initiative) – also new, an offshoot of RLG Conspectus work?; "PREFIS" (Preservation Reformatting Information Service) – a new sort of forum for information and expertise?); all part of  recasting RLG programs work, particular in the preservation area, following the RLG92 reorganization
- Preservation Program – 1990s communications: A 3-page memo, undated, evidently from Nancy Elkington, on communication mechanisms and uses, including a listserv called "RLG Preservation List," "PREFIS: The Preservation Reformatting Information Service," and (other?) electronic conferencing anticipated for summer 1992 – memo appears to be meant for a listserv posting
- Preservation Program – Planning Conference, 7-8 June 1993: Speaker invitation letters, agenda, speakers and Preservation Advisory Council members and attendees lists; April 1993 issue of "RLG Preservation Update," a listserv posting announcing the conference; also, subsequent new PRESERV Program brochure, conference report, July 1993 issue of "Colloquium: News of the RLG Membership," job description for Member Programs & Services department officer for preservation (Laurie Abbott's former position), and two memos on "PRESERV '94" agenda and plans; April-September 1993
- Preservation Program – aka PRESERV: Copies of "RLG Preservation Update" for January, April, and May 1993 followed by February (title changed to "RLG PRESERV Update)), April (titled "RLG PRESERV Highlights"), June, and November 1994 (gaps simply issues missing from this folder, or nothing published in other months?); also, "PRESERV in FY94: Annual Highlights," September 1994

- Preservation Program – "Whole Discipline" project: Plans for a "whole discipline preservation project," treating materials across a range of formats and locations, July 1993 – November 1994
- Preservation Program – Digital focus: Formation and initial work of the program's Task Force on Digital Test Projects, later charged as the RLG "Digital Preservation Projects Task Force," June 1994 – June 1995; plus, copy of RLG's October 1993 agreed-on, short, organizational strategic directions memo: "Mid-Decade Directions Outline," starting with "1. Preservation and Distribution of Digital Information"
- Preservation Program – needs assessment: "Final Report on the Archives Preservation Needs Assessment Field Test, Conducted by Members of the Research Libraries Group, Inc.," January 1994, plus a report summary (undated sheet); done for a Commission on Preservation and Access (CPA) model, at CPA's request
- Preservation Program: Agenda and outcomes from an RLG PRESERV meeting of 19 March 1994, Cornell University, following a "Preservation of Digital Files Symposium," held on 17-18? (Not enough about the symposium per se in this file – see also Carton 54)
- RLG Digital Planning Retreat: Confidential (to central staff) 7-page report on day-long discussion by 10 RLG staff – James Michalko, David Richards, Nancy Elkington, Win-Shin Chiang, La Vonne Gallo, Carol Hughes, Bruce Washburn, Alan Tucker, and Patti McClung (facilitator) – about RLG digital opportunities, looking ahead and trying to dig into activities in a new-ish area for RLG; 18 January 1995
- Preservation Program correspondence: Some exchanges with/about the Preservation Advisory Council and preservation activities, fall 1994 (fiscal year 1995) and fall 1995 (fiscal year 1996)
- Preservation Program planning: Strategic five-year plan outline for the PRESERV Program, e-mailed version, plus several "appendices" of summer 1996 PRESERV activities/background; June-July 1996
- Preservation Program – contracting with Cornell: Working with Cornell University library staff, specifically Anne Kenney and Oya Rieger, to produce the "RLG DigiNews" newsletter and to design and conduct "MDIP" (Managing Digital Imaging Projects") workshops; initial planning for this done by Linda West, director of Member Programs and Services, Nancy Elkington, Ricky Erway, arrangements devolved onto Robin Dale to shepherd/support; only part of a longer contracting relationship with Kenney and Rieger; June 1996 – April 1999
- Preservation Program – MDIP: "Managing Digital Imaging Projects: An RLG Workshop," presented by Anne Kenney and Oya Rieger, Cornell University, at the Smithsonian Institution, Washington, DC, 24-29 October 1997; contents of a 3-ring binder with hand-lettered dividers; includes participant list, sessions summary, and background/working materials – about 3/4 inches' worth; 1997
- Preservation Program: Preservation Advisory Council material, 1996-1997 (fiscal year 1997)
- Preservation Program: Preservation Advisory Council material, 1997-1998 (fiscal year 1998)
- Preservation Program: Preservation Advisory Council material, March-November 1999 (mostly in fiscal year 1999, with a survey of participants than ran over into fiscal year 2000 [after 1 September]
- Digital Access Agenda: Digital Image Access Project (DIAP) – Basic starting-out information of the type sent to interested inquirers – original participation information to RLG members, sheet on the "RLG/Stokes Technical Test Project," an RLG press release on 8 members and the project being undertaken, a few subsequent examples of communication

> with/among the participants; look elsewhere for what actually happened during the project; March 1993 – August 1994

- Digital Access Agenda: Mailing information about those interested in DIAP (Digital Image Access Project) – this folder shows types of interested generated, and from what quarters; they were not sent the specific list of hardcopy materials provided to project participants?; appears that there were several listserv/Corp Mail address database codes for different kinds of information distribution – DIGML to interested parties, but DIAP1 for participants, for example?; October 1993 – November 1995
- Digital Access Agenda: DIAP (Digital Image Access Project) workshop – preparations for, correspondence about, final agenda and participation list, a little follow-up; a "process" rather than a "content" file; October 1994 – April 1995
- Digital Access Agenda: DIAP (Digital Image Access Project) workshop attendees' thoughts; post-"symposium" evaluations collected; early April 1995
- Digital Access Agenda: "RLG Digital Image Access Project: Proceedings from an RLG Symposium held March 31 and April 1, 1995, Palo Alto, California" (no longer called a "workshop"); edited by Patricia A. McClung (copy-edited and production overseen by Jennifer Porro); very incomplete folder  -- a few memos about proceedings publication preparation, plus a copy of Ricky Erway's presentation -- "Options for Digitizing Visual Materials" – from the full publication [full soft-bound proceedings are in another carton]
- Preservation in the UK/Ireland: The Cedars (CURL [Consortium of University Research Libraries] Exemplars in Digital ARchiveS) Project – Background/anticipatory/planning papers from Cedars' Web site at the University of Leeds, all mid-1998; Nancy Elkington, RLG program officer then stationed in London to work with UK/Ireland members, was included in Cedars' management group
- Preservation in Australia: Invitation and background for program officer Robin Dale to join the International Advisory Group for PADI (Preserving Access to Digital Information) and PADI's Web site, from Jan Fullerton, head of the National Library of Australia; September-November 1998

[Carton 144: See note preceding Carton 1 above.]

**CARTON 145: Files of Noel Hanf, Wiggin & Dana**

Late 1990s-2004: Mixture of Board meetings nos. 82-85 and nos. 93-96 with a few board elections, a few annual membership meetings, a couple of Cultural Materials meetings, a couple of annual financial statements, and the RLG Secretary's 2003 annual report to CT Secretary of State.  [SEE ALSO: Presidential Carton 44 for meetings 83-102.]

- Annual Membership Meeting, April 26, 1999 (Getty Center, Los Angeles, CA)
- Board of Directors, No. 82, June 21, 1999 (New York, NY)
- Board of Directors, No. 83, October 3, 1999 (Noel Hanf's notes only?)
- Board of Directors, No. 84, February 25, 2000 (Mountain View, CA)
- Cultural Materials Initiative Policy Meeting, March 24, 2000 (New York, NY)
- Cultural Materials Alliance Meeting, April 30, 2000 (New York, NY)
- Board of Directors, No. 85, June 19, 2000 (Boston, MA)
- Audited Financial Statement from Grant Thornton for Fiscal Year 2000
- Audited Financial Statement from KPMG for Fiscal Year 1995
- Board elections & balloting, 2004
- Board elections and balloting, 2001

- Board of Directors, No. 93, February 24, 2003 (Mountain View, CA)
- Annual Membership Meeting, April 20, 2002 (Amsterdam, Netherlands)
- Annual Membership Meeting, May 6, 2003 (Boston Public Library, Boston, MA)
- Board of Directors, No. 94, June 20, 2003 (New York, NY)
- Board of Directors, No. 95, September 29, 2003 (Palo Alto, CA)
- Board of Directors, No. 96, February 20, 2004 (Palo Alto, CA)
- Annual Membership Meeting, April 27, 2004 (Washington, DC)
- RLG Secretary's 2003 Annual Report to Connecticut Secretary of State (names and addresses of board members)

## CARTON 146: Files of Noel Hanf, Wiggin & Dana

June 1983 – February 1985: Meetings nos. 24-31 of the RLG Board of Governors and meetings of some of its key committees (may include agenda, minutes, and/or related memos).  [SEE ALSO: Presidential Carton 20 for nos. 16-28 and Carton 68 for nos. 22-33.]

- Board of Governors, No. 24, June 21, 1983 (UC Santa Barbara)
- Board of Governors, No. 25, September 29, 1983 (Dartmouth College)
- Board of Governors, No. 26, December 1, 1983 (O'Hare Hilton)
- Board of Governors, No. 27, March 1, 1984 (Stanford University)
- Special meetings of Executive, Finance, and Computer Systems committees of the Board of Governors, March 26, 1984 (New York University)
- Board of Governors, No. 28, June 19, 1984 (Dallas, Texas)
- Special Committee of RLG-member presidents, June 27, 1984 (San Francisco, CA)
- Executive and Computer Systems committees, August 31, 1984 (Chicago, IL)
- Board of Governors, No. 29, October 4, 1984 (Stanford, California)
- Board of Governors, No. 30, December 6, 1984 (New York Public Library)
- Board of Governors, No. 31, February 28, 1985 (Stanford University)

## CARTON 147: Files of Noel Hanf, Wiggin & Dana

February 1988 – September 2002: Meetings nos. 42-47, 80, and 89-92 of the RLG Board and meetings of the Executive Committee (may include agenda, minutes, and/or related memos).  [SEE ALSO: Corporate Communications Cartons 66, 30, and 48 for same meetings; and Presidential Carton 44 for meetings 83-92 and beyond.]

- Board of Governors, No. 42, February 25, 1988 (University Southern California)
- Executive Committee, April 27, 1988 (New York, NY)
- Board of Governors, No. 43, June 16, 1988 (Stanford University)
- Executive Committee, August 24, 1988 (New York, NY)
- Board of Governors, No. 44, October 13, 1988 (SUNY at Binghamton)
- Board of Governors, No. 45, November 17, 1988 (New York University)
- Executive Committee, January 5, 1989 (Mountain View, CA)
- Board of Governors, No. 46, February 23, 1989 (Palo Alto, CA)
- Executive Committee, April 4, 1989 (Cincinnati, OH)
- Board of Governors, No. 47, June 15, 1989 (New York University)
- Executive Committee, August 16, 1989 (Philadelphia, PA)
- Board of Directors, No. 80, February 25, 1999 (Palo Alto, CA)

- Board of Directors, No. 88, June 25, 2001 (New York, NY)
- Board of Directors, No. 89, October 7, 2001 (Washington, DC)
- Board of Directors, No. 90, February 15, 2002 (Mountain View, CA)
- Board of Directors, No. 91, June 28, 2002 (New York, NY)
- Board of Directors, No. 92, September 30, 2002 (Washington, DC)

## CARTON 148: Files of Noel Hanf, Wiggin & Dana

March 1979 – June 1981: Meetings nos. 1-13 of the RLG Board of Governors and meetings of the Executive Committee (may include agenda, minutes, and/or related memos).  [SEE ALSO presidential Carton 60 for same period.]

- Executive Committee, March 20, 1979 (New York Public Library)
- Executive Committee, May 29, 1979 (Columbia University)
- Executive Committee, July 8, 1979 (University of Michigan)
- Executive Committee, August 19, 1979 (Columbia University)
- Executive Committee, September 23, 1979 (New York Public Library)
- Board of Directors, Board of Governors [originally the designation of an annual meeting group?], and Executive Committee, October 29, 1979 (University of Pennsylvania) – counted in subsequent numbering scheme as Meeting No. 1 of the Board of Governors, although explicit reference to meeting numbers was haphazard in agendas and minutes at first
- Board of Governors, No. 2, November 26, 1979 (Princeton University)
- Board of Governors, No. 3, January 7, 1980 (Stanford University)
- Board of Governors, No. 4, February 18, 1980 (Columbia University)
- Board of Governors, No. 5, March 31, 1980 (Yale University)
- Board of Governors, No. 6, May 12, 1980 (Brigham Young University)
- Board of Governors, No. 7, June 26, 1980 (Rutgers University)
- Board of Governors, No. 8, August 5, 1980 (Colorado State University)
- Board of Governors, No. 9, October 28, 1980 (Johns Hopkins University)
- Board of Governors, No. 10, December 16, 1980 (Berkeley)
- Board of Governors, No. 11, February 17, 1981 (Tulane University)
- Board of Governors, No. 12, April 14, 1981 (Northwestern University)
- Board of Governors, No. 13, June 24, 1981 (Stanford University)

## CARTON 149: Files of Noel Hanf, Wiggin & Dana

Miscellaneous board files (especially for elections), 2001-2004, plus representative miscellaneous work with RLG -- from billing W&D services to RLG, to reports from auditors, to Ariel sale, to service developments; too diverse to summarize, but not a lot.

- Wiggin & Dana services billing to RLG for periods April-August 2001, unclear period over 2001-2002, and December 2002 – March 2003
- Annual orientation presentation (slide printouts) for new members of RLG Board of Directors, October 7, 2001
- RLG annual audit by Grant Thornton, August 31, 2001
- Annual audit by Grant Thornton, August 31, 2002
- Grant Thornton auditors letter to Wiggin & Dana; W&D response (regarding RLG-Infotrieve Ariel-related dispute), October 2003

- RLG Board of Directors Nominating Committee 2002
- RLG Board of Directors Nominating Committee 2003
- RLG Board of Directors Nominating Committee 2004
- Presentation materials and brochures for RLG Cultural Materials Initiative, January 2001; various RLG four-color brochures, February 2002
- Sale of Ariel to Infotrieve: Confidential memo to RLG Board of Directors regarding sale terms, November 2002
- Bodleian Library 400th Anniversary conference, 2002 (Noel Hanf registration)
- RLG Disaster Recovery Program: Chief Financial Officer John Sundell memo to Noel Hanf and RLG Treasurer Robert H. Scott regarding their access to RLG Bank of America accounts as part of disaster planning), March 2002
- British Library – RLG possible joint venture: Negotiations to develop joint Europeans services (a record supply database?), 1994-1996  (Appears to be part of assessment of what this was about and what failed)
- Ameritech Library Services, materials related to joint development of Diogenes, later Marcadia, copy cataloging service, 1996-1997

## CARTON 150: Files of Noel Hanf, Wiggin & Dana

June 1985 – September 1986: Meetings nos. 32-36 of the RLG Board of Governors and some meetings of its key committees (may include agenda, minutes, and/or related memos), plus file on Ford Foundation and NAC (national Network Advisory Committee) meetings involving Noel Hanf. [SEE ALSO Corporate Communications Carton 43 for same board meetings, and Cartons 24 and 166 for a bit more on NAC.]

- Board of Governors, No. 32, June 20, 1985 (University of Minnesota)
- Special Committee of RLG-member presidents, June 29, 1985 (Cambridge, Mass.)
- Board of Governors, No. 33, October 3, 1985 (Cornell University)
- Ford Foundation Library Committee's invitational meeting [at instigation of Council on Library Resources?] on "Legal and Economic Issues Inherent in the 'Information Revolution," December 5, 1985.  PLUS Noel Hanf's paper, "Library Networks and the Law," delivered at a Network Advisory Council (NAC) meeting in May 1985.  PLUS background papers read by Hanf in preparing.
- Board of Governors, No. 34, February 27, 1986 (Stanford University)
- Executive Committee, May 2, 1986 (Minneapolis, Minnesota)
- Board of Governors, No. 35, June 12, 1986 (University of Iowa)
- Board of Governors, No. 36, September 5, 1986 (New York Historical Society)
- Special Committee of RLG-member presidents, September 28, 1986 (Stanford University)

## CARTON 151: Files of Noel Hanf, Wiggin & Dana

November 1986 – October 1987: Meetings nos. 37-40 of the RLG Board of Governors and meetings of some of its key committees (may include agenda, minutes, and/or related memos). [SEE ALSO Corporate Communications Carton 43 for same meetings.]

- Board of Governors, No. 37, November 6-7, 1986 (Brown University)
- Executive Committee, January 12, 1987 (Stanford University)
- Board of Governors, No. 38, February 11, 1987 (Stanford University)
- Executive Committee, April 15, 1987 (New York University)

- Board of Governors, No. 39, June 8, 1987 (Mackinac Island, Michigan)
- Executive Committee, July 24, 1987 (New York University)
- Special Committee of RLG-member presidents, October 5, 1987 (University of Pennsylvania)
- Board of Governors, No. 40, October 8, 1987 (University of Pennsylvania)

## CARTON 152: Files of Noel Hanf, Wiggin & Dana

1977–1998: Meetings nos. 74-78 of the RLG Board of Directors and Annual Meetings, plus various business dealings – e.g., transfer of BALLOTS to RLG and later distributor dealings. [SEE ALSO Corporate Communications Cartons 57 and 30 for same board meetings.]

- Stanford University Retirement Plan, sent to Noel Hanf in 1994 (no context)
- Transfer of BALLOTS to RLG from Stanford University and related early issues of change from BALLOTS to RLIN, 1978-1984 (includes BALLOTS rates for services, February 1978)
- BALLOTS customer contracts:
    - 1978-1979 – More details of Stanford to RLG BALLOTS transfer
    - August 1978 – CLASS-Stanford Agreement for the "California Library Authority for Systems and Services" to provide BALLOTS to the California library community
    - 197? – Lists of RLIN users through RLG and through CLASS
    - 1977-1978 – Some Stanford University user contracts or parts of them
- Evolution of RLG's agreement with CLASS (California Library Authority for Systems and Services) over 1981-1989
- Board of Directors, No. 74, February 28, 1997 (Mountain View, CA)
- Board Nominating Committee, 1997
- Annual Membership Meeting, May 5-6, 1997 (Chicago, IL)
- Board of Directors, not numbered (single meeting topic: severance-pay benefits plan), May 5, 1997 (Chicago, IL)
- Board of Directors, No. 75, June 20, 1997 (New York, NY)
- Board of Directors' Conflict of Interest policy and annual questionnaire drafting, September 1997
- Board of Directors, No. 76, October 4, 1997 (Washington, DC)
- RLG AMICO distribution agreement with AAMD (American Association of Museum Directors), drafts in first quarter of calendar 1998
- RLG visit by Noel Hanf and Mary Norris, Wiggin & Dana, to consult with staff as needed, February 1-2, 1998 (thin folder of very mixed/unrelated topics)
- Board of Directors, No. 77, February 23, 1998 (Mountain View, CA)
- Telecommunications Act of 1996, Universal Service section and RLG (response to query from New York Public Library), April 1998
- Board of Directors, No. 78, June 26, 1998 (New York, NY)
- RLG dealings with SilverPlatter Information, Inc., mid-1998
- Annual Membership Meeting, May 5-6, 1998 (London, England) – plus more about the UK and RLG

## CARTON 153: Files of Noel Hanf, Wiggin & Dana

1980s-1990s: Mixture of files on some RLG dealings with Stanford University (host institution agreement), members (membership agreements), corporation (bylaws, a board election), and business partners (for fonts use, AMICO dealings, Ariel, Retro Link Associates, AVISO).

- RLG-Stanford Host Institution Agreement revision drafting and completion, 1995 – plus a little towards a separate RLG benefits package; 1999 letter from Noel Hanf to John Sundell, RLG CFO
- RLG-SU Host Institution Agreement and severance benefits: Materials related to preparing to end RLG participation in the Stanford benefits plan, 1988-1994 (from earlier copy of host agreement to 1994 exchanges of Molly Singer, RLG CFO, and president James Michalko with RLG Board and Noel Hanf, respectively)
- Ballots cast by RLG General Members in Board election of 2000
- Wiggin & Dana statement for services to RLG, January-July 2000
- Wiggin & Dana statement for services re SUNY Binghamton, 1994-1995
- Wiggin & Dana statement for services re SUNY Albany and SUNY Buffalo, 1994
- Membership/membership renewal contract negotiations for four SUNY campuses, Albany, Binghamton, Buffalo, Stony Brook, 1994
- Membership contract negotiations for SUNY campuses (mostly Binghamton), 1981-1983
- One letter re transfer of Avery Index to Architectural Periodicals from Columbia University to the J. Paul Getty Trust, 1983
- Clean copy of RLG Bylaws and Certificate of Incorporation effective 1 June 1993
- Memos from Linda West, Director of Member Programs, on member dues and program participation changes, spring 1997; plus RLIN Rates for Services for fiscal year 1998
- David Richards, Director of Computer Development (aka Systems), to Wiggin & Dana regarding draft license agreement for RLG use of Bigelow and Holmes fonts [for CJK? for Arabic and/or Hebrew?], 1995
- AMICO, 1998: One e-mail providing glimpse of AMICO Executive Director David Bearman's operating style
- Ariel: PICA (Netherlands) distribution agreement, draft of 15 July 1994
- One item on free RLIN searching program for library schools, 1994
- Retro Link Associates and RLG: RLA's switch from RLG's BRCON service to intersystems Zephyr connection for use of RLG bibliographic records in its cataloging services – modifications to agreement, 1994
- RLG-ISM (Information Systems Management Corporation, Canada) draft AVISO development/marketing agreement to foster standards-compliant directions in ISM's AVISO product* to support the RLG SHARES resource-sharing/interlibrary loan program, 1993-1994. [*comprehensive interlibrary loan management]

## CARTON 154: Files of Noel Hanf, Wiggin & Dana

1990-1994: Primarily meetings nos. 51 and 53-63 of the RLG board and related committees [SEE ALSO Corporate Communications Cartons 69 and 46 for all meetings from 51 to 63]. Also, files on annual meetings in 1993 and 1994 and a few files on varied business dealings (Retro Link Associates agreement, CERL).

- Board of Governors, No. 51, November 8-9, 1990 (Washington, DC)
- Board of Governors, No. 53, June 13-14, 1991 (Washington, DC) – action to embark on "RLG92" changes in governance and membership structure
- Executive Committee Meeting, July 25, 1991 (Chicago, IL) – preparations for first election of new, smaller "Board of Directors"
- Board of Directors, No. 54, October 4, 1991 (Mountain View, CA) – first meeting of new, smaller board elected by all members

- Board of Directors' 1991-1992 Reference Binder
- Board of Directors, No. 55, January 31, 1992 (Mountain View, CA) – includes outline of tour of Villa Street offices with description of divisions' functions
- Board Nominating Committee, 1992
- Board of Directors, No. 56, April 10, 1992 (Washington, DC)
- RLG – Retro Link Associates Agreement: signed on January 1, 1992, problems described in memo from Jack Grantham, Director of Customer Operations and Support, June 1992
- Annual Membership Meeting, June 24, 1992 (Stanford, CA) – the first of these under Bylaw changes made as part of "RLG92"
- Board of Directors, No. 57, June 24, 1992 (Mountain View, CA)
- Board of Directors' 1992-1993 Reference Binder
- Board of Directors, No. 58, October 16-17, 1992 (Washington, DC) – plus staff reorganization guide from James Michalko
- Staff Benefit Plan Participation Census, 1993
- Board of Directors, No. 59, February 12, 1993 (Mountain View, CA)
- Board Nominating Committee, 1993
- Board of Directors, No. 60 [conference calls], April & May 1993
- Board of Directors, No. 61, June 21, 1993 (Mountain View, CA)
- Annual Membership Meeting, June 21-23, 1993 (Mountain View [& Palo Alto?], CA)
- CERL (Consortium of European Research Libraries) – RLG draft agreement and considerations about "RLG in Europe," 1993
- Board of Directors, No. 62, September 30 – October 1, 1993 (Washington, DC)
- Board Nominating Committee, 1994
- Board of Directors, No. 63, February 2, 1994 (Mountain View, CA)
- Annual Membership Meeting, February 2-3, 1994 (Mountain View, CA)

**CARTON 155: Files of Noel Hanf, Wiggin & Dana**

1994-1997: RLG Board of Directors meetings nos. 64-73, annual meeting in 1995, and some Wiggin & Dana consultation with RLG post-Host Institution arrangement with Stanford. [SEE ALSO Corporate Communications Cartons 46 and 57 for same board meetings.]

- Board Nominating Committee work, 1994
- Board of Directors, No. 64, March 29, 1994 (teleconference)
- Annual Membership Meeting, May 1, 1995 (Cambridge, MA) – RLG's 20th anniversary celebration; includes slide-show script narrated by Noel Hanf
- Board of Directors, No. 65, June 6, 1994 (London, England)
- Board of Directors, No. 66, September 25-26, 1994 (Washington, DC)
- Board of Directors, No. 67, February 24, 1995 (Mountain View, CA)
- Board of Directors, No. 68 [?? Needs double-checking], April 19, 1995 (teleconference)
- Board of Directors, No. 69, July 7, 1995 (Washington, DC)
- Board of Directors, No. 70, October 6-7, 1995 (Washington, DC)
- Board of Directors, No. 71, February 23, 1996 (Mountain View, CA)
- RLG visit by Noel Hanf and Mary Norris, Wiggin & Dana, April 29-30, 1996
- Annual Membership Meeting, May 6-7, 1996 (Philadelphia, PA)
- Board of Directors, No. 72, June 21, 1996 (New York, NY)
- Board of Directors, No. 73, October 6-7, 1996 (Washington, DC)
- Internal notices of new or withdrawing members and steps involved, 1996 – small sample

- Human resources consultation: Wiggin & Dana review of RLG employment application form, 1996, RLG affirmative action program, 1996, and employee handbook, 1997

## CARTON 156: Files of Noel Hanf, Wiggin & Dana

1981-1983: Primarily meetings nos. 14-23 of the RLG Board of Governors and some of its key committees (may include agenda, minutes, and/or related memos). SEE ALSO presidential Carton 20 for nos. 16-28 and Carton 68 for nos. 22-23.

- RLG income tax return for 1980 with comments from Noel Hanf
- Board of Governors, No. 14, September 15-16, 1981 (Chicago, Illinois) – agenda and minutes
- Executive Committee Meeting, 4 November 1981 (New York, NY) – minutes
- Special Committee Meeting of RLG-member presidents, 4 November 1981 (New York, NY) – minutes
- Board of Governors, No. 15, 10 December 1981 (New York University, NY) – "general membership meeting" with keynote speaker John Brademas, New York University's president
- Special Committee Meeting of RLG-member presidents, 16 February 1982 (Stanford, CA) – agenda and minutes
- Executive Committee Meeting, 16-17 February 1982 (Stanford, CA) – agenda and minutes
- Board of Governors, No. 16, 18 February 1982 (Stanford, CA) – agenda and minutes
- Board of Governors, No. 17, 20 March 1982 (Chicago, IL) – agenda and minutes, plus William and Caroline Arms' "Report on Performance Problems of the RLIN Computer System," 17 March 1982
- Board of Governors, No. 18, 22 April 1982 (Chicago, IL) – agenda and minutes plus related memo [president Edward E. Shaw announces intention to resign by or before 6 July 1982]
- [Not found: any indication of a July 1982 Executive Committee Meeting]
- Board of Governors, No. 19, 7 July 1982 (Temple University, PA) – agenda and related articles
- [SEE Carton 20 for Special Committee meeting on 26 July 1982]
- Board of Governors, No. 20, 30 September – 1 October 1982 (American Antiquarian Society, MA) – agenda, minutes, and revised Bylaws
- Board of Governors, No. 21, 2 December 1982 (Chicago, IL) – agenda, minutes, and miscellany
- Patricia M. Battin, RLG president as of July 1982, memo to Special Committee transmitting "RLIN testimonials" from member-users, 21 December 1982
- Board of Governors, No. 22, 10-11 February 1983 (Stanford, CA) – agenda and related memos; minutes appear incorporated in agenda for meeting No. 23]
- Executive Committee Meeting, 18 April 1983 (Washington, DC) – 1 background member and notes of Noel Hanf
- Special Committee meeting of RLG-member presidents, 18 April 1983 (Washington, DC) – agenda and notes of Noel Hanf
- Board of Governors, No. 23, 21-22 April 1983 (University of Oklahoma) – agenda [minutes incorporated in agenda of meeting No. 24?]

## CARTON 157: Files of Noel Hanf, Wiggin & Dana

1989: CLASS (California Library Authority for Systems & Services) lawsuit against RLG over RLG's decision to terminate service agreement under which CLASS provided RLIN services to libraries.

- CLASS vs. RLG: Some background on CLASS-RLG relationship, 1977-1989; includes the 1987 service agreement being terminated [much more in files provided by C. James Schmidt, RLG, and Adrian Arima, Stanford University]
- CLASS vs. RLG: Two background packets from Stanford University's files, compiled by Adrian Arima, legal office, August 1979 – includes Stanford-BALLOTS relationship with CLASS
- CLASS vs. RLG: Background packet from RLG's files, compiled by vice president C. James Schmidt, August 1989
- CLASS vs. RLG: Correspondence on the case, May-August 1989
- CLASS vs. RLG: Correspondence on the case, September 1989 – June 1990 – Includes final settlement of 29 June 1990
- CLASS vs. RLG: Pleadings, Binder 1:
    1. Summons and Verified Complaint, 8 August 1989
    2. Points and Authorities in Opposition to Motion for Preliminary Injunction, 25 August 1989
- CLASS vs. RLG: Pleadings, Binder 2:
    1. Declaration of James Michalko in Opposition to Motion for Preliminary Injunction, 25 August 1989
    2. Notice of Hearing on Application for Admission of Counsel Pro Hac Vice, 24 August 1989
    3. Memorandum of Points and Authorities in Support of Application for Admission of Counsel Pro Hac Vice, 25 August 1989
    4. Declaration of Charles H. Brock in Support of Application for Admission of Counsel Pro Hac Vice, 25 August 1989
    5. Declaration of William J. Doyle in Support of Application for Admission of Counsel Pro Hac Vice, 25 August 1989
    6. Ex Parte Application for Order Shortening Time for Hearing on Application of William J. Doyle for Admission as Counsel Pro Hac Vice, 25 August 1989
    7. Order, 25 August 1989
    8. Plaintiff's Reply to Points and Authorities in Opposition to Motion for Preliminary Injunction, 29 August 1989
    9. Tentative Decision and Proposed Statement of Decision, 5 October 1989
    10. Notice of Deposition, 16 October 1989
    11. Notice of Order Denying Plaintiff's Motion for Preliminary Injunction, 2 November 1989
- CLASS vs. RLG: Pleadings, Binder 3:
    1. Notice of Motion for Preliminary Injunction and Discovery Sanctions, 14 November 1989
    2. First Amended Complaint, 14 November 1989
    3. Points and Authorities in Support of Order to Show Cause re Confidentiality of Records, 13 November 1989
    4. Order to Show Cause and Temporary Restraining Order re Confidentiality of Files, 15 November 1989
    5. Declaration of William J. Doyle in Opposition to Plaintiff's Motion for Sanctions, 22 November 1989
    6. Points and Authorities in Opposition to Plaintiff's Motion for a Preliminary Injunction, November 22 1989

7. Points and Authorities in Opposition to Plaintiff's Motion Regarding Confidentiality of Files, 22 November 1989
8. Declaration of James Michalko in Opposition to Plaintiff's Motion for Preliminary Injunction, 29 November 1989

See Correspondence file, September 1989 – June 1990 for final outcome.

The remaining files in this carton largely duplicate the bound materials, but with some additional memoranda included (identified in this inventory sans legal expertise in describing):

- CLASS vs. RLG: 4 August 1989 – Plaintiff's suit, filed with California Superior Court, Santa Clara County, and defendant notification from the court clerk
- CLASS vs. RLG: 8 August 1989 – Bound version of Plaintiff's suit
- CLASS vs. RLG: 25 August 1979 – Defendant's opposition to Plaintiff's motion for preliminary injunction (against termination of RLG-CLASS service agreement); declaration of James Michalko
- CLASS vs. RLG: 28 August 1989 – Plaintiff's notice of motion for preliminary injunction against termination of RLG-CLASS service agreement
- CLASS vs. RLG: 1 September 1989 – Plaintiff's response to defendant's opposition; declarations of Gary Strong, Sharon Vaughn Shirasawa, and Ronald F. Miller
- CLASS vs. RLG: 5 October 1989 – Judge denies plaintiff's original application
- CLASS vs. RLG: November 1989 – Plaintiff's request and court's grant of a 29 November 1989 appearance in court of defendant to contest the issue of record confidentiality [sequence summarized accurately?]
- CLASS vs. RLG: 22 November 1989 – Defendant counter filings in opposition, including further declaration of James Michalko
- CLASS vs. RLG: mid-November 1989 – Plaintiff's "First Amended Complaint," plus cover memo to William J. Doyle, Wiggin & Dana, from San Jose, CA attorney Charles H. Brock, Hoge, Fenton, Jones & Appel, Inc.
- CLASS vs. RLG: 29 November 1989 – Plaintiff submits support for preliminary injunction based on California antitrust law (see also memo in preceding mid-November file); declarations from Sharon Vaughn Shirasawa and Ronald F. Miller

## CARTON 158: Files of Noel Hanf, Wiggin & Dana

1981-1987: OCLC-RLG approaches to database copyrighting, RLG-Getty Trust dealings, RLG-Transtech "CJK" dealings.

- Correspondence re OCLC Database Copyrighting: Supplementary Copyright Registration for Claims of Joint Authorship by RLG members that had records in OCLC, 1984-1986 (includes views and actions of OCLC networks AMIGOS and SOLINET)
- J. Paul Getty Trust: Correspondence with Trust counsel regarding archive load of Getty records into RLIN and membership possibilities, 1982-1983
- J. Paul Getty Trust: Agreements with RLG regarding records load into RLIN and the Avery Index to Architectural Periodicals as an RLIN special database, together with background on the Trust's relationship and agreement with Columbia University to "host" the Avery Index, 1982-1983
- J. Paul Getty Trust: Prospective support for RLG project to create a portable RLIN system running on Amdahl Corporation's Aspen operating system (then in development), 1984
- CJK as an RLG trademark, 1986-1987

- Transtech International Corporation: Negotiation for Transtech to do CJK keyboard for RLG's use with IBM PCs, 1986 (single memo)
- Transtech International Corporation: Press releases and news article(s) about the Transtech-RLG partnership and resulting CJK system; RLG step towards trademarking "CJK", 1981-1984
- Transtech International Corporation: Negotiations over use of RLG proprietary CJK information in CLSI (CL Systems, Inc.) – Transtech collaboration on CLSI LIBS 100 system, 1985
- Transtech International Corporation: Draft maintenance agreement with Transtech for its "CJK terminal clusters" [was this executed?], 1983
- Transtech International Corporation: Correspondence related to work contracted, specifications, milestones and payments, and contract modifications, May 1981 – August 1982 [overlaps with following Documents folder]
- Transtech International Corporation: Documents and correspondence related to RLG-Transtech work agreement, June 1981 – March 1982 [overlaps with preceding Correspondence folder]
- Transtech International Corporation: Proposals to RLG for East Asian Character Input and Output [CJK] Equipment, 1981
- Transtech International Corporation: (Genesis of relationship) RLG Request for Proposals to supply East Asian character input and output equipment, 1981

## CARTON 159: Files of Noel Hanf, Wiggin & Dana

1975-1992: Mix of legal and budget/performance files on RLG and RLIN, with a focus on tax-exempt status; includes a 1984 IBM computer capacity study.

- RLG audited financial statements for FY1982, FY1983, [not '84], FY1985, FY1986, FY1987, FY1988, FY1989, [not '90], FY1991, FY1992
- Wiggin & Dana detailed itemization of billing charges for client RLG, 1989
- Directors and officers insurance under Stanford policies (Barbara Lindeman to Noel Hanf), 1988-1989
- Member use statistics for RLIN, 1988 (an example of routine statistics kept that also gives a benchmark of sorts for this period)
- James Michalko to RLG Board on FY1987 fiscal budget performance and current (FY1988) performance; plus approved FY1989 budget
- IBM computer capacity study and FY1985 planning recommendations to RLG, 1984
- RLG Summary of Findings, Sales, Use and Property Tax, study in 6 parts, undated [1990?]; PLUS (why?): Draft of "Networking – A Review of Selected Legislation, Regulations, and Related Issues," the project of an NCLIS/SLA (National Commission on Library Information Systems/Special Libraries Association) task force, written by Betty Taylor (from University of Florida Law Library); PLUS: miscellaneous related Wiggin & Dana research, 1984
- RLG's organizational/exempt status: Various documents related to issues of RLG's exempt status re types of members/users; topics include qualification as a public charity vs. a supporting organization; how to qualify potential members by their own organizational type – e.g., Linda Hall Library as a private foundation; the breakdown of RLG's sources of revenue (1978-1992) [apparent overlap with "RLG tax exemption matters" file below] – includes work by Judy Tucker and Barbara Lindsay, Wiggin & Dana
- RLG qualification in California for tax-exempt status: work to establish this status and "revival" task some years later, 1979 and 1990 – overlap with following file?

- RLG tax exemption matters: Includes impact of who is a member and relations with CLASS (California Library Authority for Systems and Services) and BCR (Bibliographical Center for Research), 1979/79 – 1980, plus a bit from 1990 [apparent overlap with "RLG's organizational/exempt status" file above]
- RLG qualification for exemption from Branford, CT municipal property taxes, 1976-1977
- RLG qualification for exemption from Connecticut sales tax, plus related correspondence, 1976 – includes faint copy of first RLG Annual Report for 1974-1975
- Supporting Organizations – Exempt Organizations: miscellany and legal research, 1976 – ca. 1992 (perhaps of interest only to legal counsel, if that, but see bits of correspondence with RLG presidents James E. Skipper and Edward E. Shaw)

[Carton 160: See note preceding Carton 1 above.]

## CARTON 161: Files of Noel Hanf, Wiggin & Dana

1973-1980s: SIGNIFICANT documents for early RLG history and developments in the 1970s, including some correspondence of first president, James E. Skipper; ALSO, various files from the 1980s – related to incorporation, governance, and the RLIN service agreement, particularly agreements with State University of New York (SUNY) campuses.

- Memos from Patricia Battin to RLG Board during her RLG presidency, 1982
- Special Committee of RLG-member presidents: Minutes of "4th meeting," 4 June 1981 (Chicago, IL)
- Wiggin & Dana statements for services to RLG: 1988, 1987, 1986, 1985, part of 1984, 1978, 1977, 1976
- Federal tax-exempt status: Review and reconfirmation, 1981
- Bylaws: Amendments between 1980 and 1984, plus some background on reasons for change
- Biennial Report of RLG to Connecticut Secretary of State, 1980 [lists officers and directors and their addresses; no text reportage]
- RLG incorporation and governance correspondence, 1 May 1975 – 20 November 1978, including possibly the largest collection extant of correspondence from RLG's first president and CEO, James E. Skipper
    -- This appears to be a central file for reconstructing the history of the original players and their first steps. Includes Noel Hanf's and Wiggin & Dana's appointments as RLG's legal counsel and firm; correspondence among the 4 founding institutions; and the Skipper correspondence noted
- Changes necessary in RLG incorporation papers in the wake of Harvard University's withdrawal, 1978
- Carnegie Corporation of New York grant to RLG, related material, 1976 [? slight file]
- Application for and grant of federal tax-exempt status for RLG, 1976; application includes a 1974 description of RLG's purpose and operations that looks highly pertinent to any early history
- Evolving drafts of Certificate of Incorporation and Bylaws, June – November 1975
- RLG founders – curricula vitae, 1976, plus descriptive material on New York Public Library and Columbia University Libraries
- Harvard and the Research Libraries Group -- description and history as written by Harvard library director Douglas W. Bryant, in:
    - "Harvard University Library Annual Report, 1973-1974" (together with Louis Martin);

- "The Cooperative Future of Research Libraries" (paper), 1975;
  - "The Changing Research Library" (paper), 1974
- Alfred P. Sloan Foundation grant-in-aid to Yale for RLG, 1974 [slight file]
- RLG founders' Memorandum of Understanding regarding operations and incorporation, 1974
- Computer systems: IBM agreements, 1977 [this file is inconclusive regarding subsequent execution]
- Computer systems (fragmentary): Beehive terminals selection, 1976; BALLOTS system selection, 1978
- Computer systems: Blackwell/North America software license for RLG, 1976-1977
- Computer systems and grants: $750,000 gift from Timothy Mellon for computer hardware acquisition and possible matching grant for RLG program from National Endowment for the Humanities, December 1976
- Development of RLIN Individual-user searching service agreement, 1982-1989
- RLG RLIN Service Agreement, May 1985 – clean copy
- Evolution of RLG RLIN Service Agreement, plus issues reported, 1978-1985
- University of Hawaii RLG RLIN service agreement, 1985 [retain?]
- University of Texas at Austin Law School RLG RLIN service agreement, 1985 [retain?]
- SUNY (State University of New York) – Albany RLG-RLIN agreement, 1985
  [SUNY agreements, renewed every X years, may appear in other cartons; unclear how useful to retain]
- SUNY (State University of New York) – Stony Brook RLG-RLIN agreement, 1985
- SUNY (State University of New York) – Buffalo (Music Library?) RLG-RLIN agreement, 1984-1985
- SUNY (State University of New York) – Binghamton RLG-RLIN agreement, 1981

[Carton 162: See note preceding Carton 1 above.]

### CARTON 163: Files of Noel Hanf, Wiggin & Dana

1979-1988: Mixed lot of incomplete or inconclusive files (from which a bit of RLG's career can be gleaned … but not all worthy of retention?).  Includes batch of W&D "dead files" – did not result in the anticipated outcomes.

- Executive Committee Meetings: Minutes, 4 June 1981; Agenda, 4 November 1981
- Line of Credit with Wells Fargo Bank, N.A., September 1979
- Bylaws and Certificate of Incorporation amendments to create the "Board of Governors," August 1979
- Agreement with RCA Services Company for Zentec terminal maintenance, 1979
- New York State Library, New York State Archives, membership, 1986
- University of Florida, Florida State University, RLIN Service Agreement and membership, 1986
- State of Utah Archives and Records Service, membership, 1986
- University of California [Santa Barbara], Conflict of Interest correspondence, 1984-1985
- Withdrawal of Tulane University, 1982-1983

DEAD FILES:
- Proposed Agreement with the Library of Congress re Data for National Union Catalog, 1983-1988

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- Proposed Agreement with the British Library and Louisiana State University re ESTC, 1987 – PLUS earlier materials related to the Eighteenth-Century Short Title Catalogue
- Proposed lease for RLG at 3180 Porter Drive, Palo Alto, 1986 (Space not taken; in 1988 RLG did move off Stanford campus to 1200 Villa Street, Mountain View; and in the years before a subset of staff was housed in office space on University Avenue in Palo Alto)
- Proposed Equipment Lease with CIS Leasing Corporation, 1983
- Proposed Agreement with CACI, Inc., re RLIN software for use in National Library of Medicine, 1983
- Proposed Agreement with UTLAS (University of Toronto Library Automation System) re Page-Form Catalog and Authorities Control, 1980-1981
- RLG, Columbia University, and online Avery Index to Architectural Periodicals, 1980 (fragments)
- Proposed Agreement with Zentec Corporation re ZMS-90, 1979-1980

## CARTON 164: Files of Noel Hanf, Wiggin & Dana

1978-1984: Early RLG/RLIN status reports and business plans; PLUS a variety of publications, from a publications list to several kinds of RLIN user manuals, aids, and updates.

- Report on BALLOTS, April 1978 (bound)
- Plan for the Development of a Research Libraries Information Network, October 1978 (bound)
- RLG Presidents' Meeting, April 1979 (cover memo from Edward E. Shaw; agenda and background) – background includes the Presidents' Statement that was published in June 1979, inviting additional support and participation in RLG
- Peat Marwick Review of RLG Business Plan for fiscal years 1979-1986 (bound)
- RLG Progress Report, June 1979 (bound)
- RLG Draft Business Plan, June 1979
- RLG Business Plan, June 1980, 1979-1980 budget, and 1980 Year in Review (annual report) (each bound)
- RLG Publications List, February 1985, plus filled-in Publications Order Form (sent with checked items to Wiggin & Dana)
- RLIN User Publications: "Special" Databases: User's Manuals for SCIPIO (1st edition, February 1982), ESTC (1st edition, April 1982), and Avery (1st edition, July 1982)
- RLIN User Publications: Updates: "Effects … of MARC Updates 5, 6, and 7" (March 1985) and "Changes" memos for the Interlibrary Loan subsystem, SCIPIO, and ESTC (December 1983)
- RLIN User Publications: "Memory Aids" for fixed fields, by material format: Archival and Manuscripts Control (December 1983), Authorities (May 1984), Books (February 1984), Film (February 1984), Maps (February 1984), Recordings (February 1984), Scores (February 1984), Serials (February 1984)
- RLIN User Publications: Codes for Country of Publication (CP field), Geographic Area (043 field), Language (L field), and Relators (subfield 4), February 1984
- RLIN User Publications: Searching for East Asian Records on Non-CJK Terminals: Supplement to "Searching in RLIN II" (1st edition, February 1984)
- RLIN User Publications: Searching [training/reference] Folder (2nd edition, May 1984)
- RLIN User Publications: Searching in RLIN II: User's Manual (2nd edition, August 1984)
- RLIN User Publications: RLG Terminal Manual: Zentec 9003, RLG 90, RLG 40, and RLG 84 (3rd edition, February 1984); plus Updates No. 1 (November 1984) and No. 2 (April 1985) to

the terminal manual; plus RLIN Equipment cover memo and "Terminal Address Strapping Sheet" filled out for Wiggin & Dana
- RLIN User Publications: RLIN System Reference Manual (1st edition, March 1984)

## CARTON 165: Files of Noel Hanf, Wiggin & Dana – half full

Mid-1980s: Material related to the Library of Congress Network Advisory Committee, PLUS reaction from RLG, OCLC, and others to AT&T private line tariffs.

- Library of Congress Network Advisory Committee (NAC): Preparations for and publication of proceedings of a NAC meeting in 1985 titled "Key issues in the Networking Field Today" – includes Noel Hanf's paper on "Library Networks and the Law"; file ALSO contains background related to OCLC's move to copyright its union-catalog database; 1984-1986
- AT&T Private Line Tariffs, counteraction by RLG, OCLC, and others, to the Federal Communications Commission, 1985, in four folders:
  - January – 13 February 1985;
  - 14 February – 26 February 1985;
  - March – April 1985;
  - May – July 1985

## CARTON 166: President's Office (aka Administration)

1994-2005: Specifically from James Michalko's files.  (NOTE: These files contain only a subset of the records filed in RLG's Lotus Notes database for project planning, tracking, and correspondence.)  Includes: British Library Joint Venture [1994-1996 in all – SEE ALSO "British Library" in Cartons 87, 149 and 185 for materials from John Haeger and Noel Hanf].  Also: Files on RLG Cultural Materials; Union Catalog on the Web/RedLightGreen; RLG-Google cooperation; RLG and other search engines.

- British Library – RLG Possible Joint Venture, 1st year (1994) – Folder 1 of 5, contents separated by numbered tabs as follows:
  1. [Undated] – RLIN/SE: A Possible Joint Venture
  2. 16 Feb. 1994 – NBD [BL's National Bibliographic Database] General Description; 9 November 1992 – NBD Concept Paper; 13 November 1992 – NBD Outline Planning Document; 6 April 1994 – RLG discussion of products and services in support of NBD; 3 August [or March 8??] 1994 – NBD feasibility report
  3. April 1994 – DJB [David J. Brown] Associates, Market Research Report: "Bibliographic Records in Europe – The Market Potential for a New Joint Venture: Phase One – European Overview; for the British Library National Bibliographic Service and the Research Libraries Group"
  4. 19 May 1994 – Costings: NBD on RLIN (with annotations)
  5. 2 June 1994 – Considerations: Creation of a Euro-Database
  6. [Undated] – Memorandum of Intent: British Library and RLG; Terms of Reference for Joint Working Party on a European Partnership [Working party: Stuart Ede, James Elliot, Helen Hodgart, David Bothamley, BL; John Haeger, Noel Hanf, Molly Singer, RLG; Also provided for two steering groups: Brian Lang, Michael Smethurst, David Russon, John Mahoney, Stuart Ede, BL; James Michalko, Paul Mosher, Robert Scott, John Haeger, RLG]
- British Library – RLG Possible Joint Venture, 1st year (1994) – Folder 2 of 5, BL-RLG Joint Working Party, contents separated by numbered tabs as follows:

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7. 14 July 1994 – Potential NBS products/services for consideration; 14 July 1994 – NBS product/service valuation; 14 July 1994 – Technical scoping issues

8. 4 August 1994 – Letter, Elliot to Haeger, with NBS (National Bibliographic Services) products operational scenarios and NBS revenue forecast sheets; 11 August 1994 – RLG revenue recognition policies; 12 August 1994 – RLG "Trends from FY92 to FY97"; 25 July 1994 – Letter, Haeger to Ede, with "Immediate next steps" task list

9. 15 August 1994 – Product operations chart and Description of production of products, plus NBD weekly lists; August 1994 – RLG services revenue analyses

10. 31 May 1994 – RLG FY1994 revenue and expense forecast; 6 June 1994 – RLG FY1994-FY95 revenue and expense trends; 6 July 1994 – Elhill: Number of Transactions [?]; 7 July 1994 – Haeger's notes re Barbara Vondy as business/financial expert on RLG's working party; 15 July 1994 – Ede to Haeger, next steps, with Haeger's annotations and diagram of "new entity"; 19 July 1994 – Haeger assumptions for discussion re BL-RLG joint venture in Europe; 4 August 1994 – Elliot to Haeger: documents for 16-17 August meeting; 23 August 1994 – Ede to Haeger on assumptions coming out of 16-17 August meeting; 24 August 1994 – Elliot to Haeger on assumptions in operational scenarios paper per 23 August Ede letter-list; 2 September 1994 – Jack Grantham to Ede, comparing notes; 7 September 1994 – Elliot to Grantham, followup questions from 17 August meeting and answers; 19 September 1994 – Elliot to Haeger, costings and revenue from BL side for 1994-1995; 21 September 1994 – BL/NBD on RLIN, tasks estimates (draft – no costing)

• British Library – RLG Possible Joint Venture, 1st year (1994) – Folder 3 of 5, contents separated by numbered tabs as follows:
0. Two memos preceding numbered tabs: 22 September 1994 – Ede to Brian Lang, Northern American and European Research Libraries Partnership: Briefing notes for discussion of K-D Lehman, Deutsche Bibliothek; 7 October 1994 – Noel Hanf to Haeger, conceptual outline of contractual aspects of joint venture

1. 17 October 1994 – David D. Brown, DJB Associates, to Ede, consultation on market research by Lorcan Dempsey (his input); October 1994 – Brown to Ede, comments on Geac role

2. November 1994 – NBS: Series of business case assessments, forecasts, and options, Elliot to Haeger

3. 7 November 1994 – "JVCO": A Proposed Joint Venture Between RLG and the British Library – 13-page draft; 1 November 1994 – Richard Bonnar, of Garret & Co., Solicitors, to Hanf, "Report on Legal Issues Arising from a Proposed Joint Venture in the Provision of Bibliographic Services" – 45 pages; 2 November 1994 – Hanf to Haeger, questions and comments on Bonnar's memorandum; November 1994 – Information from Hanf to Haeger (pages from guide by Price Waterhouse) on VAT (value-added taxation) in the UK

• British Library – RLG Possible Joint Venture, 1st year (1994) – Folder 4 of 5, contents separated by numbered tabs as follows:
4. British Library Act, 1972, chapter 54, British Library governance, finance, staff matters

5. 1 November 1994 – Mark P. Fredenburg [consultant/contractor?] to Haeger and Molly Singer: Revenue projections for RLG, FY1992 – FY2000 [FY ending in August through 1994; thereafter, ending in March]; 1 November 1994 – Fredenburg to Haeger and Singer: Operational expenses for the RLG side of the proposed joint venture, 1995-2000 [years ending in March, not August, RLG's normal fiscal year]; 2 November 1994 – Fredenburg to Haeger: Preliminary merger expense projections; 3

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November 1994 – Fredenburg to James Michalko and Haeger: Baseline projections for RLG side of proposed joint venture, FY1994 – March 2000; 14 November 1994 – Fredenburg to Grantham: Projected expenses of taking over the British Library's bibliographic database, with request for review; 14 November 1994 – Grantham to Fredenburg: Response and notes, copied to Haeger (including an appended question from Haeger to Fredenburg); [Undated] – British National Bibliographic Services organization chart; June 1994 – RLG organization charts, by division

6. 30 November 1994 – *** CONFIDENTIAL*** "JVCO:" A Proposed Joint Venture Between RLG and the British Library: Business Plan – 56 pages including appendices (projections)

7. 7 November 1994 – Items for BL-RLG working part meeting, 8-9 December; 24 November 1994 – BL-RLG Joint Venture: potential data distribution model, Joint Venture entity and British Library interactions; 1 December 1994 – Hanf e-mail to Haeger: How the joint venture might be governed; 2 December 1994 – Fredenburg to Haeger: Valuation of RLG and NBS (National Bibliographic Services) contributions; 7 December 1994 – Bonnar (Garret & Co.) to David Bothamley (BL): Notes re governance, assets, etc. of JVCO in anticipation of RLG-BL 8 December meeting; 12 December 1994 – Glynn Barker (British Library Document Supply Centre, BLDSC) to Bothamley: VAT classification of BL sales, and product price sheets; 16 December 1994 – BL-RLG working party: User conversion costs, paper by Elliot; 22 December 1994 – Hanf e-mail to Haeger: RLG bylaws restrictions on disposition of assets (Section 1.13, handling of member capital contributions); 22 December 1994 – Ede e-mail to Haeger: Next working group meeting, anxieties, and revised notes; 22 December 1994 – Hanf e-mail to Haeger: Comment on attached views of Bonnar (attached) regarding the joint venture; 23 December 1994 – Hanf e-mail to Haeger: How to address Ede's and Bonnar's concerns regarding joint venture

- British Library – RLG Possible Joint Venture, 1st year (1994) – Folder 5 of 5, contents separated by numbered tabs as follows:
    8. 20 December 1994 – Michalko to Brian Lang [Chief Executive, British Library, Deputy Chair of BL Board]: Recommendations for important working party meeting in January 1995
    9. 3 January 1995 – Revised version of "JVCO" Business Plan
    10. 3 January 1995 – Proposed Alliance with RLG: Progress Report (to BL Steering Committee) from Ede; 5 January 1995 – Cover memos from Ede plus "The British Library National Bibliographic Services Investment Appraisal Project Business Case" [comparing the joint venture with the in-house development of BL systems to support NBS offerings]

- RLG Cultural Materials/Cultural Materials Initiative: Reports to Fidelity Foundation, 2003-2004 (Final report for Cultural Materials Initiative Grant)
- RLG Cultural Materials: Creating public as well as academic access – work leading to the Trove.net service
- RLG Cultural Materials/Cultural Materials Initiative: Funding/Sponsorship consultation and prospecting, 2000-2004
- Funding/Sponsorship background reading, 2003
- Union Catalog on the Web/RedLightGreen/more – Background reading file, 1996-2000
- Union Catalog on the Web/RedLightGreen: Metadata Harvesting and Mellon interest, early planning for UCW and proposal to the Andrew W. Mellon Foundation, etc.; Folder 1 of 2, 2000-July 2001

- Union Catalog on the Web/RedLightGreen: More planning, 2000-2001 studies, Advisory Group, formal proposal to the Andrew W. Mellon Foundation, etc.; Folder 2 of 2, August-December 2001
- Union Catalog on the Web/RedLightGreen: Final Report to Mellon Foundation on Planning Phase, June 2001-March 2002, submitted May 2002
- Union Catalog on the Web/RedLightGreen: Planning and implementation – Plumb Design, RecomMind, and RLG documents, December 2001-late 2003
- Union Catalog on the Web/RedLightGreen: Proposal to the Andrew W. Mellon Foundation for Implementation Phase of April 2002-June 2003; plus project/product team work fragments
- Union Catalog on the Web/RedLightGreen: User studies (fragments of the whole), 2002-2003
- Union Catalog on the Web/RedLightGreen: Marketing Plans in consultation with Azimuth Consultants, 2003
- Union Catalog on the Web/RedLightGreen: Final Report to the Andrew W. Mellon Foundation on Implementation Phase, 2002-2003, submitted October 2003
- Union Catalog on the Web/RedLightGreen: Proposal to the Andrew W. Mellon Foundation for Deployment Phase, 2004-2005, submitted in 2003
- Union Catalog on the Web/RedLightGreen: Deployment Phase User Study conducted with Azimuth Consultants, 2004
- Union Catalog on the Web/RedLightGreen: Deployment Phase Opportunity Analysis (business, market sizing, customer acquisition plans), Ted Hill Associates, 2004-2005
- Union Catalog on the Web/RedLightGreen: Final report to the Andrew W. Mellon Foundation on Deployment Phase, 2004-2005, submitted April 2005 (appendices include Azimuth user study and Ted Hill opportunity analysis)
- RLG-Google discussion and joint cooperation agreement, 2003-2005 [record breaks off in January 2005]
- RLG dealings with other-than-Google search engines; sorted by General; LookSmart; AskJeeves; MSN; Yahoo!; Highbeam; and Others; includes work with consultant Ray Williams – 2004-2005

## CARTON 167: President's Office (aka Administration)

1994-2006: Specifically from James Michalko's files – predominantly concerning strategic planning for the organization, 1993-2005. Also: Five years of management team meetings, 2002-2006; 10 files on all-staff briefings, 2001-2006; one 1990s file on staff input to benefits program; one 1999 file on RLG Cultural Materials launch. [NOTE: These files contain only a subset of the records filed in RLG's Lotus Notes database for the same topics.]

- Senior Staff management team meetings, March 2006
- Senior Staff management team meetings, 2005
- Senior Staff management team meetings, 2004
- Senior Staff management team meetings, 2003
- Senior Staff management team meetings, 2002
- All-staff briefing (aka Mind Meld), fall 2005
- All-staff briefing (aka Mind Meld), February 2005
- All-staff briefing (aka Mind Meld), September 2004
- All-staff briefing (aka Mind Meld), May 2004
- All-staff briefing (aka Mind Meld), November 2003

- All-staff briefing (aka Mind Meld), May 2003
- All-staff briefing (aka Mind Meld), November 2002
- All-staff briefing (aka Mind Meld), May 2002
- All-staff briefing (aka Mind Meld), 11-12 February 2002
- All-staff briefings (aka Mind Melds) inception and announcement, November 2001
- Action Scenarios 5-6; staff layoffs, 2005-2006
- Strategic Framework Management: FY2006 management team (aka senior staff) objectives, 2005-2006
- Strategic Framework Management: New performance evaluation model, 2004-2005
- Strategic Framework Management: Senior staff work, 2004 lead-in to January 2005 layoffs, reorganization
- Strategic Framework Management: Organizational "Change Program," 2004
- Strategic Framework Management: Calendar Drafts, 2004-2005
- Strategic Management Planning: RLG Board Fiscal Commission, 2004 – senior staff work
- Strategic Management Planning: RLG Board Fiscal Commission – 2004, Folder III
- Board's Fiscal Commission Outcomes: Strategic Framework Management, June 2004
- Strategic/Financial Planning, 2003-2004: Board Fiscal Commission notes and background
- Strategic Management Planning: RLG Board Fiscal Commission – 2003-2004, Folder II
- Strategic Management Planning: RLG Board Fiscal Commission – 2003-2004, Folder I
- Board Strategic Planning "Retreat," April 25, 1999
- Strategic Planning in 1999: Process and Presentation for Board's April meeting
- Strategic Planning Input, Member Programs, 1999 (plus earlier background)
- Strategic Planning Input, for "Information Discovery and Delivery," early 1999
- Strategic Planning Input, for Technical Processing, early 1999
- Strategic Planning: Background from 1996 for renewed planning in 1999
- "Mid-Decade" Strategic Planning, 1993
- Staff Benefits Program: Surveys, Results, 1994-1997
- RLG Cultural Materials/"Heritage": Initiative and Alliance launch, 1999

**CARTON 168: Member Programs**

1995-1997: Digital Collections Project "Studies in Scarlet," which produced the "Marriage, Women, and the Law: 1815-1914" RLG online database. This was RLG's first coordinated digital-imaged collection and could be searched without charge.  Provenance: Archived by Product Management (when still Integrated Information Services), but originally compiled by Ricky Erway while she was a member services officer in the Member [Systems &] Services department – an earlier name of what became Member Programs & Initiatives and finally just Member Programs.

- Digital Collections Project "Studies in Scarlet" – SGML (Standard Generalized Markup Language) considerations, 1992-1997.
- Digital Collections Project "Studies in Scarlet" – Work with service vendor Data Conversion Laboratory (DCL), 1996-1997.
- Digital Collections Project "Studies in Scarlet" – Other service vendors investigation/use, 1996.
- Digital Collections Project "Studies in Scarlet" – Participant involvement, 1995-1997.
- Digital Collections Project "Studies in Scarlet" – Harvard University Law Library Quarterly Reports (statistics and costs), 1996-1997.

- Digital Collections Project "Studies in Scarlet" – Harvard University Law Library correspondence ("Chron File"), 1995-1997.
- Digital Collections Project "Studies in Scarlet" – Harvard University Law Library Startup Documentation (initial participation paperwork), 1996-1997.
- Digital Collections Project "Studies in Scarlet" – Harvard University Law Library Samples (photocopies of images for the shared digital collection), undated.
- Digital Collections Project "Studies in Scarlet" – Harvard University Law Library Final Proposal for contributions to the project [undated].
- Digital Collections Project "Studies in Scarlet" – Harvard University Law Library Preliminary Proposal(s) for contributions to the project, early 1996.

The rest of this carton contains the same set of 6 folders – Quarterly Reports; Chron File of correspondence; Startup Documentation; Samples; Proposal; and Preliminary Proposal – for the 6 other project participants: University of Leeds, North Carolina State Archives, New York Public Library, New York University Law Library, Princeton University, and University of Pennsylvania Law School's Biddle Law Library. [NOTE: These 6 sets were NOT individually weeded and reordered in the 2006 accessioning review. A spot-check for final reports turned up diskettes in the Princeton file and U. Penn. Files, and no samples for Penn.]

## CARTON 169: Product Management

1981-2000: Primarily a set of files on the ESTC (English Short Title Catalogue – originally, Eighteenth-century STC) database and RLG's dealings with Henry Snyder / ESTC North America offices and with the British Library; 3 folders with a bit on related programmatic projects follow this set. Provenance: Archived by Wesley Taoka while department was still called Integrated Information Services. Originally compiled by John Haeger's Programs and Planning department staff. Includes materials filed by Leslie Hume, Connie Gould, Jack Kessler, Elizabeth Wahl, and Curtis Lavery, working for John H.

- ESTC: RLG, British Library, and Louisiana State University Agreement, 1981 (LSU being Henry Snyder's base at the time)
- ESTC: RLG, British Library, and ESTC/NA Agreement, 1982-1984
- ESTC: ESTC/NA Articles of Incorporation, November 1984
- Partnering beyond ESTC: RLG – British Library Memorandum of Understanding (including a dedicated telecommunications link and other types of collaboration), 1984
- ESTC: RLG, British Library, and ESTC/NA Agreement, September 1985
- ESTC: RLG License Agreement for use of British Library's UKMARC database records, 1985-1986
- ESTC: British Library RLIN Service Agreement for ESTC uses, 1986
- ESTC: RLG - ESTC/NA - University of California, Riverside (Snyder's base) agreements and contracts, 1987-2002
- ESTC: Chronological correspondence/papers in 1988
- ESTC: Various descriptive, promotional, and user publications, 1987-1998 [not a large folder]
- ESTC: Chronological correspondence/papers in 1991
- ESTC: International Committee, 1991 (October meeting)
- ESTC: Chronological correspondence/papers in 1992
- ESTC: International Committee, 1992 (October meeting)

- ESTC: Migration from SPIRES application into RLIN Integrated Technical Processing System ("ITPS"); also, into in Eureka end-user interface, 1992-1996
- ESTC: Chronological correspondence/papers in 1993
- ESTC: International Committee, 1993 (October meeting)
- ESTC: Early English Periodicals/Serials Project (with ESTC/NA), 1993-1994
- ESTC: Chronological correspondence/papers in 1994
- ESTC: International Committee, 1994 (October meeting)
- ESTC: Chronological correspondence/papers in 1995
- ESTC: International Committee, 1995 (October meeting)
- ESTC: STC (short title catalogs – beyond original ESTC) project, Phases 1 and 2, 1989?-199? [Fragmentary; more information intermixed into Chronological files and in the International Committee files]
- ESTC: RLG – American Antiquarian Society – Bowker/Saur agreement on publication of "Bibliography of American Imprints to 1901," 1991 [There are more facets to the uses of the AAS ESTC records than just this one; mixed into Chronological files as well]
- ESTC: Chronological correspondence/papers in 1996
- ESTC: As a part of the joint Dialog@CARL with RLIN and CitaDel (DCRC) service, 1997
- ESTC: RLG dealings with Primary Sources Media, 1997-1998 (towards some form of full text online)
- ESTC: Offering custom snapshot tapes of ESTC records to the contributors, 1992-1997
- ESTC: Examples of tape requesting process, 1996-1997
- ESTC: Chronological correspondence/papers in 1997
- ESTC: Meetings on ESTC futures, with ESTC/NA office, June 1997 (and again in 1998?)
- ESTC: Subscriptions and single-search customers and use statistics, RLG fiscal year 1997
- ESTC: Status reports, both internal and to partners (British Library and ESTC/NA), 1997-1998
- ESTC: Chronological correspondence/papers in 1998 (e-mail among the partners, RLG, British Library, ESTC/NA)
- ESTC: Chronological correspondence/papers in 1999 (slight file; mostly e-mail)
- ESTC: Chronological correspondence/papers in 2000 (very slight file)
- ESTC: Use statistics, RLG fiscal year 2000
- EPB (Early Printed Books): Scrap of one meeting's minutes, 15 October 1992
- Programmatic database activities, 1995: Jack Kessler status report to John Haeger
- HPB (Hand Press Book database): Dealings with CERL (Consortium of European Research Libraries), 1999 (slight file)

**CARTON 170: President's Office (aka Administration); Product Management**

1988-1998: First set of folders, James Michalko's, focuses on various cycles and types of strategic/management planning, 1988-1999, and a try at "activity based management" – largely an exercise tried in 1997 with consultant Stephen Peacock.  Second set, from information services officer Win-Shin Chiang (pre-Integrated Information Services/Product Management department), deals with evolution and end of RLG-CARL joint "DCRC" service, 1996-1998.  [SEE Carton 52 description for cross-references to DCRC materials in several cartons.]

- Board-commissioned RLG organizational review by A.D. Parker & Associates -- 13 October 1988 presentation to Board of Governors
- Board-commissioned RLG organizational review by A.D. Parker & Associates – addressed at a special meeting in November 1988

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- Strategic Planning, 1996: Service Design – with consultant Barbara Vondy (papers organized into tabbed sections by J. Michalko)
- Strategic Planning, September 1996 – March 1997: Service Design Process, RLG Business Lines (prepared and organized by consultant Barbara Vondy; information on diskettes included in folder)
- "Financial Strategy – 2000" presentation to Board of Directors, January-February 1997
- Strategic Planning followup, 1996-1997: Miscellany; continued use of consultants
- Strategic Planning topics, 1999: "Collaborative Needs" (how organizations contribute
- Strategic Planning areas, 1999: Future of interlibrary lending
- Strategic Planning areas, 1999: IDD (information discovery and delivery)
- Strategic Planning areas, 1999: Bibliographic record supply
- Strategic Planning, 1999: Workbook approach
- Strategic Planning, 1999: Some correspondence with consultant Barbara Vondy
- Strategic Planning, 1999: Work in June meeting of RLG Board of Directors
- Strategic Planning areas, 1999: Resource Sharing (Interlibrary loan / document delivery / digital)
- Strategic Planning areas, 1999: Long-term retention / digital archiving
- Strategic Planning areas, 1999: RLG Cultural Materials
- Strategic Business Planning, 1999: ideas on OCLC relationship
- "Activity-based management" for RLG, 1997: Finding consultant
- "Activity-based management," 1997: Background sent to chosen consultant, Stephen Peacock
- "Activity-based management," 1997: materials for ABM workshop for RLG management & involved staff (part of Peacock consultancy)
- "Activity-based Management," 1997: ABM teamwork material (part of Peacock consultancy)

- DCRC: End of RLG-CARL agreement and joint service, 1998
- DCRC: Customer access analysis, 1998
- DCRC: Marketing and sales material, 1997-1998
- DCRC: RLG and CARL negotiations, service developments, 1997 (file 2 of 2)
- DCRC: RLG and CARL (and KRI – Knight-Ridder) negotiations, service evolution, 1997 (file 1 of 2)
- DCRC: RLG and CARL (and KRI – Knight-Ridder) negotiations, service planning, 1996

## CARTON 171: Product Management

1991-1997: Over half these files deal with the CitaDel service, later called RLG Citation Resources (article-citation databases). Some other files supplement strategic planning archives. Last 7 files are partial records of RLG's service arrangements with library consortia.  [NOTE: MANY cartons contain one to many folders on CitaDel/Citation Resources; includes Cartons 23, 52, 83, 128, 171, 173, 174, 178, 184, 188, 192, 193, 187, 202, 203, 213, and 214.]  Provenance: Archived by Wesley Taoka when department was Integrated Information Services. Originally compiled by information services officer Win-Shin Chiang (pre-IIS department; she worked at various times for John Haeger and was part of the Information Delivery Services department under Jim Campbell in the mid-1990s).

- CitaDel Service: Pre-launch marketing (features) survey, 1991
- CitaDel Service: Marketing in service launch year, 1992
- CitaDel Service: Prospective files interest survey, 1993

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- CitaDel Service: Marketing fragments, 1993
- IDS (Information Delivery Services department) goals and status, 1993-1994 (prior to the 1994 service "midcourse review") [NOTE: IDS was headed by James Campbell, and staffed with Jim Coleman, Joan Aliprand, Connie Gould, Win-Shin Chiang; John Haeger took over group when Campbell left for medical reasons]
- CitaDel Service: "Mid-Course Review" of service performance and future directions, 1994-1995
- CitaDel Service: Completed mid-course-review surveys of CitaDel subscribers and prospective subscribers, 1994
- CitaDel Service: Marketing - promotional short subscriptions through Eureka, February-July 1995
- CitaDel Service: Marketing - promotional trial subscriptions through Eureka, January-July 1996
- CitaDel Service: Marketing – promotion of Latin-American databases at first annual REFORMA National Conference, June-August 1996 [REFORMA: "National Association to Promote Library Services for the Spanish Speaking"]
- Strategic product/service planning: Mid-Decade Planning documents, October 1992 – June 1994
- Strategic planning/marketing: RLG Strategies for 2000, done in early 1996
- Information Discovery and Delivery (IDD: strategic area): Business Segment Analysis Worksheets [part of financial strategy planning], 1996

Consortial files, in alphabetical order:
- CETEI (Centro de Tecnologia Electronica y Informatica): Consortial access to RLG databases (pretty incomplete), 1997
- CHEST (Combined Higher Education Software Team): Scraps of dealings with UK consortium re RLG databases, 1992-1994; 1996; 1997
- CSU (California State University System): Use of RLG databases by CSU's library system, 1992
- CSU (California State University System): Continuation of dealings for RLG databases use by CSU's library system, 1993-1994
- FCLA (Florida Center for Library Automation): CitaDel/RLIN access, 1992-1994
- OhioLINK: Fragments of dealings re CitaDel access, 1993-1994
- TEX SHARE Request for Proposal: Failed RLG bid to provide services (CitaDel and Ariel), 1995 [TEX SHARE: "Cooperative program of 52 public-institution academic libraries in the State of Texas"]
- University of California: System-wide RLG database access; UC Berkeley's Law Library's Index to Foreign Legal Periodicals as a CitaDel database, 1993-1994

## CARTON 172: Corporate Communications

1986-1998: Mix of strategic planning records (1991 & 1995-1996 – includes "Chaminade" senior management retreat (from which a few photos can be found in Carton 33), Corporate Communications unit correspondence and operational documents (1990-1998), and RLIN user publications (1986 - 1990s).

- Strategic Directions 1996-2000: Background & work prior to consultancy with Reed Byrum (Byrum & Associates), 1995
- Strategic Directions 1996-2000: Roll-out Plans, Member Mailing

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- Strategic Directions 1996-2000: Communicating new directions; work with consultant Reed Byrum, November 1995 – early 1996
- Strategic Directions 1996-2000: Development of slide presentation, October 1995 - January 1996 (Reed Byrum also involved)
- Strategic Directions 1996-2000: Presentation through pages in RLG's Web site, working with Reed Byrum, January-March 1996
- Strategic Directions 1996-2000: Feedback from and discussion with RLG members, January-March 1996
- Consideration Points for Prospective International Members – paper developed by Nancy Elkington to assist UK and other non-US institutions, 1995
- "RLG92" Transition: Complete Workbook for RLG Senior Management Conference/Retreat at Chaminade, Santa Cruz, CA, July 1991.  CONTENTS:
    1. Agenda
    2. Marketing
        a. RLG Market Matrix
        b. New Ventures Marketing Report [from principal Robin Stavisky]
        c. Charts (James Michalko)
        d. Press Releases
            i. New Organizational Structure
            ii. Background on RLG92
            iii. RLG Announces Rates and Fees
            iv. RLG Summarizes Year of Accomplishment
            v. RLG Publication Assesses Needs in the Sciences
            vi. RLG Board Set's Organization's Course for the '90s
    3. Current Objectives
    4. Development Projects
    5. Organization Chart
    6. Transition Team Reports
        a. Database
        b. Publications
        c. Migration/Technical Processing
        d. Telecommunications
        e. Hardware
        f. Human Resources
        g. Operations
        h. Division Status
        i. Programs Status
    7. Appendixes
        a. Self-directed Work Teams
        b. General Articles

[Notes at foot of contents page add: "Additional information available on 'Self Directed Work Teams' and 'General Articles' upon request." And: "Please bring your own copy of the RLG92 Transition Plan to the Conference." NOTE: Jack Grantham's copy is in Carton 119.]

- Corporate Communications/Assistant Secretary's Correspondence, 1997-1998
- Corporate Communications/Assistant Secretary's Correspondence, 1996
- Corporate Communications/Assistant Secretary's Correspondence, 1995
- Corporate Communications/Assistant Secretary's Correspondence, 1994
- Corporate Communications/Assistant Secretary's Correspondence, 1993

- Corporate Communications/Assistant Secretary's Correspondence, 1992
- Corporate Communications/Assistant Secretary's Correspondence, 1991
- Corporate Communications/Assistant Secretary's Correspondence, 1990
- Publications Distributions: Mailing Request Forms, 1993-1998 [-- this is a subset of the years these were in use, which for Corporate Communications lasted until RLG merged into OCLC in mid-2006]

- RLIN User Publications: Cataloging Folder, May 1989
- RLIN User Publications: Tagging Folder, March 1989
- RLIN User Publications: Archival Control Folder, November 1986
- RLIN User Publications: ILL Folder, April 1988
- RLIN User Publications: CJK Thesaurus and keyboard diagrams, 1987 [not a real "Folder" – subsets of one?]
- RLIN User Publications: MSW-CJK Folder, February 1989 [MSW="MultiScript Workstation"; CJK="Chinese, Japanese, and Korean original scripts"]
- RLIN User Publications: International online connections to RLIN [ca. 4 pp., undated – early 1990s?]

## CARTON 173: Product Management

1989-2002: Integrated Information Services pricing, expense budgeting, and projects; partial history of negotiations for several citations databases (originally called the RLG CitaDel databases); some consortial access files; portion of Primary Sources dealings; dealings with K.G. Saur; several uncompleted/rejected negotiations with Academic Press, Oxford University Press, and American Council of Learned Societies.  Mixed in with this is an annual meeting packet.  Provenance: Mix of materials filed by Win-Shin Chiang as a member of the earlier Information Delivery Services department, and Susan Yoder, as director from mid-1998 of Integrated Information Services.

- Annual Membership Meeting 1997 – registration packet (Win-Shin Chiang's)
- Integrated Information Services' FY2002 pricing development
- Integrated Information Services' FY2001 pricing development
- Integrated Information Services' FY2000 pricing development
- Integrated Information Services' FY1999 pricing development
- Integrated Information Services' FY2001 expense budget development
- Integrated Information Services' FY2001 projects line-up
- Management Team Mid-FY2001 Projects Status/Strategy Review, February-March 2001
- Integrated Information Services' FY2000 expense budget development
- Integrated Information Services' FY2000 projects line-up
- Integrated Information Services' FY1999 expense budget development
- Integrated Information Services' FY1999 projects line-up
- Anthropology citations database: Negotiations for Royal Anthropological Index records, 1999-2000
- Bibliography of the History of Art citations database: Negotiations with the Getty Research Institute, 1999-2000
- Hand Press Book database: Meetings and negotiations with CERL (Consortium of European Research Libraries), September 1997 – mid-2002 (plus a February 2003 memo)
- History of Science, Technology, and Medicine citations database: Negotiations from 1996 to late 2002

- Inside Information Plus citations database: Dealings with British Library, mid-1999 – March 2000 ["Plus" in italics was part of formal database name]
- Consortial database subscriptions: CAUL (Council of Australian University Librarians), 1994-1996
- Consortial use of RLG services: CETEI (Centro de Tecnologia Electronica y Informatica) and Ariel document transmission system, 1993-1995
- K.G. Saur: Dealings on Saur publications based on RLG database records, 1990-1991
- K.G. Saur: Dealings on Saur publications based on RLG database records, 1994-1996 (mostly royalty payments)
- K.G. Saur: Dealings on Saur publications based on RLG database records, 1997 (Elizabeth Wahl coordinating)
- K.G. Saur: Dealings on Saur publications based on RLG database records, 1998 (coordination passes from Elizabeth Wahl to Curtis Lavery; at end of year goes to Karen Smith-Yoshimura) [a slight file]
- Primary Sources Media: Negotiations regarding future home of "Studies in Scarlet/Marriage, Women, and the Law" data; plus implementation of the "e18 demo," May 1998 – March 1999 [SEE ALSO Cartons 91, 169, possibly others]
- Academic Press and RLG negotiations to include AP's Image Directory with The AMICO Library and/or "RLG Museum Resources," 1998 – early 1999 (plus some separate 1996 dealings)
- Academic Press sale offer of AP's Image Directory, 1998 (file 1 of 2)
- Academic Press sale offer of AP's Image Directory: RLG assessment and turn-down, 1999 (file 2 of 2)
- Oxford University Press request for proposal for electronic editions of the "Oxford English Dictionary" and RLG's consideration (decided not to respond), November 1996 – December 1998 [includes OED specification diskettes]
- Oxford University Press request for proposal for "American National Bibliography Online" and RLG response, March-April 1999 (inconclusive)
- ACLS (American Council of Learned Societies) and potential RLG-built "Electronic Publication Space" for the humanities, July-September 1998 (inconclusive)

## CARTON 174: Product Management

1986-1998: Aspects of the CitaDel Service (later called RLG Citations Databases) offering citations databases from a variety of suppliers together with document delivery for articles found; folders include some examples of database prospecting.  Provenance: Contents predate the "Product Management" department per se; come from files of staff in Information Delivery Services, primarily from Win-Shin Chiang.  [SEE more cross-references to CitaDel and citations work in Carton 171's summary.]

- CitaDel Service: Cambridge Scientific Abstracts (CSA) as a database supplier (weeded & combined files), 1993-1997
- CitaDel Service: University Microfilms International (UMI) as a database supplier, File 3 of 3, 1996-1997
- CitaDel Service: University Microfilms International (UMI) as a database supplier, File 2 of 3, 1994-1995
- CitaDel Service: University Microfilms International (UMI) as a database supplier, File 1 of 3, 1991-1993

- CitaDel Service: UMI's Dissertation Abstracts (DSA) database through RLG's Eureka interface, plus article comparing CitaDel and OCLC's FirstSearch service, 1995-1996
- CitaDel Service: Engineering Information's Ei Page One lifetime as an RLG citations database, 1992-1997 (this file overlaps/duplicates some of what is in document delivery files in Carton 178?)
- CitaDel Service: CSI's Government Periodicals Index (GPI) lifetime as an RLG citations database, File 2 of 2, June 1994 – September 1997
- CitaDel Service: CSI's Government Periodicals Index (GPI) lifetime as an RLG citations database (provides a window on the steps needed to bring up a new database), File 1 of 2, March 1993-May 1994
- CitaDel Service: Negotiations for Handbook of Latin American Studies (HLA) (by Win-Shin Chiang), February 1994 – June 1995
- CitaDel Service: UCLA's Hispanic American Periodicals Index (HAP) lifetime as an RLG citations database, 1986-2001
- CitaDel Service: Index to 19th-Century American Art Periodicals – database evaluation and early negotiations for, 1997
- CitaDel Service: Discontinuation of CSA's Marine Biology (MRB) database as an RLG citations database, 1994-1997
- CitaDel Service: INIST's PASCAL (sciences-focused) as an RLG citations database, and its discontinuation in 1997, 1993-1997
- CitaDel Service: PAIS's Public Affairs Information Service (PAI) lifetime as an RLG citations database, 1991-1997
- Citations Databases Prospecting, General: (individual file folders not retained; none of the databases touched on here were carried through on), 1991-1997
- Prospecting for Citations Databases: FBIS/Readex, 1993
- Prospecting for Citations Databases: Information Access Company (IAC) – Legal Resources Index and Academic Index, 1991-1994
- Prospecting for Citations Databases: Index Islamicus, 1994 – early 1997
- Prospecting for Citations Databases: British Library – Inside Conferences, 1993-1995
- Prospecting for Citations Databases: Legal Journals Index (UK), 1992
- Prospecting for Citations Databases: LEGI-SLATE, 1992
- Prospecting for Citations Databases: American Mathematical Society – MathSci Database, 1989-1992
- Prospecting for Citations Databases: Modern Language Association – MLA Bibliography, 1990-1994
- Prospecting for Citations Databases: Library of Congress – National Translations Center records, 1991-1992
- Prospecting for RLG CitaDel Service Distributors: LEXIS-NEXIS as a possible collaborator (file contains RLG databases and interfaces brochures), 1996
- Prospecting for Citations Databases: Princeton University – Population Index, 1995-1992
- Prospecting for Citations Databases: American Psychological Association – PsychInfo, 1989-1994
- Prospecting for Citations Databases: University of Liverpool – Science Fiction, 1997-1998
- RLG Consortial Deal on Behalf of Members (?): Evaluating access to Intelex Corporation's "Past Masters" database, 1996

## CARTON 175: Computer Systems (aka Development)

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1982-1988: Materials related to the Linked (Authorities) Systems Project carried out by the Library of Congress, RLG, WLN (Washington/Western Library Network), and later, OCLC. In this carton, OCLC seems not yet to have joined in the project.  Archived by Wayne E. Davison, who was a key designer and player in the multiyear effort.  [NOTE: For materials on LSP, SEE Cartons 10, 15, 24, 56, 120, 175, and 176.]  KEY ACRONYMS USED: LSP=Linked Systems Project. SNI=Standard Network Interconnection. AI=Authority/ies Implementation. OSI=Open Systems Interconnection.

- [Front of carton, not in a folder] "The Linked Systems Project: A New Dimension in Networking," undated history/purpose brochure [1985?]
- Linked Systems Project: WLN, LC, RLG Document Control Lists, 1983-1984
- Linked Systems Project document: "Linked Authorities Systems Project (LASP): LSP External Design: Intersystem Component, LASP-39a, February 1882, revised February 1983
- Linked Systems Project Standard Network Interconnection document: "Connection-Oriented Transport Layer Specification, SNI.4-257, September 1983, revised March 1983
- Linked Systems Project Standard Network Interconnection document: "Connection-Oriented Session Layer Specification, SNI.6-271," November 1982, revised August 1983
- Linked Systems Project Standard Network Interconnection document: "Network Operation and Management Requirements, SNI.22," January 1983
- Linked Systems Project Authority Implementation document: "Application Service Definition and Protocol Specification: Record Transfer, LSP/AI-3" [running title is "Application Layer Specification: Record Transfer"], April 1983 (vers. 0?), plus Version 1, October 1984
- Linked Systems Project Authority Implementation document: "Application Service Definition and Protocol Specification: Information Retrieval, LSP/AI-4 [running title is "Application Layer Specification: Information Retrieval"], April 1983 – includes comments on a set of April 1984 revisions
- Linked Systems Project Authority Implementation document: "Common Application Service Definition and Protocol Specification, LSP/AI-5," Version 1, October 1984 – first version produced in April 1983
- Linked Systems Project Authority Implementation document: "Presentation Layer Service Definition and Protocol Specification, LSP/AI-6," April 1983, plus versions of August 1983, August 1984, and October 1984
- Linked Systems Project Authority Implementation document: "LSP/AI Application Layer Data Structures, LSP/AI-7," April 1983, plus April 1984 revisions
- Linked Systems Project Standard Network Intercommunication document: Library of Congress's "FEP Intersite Test Script Language, SNI.28[-L?]," DRAFT, April 1983
- Linked Systems Project Standard Network Interconnection document: "RLG Network Entity Design Specification, SNI.7R," May 1983
- Linked Systems Project Standard Network Interconnection document: "Open Systems Interconnection SNI.25—Network Layer Test Plan," April 1983; plus Library of Congress's "Local Operator Control Function Design, SNI.25.LC," June 1983
- Linked Systems Project Standard Network Interconnection document: "Open Systems Interconnection SNI.26 Transport Layer Test Plan," June 1983
- Linked Systems Project Standard Network Interconnection document: Library of Congress's "Intersite Operations Application Design, SNI.14-LC," June 1983
- Linked Systems Project Standard Network Interconnection document: "Library of Congress Transport Entity Design, SNI.9.LC," June 1983, revised July 1983
- Linked Systems Project Standard Network Interconnection document: "Statistics Specifications, SNI.23," DRAFT, July 1983

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- Linked Systems Project Standard Network Interconnection document: "Library of Congress Presentation Entity Design," July 1983
- Linked Systems Project Standard Network Interconnection document: "RLG Transport Entity Design Specification, SNI.9R," August 1983 (with cover memo)
- Linked Systems Project Standard Network Interconnection document: "Library of Congress Common Application Entity Design," August 1983
- Linked Systems Project Standard Network Interconnection document: "Open Systems Interconnection SNI.27 Session Layer Test Plan," August 1983
- Linked Systems Project: Work and Meetings, August 1983 (includes some LC and WLN documents)
- Linked Systems Project Standard Network Interconnection document: "Library of Congress Session Entity Design [SNI-12L]," October 1983 [has W. Davison date of January 1984 written at top]
- Linked Systems Project Standard Network Interconnection document: "Library of Congress Session/Transport Interface Design Document," November 1983
- Linked Systems Project Standard Network Interconnection document: RLG's "Session Entity Design Specification, SNI.12R," December 1983 – plus W. Davison cover memo and "Network Session Channel Interface Specification," June 1983
- Linked Systems Project document: Library of Congress-issued "Linked Systems Project Structure and Interface Design" – original of 1983; subsequent version of June 1984; and two sets of update pages, December 1984 and February 1985
- Linked Systems Project Standard Network Interconnection document: RLG's "Application Entity (Message Services) Design Specification, SNI.14R," March 1984
- Linked Systems Project Standard Network Interconnection document: Library of Congress's "Network Operator's Manual, SNI-31L," April 1984
- Linked Systems Project Standard Network Interconnection document: "Application Layer/Entity Design and Test Plans, SNI.29," April-August 1984
- Linked Systems Project: Library of Congress's "Information Retrieval Application Program: Program Design Document," May 1984
- Linked Systems Project Standard Network Interconnection document: "Message Transfer Application Service Definition and Protocol Specification, Version 1, SNI-8," October 1984
- Linked Systems Project Authority Implementation document: "LSP Intersite Test Plan, LSP/AI-9," February 1984 Draft
- Linked Systems Project Authority Implementation document: "LSP Application Test Plan: Record Transfer, LSP/AI-9, October 1984 (plus cover memo)
- Linked Systems Project Standard Network Interconnection document: "LSP/SNI Protocol Specifications, SNI.30," Initial Release, October 1984; plus annotated pages from SNI.30 1.1, May 1986 and a brief memo from Kathy Bales to Wayne Davison regarding testing, September 1986
- Linked Systems Project Standard Network Interconnection document: RLG "Network Operations Guide, SNI-31R," February 1985; plus marked-up "LSP Codes and Values," 1985, and "SNI Names and Addresses, SNI.31 1.0 (DRAFT)", February 1989
- Linked Systems Project Standard Network Interconnection document: RLG's "Network Management Guide, SNI-32R," February 1985
- Linked Systems Project miscellaneous items: Library of Congress Statistics Reports, February 1986; ANSI Z39.47-1985 tables; ANSI-ISO character set comparisons [no date]

**CARTON 176: Computer Systems (aka Development)**

1985-1990: Materials related to the Linked (Authorities) Systems Project carried out by the Library of Congress, RLG, WLN (Washington/Western Library Network), and later, OCLC. In this carton, OCLC has become a participant.  Archived by Wayne E. Davison, who was a key designer and player in the multiyear effort.  NOTE: Meeting minutes for the LSP working groups are mixed in with other documents in Cartons 175 and 176 rather than filed as a separate group. Additional sources are noted under Carton 175.  KEY ACRONYMS USED: LSP=Linked Systems Project. OSI=Open Systems Interconnection. SNI=Standard Network Interconnection. AI=Authority/ies Implementation. BA=Bibliographic Analysis. TC=Technical Committee. PC=Policy Committee.

- Linked Systems Project: Papers on and articles about OSI, LSP, the participants' implementations, etc.; many undated – mostly mid-1980s.
- Linked Systems Project: Work/research undertaken by programmer Steve Eastman, 1985
- Linked Systems Project: Sleeved set of transparencies about RLG and its work (4 are missing) – numbers 9-22 are related to LSP, 1989
- Linked Systems Project Technical Committee: W. Davison's Chron File of Exchanges, 1985
- Linked Systems Project Technical Committee: W. Davison's Chron File of Exchanges, 1986
- Linked Systems Project Policy Committee: Implementation and development agreements by WLN, RLG, OCLC, and LC, including support for Z39.50, late 1986-early 1987
- Linked Systems Project Technical Committee: W. Davison's Chron File of Exchanges, 1987
- Linked Systems Project Technical Committee: W. Davison's Chron File of Exchanges, 1988-1990
- Linked Systems Project Technical Committee: Document identification/numbering scheme – lists titles from LSP/TC1 through LSP/TC42, and LSP/TC57 through LSP/TC78 (pages listing 43-56 and anything above 78 are missing), April 1997 and July 1989
- Linked Systems Project Technical Committee: Use of Stanford-RLG Electronic Messaging System (EMS) – setting up participants and printout of "EMS Hints" for system use, November-December 1985
- Linked Systems Project Technical Committee: Numbered documents/communications: LSP/TC7, LSP/TC13, LSP/TC16 to 20, LSP/TC32 to 34, LSP/TC36 to 43, LSP/TC45, with dates ranging from 1986 to 1989
- Linked Systems Project Technical Committee: Numbered documents/communications: LSP/TC46 to 55, with dates in 1987 and 1988
- Linked Systems Project Technical Committee: Numbered documents/communications: LSP/TC57 to 64, LSP/TC66 to 70, LSP/TC72 to 74, LSP/TC77 to 78, LSP/TC81, dates ranging from 1987 to 1989
- Linked Systems Project: Bibliographic Analysis: Small chron file of exchanges covering part of 1987
- Linked Systems Project: Bibliographic Analysis: Document identification/numbering scheme for LSP:BA titles, 1982-1989
- Linked Systems Project: Bibliographic Analysis document: "Mark-up of SNI.30 and Z39.50 Implementation Specifications, BA/LC-2" --1986 documents marked-up by hand, June 1988
- Linked Systems Project: Bibliographic Analysis document: "Review of Bibliographic Records Standards and Related Issues, LSP/BA-4," October 1987
- Linked Systems Project: Bibliographic Analysis document: "Analyses of Searching: Bibliographic and Authority Records -- WLN, RLG, OCLC, LC, Vol. 1: Analysis, LSP/BA-5," April 1985, revised January 1988
- Linked Systems Project: Bibliographic Analysis document: "Bibliographic External Design: Intersystem Functional Requirements, LSP/BA-6," June 1988

- Linked Systems Project: Bibliographic Analysis document: "Application Protocols and Data Structures, Revision of SNI.30 Chapters VIIA-VIIC, VIII, and Appendix A, LSP/BA-7," Draft of December 1988 ("Amendment to SNI.30 for NCCP," wrote W. Davison on front page)
- Linked Systems Project: Bibliographic Analysis document: "General Functional Requirements: Library of Congress System Component, LSP/BA-10," June 1988
- Linked Systems Project: Bibliographic Analysis document: Set of numbered documents: LSP/BA-38, -40, -43, -45, -51, -52, -54, -55, -60, -62, -65, -67, -72, -73, -74, dates in 1987 and 1988
- Linked Systems Project: Bibliographic Analysis document: Set of numbered documents: LSP/BA-76, -79, -80, -84, -92, -93, -94, -96, -103, -104, -105, -106, -107, -108, -109, -110, -111, -112, -114, -115, -130, -131, dates in 1988 and 1989
- [Unrelated to LSP] C. James Schmidt to Wayne Davison, need for barcode reader compatible with Zentec RLG90 terminal, 1985-1986

## CARTON 177: Product Management

1991-2004: Largely deals with RLG's digital initiatives, which Ricky Erway was hired  (in 1995) to help shape and realize. Question marks (?) indicate lack of certain dating. These files need comparison to others on same topics to flesh out a solid understanding of work on these initiatives and services.  Provenance: Created prior to the department's creation; predominantly from 1995 to early 2000s, coeval with arrival at RLG of program officer and product manager Ricky Erway. Archived by Erway; includes materials passed on to her from departing head of member programs, Patti McClung.

- RLG organization charts, 1994-2000 (?)
- "RLG Prospectus" (1991) and various service brochures and ads, 1991-ca. 1996 (?)
- "Introduction to RLG" presentation pages, undated - 1994-1995?
- RLG "official" separation from Stanford University: Party invitation and president James Michalko's description of the role Stanford played in fostering RLG, October 1995
- Strategic directions, 1996-2000: Choices made, facets of what went into describing them from Erway's perspective and files, October-December 1995
- RLG Activity-Based Management "realization" overview, May 1997
  (More on activity-based management exercise & outcomes in other cartons)
- RLG's international document discovery and delivery projects, draft outline, October 1995 (Finding aids; Studies in Scarlet; archival server (Arches); ILL lender scheme; patron-initiated ILL requests; material delivery straight to patron's workstation; JEDDS testbed use of Ariel; WebDOC; Eureka on the Web; general points)
- Archival Server, aka Arches: Early documents and early "digital future" planning, 1993-1994 (Includes actions following Mid-Decade Planning Group's April 1993 report)
- Archival Server, aka Arches: Mix of project descriptions and presentation materials, 1995-1999
- WebDOC: Various aspects of PICA-RLG plans – a facet of RLG's archival server (Arches) vision, 1995-1997
  (Organize together with WebDOC material in other cartons?)
- No Excuses Task Force: Group focused on key projects' progress – WebDOC, Integrated International Information Delivery, and archival server (Arches) – facets of progress, August 1995 – March 1997

- Metadata Summit: Organized by RLG/Erway on "issues not yet being addressed in 'Dublin Core' metadata discussions" – issues of concern particularly to libraries, archives, and museums, 1997
- Metadata Summit: Working Group formed following summit meeting; report from group delivered by Lynn Marko at Helsinki Dublin Core Meeting, October 1997
- Finding Aids: FAST (Finding Aids SGML Training) Project and online access – origins of RLG Archival Resources database and service, 1995-2002
  (These are scraps; combine with other files, esp. those of Anne Van Camp?)
- Finding Aids: FAST (Finding Aids SGML Training) Project and online access, 1996-1998
- Finding Aids: Gladys K. Delmas Foundation-supported conversion to online EAD-marked-up form, 1998
  (These are scraps; combine with other files, esp. those of Anne Van Camp?)
- REACH (Record Export for Art and Cultural Heritage) Project: Forerunner of what was realized in the AMICO Library and RLG Cultural Materials; described as "repurposing and sharing museum object records", 1997-1998
- VISION (Visual Resources Sharing Information Online) Project: Collaboration of RLG and Visual Resources Association (VRA) to create something (see November 1997 press release); another lead-up to the RLG Cultural Materials initiative, 1997-1999
- Studies in Scarlet: Marriage, Women and the Law, 1815-19?? – slight file on project team and evaluation of the pilot digital collection service, 1998
- Museum Resources: Umbrella term for efforts like REACH and VISION (AMICO too); image data services planning pre-Cultural Materials Alliance and service development, 1996-1999
- RLG Cultural Heritage/Materials Initiative: Grant funding efforts, April 1999 - ? (2002?)
  (Ford Foundation, National Science Foundation, Harcourt Foundation, Paul Sharpe Consultancy, Fidelity Foundation, IBM, IMLS?, Luce …)
- RLG Cultural Heritage/Materials Initiative: Planning in second half of 1999, prior to member-participants' meetings
- RLG Heritage/Materials Initiative: "Buy-in" meeting with first members to form part of the participating alliance, November 1999; Cultural Materials Initiative (CMI) Policy Advisory meeting, March 2000; Cultural Materials Alliance (CMA) meeting, April 2000 (in conjunction with RLG annual membership meeting)
- Cultural Materials Public Announcement: Set up by Member Initiatives manager Anne Van Camp, 1999-2000
- Cultural Materials: Early licensing discussions, 1999-2000
- Cultural Materials: Market assessing (scrappy file), 1999-2002
- Cultural Materials: Interface design, 1999-2002
- Cultural Materials: Descriptive standards and models, largely work by/with Tony Gill, including CIDOC Conceptual Reference Model, 1998?-2001
- Cultural Materials: Scraps of work with/outreach to RLG's Cultural Materials Alliance (CMA) participants, plus advisory groups, 1999-2003
- Cultural Materials: Content Development Advisory Group – meeting in June 2002
- Cultural Materials: Instructional Technology Advisory Group and earlier background material, 1998-2003
- Cultural Materials: Surrogate Guidelines Advisory Group, 2000-2006, including final (at that time) guidelines posted on RLG Web site
- Cultural Materials: Planning meeting papers, largely undated, but per Ricky Erway: 2000
- Cultural Materials: Technical Review Meeting (panel of invited external experts), January 2001
- RLG Cultural Materials service/database: Planning and service rollout/launch, 2001

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- Cultural Materials: Planning (scrappy file), 2002
- Cultural Materials: Planning (again, only scraps – seek Susan Yoder's files), 2003
- Cultural Materials: Request for proposal and selected member-participants for Harcourt Foundation-funded History of Science and Technology Digitization Project, early 2002 (Selected: American Antiquarian Society; Clark Art Institute; Huntington Library; Library of Congress; New York Academy of Medicine; Smithsonian Institution Libraries; University of California, Berkeley; University of Cambridge; University of Glasgow; University of Minnesota; and University of Oxford)
- Cultural Materials: Part of records for unfounded History of Science and Technology Digitization Project, 2002
- Cultural Materials: Development of public/commercial service from academic base, resulting in Trove.net, 1999-2004
(Bits and pieces; not sufficient narrative of the whole)

## CARTON 178: Product Management

1981-1997: One pre-CitaDel Service folder, followed by aspects of RLG's entry into and conduct of citation databases service, which carried the name CitaDel until at least 2000.  SCIPIO-related and other files complete this carton. Carton 178 contents predate the "Products Management" department per se; come from files of staff in Information Delivery Services, primarily from Win-Shin Chiang.  [SEE more cross-references to CitaDel and citations work in Carton 171's summary.]

- Pre-CitaDel Service: Potential Special Databases – Bibliography of Asian Studies (not completed), 1981-1984
- From the CIT File (in RLIN) to CitaDel: Some history, 1991-1993
- CitaDel Service: Following pilot, initial announcement of full service in 1992 (e-mail to RLG members; brochure; Q&A pages)
- CitaDel Service: Database suppliers' agreements between RLG and UMI (University Microfilms International), EI (Engineering Information, Inc.), PAIS (Public Affairs Information Service, Inc.), and CSA (Cambridge Scientific Abstracts), 1991-1993  (specific databases covered in separate files]
- CitaDel Service: RLG's service accounting procedures, 1992-1993
- RLIN Customer Service Agreement for Searching, September 1993 and July 1991
- CitaDel Service: Citadel Customer Service Agreement – six versions used between July 1992 and some time in 1998-1999
- Citadel Service: Agreements for Trial Subscriptions to RLG Databases, 1993-1994
- Customer Service Agreements: Dealing with the proliferation of versions for specific services, customer types, etc. – 1994 memo
- CitaDel Service: Database supplier agreements – Database Online Licensing, version of October 1997; Document Supply, veers. Of October 1992 and August 1994 (document supply agreements and service through CitaDel were discontinued in September 1997, with major change in type of suppliers and databases included in the service)
- CitaDel Service: Midcourse Review study, background, and reactions, 1994
- CitaDel Service: Document delivery arrangements for RLG citation databases, 1992-1996
- CitaDel Service: British Library Document Supply Centre as document delivery source for RLG, 1991-1996
- CitaDel Service: Congressional Information Service, Inc. supplier agreements, April 1994
- CitaDel Service: University Microfilms International as document delivery source for RLG, 1992-1996

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- CitaDel Service: Planned request for proposals for CitaDel sole-source document supplier – work by a consultant, James T. Maloney, 1995
- CitaDel Service: Annual reports to citations database suppliers for RLG Fiscal Year 1997, December 1997
- CitaDel Service: Termination of "General Files" (12 databases from 6 suppliers), 1997 (UMI file acronyms: ABI, DSA, NPA, & PRA; CSA files: ENV, LIF, MRB, & SCP; EI: EI Page One; CIS: GPI; PAIS: PAI; INIST: PAS
- CitaDel Service: Licenses with suppliers, 1992-1998 (Labeled "inactive" at some point; separate tabbed sections for: DCRC; HAPI; Saur; BLDSC; CSA; EIP; UMI; EIP-DD; GPI; GPI-DD; PAIS; PICA; UMI-DD; UMI-SERV; UN)
- CitaDel Service: Active citations database suppliers to RLG, 1998
- Information Delivery Services Department: Online Filing Scheme 1997
- Research Resources: Research in American Literature Project Statement, June 1992-1993
- RLG Task Force on Scholarly Bibliographies, May 1993 meeting notes
- "Electronic Document Delivery: The New Paper Chase" – Preparations and presentation by Win-Shin Chiang at Northern California Association of Law Libraries Conference, topic "Legal Research: 2001," November 1993
- Retro Link Associates, an RLG business partner: 1993-1994 brochures (RLA later became MARC Link; this file predates the RLA-RLG MARCADIA automated copy cataloging service)
- SCIPIO Database: Some user/marketing pieces; adding records from PACSCL (Philadelphia Area Consortium of Special Collections Libraries); expanding contributors to SCIPIO, 1989-1995
- SCIPIO Database: Conversion/migration from SPIRES "Special Database" construction to RLIN "ITPS (integrated technical processing system), and also making available through the Eureka interface, 1994-1997
- SCIPIO Database: Follow-up after June 1997 database migration – issues addressed by contributors and RLG staff, July 1997 – April 1998
- Getty Provenance Indexes, September 1995 (slight file; part of the RLG-Getty Art History Information Program collaboration was a plan, not realized, to introduce these through RLIN)
- RLG-GETTY AHIP (Art History Information Program) project: Bibliography of the History of Art as a CitaDel citations database, 1995-early 1997
- IFLA (International Federation of Library Associations) 1997 conference: Win-Shin Chiang attended and provided information on RLG's "Studies in Scarlet" project and RLG's interest in Permanent Naming (URNs), while engaging in plans for the Wellcome Library file to be added to the CitaDel History of Science and Technology database, August 1997
- RLG Law meetings at Association of American Law Libraries (-rians?), Baltimore, MD, July 1997
- RLG membership in NFAIS (National Federation of Abstracting and Indexing Services): on-again – off-again, 1991 & 1996-1997

[Cartons 179 & 180: See note preceding Carton 1 above.]

**CARTON 181: Member Programs**

1987-1994:  A mix of work done by groups reporting to vice president John W. Haeger and director of Member Programs Patti McClung. Haeger's PRIMA (Program for Research Information Management) involved research and experimentation in the late 1980s and early 1990s into

extending online tools for scholars.  These efforts included a set of "information needs assessments" in various disciplines as well as databases like the MLA Research in Progress Database and the Medieval and Early Modern Databank. The RLG Preservation Program under McClung was (in addition to earlier microfilming efforts) the umbrella for photo preservation and RLG's entry into digital-imaging activities.

- Research in Progress Database (RIPD): Functional Requirements, by Jim Coleman, August 1987
- Research in Progress Database (RIPD): Record Structure/Data Dictionary, by Jim Coleman, eight versions produced from late 1987 to August 1988
- Research in Progress Database (RIPD): RIPD System Displays, Commands, and State Transitions, by Jim Coleman, four versions produced from December 1987 to February 1988
- Research in Progress Database (RIPD): RIPD System Displays, Commands, and State Transitions, by Jim Coleman, four versions produced from April to August 1988
- Research in Progress Database (RIPD): Work on a Field Guide (to system data elements), 1988
- Research in Progress Database (RIPD): Explain Screens, by Jim Coleman, August 1988
- Medieval and Early Modern Data Bank (MEMDB): RLIN Implementation Functional Specification, by Walt Crawford, June 1989
- "A Biographical Database for RLG: Functional Specifications," by Maurice Leatherbury, MetaMicro Library Systems, Inc., consulting to John Haeger, April 1991 (never built)
- Preservation Program: RLG Photograph Preservation Task Force charge and work, 1992-1993
- Preservation Program: RLG - Stokes Imaging Technical Test Project, 1992-1993 [see also folders for Photo Preservation Task Force and DIAP of same period]
- Digital Image Access Project (DIAP): Request for Proposal issued to RLG Members to participate in the project, plus related memos; DIAP was an outcome of Photograph Preservation Task Force work, 1992-1993 [see also folders for Photo Preservation Task Force and RLG – Stokes Imaging test of same period]
- Digital Image Access Project (DIAP): Evaluation of member responses to RLG project RFP, 1993
- Digital Image Access Project (DIAP): RLG RFP responses from members Amon Carter Museum, California Historical Society, Cleveland Public Library, Columbia University, Cornell University, and Duke University, 1993 [folder 1 of 3]
- Digital Image Access Project (DIAP): RLG RFP responses from members Emory University, Getty Center Resource Collections, Hagley Museum and Library, Harvard Fine Arts Library, Huntington Library, Frances Loeb Library (Harvard Graduate School of Design), Nevada State Archives, New York Public Library, New York State Archives, 1993 [folder 2 of 3]
- Digital Image Access Project (DIAP): RLG RFP responses from members New York University, Northwestern University, Stanford University, University of California – Berkeley, University of Iowa, University of Minnesota, and University of Toronto, 1993 [folder 3 of 3]
- Preservation Program: Proposal to National Endowment for the Humanities for "Foundations for a Whole Discipline Preservation Program in Architectural History, 1865-1945, Phase 1 (October 1995 – September 1997)," November 1994 (not funded)

[Carton 182: See note preceding Carton 1 above.]

## CARTON 183: Product Management

1997-2002: All related to AMICO (Art Museum Image Consortium) and AMICO Library (the images that RLG turned into a database with viewing/using interface and a licensable service for academic subscribers. Archived by Susan Yoder, director of Integrated Information Services and then Product Management.  [SEE Carton 17 for cross-references to other cartons with AMICO material.]

- AMICO: Consortium formation and RLG discussions with for creating testbed image service, August 1997-August 1998
- AMICO: RLG involvement in plans for National Science Foundation digital libraries program grant, and work on AMICO per the proposal, summer [North American] 1998
- AMICO: Steps in launching the AMICO Library testbed, facets of the RLG-AMICO relationship, 1998-1999
- AMICO: Hammering out pricing models and revenue/expense splits between RLG and AMICO, December 1998 – mid-1999 (more on pricing in other folders)
- AMICO: AMICO's data specification of February 1999 – more than one version preceding? Certainly following
- AMICO: RLG-AMICO chronological file of exchanges not filed under specific topics, January 1999 – July 2002
- AMICO: Pricing for consortia, ICOLC (International Coalition of Library Consortia) Issues, negotiations, etc., 1999 – March 2000
- AMICO: Negotiating among RLG, JISC, and AMICO on JISC (Joint Information Systems Committee, UK) agreement for AMICO Library (to give UK libraries access to it); involved JISC requirements regarding use of Athens authentication server, June 1999 – May 2000, file 1 of 3
- AMICO: Negotiating among RLG, JISC, and AMICO on JISC (Joint Information Systems Committee, UK) agreement for AMICO Library (to give UK libraries access to it); variety of issues – June-September 2000, file 2 of 3
- AMICO: Negotiating among RLG, JISC, and AMICO on JISC (Joint Information Systems Committee, UK) agreement for AMICO Library (to give UK libraries access to it); arriving at the agreement – October-December 2000, file 3 of 3
- AMICO: Addendum to JISC's AMICO Service Agreement for extension beyond 2001 to October 2003 (incomplete record in this file), September-December 2001
- AMICO: Efforts to achieve agreement with Nylink (founded in 1973 as SUNY-OCLC network) for AMICO Library use by New York libraries; involved RLG, Nylink, AMICO – broken trail in this file, November 1999 – June 2000 and then August 2001
- Luna Imaging: Sizing up Luna Imaging and its service Insight for possible collaboration towards interface/access in RLG Cultural Materials service (prior to attempt to use Insight for AMICO Library), late 1999 – January 2000
- AMICO: Renegotiation of RLG's AMICO Library distribution agreement, with sidelights on JISC distribution and work with Luna Imaging; does not include clean copy of final revised agreement – just the signature page, undated, August 2000 – June 2001
- AMICO and Luna Imaging: Partial file on RLG work with Luna Imaging to make the AMICO Library accessible via Luna's Insight, March-May 2001, file 1 of 2
- AMICO and Luna Imaging: Partial file on RLG work with Luna Imaging to make the AMICO Library accessible via Luna's Insight – not completed, June 2001 - January 2002, file 2 of 2

## CARTON 184: Product Management

1991-1998: Concerns of staff in Information Delivery Services, later Integrated Information Services – includes staff sales training, marketing, pricing, promotion, budgeting and planning, packaging

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services, vendor relations; includes some files on "DCRC." [SEE Carton 52 for cross-references to other cartons with DCRC materials.]

- RLG Staff Sales Training, 1991
- Wiggin & Dana pro bono legal consultation, from Mary Norris, RLG Fiscal Year 1992
- Aspects of copyright clearance and RLG's concerns, 1992-1995
- CitaDel Service: Marketing/Reference Binder for FY2003 (August 1992)
- One-Way Disclosure Confidentiality Agreement, provided by Wiggin & Dana for RLG's use, October 1993
- Budget/Planning Issues, FY1993 and FY1994 (April –May 1993)
- Procedures for closing RLG sales and setting up customer accounts, 1993-1996
- CitaDel Service and Eureka Interface: Miscellaneous brochures and price lists, 1993-1996
- CitaDel Service: E-mail updates to citations database suppliers ("CitaDel Partners"), 1993-1996
- RLG Sales and Marketing Workbook, FY1996 (created by newish director of Sales & Marketing, Kris Tague)
- Marketing materials handed out conference (REFORMA) focused on Chicano/Latino/Latin American Studies, 1996
- Service Pricing: Preparation of RLG's FY1997 rates, January-August 1996
- CitaDel Service: Promotion at ALA – Win-Shin Chiang background for schedule at American Library Association January 1996 (Midwinter) and July 1997 (Annual) conferences
- Service Pricing and Packaging: Facets of preparations for FY1998, February-August 1997
- Service Packaging and Fixed-Price Offers: Online data resource package for FY1998; negotiations with big-user members and others
- Service Pricing: Work towards rates for FY1999, January –April 1998
- Dialog@CARL + RLIN & CitaDel (DCRC): Compendium, tabbed and in plastic sleeves, of salient aspects of the RLG-CARL joint service for "Dialog at CARL plus RLIN and CitaDel," put together by Win-Shin Chiang, 1996-1998
- DCRC and CitaDel RLG Member Bulk Purchasing Plan, 1996-1997
- DCRC Service: RLG's agreements with CitaDel database suppliers as part of the DCRC offering, 1997
- DCRC Service Contents, 1996-1997
- DCRC Service Contents, 1997-1998
- DCRC Service Marketing: Preparations for American Library Association annual conference, July 1997, plus some ALA Midwinter handouts, February 1997
- RLG Archival Resources: OpenText Corporation license to RLG of Livelink software to support the RLG archives service, 1996 and 1998
- Distribution of Access to RLIN (RLG's Union Catalog database): Maruzen Co., Ltd. Remarketing Agreement with RLG, April 1997 (to offer RLIN via Z39.50 connection)
- Integrated Information Services Department (or person within IIS) – "Great Knowledge Binder" containing sections on CitaDel/Citation Resources, AMICO Testbed, Eureka, Collection Guides/Finding Aids, Marketing stats., marketing study, and some current RLG newsletters, 1998

## CARTON 185: Files of Noel E. Hanf, Wiggin & Dana

1993-1998: RLG's attempted joint venture with British Library. [SEE ALSO 87, 149, and 166.] Carton 185 also contains contractual history of joint service with CARL Corporation (Dialog@CARL with RLIN & CitaDel). [SEE Carton 52 for cross-references to cartons holding DCRC materials.]

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- British Library – RLG Possible Joint Venture: First ideas, including possibility of growing into a multiply owned European venture; largely John Haeger brainstorming with Wiggin & Dana's advice, April-August 1993
- British Library – RLG Possible Joint Venture: More Thoughts on the European Aspect, Noel Hanf to John Haeger, May 1994 [?]
- British Library – RLG Possible Joint Venture: Creation of RLG-BL Joint Working Group; background for 18-20 July 1994 meetings; July meeting (in the UK notes) and related material, June-July 1994
- British Library – RLG Possible Joint Venture: Wiggin & Dana input on legal aspects and forms of an RLG-UK-European entity, July 1994
- British Library – RLG Possible Joint Venture: Meeting & discussions in Washington, DC, 27 September 1994
- British Library – RLG Possible Joint Venture: Meeting in London, 12-13 October 1994
- British Library – RLG Possible Joint Venture: Progress on legal aspects, meeting in Palo Alto, CA, 7-9 November 1994
- British Library – RLG Possible Joint Venture: Notes made by Noel Hanf in calls and meetings from 1 September to 8 December 1994
- British Library – RLG Possible Joint Venture: Materials related to meeting in London; includes "JVCO" (joint venture) business plan of 30 November 1994
- British Library – RLG Possible Joint Venture: Exchanges, documents, notes following December meeting, plus preparations for January 1995 meeting; tenor of discussions changes noticeably, December 1994
- British Library – RLG Possible Joint Venture: British Library Business Case and revised "JVCO (joint venture) Business Plan, 3 January 1995
- British Library – RLG Possible Joint Venture: Materials related to meeting in London, 9-10 January 1995, plus apparent end to the proposed joint venture prior to the 9th – with some RLG post-mortem assessment, January 1995
- British Library – RLG Discontinued Joint Venture: Follow-up assessments & communications, January-February 1995
- British Library – RLG Recast Proposed Joint Venture: "Global Record Supply"; exchanges did not realize an actual service in the end, September 1995 – September 1996

Rest of files in box (less than 1/3rd) are records from RLG – CARL Corporation attempt to provide a new joint service, "DCRC" (Dialog@CARL with RLIN and CitaDel); plan: to combine access to the RLG Union Catalog and other RLG-offered databases with myriad Dialog citation databases, through a new special interface:

- DCRC: Creation/agreements on new service between CARL & RLG (with KRI [Knight-Ridder Information], real source for Dialog, going along) – "upward arc" of service evolution, December 1996 – October 1997
- DCRC: Breaches & dissolution of new service between CARL & RLG – "downward arc" of service evolution, October 1997 – June 1998
- DCRC: Impact/role of M.A.I.D., UK purchaser of Dialog's parent KRI (Knight-Ridder Information), in problems between CARL and RLG; large portion of the file is early background on M.A.I.D, October-November 1997
- Post-DCRC: Potential RLG acquisition of CARL/UnCover assets; does not reveal final outcome (in August 1998 RLG began planning shared acquisition with Ex Libris), December 1997 – September 1998

- Ryan vs. CARL Corporation lawsuit: RLG attention to matter, April 1998 – October 1998

**CARTON 186: Files of Noel E. Hanf, Wiggin & Dana**

1976-2000: Mix of normal legal/financial administrative matters, a few computer-systems related topics (e.g., purchase of Amdahl mainframe), board-related business including bylaw amendments and elections to the board, a good package of materials from very first meeting of Cultural Heritage [Materials] Alliance; carton ends with "DCRC" files. [See Carton 52 for cross-references to other cartons holding DCRC materials.]

- Biennial reports to Connecticut Secretary of State on corporation's board and officers, for 1982, 1984, 1986, 1988, 1990, 1992, 1994; plus Annual reports to the Secretary for 1996, 1997, 1998, 1999, and part of 2000
- Audit letters between RLG/auditors and Wiggin & Dana/Noel Hanf to acquire corporate information for annual RLG audits; file contains request, response, and a little related material for 1976, 1977, 1978 (request only), [no 1979], [no 1980], 1981, 1982, 1983, 1984 (response only), 1985 (including July mail of ten Wiggin & Dana billing statements), 1986, 1987, 1988, [no 1989], 1990, 1991, 1992, 1992 OMB A-133 audit (for NEH grant), 1993, 1994, 1994 OMB A-133 audit (for NEH grant; response only), 1995, 1996, 1997, 1998
- KPMG Peat Marwick/Peat Marwick Main & Company: Audit engagement letter for RLG's fiscal year 1997 (September 1996 – August 1997)
- Purchase of Amdahl mainframe computer by RLG (close to $5 million; moved outside of IBM mainframe sphere preferred by Stanford … & IBM), 1989-1990
- RLG Transition from Stanford Administrative Services in 1995: Adoption of RLG's own benefits package – material for board action to approve, August 1995
- Board of Directors business: RLG members' vote to ratify RLG bylaw amendments – sample ballot (results appear in bylaws version filed with 1993 board elections), December 1992 – January 1993 (results tallied 1 February)
- Board of Directors business: Board elections by RLG members – sample voting ballots with results checked; separate ballot on bylaws revision; resulting amended bylaws, March-April 1993
- Board of Directors business: Board elections by RLG members – member representatives (voters) lists, sample ballots, election results, May-June 1994
- Board of Directors business: Board elections by RLG members – member representatives (voters) lists, sample ballots, election results, April 1995
- Board of Directors business: Board elections by RLG members – member representatives (voters) lists, sample ballots including a change to bylaws, revised bylaws, April-May 1996
- Board of Directors business: Board elections by RLG members – creation of ballots, sample ballots, results including bylaws change, and actual ballots counted, April-May 1997
- Board of Directors business: Board elections by RLG members – member representatives (voters) lists, sample ballots, results including bylaws change, April 1998
- Board of Directors business: Board elections by RLG members – Nominating Committee work and sample ballots, 1999
- Board of Directors meeting no. 79 agenda (cover memo, agenda pages, meeting handouts, Noel Hanf's notes, some follow-up material), 9-10 October 1998 (Washington, DC)
- Cultural Heritage [Materials] Initiative Alliance: Lead-up to and materials involved in the kick-off meeting of key alliance participants; includes Noel Hanf's handwritten notes, August-November 1999

- Oracle Application Developer Agreement, scraps of exchange between David Richards and Oracle, early 1990
- Host Institution Agreement between RLG and Stanford University: Evolution of hosting relationship, specifically the Stanford Data Center Agreement (this file contains only drafts), 1996
- RLG – Stanford Data Center Service Level Agreement: services from SDC to RLG, completed version, 1 September 1999
- K.G. Saur Verlag agreement: Regarding French titles from RLG Union Catalog – single exchange on agreement draft, between John Haeger and Noel Hanf, March 1997
- RLG/RLIN service agreements, various: Library Schools Addendum (for free searching), Zephyr Access Addendum (for using Z39.50 connection); RLG Members' Service Agreement, February-August 1994
- CIMI (Computer Interchange of Museum Information) Consortium Financial Management: Portion of agreements, activity, and background for RLG taking over CIMI financial administration from MSN (Museum Computer Network), April 1994 – December 1996
- DCRC & potential acquisition of CARL/UnCover asset: Background on RLG-CARL-Dialog/KRI relationship; leads up to agreement enabling Dialog@CARL with RLIN & CitaDel service and then traces the route to service's dissolution, December 1996 – October 1997
- [Should have been incorporated in other Wiggin & Dana files for these topics – see Carton 185]
- Potential acquisition of CARL/UnCover assets: Related to other Wiggin & Dana files on same topic [see Carton 185]; some of the records on RLG's interest/offer, plus legal perspectives on effect on RLG's IRS status if done, 1997-1998
- Potential acquisition of CARL/UnCover assets: Related to other Wiggin & Dana files on same topic [see Carton 185], doesn't get to complete end of matters, February-August 1988

## CARTON 187: Files of Noel E. Hanf, Wiggin & Dana

1976-1999: Large variety of topics; includes two papers by James Michalko; examples of Wiggin & Dana billing statements; notes on RLG's organizational/tax-exempt status; bylaw changes; host institution agreement with Stanford; 3 annual financial statements; and a number of folders on Ariel and Ariel sale.  [SEE Carton 23 for cross-references to other cartons holding Ariel material.]

- Addresses (papers) by James Michalko, 1992: "Today's Librarians Face Tomorrow's Scholars: Faults and Fissures"; and "Future Development of National Information and Research Networks: Where Do Government Records and Archives Fit In?"
- Wiggin & Dana billing/work statements: These cover work for RLG in the 1st 6 months of 1984; 1997-1998; 1988-1989; 1989-1990; 1990-1991; and 1991-1992 – give a sort of overview of corporate/business issues for RLG across this period
- Wiggin & Dana billing/work statements: These cover work in RLG's fiscal years FY93 (1992-1993); FY94 (1993-1994); FY95 (1994-1995); parts of FY97 and FY99 – continuation of material the similar file for 1984-1992
- Wiggin & Dana contracts/orders for legal services to RLG: 1987-1989; 1994; 1995; 1996; and 1997 (during this time RLG shifted from Stanford University procurement to its own administration)
- RLG tax-exempt status: File of notes including extensive 1979 analysis by Edwin A. James (EAJ) at Wiggin & Dana, 1976-1979
- Changes to RLG Bylaws and Certificate of Incorporation [not a comprehensive file; see more material in other cartons], 1980 … 1983

- Reclassification of RLG IRS organizational status: Successful analysis and move to 509(c)(2) from earlier 509(c)(3) status [more on this topic in other cartons], 1986-1994
- Membership in RLG & IRS tax-exempt status: Responses to a few membership inquiries and Wiggin & Dana analysis of eligible organizations, 1990-1993
- Host Institution Agreement between RLG and Stanford University: Revision exchanges [part of larger record; needs collation with other files], 1991-1993
- Intellectual Property Rights and the National Information Infrastructure: Background reports (from Secretary of Commerce and American Association of Universities Task Force) in Noel Hanf's files, 1994
- RLG property taxes and exemptions, 1994
- RLG transition from Stanford benefits administration to independent program: Molly Singer's notes and concerns following 7 April 1995 planning meeting with Stanford managers (single-item file), April 1995
- Audited RLG 1992-1993 financial report (bound) with cover letter, December 1993
- Audited RLG 1997-1998 and 1998-1999 financial reports (bound with cover letters), December 1998 & 1999
- Proposed RLG short-term investment in equity securities: Noel Hanf sets out requirements under UMIFA (Uniform Management of Institutional Funds Act) and California specifics, September 1999
- Ariel: Evolution of Ariel software domestic distribution agreement from RLG, August 1994 – April 1995
- Ariel sale: Confidential information to potential buyers of this RLG service line (bound copy), February 2002
- Ariel sale to Infotrieve: Dealings over Ariel trademark for clearing way to sale, October-November 2002
- Ariel sale to Infotrieve: Due diligence information, November-December, 2002
- Ariel sale to Infotrieve: Search results from Corporation Service Company to prepare for UCC filings, December 2002
- Ariel sale to Infotrieve: Background on RLG-Infotrieve [?] letter of agreement regarding interests of NLA (National Library of Australia), AV-CC (Australian Vice-Chancellors' Committee), and JISC (UK Joint Information Systems Committee) in Ariel and its distribution
- Ariel sale to Infotrieve: Notes, correspondence, memos, late 2002 – early 2003
- Ariel sale to Infotrieve: Final documents and correspondence among legal counsels, 21 January 2003

## CARTON 188: Files of Noel E. Hanf, Wiggin & Dana

1978 – 1997: Mixed material, including plans to transfer responsibilities for RLG from Yale to Stanford; RLG relations with BCR (Bibliographical Center for Research), then OCLC (1979-1987; testy); early bylaw amendments, early RLIN systems documents (1979-1980), and 1982 performance problems; Battelle report (and draft response by John Heyeck) on "linking the bibliographic utilities" (1980); board meetings no. 8 and 9 materials; Yale article on Sterling Library and its engagement in RLG; start of long-lasting agreement with National Underground Storage, Inc. (1983); RLIN developments and documents in 1980s; various legal issues and strategic planning from 1985 to 1996; more RLIN developments and RLG relations with other entities, 1990s; transfer of support services for CIMI (Computer Interchange of Museum Information) from MCN (Museum Computer Network) to RLG; 1997 selection of California employment counsel in anticipation of staff layoffs.

- Yale as RLG's fiscal agent: Draft agreement and prospect of Stanford University's role in future, May-June 1978 [Sort of a precursor to the Host Institution Agreement arrangement later done at Stanford]
- RLG/RLIN and BCR (Bibliographical Center for Research): Contractual relationship vis-à-vis prospective RLG members, 1978 – March 1979
- Issues of RLG/RLIN competition/cooperation with other entities, especially OCLC: Wiggin & Dana notes (Linda Randell and Noel Hanf), 1978-1979 [See also "OCLC proposed restrictions" 1979 folder and "Restraint of trade/antitrust issues" 1981-1987 folder in Carton 188]
- OCLC proposed restrictions on records access and sharing, case of PALINET and University of Pennsylvania protest, March-July 1979
- Restraint of trade/antitrust issues in RLG-OCLC relationship, 1981, notable 1982 (early "anti-RLG" actions by Roland Brown & Paul Schrank), then bits in 1983, 1984, and 1987
- Board of Governors business: Bylaw amendments related to form of board, December 1979 – January 1980
- RLIN systems documents: "Overview of the RLG Authority Subsystem," July 1979; draft "User View of the RLIN Network Acquisitions System," December 1979; and "RLG Plans for a Patron Access System," January 1980
- Battelle Institute's CLR (Council on Library Resources)-commissioned "Technical Report on Linking the Bibliographic Utilities: Benefits and Costs," July 1980, plus RLG 8-page preliminary response in letter from John Heyeck, August 1980
- Board of Governors meeting no. 8 minutes, 5-6 August 1980 (Fort Collins, CO)
- Yale "Alumni Magazine" article on Sterling Library and its role and engagement in RLG, emphasizing technology and cooperation, October 1980
- Board of Governors "annual meeting" (meeting no. 9) special session agenda (Council on Library Resources and foundations officers invited), 29 October 1980 (Baltimore, MD)
- RLIN performance problems and load management plan, including legal aspects, March 1982
- RLG agreement with National Underground Storage, Inc., 1983 (was actually executed at some point beyond this file and agreement still existed at least into 2006)
- Wiggin & Dana legal research on RLIN: Noel Hanf memo on the prospect plus RLIN video terminal "Site Preparation Guide," 1983
- RLIN and distributed processing: Carnegie-Corporation-funded RLG staff study on the tasks involved in distributing RLIN's processing capabilities beyond the mainframe computer (formerly in 3-ring binder), November 1983
- Proposed agreement with IBM re development of non-Roman characters for IBM PC [outcome not indicated], August 1984
- Proposed agreement with INFOUR (Information, Investment, Intelligence, Incorporated) and its president, Brett Butler, to have INFOUR create an RLIN retrospective conversion system ("ReLIN") [outcome not indicated here], February-July 1985
- RLIN and local systems: Iterative staff paper on links between RLIN and members' local processing/reference systems, October-November 1985
  [Paper by Lennie Stovel; see also "Strategic Planning" 1986 folder in Carton 188]
- Agreement with the Haworth Press to publish in special double issue of Haworth's "Collection Management" journal the proceedings of RLG's 10th anniversary event, "International Conference on Research Library Cooperation [think this did happen], November-December 1985

- Amdahl's Aspen operation system development: "Information Week" article mentioning RLG, December 1985, plus Richard W. McCoy's cover memo, January 1986  [See also other files on RLG and Aspen]
- Strategic planning: Directions for 1986 through 1990 – draft staff document and Board of Governors' feedback, notably Patricia Battin, December 1985 – February 1986.  [Conveys an ongoing tension between systems & programs and central staff & library perspectives]
- Overpriced serials subscriptions to libraries: Richard Dougherty (University of Michigan) and Wiggin & Dana exchanges on how to counter/resist, August 1985 – July 1988.
- Proposed [executed] agreement with The Computer Company, to provide TCC with RLIN bibliographic records for microform materials and receive in consideration thereof discounted TCC authority control services for RLIN users [outcome not indicated here], May 1987 – September 1988
- Tracking sources of RLG revenue for IRS-related purposes: Scraps of Barbara Lindsay's files, primarily correspondence with/about RLG, advising on membership eligibility, and considering RLG classification change under IRS Code Section 509, 1987-1993
- Benchmarks/operations measures: Membership, cataloging, RLIN performance, "Library Identifiers (of customers), databases available, press releases, all issued between September and December 1990
- "RLG92" organizational changes: Letters from John W. Haeger and James Michalko (latter missing page 2) on "Changes to RLG Membership and FY92 Fees," June 1991
- "RLG92" organizational and service changes: "Chronicle of Higher Education" interview with James Michalko, 22 January 1992
- CitaDel/Citation Resources: Marketing materials and contract agreements, 1992; "Chronicle of Higher Education" comparison of OCLC and RLG pricing, 1993
- ISM Z39.50 access to RLIN: Agreements to give ISM Library Information Services Ltd.'s UTLAS system users access to RLIN through RLG's Zephyr connection, November 1993 – October 1994
- Transition from Stanford University administrative support to independent RLG functions: Bank of America banking relationships, January 1995
- Member-user agreement for State University of New York at Binghamton, good for 10 years, from August 1995 to 2005
  [Believe that only the SUNY institutions did it this way, owing to perceived state regulations]
- Strategic planning/directions: "Strategy for 2000" mailing (cover memo, questionnaire, brochure) and follow-up e-mail to members from Linda West, January & March 1996, respectively
- Ariel: Agreements to enhance software for use in Australia, with AV-CC (Australian Vice-Chancellors' Committee) – related to JEDDS, February 1996
- RLG and CIMI (Computer Interchange of Museum Information) Consortium: Transfer of support services being provided to CIMI, from MCN (Museum Computer Network) to RLG – scraps of the record, spring & December 1996
- Legal counsel beyond Wiggin & Dana: Selection of California employment counsel – related to coming RLG staff layoffs, fall 1997

[Cartons 189-190: See note preceding Carton 1 above.]

**CARTON 191: Files of Noel E. Hanf, Wiggin & Dana**

1979-2005: Numerous topics, including membership development and processing; early major RLG loans; 1982 actions by interim president Patricia M. Battin; aspects of "RLG 92" reorganization in

1991-1992; various board meeting materials, ca. 1999-2005. Includes "The President in the Board Room: JPM's Table Talk, 1993-2003 (Noted by one who was there)" – compiled by then-board-chair Reg Carr.

- RLG Directory, March 1979: Draft copy listing board members, committee members, and central staff
- RLIN users/RLG members "prospective installation list": Lists institution's service uses, estimated annual titles processed in RLIN, etc., 16 March 1979
- RLG membership: Correspondence and copies of forms regarding membership invitations and acceptances, 1979-1980
- RLG membership: Correspondence and copies of forms regarding membership invitations and acceptances, 1981-1985
- RLG membership: Correspondence and copies of forms regarding membership invitations and acceptances (one *original* membership form at back of file), 1986-1989
- Membership & service agreements record kept at RLG headquarters: <u>Not</u> part of Wiggin & Dana files, but indicates what forms (and their dates) could be tracked as staff, filing responsibilities, and RLG location changed over the years – last updated 8 December 2005
- RLIN service agreement for RLG members: Draft version of December 1991
- Pricing individual RLG programs: Part of change in wake of "RLG92" reorganization; Shared Resources most notable flash point, March-June 1992
- RLG membership: Member development program of 1993 – plans for spring/summer campaign, memo to RLG board, 12 March 1993
- Early major RLG loan agreements: Agreements with Ford Foundation and Carnegie Corporation, plus loan and repayment agreements with RLG's members – incomplete draft chronology plus some key documents, 1980 – early 1992
- 1982 actions by interim president Patricia M. Battin: Letter to all non-RLG Association of Research Libraries members to counteract negative publicity, 27 August 1982; *plus* reorganization memo to central staff, 30 August 1982
- "Dead file" – Robert Half of Northern California, Inc. vs. Stanford University & RLG, 1983-1988; issue of whether a Robert Half temporary worker was incorrectly hired – not required in archive, unless desired as an object lesson on (a) when to litigate/when to settle and (b) Stanford-RLG relations
- RLG's "foreign corporation" filing in California, 30 June 1991
- Strategic planning for 2000-2003: Work done by RLG's board of directors, November 1998 – April 1999; *plus* bound summary for later board members of planning "from fall 1998 through fall 1999"
- Performance evaluation process; correspondence among Hanf, Scott, and others, August-September 1999.
- Wiggin & Dana attention to University of Oxford Library matter (infringement by Indiana University professor), incomplete record & no direct relation to RLG, August 1996 – September 1999
- Board of directors meeting No. 83 agenda & related materials, 3-4 October 1999 (Washington, DC)
- Board nominating committee and election slate: Aspects of preparation, January-March 2000
- "The President in the Board Room: JPM's Table Talk, 1999-2003 (Noted by one who was there)" – booklet produced by board Chair Reg Carr (University of Oxford) … very much on the mark (except for the exclamation points), September 2003

- Board of directors meeting No. 84 (minimal material, no agenda), 25 February 2000 (Mountain View, CA) – only a few related memos plus set of exchanges among 2000 nominating committee members
- Board of directors meeting No. 87 agenda & related correspondence, 15-16 February 2001 (Mountain View, CA)
- Board nominating committee and election results: Committee deliberations, ballots to members, results (included bylaw amendments), February-April 2001
- RLG Annual Membership Meeting agenda/registration packet/Web printouts, 30 April – 1 May 2001 (Ottawa, Canada)
- Board of directors meeting No. 97 advance memos, bound agenda, & Noel Hanf's notes, 18-19 June 2004 (New York, NY)
- Board of directors meeting No. 98 scraps of preparation & example of Conflicts-of-Interest questionnaires collected, 4-5 October 2004 (Washington, DC)
- Board of directors meeting No. 99 advance memo only (December 2004), 25-26 February 2005 (Mountain View/Palo Alto, CA)
- Facets of RLG negotiations with Google, May 2003 – December 2004
- Board audit committee founding: California Nonprofit Integrity Act of 2004 and RLG response (need for new audit committee to meet requirements of this post-Sarbanes-Oxley legislation), December 2004 & some early 2005 work
- Board of directors conference call (unnumbered), 14 December 2004: Actions prepared for and taken by board, including bylaw revisions and changes in RLG benefit programs

## CARTON 192: Files of Noel E. Hanf, Wiggin & Dana

1979-1999: Mixed material: Audited financial statements, FY1990-FY1992; Wiggin & Dana legal services & billing statements; James Michalko board updates; bylaws & certificate of incorporation versions, 1989-2001 various service/business issues and relationships, 1991-1993; successive host institution agreements with Stanford; set of folders on RLG-CARL-KRI relationship regarding "DCRC" service and after; a few other topics.

- Audited financial statements for the year ended August 31, 1990
- Audited financial statements for the year ended August 31, 1991
- Audited financial statements for the year ended August 31, 1992
- RLIN Rates Schedules (price lists) for September 1992 – August 1993
- Wiggin & Dana legal services to RLG: Engagement letter of August 1988; contract (with RLG's host institution, Stanford University), October 1988; correspondence to amend and extend contract, November 1989 – September 1993
- Wiggin & Dana billing/work statement: Background, statement, commentary on process for work done for RLG, 1 September 1993 – 31 July 1994 [see more in Carton 187]
- Wigging & Dana billing/work statements: Two statements in stripped-down style requested by RLG's chief financial officer Molly Singer, for 1 June 1998 – 31 January 1999
- James Michalko's updates to members and/or board: Intermittent e-mail reports, December 1990 – March 1993
- RLG Bylaws and Certificate of Incorporation: Versions effective 24 February 1989 and 26 May 1989 respectively – amended from three to four membership categories
- RLG Bylaws and Certificate of Incorporation: Versions effective 1 September 1991 – both were amended to change RLG's IRS section/categorization from 509(a)(1) to 501(c)(3), as well as to reflect "RLG92" changes in organization and governance

- RLG Bylaws and Certificate of Incorporation: Versions effective 1 February 1993 – amended to reduce minimum board meetings annually, keep the board Chair until successor elected, and ensure RLG's identification as a public charity, not a private foundation
- RLG Bylaws and Certificate of Incorporation: Versions effective 1 June 1993 – amended regarding election of at-large directors
- RLG Bylaws and Certificate of Incorporation: Versions effective 1 May 1998 – includes members' voting materials for the changes made]
- RLG Bylaws and Certificate of Incorporation: Modifications voted on and approved by members in April 2001 – clean revised copies not filed here
- Retro Link Associates: Contract for RLA retrospective conversion products using RLIN data [previous to and separate from Diogenes/Marcadia automated copy cataloging service], 18 December 1991
- RLG-OCLC CJK records exchange: Proposed and completed agreement to exchange machine-readable records for Chinese/Japanese/Korean materials from each other's main bibliographic database, 20 December 1991 – end of February 1992
- Trade/Service Marks: Successful registrations for Ariel document transmission software and Prospero interlibrary loan management software [never completed by this name; ultimate actual product was ILL Manager], December 1991 – March 1992
- AVIADOR (Avery Videodisc of Architectural Drawings on RLIN): RLG & Avery Library agreement regarding RLG support for Avery's AVIADOR product – distribution, user support, and marketing, 10 July 1992
- WLN Conspectus Software: Agreement with WLN (Washington, then Western Library Network) for work to develop and license WLN software to support the RLG Conspectus, 29 July 1992
- Berry Computer & Amdahl processor: Agreement with Berry Computer to least Amdahl 6100-300 DASD (Direct-access storage device[s]) controller, October 1992
- BRCON (RLG's "batch retrospective conversion" software): Original investment in by RLG members – sample letter, 10 May 1988; looking at BRCON revenue in wake of investor withdrawal from membership – July 1992; and decision to withdraw from service by turning over to Retro Link Associates for use in serving customers – January 1993
- Environment/trends: (e.g., "be more entrepreneurial") Government pressures on Library of Congress, reactions from watchers, March-May 1993
- Stanford University – RLG Host Institution Agreement: Copies of 1979, 1983, and 1988 agreements, followed by incomplete facets of revision as RLG prepared to move away from a Stanford-managed administrative framework, June 1993 – January 1995 [records in other cartons help complete the history]
- Stanford software licensing to RLG: Incomplete – aspects of Stanford-RLG facilities contract (from RLG chief financial officer John Sundell), October 1999
- "RLG" as corporation's dba name: Partial record of steps to filing for a "Doing business as" ("fictitious") name of RLG for use in place of "The Research Libraries Group, Inc." [despite some confusion, this was simply RLG, _not_ RLG, Inc.], January-June 2001
- RLG – CARL Corporation – Knight-Ridder Information): Move to create RLG-CARL joint service in article location/access (KRI being CARL's parent company) – bits of Mary Norris's files, December 1996 – March 1997
- RLG – CARL "DCRC" service: Amending RLG's Citation Resources/CitaDel file licensor agreement as part of new joint service ("Dialog at CARL with RLIN & CitaDel"), December 1996 – February 1997
- RLG – CARL Corporation – Knight-Ridder Information): Dispute with CARL & its parent, KRI – Tom Casagrande's file at Wiggin & Dana, October 1997 – March 1998

- RLG – CARL Corporation – Knight-Ridder Information): Dispute/termination of contractual relationship and joint service with CARL & its parent, KRI – Mary Norris's files (not everything) at Wiggin & Dana, October 1997 – March 1999
- RLG – CARL UnCover – KRI/MAID: Potential acquisition/purchase of CARL UnCover service when parent (acquired by an English firm, MAID) put it on the market; includes dealings with another bidder, Ex Libris (in Israel); facets of due diligence [detailed confidential documents released by seller not retained] and correspondence within RLG (purchase not made), November 1997 – September 1998

## CARTON 193: Files of Noel E. Hanf, Wiggin & Dana

1993-2003: Copy of ARL/RLG ILL cost study, 1993; rest of folders all related to RLG service offerings – Hand Press Book database, Diogenes/Marcadia automated copy cataloging, RLG Cultural Materials, CitaDel/Citation Resources, AMICO, a bit more on others.

- "ARL/RLG Interlibrary Loan Cost Study: A Joint Effort by the Association of Research Libraries and the Research Libraries Group," by Marilyn M. Roche [RLG], softbound publication by ARL in June 1993
- CERL (Consortium of European Research Libraries) & HPB database: Part of the record on CERL's Request for Proposals/Tender for a Hand Press Book database, and RLG's consideration of a draft contract asked for as part of responding, September 1993
- Diogenes (later Marcadia) automated copy-cataloging service: RLG – Retro Link Associates draft agreement for collaboration on such a future service, November 1995
- RLG Cultural Heritage/Materials: Handouts on the Cultural Materials Initiative/Alliance, February 2000; agenda & handouts from a CMI/CMA meeting of 29 April 2001; and background folder for potential sponsors of the RLG Cultural Materials database, January 2001
- RLG Cultural Heritage/Materials: Work towards contributor's license agreement, with Cultural Materials Alliance's Policy Advisory Group, November 2000 – April 2001; *plus* Issues for the New York State Education Department in the license contract, June 2001
- RLG Cultural Heritage/Materials: Completing the Cultural Materials Alliance contributor's license agreement – one example of negotiations successfully concluded, with the University of Oxford, May-November 2001
- Database/Service copyright questions and considerations [Mary Norris – Wesley Taoka], January 2002
- RLG Cultural Materials service: "Courtesy"/individual access to the database [Mary Norris – Susan Yoder], February 2002
- RLG Citation Resources (renamed from CitaDel, but change not made in file providers' contracts): Question of individual subscribers [Mary Norris – Wesley Taoka], February 2002
- AMICO (Art Museum Image Consortium) & The AMICO Library: Founding, mission, RLG's role/involvement with, various facets of AMICO operations (printouts from AMICO Web site) through review of AMICO Library offering (by Henry Pisciotta, Penn State University Libraries), ca. August 1997 – June 2000
- AMICO (Art Museum Image Consortium) & The AMICO Library: Negotiations and correspondence for AMICO Distribution Agreement with RLG, November 1997 – August 1998
- AMICO (Art Museum Image Consortium) & The AMICO Library: Incomplete exchange on AMICO and OCLC, July-August 1999; *plus* 17 March 1998 RLG AMICO Distribution Agreement

- AMICO (Art Museum Image Consortium) & The AMICO Library: Developing RLG counterpart to the AMICO customer service agreement, June 1998
- AMICO (Art Museum Image Consortium) & The AMICO Library: Single memo from James Michalko launching renegotiation of 17 March 1998 RLG AMICO Distribution Agreement
- RLG-AMICO-HEFCE/JISC* Agreement: Negotiations and resulting agreement for UK provision of access to the AMICO Library, October-November 2000; plus Amendment to extent the agreement, October-December 2001
      *Higher Education Funding Council of England/Joint Information Systems Committee
- RLG/AMICO interest in ARTstor, new/competitive? Undertaking of the Andew W. Mellon Foundation, February-May 2001
- Union Catalog on the Web (later "RedLightGreen"): RLG Intellectual property agreement/license required by funding grantor, Andrew W. Mellon Foundation, April-May 2001
- ILL Manager software: Follow-up (file incomplete) involving Noel Hanf to a report in fall 2001 RLG board meeting – ILL Manager vis-à-vis OCLC and the British Library Document Supply Centre (BLDSC), February 2002
- Ariel document transmission software: Sale to Infotrieve – softbound "Asset Purchase Agreement," January 2003

[Cartons 194-195: See note preceding Carton 1 above.]

## SMALL MAP FOLDER 196: Marketing & Sales (Corporate Communications)

1992: "Discovering RLIN" 4-color poster (designed by Jennifer Porro, based on book cover by Hilary Hannon).

## CARTON 197: Computer Systems (aka Development)

1983-1995:  Seventy-seven folders; a mix of system specifications, proposals, requirements, documentation, presentations, reports, e-mail exchanges.  Subjects include (at some point in their planned or executed development): RLIN archival processing and AMIS; a local system based on RLIN; RLIN and CJK (Chinese-Japanese-Korean integration); other non-Roman scripts/alphabets; PRIMA-related databases (RIPD, MEMDB); MARC issues; article-citation files; work leading to the Eureka searching interface (largest set of files in Carton 197); ESTC and HPB databases; MARC materials-format integration.

- System specifications: "External Specifications for RLIN Archival Processing – Online Processing and Batch Requirements," vi+157 pages, copyright 1983, printed 17 October 1983
- System proposal: "A Proposal for the Development of an Integrated Local Library System Based on RLIN/ASPEN," by G. H. Cady, W. C. Crawford, W. E. Davison, J. J. Herr, L. H. Jones, D. R. Richards, and A. M. Tucker, iii+56 pages, plus 6 appendices (A – "RLIN Batch Processing Overview," B – "RLIN Communications System Overview," C – "RLIN/ASPEN Project Description," D – "RLIN Network Server Project Description," E – "High Level Design of RLIN Integrated Local Library System," F - "Response to RFI Questionnaire"; -- significant turning point (proposal not approved) and good snapshots of RLIN at this time; 30 November 1983
- System specifications – statistical reports: "Bibliographic Statistical Analysis – Specification," DRAFT, 5 pages, 18 December 1985 (Reports by language and by Library of Congress classification number, both for single and multiple users; also by date of publication, by

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language, and by language and vendor); these specs are the merest sample – 100s of reports got requested, specified, adjusted, over the years, both for users and for RLG staff

- Systems documentation: "A Technical Overview of RLIN," ii+44 pages, April 1986 – Originally created as a larger-picture survey of RLIN for librarians and interested agencies, when it was called "A Conceptual Overview of RLIN," this document was adopted and updated periodically by systems developers to provide more technical/functional background for vendors, funding proposals, etc.; it become more technical and detailed with time
- RLG/RLIN presentations at the Library of Academia Sinica, Beijing, 1986: Loose-leaf originals of apparently ca. 80 slides used (all of them?); covers lots of RLIN system services and architecture, RLIN's CJK character handling; systems' technical underpinnings, communications system, error reports and change requests, hardware – and 1 page on RLG member programs; all together, a specific but uncommented slice in time
- Systems development – Pascal & IBM: RLG-provided background for a meeting of Dave Richards with the Pascal development group at IBM's Santa Teresa Laboratory (in/near San Jose, CA); comprises 13 September 1985 version of "A Technical Overview of RLIN" (with 3 appendices on East Asian Language support, archival and manuscripts control, and batch processing), the 22 October 1985 version of "RLIN Pascal Environment Programmer's Manual," and the 12 December 1984 version of "RLIN System Services Programmer's Manual"; cover memo dated 17 September 1985
- Systems development – Pascal and IBM: Multiyear exchange between RLG and IBM regarding RLG's use of and modifications to Pascal programming language; IBM's adoption of Pascal and possible interest in / collaboration on RLG's adaptations; RLG's requests for VS Pascal source code to continue being able to use Pascal, for IBM's development of Pascal in certain directions, and other enhancements; -- total suggests modest success in getting at source code [?], but saved memos end inconclusively [?]; 11 July 1985 – 10 August 1992
- Systems development – non-Roman Authorities: Paper written by Karen Smith-Yoshimura ("Thoughts on Non-Roman Authorities") "as a basis for discussions" with Library of Congress staff "to assist in preparing a MARBI proposal to modify the MARC Authorities Format to allow inclusion of non-Roman scripts"; 2-1/2 pages, 30 April 1987; PLUS: 2 background [?] items on "multilingual word processing" and character sets in "MARC Formats for Bibliographic Data" – not clear how related these are –
- System specifications – Library of Congress & non-Roman card printing: "External Specifications for the LCCJK Display," 17 pages, March 1988; despite the display name (temporary?) this seems in fact to modify an earlier spec. (for an RLIN display that LC could send to its Tokyo-based catalog card printers to guide their LC CJK card production) so that LC could similarly provide copy of its RLIN Hebrew records to overseas printers for card production
- System specifications – Library of Congress & LCCJK display: RLIN "External Specifications for the LCCJK Display," 19 pages; "verified and documented March 1988; updated to incorporate USMARC updates November 1989" appears on the cover -- despite the 1988 date in the page footers
- Systems development – RIPD: Partial set [one assumes] of e-mail and letter exchanges over the specification and development of the Research in Progress Database for the Modern Language Association (MLA); involves Leslie Hume, Jim Coleman, Ed Glazier, Karen Bendorf, and Paula Schwartz at RLG and Eileen Mackesy, Suzanne Mills, and Michele Willey [yes?] at MLA; 7 January – 12 April 1988
- System specifications – RIPD: "Specification for Interface between RIPD [Research in Progress] Database and Products Systems," 5 pages [total?], 15 January 1988

- System specifications – RIPD: "RIPD [Research in Progress Database] Task List and [Time] Estimate," e-mails from Suzanne Mills [BR.SPM]; 1st memo for "Phase I" dated 22 January 1988; 2nd memo for "Phase I Extension" dated 18 April 1988
- System specifications – RIPD: "RIPD [Research in Progress Database] System Displays, Commands, and State Transitions," ii+86 pages, by Jim Coleman, "Phase II – Final," 11 April 1988
- System specifications – RIPD: "Specifications for RIPD [Research in Progress Database] Output Tape Production," 4 pages [unattributed], 25 July 1988; PLUS: "Use of 'INS' in Batch Products in RIPD," 3 pages, 26 July 1988 [INS field used for giving/causing instructions regarding product generation]
- System specifications – Arabic in RLIN: (1) "Functional Requirements for Arabic Capability for RLIN," 5 pages [by John Eilts] [May 1988], "an overview of functional requirements"; (2) 9-page memo from John Eilts and Joan Aliprand, undated, responding to (1)'s reviewers; (3) "Arabic on RLIN / Functional Requirements for Arabic as Another of the RLIN Non-Roman Scripts," v+24 pages, by Joan Aliprand, "unrevised draft," 25 April 1989; (4) "Arabic on RLIN / Functional Requirements [etc.]" v+24 pages, 5 June 1989; and (5) 7-page memo from Joan Aliprand to reviewers summarizing comments and giving responses [for which version?]
- Systems development – MARC proposal comments: Copy of Agenda for 7-10 January 1989 meeting of "RTSD/LITA/RASD Committee on Representation in Machine-Readable Form of Bibliographic Information (MARBI)," showing a set of proposals and discussion papers; PLUS a "final version" (per Lennie Stovel) of "RLG Staff Review," comments, questions, recommendations regarding the proposals and topics, addressed to the MARBI/USMARC Advisory Board, prepared by Paula Schwartz, RLG Liaison, 12 pages, January 1989 – just one sample of myriad such responses over the years
- System specifications – MEMDB: "Medieval & Early Modern Data Bank / RLG Implementation / Functional Requirements," iii+79 pages, by Walt Crawford, 6 March 1989 (MEMDB defined on page 1)
- System specifications – MEMDB: "Medieval & Early Modern Data Bank / RLG Implementation / Functional Specification," vi+240 pages, by Walt Crawford, 1 June 1989
- System specifications – MEMDB: "Technical Architecture Plan for MEMDB [Medieval & Early Modern Data Bank]," i+14 pages, DRAFT of 30 April 1990
- System specifications – MEMDB: "Technical Architecture Plan for MEMDB [Medieval & Early Modern Data Bank]," i+14 pages, unattributed, cover says "revised June 1990" but page footers still say "DRAFT 9/13/90"; -- The Medieval & Early Modern Data Bank (MEMDB) project entails implementing a mainframe database, batch processes to load records into [it], a mainframe server to access the database, and a PC application that must communicate requests to the server over an asynchronous communication path"
- Systems development – CJK: (1) "Project proposal – Eliminating Aggregation Obstacles in Romanized Chinese Phrase Searching and Word-Division/Aggregation Obstacles in CJK [Chinese-Japanese-Korean] Phrase Searching," 6 pages, by Karen Smith-Yoshimura, November 1989; (2) "'Off the Aggregator' – Eliminating Various Problems in Chinese Phrase Searching" [title doesn't indicate that, in fact, "use of aggregator symbols to input Romanized CJK data is not affected," per Lennie Stovel note], iii+12 pages, by Joan Aliprand, 12 February 1990; (3) Lennie Stovel's e-mailed review comments to Joan A., annotated in turn by Joan, 2 pages, 26 February 1990
- System specifications: "Set Processing – External Design Specification / Part I – General Rules and Rules for non-GPO [Government Printing Office] Sets," post-implementation version, iii+30 pages, by Susan Robillard Oros, 25 May 1990; -- "The general overview of Set Processing is to be found in 'Set Processing – Functional Requirements' of 19 May 1990" [not found in this carton]

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- AMIS project (Archives & Museums Information System): "Technical Architecture / Preliminary Technical Overview," i+29 pages, by Cecil Bloch – not entirely clear if this is the version of 1 August 1990 or 18 June 1990 (see title page and verso); -- "AMIS…is intended to support the information management requirements of archives and museums, with the exception of payroll, human resources, and financial management. Above all, AMIS will provide a computing environment within which an institution's activities can be managed"
- AMIS project (Archives & Museums Information System): "AMIS Check Lists," iii+53 pages and 14 handwritten pages as Appendix B, by Cecil Bloch, 27 November 1991; -- for context of this explanatory technical paper, see "[AMIS] Technical Architecture / Preliminary Technical Overview," 1 August 1990, in this carton
- Systems development – RLG-OCLC Link: Acting on an RLG-OCLC Memorandum of Understanding to work together on compatibility and standards adherence "regarding computer-to-computer linkage" towards the end of enabling each other's users "to engage in automated interlibrary loan activity" while working on different systems (signed 20 March 1990); first efforts to focus on intersystem searching? (RLG's proposal) using Z39.50-based link, but difficulties in agreeing on what should be attempted, how to implement, access to RLIN via PRISM (OCLC's cataloging system) vs. EPIC (OCLC's searching system)…; 21 December 1990 – 10 May 1991; -- slim collection of e-mails and notes that doesn't continue much beyond attempts to agree on approach [this looks to have been underway much at the same time as RLG began to reorganize itself and launch into the "RLG 92" recasting/new directions effort; see RLG 92 in other cartons]
- System specifications – MARC updates (ongoing): SAMPLES of chronic changes necessitated by Library of Congress updates to various facets of the USMARC (MAchine-Readable Cataloging) format; (1) "Change request #465 / Enhancements to RLIN Authorities System / USMARC Authority Format – LC Updates 2 & 3 / External Specifications / Implemented Version," 5 pages, by JoAnn Stewart, 7 November 1990 (reformatted 2 April 1991); PLUS (2) "Authorities Update 4 – External Specifications," post-implementation version, 3 pages, by Susan Robillard Oros, 3 August 1992
- System specifications – BRCON: (1) "BRCON/PC Functional Specification (Version 5)," 48 pages + 1-sheet Addendum, by Cecil Bloch, March 1991; (2) "BRCON2 / PC Functional Specification (Version 6)," 53 pages, by Cecil Bloch, November 1991; -- "[These] document[s] discuss the new PC program for input and update of bibliographic data for batch retrospective conversion [of older cataloging to machine-readable records in RLIN]"
- Systems documentation – BRCON: "BRCON2 / PC Processor: Technical Documentation," i+45 pages, by Cecil Bloch, April 1991; -- "In approaching BRCON source code it is essential to have an understanding of its history. The present program is an extensive rewrite of the original. The old version comprised 2 separate programs, BRINPUT and BREDIT…."
- Systems documentation: "RLIN Database Review Transition Team Report," ca. 20 pages, 21 May 1991; -- an exploration of possibilities for reducing the growth rate of the [RLG union catalog] Books file, to reduce hardware expenditure on additional 3390 disk drives; includes short- and longer-term recommendations and background issues/considerations (one possibility: removing "secondary cluster members" [SCMs] from records -- and the impact this could have on users)
- Systems documentation: "Database Redefinition / Report of the SCIRD team / Draft for management review, ii+19 pages, 6 September 1991; -- "The SCIRD team recommends that the RLIN bibliographic database be redefined to contain complete bibliographic data for certain categories of records, and only partial holdings and acquisitions data for other categories of records. To that end, we recommend…a project…examin[ing] records…to modify or remove them accordingly" [SCIRD = Secondary Clustering

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Improvement/Reduction Discussion; team members were Karen Bendorf, Rich Fuchs, Keith MacLaury, and Susan Oros, with Lennie Stovel facilitating]

- Systems development/discussion – "USE" project: Two papers from what must have been a larger set on improving RLG/RLIN database searching for users in the library [emphasis on non-technical-processing types?]; first outcome may have been "Minor RLIN Enhancements" (see folder in this carton from August 1991); Paper 1 – "Cumulated Comments on User Search Enhancements Functional Requirements Discussion Draft," 11 pages, 25 March 1991; Paper 2 – "User Search Enhancements Intermediate Note / Discussion Paper," 12 pages, by Walt Crawford, 30 April 1991
- System specifications – record clustering: "Clustering Specifications / BKS, MAP, REC, SCO, SER, VIM," implemented version, iii+46 pages, by Susan Robillard Oros, 19 December 1991; -- clustering linked records by editions of works the six types of clustering were for records in the Books, Maps, Sound recordings, musical Scores, Serials, and Visual Materials USMARC formats
- System specifications: "Engineering Index Project Functional Requirements," 24 pages, "preliminary version," 2 April 1990, by Walt Crawford; PLUS two reviewers' reactions of 4 April 1990
- System specifications – Citation files: "Analytics Within ITPS [RLIN "integrated technical processing system"] / Engineering Index Functional Requirements," review version, 23 pages, by Walt Crawford, 24 April 1990; PLUS "Citations File External Design," 16 pages, by Walt Crawford, 29 August 1990; and "Engineering Index Conversion Technical Architecture Document," 3 pages, by Walt Crawford based on draft version from Rich Fuchs & Lenore Jones, revised 30 August 1990
- System specifications – Citation files: "Generic Citations File Functional Requirements," 4 pages, undated [after 1990]; "CIT Management Plan for Generic Citation File Implementation," 7 pages, 15 October 1991, updated 7 February 1992; "CIT Approvals" for various screen and user document blueprints, pretty much undated (some from early 1992); "System Changes – Supplement to RLIN Publications," 8-page memo to users plus two reference cards for CitaDel File searching basics and the Ei Page One CitaDel file, 12 February 1992; "Project Management Plan for Midsummer ITPS [RLIN] Install [bouquet of changes, including CitaDel-related], 9 pages, 1 May 1992; "Post Implementation Report / History of Technology [Citation File] Installation, 29 February 1992," 6 pages, 1 May 1992; three "Technical Architecture Document" pieces related to the History of Technology file, dated from 10 October 1991 to 1 May 1992
- Systems/programs development – Index to Foreign Legal Periodicals: Memo to member law libraries, data submission sheet, and survey questionnaire, sent from Kent McKeever, Columbia Law Library, working with Jim Coleman at RLG; 22 pages total, 1 October 1991
- Systems specifications – Citation files: "External Design Specification for the Addition of CitaDel Files to RLIN ITPS [Integrated Technical Processing System], iii+19 pages, by Joan Aliprand and Susan Oros, "Chapters 1 & 3 revised by Kathy Bales for FY94 changes," 28 July 1993
- Systems specifications – Citation files: "CitaDel Issue Retrieval & Display: A Proposed Methodology to Provide Table-of-Contents functionality Within CitaDel Files," "A Eureka Post-Production Design Paper," 3 pages, by Walt Crawford, 25 August 1993
- System specifications – RLIN: 'Minor RLIN Enhancements / External Design," 4 pages, by Walt Crawford, "Final Version: 13 August 1991"; PLUS [had been stapled to first document] "Minor RLIN Enhancements / Comments (and Reactions) on External Design," 2 pages, by Walt Crawford, 13 August 1991
- System specifications/design – re:SEARCH [led to MERLIN, led to Eureka]: "RLIN3 Overall Design Discussion Draft" [re:SEARCH Design Document No. 1], 13 pages, by Walt

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Crawford, draft of 15 August 1991; PLUS "Responses to (and Summary of) Comments on 'RLIN 3 Overall Design Discussion Draft'" [re:SEARCH Design Document No. 2], 11 pages, by Walt Crawford, 1 October 1991; …"RLIN3, as envisioned in [Doc. No. 1], is a search-only system designed to bring RLIN's database to a wider audience…."

- System specifications – Z39.50 Server Project: Two papers, both dated 3 October 1991 – (1) "Z39.50 Server Functional Requirements," i+3 pages, by Lennie Stovel; (2) "Z39.50 Server Project Technical Architecture," i+6 pages, by Rich Fuchs, edited by Lennie Stovel; …"The goal of this project is to provide a Z39.50 server running under Orvyl and capable of supporting searches of the RLIN database using the 'American National Standard Information Retrieval Service Definition and Protocol Specifications for Library Applications' (ANSI Z39.50). The server is a target that communicates with multiple clients … a piece of the support that other computer systems (for example, NOTIS) will need to search RLIN." [Plus more on how this is part of RLG's Strategic Technical Plan.]
- System specifications/design – re:SEARCH [led to MERLIN, led to Eureka]: "research Overall Design: Basis & Early Questions," … "Design Document 3," 6 pages, by Walt Crawford, 4 October 1991; …Clarifies RLIN3 goal as: "re:SEARCH should enable effective searching of RLIN databases by students, faculty, and others who have received no special training [or] documentation, working from any computer (or terminal) able to access Internet or SprintNet and supporting VT100 terminal emulation." [Last is a precondition' for initial version of new system planned.]
- System specifications – re:SEARCH [led to MERLIN, led to Eureka]: "Possible re:SEARCH Elements" ["Working document 5"], 18 pages, by Walt Crawford, 11 November 1991; … "This paper suggests possible design elements … both short- and long-term … a set of possibilities … for discussion by the re:SEARCH Task Force"….
- System specifications – re:SEARCH [led to MERLIN, led to Eureka]: "re:SEARCH Goals & Objectives / An Internal RLG Working Document" ["document 4/v2"], 5 pages, by Walt Crawford, 7 December 1991; he notes that "re:SEARCH" is a working name for a new search system for [general, non-librarian] users [called "end users" in RLG patois, and "patrons" often in libraries] and subject to change.
- System specifications – re:SEARCH [led to MERLIN, led to Eureka]: "re:SEARCH Design Elements (Informal Functional Requirements), An Internal RLG Working Document [no. 5/v2]," 18 pages, by Walt Crawford, "based on Task Force," 7 December 1991
- System specifications – MERLIN [led to Eureka]: "MERLIN Design Element Clarifications & Notes, An Internal RLG Working Document" ["MERLIN Working Document 5.1: Based on re:SEARCH Working Document 5/v2"], 6 pages, by Walt Crawford, 18 February 1992; … "for the [library] patron-oriented search system (MERLIN)'….
- System specifications – MERLIN [led to Eureka]: Memo re "Changes from re:SEARCH Design Elements…", 3 pages, from Walt Crawford to [those] receiving "MERLIN Functional Requirements & External Design" [NOT FOUND IN THIS CARTON], 20 March 1992; …"This note should accompany a copy of 'MERLIN Functional Requirements' [etc.], MERLIN Working Document 1, which supersedes 're:SEARCH Design Elements (Informal Functional Requirements) and incorporates 'MERLIN Index Result Matrix' [LATTER ALSO NOT FOUND]
- System specifications – MERLIN [led to Eureka]: "Notes from MERLIN Spec Review," 7 pages, by Walt Crawford, 17 April 1992; …"notes I took for possible changes …. They do not represent full discussion … not … a record of the 3 meetings."
- System specifications – MERLIN [led to Eureka]: "MERLIN Visual Prototype, Version 1," 1992 [prior to 1 May], from Walt Crawford – 2-page introduction & operational notes plus a 3M 3.5 doubleside 1.0 MB DISKETTE, copyright 1992 by The Research Libraries Group, Inc.; …"MERLIN is the working name for RLG's patron-oriented search service. The actual

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system will have a different name. The MERLIN demo diskette … is being distributed to gather feedback on some aspects of MERLIN."

- System specifications – MERLIN [led to Eureka]: "Feedback from MERLIN Prototype, Merged, with Comments [working document 3]," 10 pages, by Walt Crawford, 24 May 1992; -- comments received so far from library staff [maybe a library patron or two?] at Brigham Young University, Princeton University, State University of New York at Albany, Rutgers University, State University of New York at Binghamton, Pennsylvania State University, Emory University, Columbia University, and New York University
- System specifications – MERLIN [led to Eureka]: "MERLIN States, Signposts, and Context / An Internal RLG Working Document [document 2]," v+32 pages, by Walt Crawford, 27 May 1992; …"Signpost region" is first 4 lines of the computer display; paper looks at how state, context, and signpost details are for each command."
- System specifications – MERLIN [led to Eureka]: "MERLIN Visual Prototype – Version 2," 30 pages, from MERLIN Implementation Team via Walt Crawford, 23 June 1992; -- is a set of screen printouts (no diskette); …"This set of screens shows the current MERLIN (working name only) design. It is part of the external design documentation."
- System specifications – MERLIN [led to Eureka]: "MERLIN Context-Sensitive Help / An Internal RLG Working Document [document 4]," 16 pages, by Walt Crawford, 9 July 1992; …"This document expands on section 3.1.5 of 'MERLIN States, Signposts, and Context.'" Document asks for comments by end of July 1992
- System specifications – MERLIN [led to Eureka]: "MERLIN Display Formats / Field Inclusion and Processing Requirements / An RLG Working Document [document 5]," iv+19 pages, by Walt Crawford, 16 July 1992; …"This document supplements [and updates] … the 'MERLIN Functional Requirements and External Design' and the MERLIN Prototype (version 2)."
- System specifications – Eureka: "List of Eureka Design Documents and Dates," 1 page, 17 December 1992; gives titles of working documents no. 1-10 (earlier name for project/interface was MERLIN); no. 1 (v.2) was dated 24 May 1992
- System specifications – Eureka: "Explicit Help/Explains Screens for Review," ii+37 pages, by Arnold Arcolio, Liz Chapman, Jonathan Lavigne, 12 November 1992; …"screens for 28 topics that deal with Eureka features through milestone 8"; cover memo (page i) explains further
- System specifications/design – Eureka: "Normalization of Characters in Eureka Searches," "Working document 5b: An Addendum to Eureka External Design," 1 page, by Walt Crawford, 17 December 1992
- System specifications/design – Eureka: "Eureka HEADINGS Command: Comments and Changes," "Eureka Working Document 11a," 3 pages, by Walt Crawford, 11 February 1993; -- mentions a "combined Eureka Phase 2 specification, now in preparation" (also in this carton)
- Systems documentation – Eureka: "RLG's Eureka – Example Screens," including Welcome, Author searching, Title searching, Subject searching, Location display, Boolean operators, Number searching, Online help; part of Eureka preview for library patrons at five RLG-member campuses; 26 February 1993
- System specifications – Eureka: "Eureka Phase 2 / Combined External Design & Specification / An Internal RLG Working Document," "Eureka Working Document 12, Version 2," 60 pages, by Walt Crawford, 23 March 1993; …"This document specifies that portion of Eureka not included in the pilot production system as of 8 February 1993. It includes needed changes to the existing system'
- System specifications – Eureka: "Eureka Export Formats / Field Inclusion & Processing Requirements / An Internal RLG Working Document," "Eureka Working Document 14," 20

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pages, by Walt Crawford, 30 March 1993; ..."This document supplements the 'Eureka Phase 2 Combined External Design and Specification"....

- System specifications – Eureka: "Eureka Phase 2 Changes and Clarifications, An Internal RLG Working Document," copies of 5 versions, from 1 March 1993 to 8 July 1993, varying in length from 7 to 15 pages, by Walt Crawford
- System specifications – Eureka: "Eureka Phase 2 Queries & Ideas / An Internal RLG Working Document," 6 pages, by Walt Crawford, 27 April 1993; ..."This document … was … briefly part of "Eureka Phase 2 Changes, Clarifications, & Ideas"....
- System specifications – Eureka: "List of Eureka Design Documents and Dates," 1 page, 28 April 1993; gives titles and indication of "inactive" documents (among others that were still good), nos. 1-14+ -- updates other list in this carton dated 17 December 1992
- System specifications – Eureka: "New Eureka Log Layout and Contents / An Internal RLG Working Document," "Eureka Working Document 15a," 5 pages, by Walt Crawford, 30 April 1993; ..."This document specifies the new layout for client logs … working Document 15b … will specify the statistical analyses desired"....
- System specifications – Eureka: "Eureka Counting and Reporting / Preliminary Reports / An RLG Internal Working Document," "Working Document 15b," 4 pages, by Walt Crawford, 7 May 1993; ..."This document sets forth specifications for Eureka system statistics – that is, initial analyses to be performed on Eureka logs as defined in … Working Document 15a. This is a preliminary list"....
- System specifications – Eureka: "Eureka Preview: Informal Statistical & Error Analysis: April 8 – July 15, 1993," "A Eureka Working Document [unnumbered]," 7 pages, by Walt Crawford, 23 July 1993
- Eureka Project: "Eureka Marketing Plan, 1993/94 and Beyond," 10 pages, by Walt Crawford "for Access Services" [another department than Systems], 3rd draft, 17 November 1993
- System specifications – ESTC: "Short-Title Catalogue Records in RLIN / Functional Requirements," by Joan M. Aliprand, "Sign-off Version," iv+30 pages, 22 February 1990
- System specifications – ESTC: "Short-Title Catalogue and Wing Records in RLIN / Specification of Changes to the Eighteenth-Century Short-Title Catalogue" [to specify changes for the addition of WING records], iii+24 pages, by Joan M. Aliprand, 14 October 1991; [Donald Goddard Wing produced "Short-title catalogue of books printed in England, Scotland, Ireland, Wales, and British America and of English books printed in other countries, 1641-1700," which was a continuation from the short-title catalogue for 1475-1640 created by Alfred William Pollard and G. R. Redgrave]
- System specifications – ESTC: "Eighteenth Century Short-Title Catalogue in RLIN ITPS [Integrated Technical Processing System]," by Joan M. Aliprand, v+33 pages, "Second draft," February 1994; PLUS cover note from Lenore Jones, Online Applications manager, to John Bloomsberg-Rissman, ESTC/North America at University of California, Riverside, 19 August 1993 [sic??]
- System specifications – ESTC: "English Short-Title Catalogue in RLIN ITPS [Integrated Technical Processing System] / External Design Specifications / Addition of Format Integration," by Joan M. Aliprand, xi+152 pages, revising and replacing Revision 3 [so this was Revision 4??], 2 May 1997
- System specifications – ESTC: "English Short-Title Catalogue in RLIN ITPS [Integrated Technical Processing System] / Addition of Format Integration," by Joan M. Aliprand, xii+159 pages, revised, 16 October 1997; also contains some of Joan A.'s annotations and interpolations
- System specifications: "Format Integration: Final Phase Post-Implementation Spec," 2-sided, ca. 5/8th inch thick, by Ed Glazier, December 1996; PLUS "Format Integration:

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Variable Fields Post-Implementation Version," 47 + 64 pages, by Ed Glazier, 31 May 1995; PLUS "Testing Defaults for Fixed Fields, 29 pages, undated  [out of this project came purple tee-shirts designed by Ed G. labeled "Semper FI" (Format Integration)]

- System specifications -- HPB: CERL (Consortium of European Research Libraries)'s own specs. for a Hand Press Book database – Version 1.1 of their requirements "for establishing a database of records of European printing of the hand-press period (c. 1450-1830)," 82 pages (no full table of contents), and "Statement of Service Requirements" for establishing the database, 41 pages (mostly appendix A, a draft contract); September 1993
- System specifications – HPB: "Hand-Press Book Database in RLIN / Functional Requirements for Search-Only Access," by Joan M. Aliprand, 44 pages (no contents page), November 1994 (first revision of October 1994 version); PLUS, "approved version" of these requirements, 53 pages, May 1995; PLUS, "Hand-Press Book Database in RLIN ITPS [Integrated Technical Processing System] / External Design Specifications for Search-Only Access / INTERNAL RLG VERSION," 52 pages (no contents page), by Joan M. Aliprand, September 1995; PLUS, "Surrogates for UNIMARC characters," 4 pages (undated but at least September 1995?)

[Carton 198: See note preceding Carton 1 above.]

## CARTON 199: Computer Systems (aka Development)

1986-1997: Entire carton devoted to the Database Server (DBS) project, starting with a few files of plans for migration to the Aspen operating system, to regrouping after Amdahl withdrew Aspen from development; moves on to developing what became Phoenix; stops well short of "completing" the project; includes memos, proposals, requirements, design specifications, tracking progress, and an array of on-staff and contract programmers' work. [SEE Carton 121 for cross-reference to other sources on DBS.]

- Systems development – Aspen Project: Outline, considerations, and diagrams of process for dumping/converting RLG/RLIN database from Orvyl/MVS environment to rebuild in the Aspen system; 6-7 short papers, indicating input from David Richards (diagrams in his hand) and Mike Pobuda (Lenore Jones, Keith MacLaury, Rich Fuchs, Robert Lerche addressed in Pobuda e-mail and Richards task list); much undated – dates range from December 1986 to 17 July 1987
- Systems development – Aspen Project: Gives brief updates from near the project's start to post-project regrouping – (1) letter from David Richards to Getty Trust (Nancy Englander) on reaching first Aspen project milestone in a contract for Getty support, 18 December 1984; (2) memo and confidential report to the RLG board's executive committee, "Aspen – Recap and Status Report," ca. 7 pages, late September 1985; (3) two 2-page memos, one to RLG Board of Governors, other to RLG staff, on Amdahl's decision to drop Aspen development and what steps RLG would need to take next to solve its problems with Orvyl development limitations and to achieve longer-term objectives, late October 1987; (4) further memos to RLG board from Carlton Rochell (then board chair) and David Richards – decision not to try to complete some version of Aspen for RLG's specific uses, changes to RLIN, SPIRES, and Orvyl that would permit ongoing database growth and support from Amdahl in doing this, and search for a new systems environment, 20 November 1987
- Systems development -- Database Server: Contents of a file and binder kept by David R. Richards, reorganized by Jennifer Hartzell (2009) into pretty strict chronological order, earliest to latest – would be useful broken out into more detail as part of an itemization of what's in this and related cartons, but as is represents what Dave R. filed in one place –

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more internal and day-to-day than other folders with proposals and contracts, etc.; 18 March 1987 – 14 January 1992

- System specifications & development – Database Server: Set of papers, many undated, starting with 4-page "Functional Requirements for an RLIN Database Server" to "form the basis for the external and internal design phases of [a project to create] an MVS-based database server to support RLIN databases," 17 April 1989; also, Introduction and Project Description drafted for a Proposal, 7 pages, no date 1989-90-91?); a bunch of Dave Richards' pencil notes on project, no date; then ideas for a presentation from Steve Eastman in December 1994 and 2 undated copies of Powerpoint slides on current limits, requirements , elements, features, staff and consultants, and work in progress through at least mid-1995; some diagrams; a timeline through 1996; and a diagram of the server, 12 March 1997
- System specifications – [Database Server]: "The SPIRES/File Server Interface," ix + 143 pages, by Sanford Rockowitz, RLG, 3 August 1988; PLUS 3 pages of later e-mail on this project's functional and environmental requirements, 5 January 1989; …"The goal of the Server/SPIRES project is to provide a version of SPIRES capable of using the Database Server" – this is part of moving to a server/client infrastructure (see more in this folder for intentions in 1989)
- Systems proposal and contract – Database Server: Contents of binder kept by David R. Richards, resorted (2009) into pretty strict chronological order, that includes May 1990 press release on the Amdahl- and Getty-funded project; background "Technical Overview of RLIN," 13 December 1988; April 1989 proposal (including appendices) to Getty Center; subsequent correspondence among RLG, Amdahl, and the Getty Center, 30 June 1989 – 15 June 1990; and some reports [not all, one thinks] on the Getty-funded project expenditures after a no-cost grant extension to 1995, 9 May 1993 – 22 May 1995
- Systems design – Database Server: First of four "deliverables" from MSB Computing Environments for design of DBS – "Phase I," I + 38 pages; "…addresses tradeoffs [in] implementing DBS's MVS infrastructure in C vs. Pascal/VS, defines [the] runtime environment, …MVS services interfaces, and lays out the requirements for a development and debugging environment that recognizes the production nature of the RLG [Amdahl] 5990 [mainframe]" – not dated (very early 1990?)
- Systems design – Database Server: Second of four "deliverables" from MSB Computing Environments for design of DBS – "Phase II," I + 62 pages; moves from monitor and runtime environment servers to database access manager, objects and services offered to servers and to threads, and detailed storage format, 18 March 1990
- Systems design – Database Server: Third of four "deliverables" from MSB Computing Environments for design of DBS – "Deliverable III: Utilities, 14 pages – "a complete revision of the document will be provided with Deliverable 4"; servers, command language, statistics and performance measurement, performance reporting (VERY brief); 8 May 1990 draft
- Systems design – Database Server/Phoenix: "Phoenix Monitor – Pseudocode" (associated with MSB Computing Environments' Deliverable IV? – David Richards' original binder so labeled); contains sections tabbed for "INCLUDE," "MONITOR," "COMMIT," "CONSOLE," "DBA," "DBAM," "DISK," "SEQFILE," "THREADS"; early June 1990
- Systems design – Database Server/Phoenix: Fourth of four "deliverables from MSB Computing Environments for design of DBS – "Deliverable  IV," ii + 107 pages; 8 sections on "Design Overview," "Phoenix Programming Environment," "Packages Offered to Servers," "Phoenix Monitor," "Basic Phoenix Servers," "Objects and Services offered to Threads," "Database Access Manager," "Database Servers," and 2 appendices; 3 July 1990
- Systems proposal – Database Server/Phoenix: Proposal from MSB Computing Environments to "implement the Phoenix Database Environment according to the design

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submitted under contract PR6821, with acceptance by RLG and some revisions, all in August 1990: PLUS set of 5 memos documenting the work done to meet 6 project milestones (1 and 2 combined), on 6 December 1990, 1 March 1991, 13 August 1991, 6 January 1993, and 16 February 1995

- Systems development management – Database Server/Phoenix: GANTT chart of tasks, programmers, and time (filled in?) as of 4 January 1991; brief fiscal record on expenditure of $250,000 given by Amdahl Corporation for Database Server development from January 1990 to August 1991 -- as of 1 February 1992; undated brief note on "Phoenix Progress Report, Amdahl/Getty" (merest contents list, undated); Ken Hetzel (contract programmer)'s "Phoenix Record Manager Summary" task timeline extending to (at least?) January 1993 – as of 8 June 1992; undated notes on tasks, staffing time needed, dependencies – last shows July 1992; timelines ending in January 1994 – as of 3 August 1992; undated text on project components and 2 diagrams, done for overheads (1992?) in Dave Richards' hand

- Systems development – Phoenix: Memos on specific Phoenix implementation issues from Robert Lerche, source program printouts from Carol Farlow Lerche, unattributed diagram, and Jack Grantham on setting up authorized Phoenix Wylbur libraries for test and for production; (how disparate and/or useful are these items?); 1 February – 12 July 1991

- System specifications: "RLIN Database Server / Record Manager Design specifications," Draft Version 0, ii + 41 pages, by David R. Richards, 19 April 1991; PLUS some review comments and suggestions from Steve Eastman and Rich Fuchs; subsequent version of these specifications, i + 27 pages (plus 2 follow-on e-mails from Steve Eastman), 23 May 1991

- System specifications: "Phoenix Record Manager / External Design Specification [DRAFT]," 26 pages, by Ken Hetzel based on "initial draft from Dave Richards"; "when the Record Manager is fully implemented, this document will serve as a user's guide"; 13 June 1991; PLUS various follow-on memos from Ken Hetzel to Dave Richards, July-August 1991

- System specifications/documentation: "Phoenix Record Manager User's Guide," 29 pages, by Ken Hetzel, MSB Computing Environments, plus cover memo from Ken H. to David Richards, 21 August 1991; "This … is the basis for the internal specifications … as well as the implementation plan" (i.e., it is in fact the functional requirements document?) – SEE ALSO January & March 1992 versions in this carton

- System specifications: "Phoenix Record Manager – Internal Design Specification," 117 pages, by Ken Hetzel, 7 November 1991 (SEE ALSO later (December) version in this carton); the November version contains David Richards' brief review annotations up to page 46, but none thereafter until pages 115-116; PLUS an 8 November 1991 cover memo and 19 November e-mail to Dave R.

- System specifications: "Phoenix Record Manager – Internal Design Specification," 136 pages, by Ken Hetzel (from original external/internal draft of David Richards); "this document … assumes the reader is familiar with the external interface, described in the 'Record Manager User's Guide.' [It] also assumes familiarity with the Phoenix Data Services, which are described in 'RLG Database Server.'" 2 December 1991 (date is in the revision history)

- System specifications: "Phoenix Record Manager / User's Guide," 29 pages, by Ken Hetzel based on David Richards' April 1991 draft; 8 January 1992; PLUS various notes/questions of Ken H. and Dave R., and excerpts AND a full copy of the User's Guide as of 19 March 1992

- System specifications: Draft "Client/Server Interface Specifications," by Sanford Rockowitz, Minaret Software, xx + 177 pages, followed by an Index of pages 289-294 (per the table of contents, pages 178-288 existed – but not found in this folder or carton), 30 March 1992; "… [specifications for] interfaces between the RDS and its clients … to resolve the conflicting

requirements for a modern architecture that can span platforms … existing and emerging standards … and backward compatibility with the existing database."

- Systems development reporting: Reports on Progress from MSB Computing Environments (Robert & Carol Lerche, plus Ken Hetzel) – first Record Manager milestone, contract no. PR6821 Amendment 6, 9 July 1992, and third Record Manager milestone, same contract and amendment, 11 January 1993 (more such reports perhaps in another carton??)
- Systems design/specifications: "Character Data in the RLIN Database Server," Draft, iv + 60 pages, by Sanford Rockowitz, apparently, 9 October 1992 – PLUS approximately 8 e-mails of considerations affecting/affected by this paper, from March 1992 to at least February 1993; "…Existing use of character data in the RLIN SPIRES environment … [is a ] problem … each clever solution has made the next solution more difficult; for example … [the coding has made] it impossible to automatically convert data to a different character set  [EBCDIC to ASCII] … [this paper set[s] out a way of thinking about character data [to] extricate ourselves from this situation while not requiring changes to existing database records or to the [RLIN technical processing] system."
- System specifications: "Record Manager RPC Interface," by Sanford Rockowitz, Minaret Software, Draft, v + 74 pages, 19 January 1993; "This specification defines the Record Manager interface as a set of remote procedure calls (RPCs) and outlines an implementation strategy…."
- System specifications: "Abstract Record Manager," by Sanford Rockowitz, Draft, vi + 144 pages, 2 August 1993; "At the core of the client/server interface for the RLIN Database Server (RDS) is a gloriously self-referential subsystem for describing complex data records abstractly, encoding records in alternative forms, and referencing record contents independently of the encoding."
- System specifications/definitions: "Defining the RDS FILEDEF database," from Sandy Rockowitz to Dave Richards, Steve Eastman, Keith MacLaury, and Michael Carroll; …"As in SPIRES, definitions for databases in the RDS [RLIN Database Server] will themselves be stored in a database [the FILEDEF]. … This relieves the RDS database schema compiler of considerable parsing chores. …drawback is the self-referentiality and attendant bootstrapping"; February 1994
- System specifications/definitions: [RLIN Database Server??] Database characteristics – cover memo and "first pass at the [sic] defining the compiled form of database characteristics, from Sanford Rockowitz to Dave Richards and Steve Eastman; "… I believe that these are sufficient for the current phase of work"; 30 March 1994
- System specifications: Draft "RDS [RLIN Database Server] Database Definition," by Sanford Rockowitz, Minaret Software, vi + 108 pages; "… The RDS is a high-volume client/server database management system that runs under the Phoenix Transaction Monitor in the MVS environment…"; 30 June 1994
- Systems development: Two memos to David Richards from Robert and Carol Farlow Lerche – "Benchmark Tasks [proposed conditions and goals] for Phoenix," 9 pages, and "Phoenix Benchmark Results," 10 pages, 21 July 1994 and 27 March 1995 respectively.
- System specifications: Sandy Rockowitz's (Minaret Software) scoping memo to Dave Richards on estimating FTE [full-time employee] hours/years for the Database Server's "Ad Hoc interface and Database Schema Compiler (AHI)"; PLUS the "AHI Project Plan," iv + 41 pages and a multipage chart of tasks; PLUS "RLIN Database Server: Ad Hoc Interface Specifications," ix + 126 pages.  The Ad Hoc Interface would provide access to databases that the new database server would manage – it was designed for use by internal staff for operations, reports, dataloads, etc.; in another folder, later on, Sandy R. says the AHI's name was changed to "Sophy"

- System specifications: "RLIN Database Server: AHI [Ad Hoc Interface – later, Sophy] Implementation Notes," iv + 31 pages, revision 1.1, by Sanford Rockowitz; "This report contains … [both] internal design and implementation notes [and] implementation plans. Some of this material previously appeared in 'Specifications for an Ad Hoc Database Access Interface' …[and] has been removed from that document and placed in this one"; August 1994
- System specifications: "RLIN Database Server" General Client/Server Interfaces," by Sanford Rockowitz (Minaret Software), ix + 190 pages, + printouts of "Pascal API," "C API," "DCE Interface definitions," all dated 28 September 1994
- Systems development – Database Server/Phoenix: Ken Hetzel cover memo to "Phoenix Dataset Management," 12 pages, saved as wyl.br.phx.doc#phxtools, "released to RLG 11-14-94"; …"Describes changes and enhancements made to the Phoenix datasets and dataset management tools since September"; changes were made to facilitate developers working in parallel on Phoenix and "to make possible more version staging of the working Phoenix operating system, with increasing reliability and functional support"
- Systems design & specification: "Database Manager Internal Design Document for Phoenix ," iii + 56 pages, by Steven J. Eastman, first written October 1992, last revised 12 January 1995
- System specifications – Database Server/Phoenix: "Database Manager Internal Design Document for Phoenix," iii + 58 pages, by Steven J. Eastman; …"Phoenix Database Manager (PHX DM) is a collection of Pascal/VS source files … intended to implement a subset of SPIRES for … RLG" (more summary appears in Chapter 2, "Concepts"); version of 26 January 1995 (11:00 a.m.)
- System specifications: "Phoenix Record Manager / User's Guide," 41 pages, by Ken Hetzel, 20 January 1995, PLUS a further revision, 45 pages, 30 May 1995
- Systems development/progress – Database Server/Phoenix: Describing and presenting status and milestones through 1996, in a milestones chart for the year; what milestone implementations will do (for staff understanding); Powerpoints for senior management team presentation (undated) and for staff presentation (undated and leaving out the risks, competing priorities/resource demands that are in the management version); staff contest initiated by Kris Tague (with aid from Lennie Stovel) to rename the Phoenix "Ad Hoc Interface (AHI)" – since it turned out in the end not to be ad hoc, but rather a special access route to databases for specialized staff/database administrators (in the end, it was named Sophy); first quarter 1996 for all of these items?
- Systems documentation: "Orvyl C/Pascal Interface," iv + 42 pages, by Sanford Rockowitz, Minaret Software – "initial documentation for implementing Orvyl programs in which portions are written in Pascal and portions are written in C…" for future incorporation in "the RLIN Pascal Environment Programmer's Manual," 10 January 1996; PLUS ca. 8 e-mails among Sandy Rockowitz, Keith MacLaury, Lennie Stovel, directed to Dave Richards and other developers, related to C/Pascal work, work on Sophy, and RLG's Database Server project, 12 August – 26 November 1997
- Systems development report: "Sophy Final Report" for RLG contracts NC9501, NC9605 with Minaret Software (Sanford Rockowitz), 50 pages, 17 November 1997; …"A final status report for the RLIN Database Server Ad Hoc Interface, renamed Sophy, delivered by Minaret Software

## CARTON 200: Member Programs

1983-2005: Carton begins with 14 folders about aspects of RLG's Preservation Program activities, from 1983 through 2005 – scattered elements related or possibly duplicating material in other

cartons. Contents appear to come from Robin L. Dale.  Followed by 25 folders related to the Cultural Heritage (later "Materials") Initiative of staff and a subset of RLG members, which produced the RLG Cultural Materials database; fairly fragmented and incomplete compared to coverage in some other cartons, but may add to the picture. Contents came from Anne Van Camp.

Preservation folders:

- Preservation Program: RLG reformatting (microfilming) projects and participants, 1983-1993/5, plus NEH (National Endowment for the Humanities) grants made to RLG and others for brittle book microfilming, 1983-1999
- Preservation Program: "RLG DigiNotes" – Introduction and numbers 1 and 2 (online "occasional" publications), May, July, and November 1995; first two issues are 8-9 pages each; issued directly from RLG (not done produced by Cornell University Library under RLG contract, as was done with RLG DigiNews, later)
- Preservation Program: "RLG DigiNews" – set of issues printed from the RLG Web site; vol. 1, no. 3 (December 1997), vol. 2, nos. 3 (June), 4 (August), 5 (October), and 6 (December) 1998; vol. 3, nos. 1 (February), 2 (April), 3 (June), 4 (August), and 5 (October) 1999; no indication why some issues from these publication years; 1997-1999
- Preservation Program:  "RLG DigiNews" – Miscellaneous communiqués among Robin Dale, Linda West, Cornell Libraries newsletter contractors, and others, from the initial setup of the Web-published version of "RLG DigiNews" through 2004 (RD was published for over a year beyond that); includes some contracting information;  not a complete history, but gives a good feeling for developments; March 1997 – end of 2004
- Preservation Program: About five memos exchanged among RLG central staff and with CLIR (Council on Library and Information Resources) on areas of possible CLIR-funded RLG work and collaborative possibilities – focused on digital imaging; 16 February – 12 August 1998
- Preservation Program: "Guidelines for Digital Imaging: Papers Given at the Joint National Preservation Office [NPO] and Research Libraries Group Preservation Conference in Warwick [England]," softbound, 105 pages plus introduction and four appendices – addresses selection, preparation for imaging, image capture, plus "the view from" Canada and Australia; 28-30 September 1998
- Preservation Program -- Digital archiving: Drafts, Web reports, e-mails from one of Anne Van Camp's files; four of them about a "final report/recommendations for RLG" from the RLG Preservation Working Group on Digital Archiving, January 1998; plus notes on an improved PRESERV (Nancy Elkington's choice of name for the Preservation Program, at least in the latter 1990s) Web site, 12 May 1998; and slides on results of the "RLG Digital Preservation Survey of Members," 19 March 1999
- Preservation/Archiving – long-term retention: Some "LTR policy framework" examples, from Stanford University, University of Michigan, Columbia University, Cornell University, New York Public Library; May 2000
- Digital Assets – creation, preservation, management: Miscellany – about eight articles, draft descriptions, and e-mails, found among Anne Van Camp's files; topics include overviews of RLG programs and projects related to the topic, METS (Metadata Encoding and Transmission Standards), digital archiving, digital cultural content creation, and notes on RLG's testbed project with Chase i-Vault towards a digital archive service; (some items might be more useful if moved into specific folders in other cartons?); fall 2000 – April 2002
- Preservation publication: "Attributes of Trusted Repositories for Digital Research Resources: Meeting the Needs for Research Resources" -- product of the RLG-OCLC Digital Archives Attributes Working Group convened in 2000; put out for public comments by 8 October 2001

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(that is, this is not the final version); 52 pages, August 2001; -- PLUS: September-October 2001 "OCLC Newsletter" containing a section on Digital Preservation that references the OCLC-RLG work

- Preservation publication: "A Recommendation for Content Information" -- a report by the OCLC-RLG Working Group on Preservation Metadata; published by OCLC? – no table of contents, no summary, no list of working group members; sections are headed "I. OAIS Definition of Content Information"; "II. Working Group Review of Content Information"; "III. An Implementation of Content Information" (the meat of the paper, 14 pages); and "IV. Discussion"; 19 pages, October 2001
- Preservation Program – historical overview: "Consortial Actions and Collaborative Achievements: RLG's Preservation Program," by Robin L. Dale, RLG program officer; appears to be an excellent long-term survey and identification of steps (for which there are more detailed files in this and other cartons; note that this overview preceded RLG's hybrid preservation-digitization focus (2004-2006), notably work on the auditing and certification of digital archives; written for and published in "Advances in Librarianship," issue 27 (2004 journal? -- undated)
- Preservation Program – digital archiving: RLG-submitted proposal (in partnership with the Minnesota Historical Society, Internet Archive, International Institute of Social History, and University of Toronto) to the Library of Congress's NDIIPP (National Digital Information Infrastructure and Preservation Program) for "AT RISK: Political Web Archives," 12 November 2003; includes background to the decision to apply for a grant and the rejection notification, with reasons given; August 2003 – April 2004
- Preservation Program – digital archiving: "A Proposal to the Andrew W. Mellon Foundation / The Auditing and Certification of Digital Archives: A Model" – submitted by the Center for Research Libraries (CRL), to work with RLG on developing "digital archives certification processes and metrics" in part by testing RLG work done with funding from NARA (National Archives and Records Administration) and with RLG's Robin L. Dale as project director; proposal was funded and was to run from May 2005 to October 2006 (was it extended?); file covers January to September 2005 plus monthly RLG budget reports for May 2005 to May 2006

Cultural Materials folders:

- RLG and national cultural heritage: Exchanges and ideas on RLG's role in developing a "cultural heritage information system" that would include "standards and digital surrogates accessible online for masses of cultural information objects"; first explicit steps towards an RLG cultural materials initiative?; sparked both by experiences with AMIS (Archives and Museums Information System) and its aborted development (termination discussed in this folder) and the "Mid-Decade Planning Group" recommendations in 1993; June 1993 – 25 March 1994
- Cultural Heritage (later "Materials") Initiative: Drafts, letters, exchanges leading to first Ford Foundation supporting grant in 1999; this folder begins with a draft potential project description perhaps from fiscal year 1996 planning?; then some information about early proposals (one from RLG to the National Science Foundation, 13 July 1998) and scoping of the work envisioned; and finally a series of related iterations that led up to proposal submissions to Ford in early and late April 1999; these in turn led to grant award on 16 June 1999; final memos in the folder address getting to the initial set of first alliance members, June-August 1999
- Cultural Heritage (later "Materials") Initiative: Contents of a 1999 binder made by Tony Gill, Member Programs [& Initiatives] department; tabbed for "CHI

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General"; "1 CHI - Alliance"; "2 CHI - Content"; "3 CHI – Interface & Access; "4 CHI – Infrastructure" (with nothing behind the last tab); includes exchanges with the Ford Foundation that led to initial funding for the initiative

- Cultural Materials Initiative: Developing content – 13 telephone surveys to gather more information about anticipated/ possible materials, plus two content "censuses" – from Ricky Erway and later from Tony Gill; November 1999 – May 2000
- General foundation prospects and next steps, spring 2000: Slim file on round of visits by John Sundell and John Haeger to the Luce, Delmas, Ford, and Mellon foundations, and what RLG should do next to follow up on funding prospects (see related later files in this carton); April-May 2000
- Cultural Materials Initiative: Progress and next steps -- portion of materials submitted to the Ford Foundation to report on progress under its initial grant and to request a follow-up grant for Cultural Materials development over two years; 20 June 2000 – 31 August 2001
- Cultural Materials Initiative: Paul Sharp consultancy – partial file (more elsewhere in RLG archives); three memos to James Michalko from Paul Sharp: 13 October 2000 proposal of what PS could do in a 3-month to 1-year consultancy; 20 October discussion of contract points raised by JPM; 2 December materials send by PS for JPM's consideration (two New York Times articles); and from 20 November 2001, work by PS on an "updated CMI pitch"
- Cultural Materials (plus other initiatives?): Miscellaneous funding leads, desires, plans for, fragmentary glimpses saved by Anne Van Camp; October 2001 – 30 July 2003
- Cultural Materials Initiative: Grant proposal to The Harcourt Foundation – $250,000 granted – three-page draft, 14 August 2000, and two copies of nine-page actual proposal with cover letter from James Michalko to Brian Knez (president and CEO of Harcourt General), 20 September 2000
- Cultural Materials Initiative: History of Science & Technology digitization project (funded by The Harcourt Foundation in 2000) – folder starts with the call for Cultural Materials Alliance participants' collection nominations for digitizing, goes through the selection process among the nominations, and ends as the digitizing and loading into RLG Cultural Materials is being wrapped up; 3 December 2001 – 4 April 2003
- Cultural Materials Initiative: East Asian project proposal – folder contains a survey of members in 2000 for interest and content to submit for a digitization of East Asian materials to be added to RLG Cultural Materials, a September 2001 request for funding to the Henry Luce Foundation – no response in folder, and a February 2002 funding proposal to IMLS (Institute of Museum and Library Services), followed by IMLS's rejection and reasons for not funding, in October 2002
- Cultural Materials Initiative: Cultural Materials Alliance Policy Advisory Group – 24 March 2000 meeting agenda (originally in a binder) that contains varied early basic descriptions and assumptions; indication of what RLG fed this group (meeting arrangements always got attention); and draft summary of the March 24 meeting from Susan Yoder, done 3 April 2000 [Note: There was much more work involving the CMA policy group than just this one meeting]
- Cultural Materials Initiative: Cultural Materials Alliance participants' (aka members') meeting (in conjunction with the 2000 RLG annual membership meeting in New York City) – draft agenda and background work feeding into the agenda topics, mostly; slim file, no minutes for this meeting of 30 April 2000
- Cultural Materials Initiative: RLG Forum during ALA (American Library Association) annual meeting, devoted to CMI topics and open to non-participants – including a few non-RLG-member attendees?; filed here: set of Powerpoint slides used at the forum by Susan Yoder, Anne Van Camp, and Bruce Washburn; 9 July – 2 August 2000

- Cultural Materials Initiative: Technical Review Committee Meeting -- partial file on this meeting of external experts to vet RLG Cultural Materials technical design and assumptions -- a milestone in developing RCM; includes some preparatory work for the meeting, the actual agenda packet, follow-up notes, and a formal summary of the meeting -- held on 8 January 2001
- Cultural Materials Initiative: Cultural Materials Alliance participants' meeting (in conjunction with the 2001 RLG annual membership meeting in Ottawa, Canada) – file includes agenda, some Powerpoint slides, guidance to participants for providing digital surrogates of their collections, some preparations for the meeting on 29 April; 19 March – 29 April 2001
- Cultural Materials Initiative: Instructional Technology Advisory Group – slim file of initial staff planning for this group (more would have been filed and referred to in RLG's online Notes database); more besides this folder from Anne Van Camp may exist in other cartons in the RLG archives; 25 November 2002 – 12 February 2003
- Cultural Materials Initiative: RLG Forum for Cultural Materials Alliance participants and others during the ALA (American Library Association) mid-winter conference -- event held 26 January 2003; file contains preparations, announcements, potential and actual attendees, notes, and follow-up internal reporting from central staff; 4 November 2002 – 7 February 2003
- Cultural Materials Initiative: Tony Gill's collection of Powerpoint slide presentations on the evolution of RLG Cultural Materials; includes a couple of write-ups – in particular, "Functional Description, Preview 2 System," for the Cultural Materials service, 27 September 2002; 1999 – 2002
- Cultural Materials Initiative: Cultural Materials Alliance Content Development Advisory Group – file contents are not comprehensive, since much would have been stored online for staff reference; more of a sampler that indicates the group's formation and kinds of correspondence and work done, such as reviewing proposals for collections to be added to RLG Cultural Materials and consulting on potential growth areas to strengthen the service; 5 May 2000  - 21 September 2002
- Cultural Materials Initiative/RLG Cultural Materials: Rounding up and shepherding participant contributions – far from comprehensive, but indicates kind of efforts, largely coordinated by Ricky Erway, to determine, recruit, record, and track more collections for RLG Cultural Materials; identifies some of the central staff who had assignments to check in with and encourage participants; also indicates some of the automated tools built by Bruce Washburn to aid the process (especially the CMI Content Manager and the "Collectron"); 24 May 2000 – 1 April 2003
- Cultural Materials Initiative: Recruiting more Cultural Materials Alliance participants – slim file indicating efforts to attract new CMA participants from both in- and outside the RLG membership (at first, this also meant interesting them in RLG membership to qualify); June-December 2001
- Cultural Heritage (later "Materials") Initiative: "CHI-5" – this team, one of several internal CHI teams identified from "-1" to "-5," seems to represent the oversight or initiative/service management team; see also the identification of CHI teams indicated on the tabs of Tony Gill's 1999 binder, also in Carton 200; very far from complete; 21 August 2001 – 1 April 2003
- Cultural Materials Initiative/RLG Cultural Materials: Public information – scattering of announcements, plus RLG Web site printouts describing service milestones, answering questions, outlining content additions; culled from various other folders in Carton 200; late 2001 – June 2003
- RLG Cultural Materials -- related art museums' project: Role for RLG in Mellon Foundation-funded effort by the Brooklyn Museum, Museum of Fine Arts, Boston, Philadelphia Museum

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of Art, and Art Institute of Chicago to "scan and pull together data about 'archival' collections, which could be added to RLG Cultural Materials [and/or RLG Archival Resources?] – [was the article in the New York Times in spring 2010 related to this project?]; early 2000 – May 2003
- Digital Resources Coordination staff group: Minutes of a single meeting attended by Ricky Erway, Bruce Washburn, Gregory Whitfield, and Pamela Dewey – largely concerned with RLG Cultural Materials, but also considering the AMICO art collections database, and work on METS (Metadata Encoding Transmission Standards); not enough in this folder to identify this group's purview and how long they were in operation; 25 November 2002

## CARTON 201: Member Programs

1993-1995: Carton begins with 20 folders about "DCP2" – efforts on RLG's second digital collections project (the first being "Studies in Scarlet/Marriage, Women, and the Law"); more to complete this subject may be in other cartons in the RLG archives. Followed by 25 folders related to RLG's activities and initiatives in archival access online, from thoughts on the "AMSC inaccessible materials project" to ArchiveGrid (which survived RLG as a service offered by OCLC). Contents appear to come from Anne Van Camp.

Digital Collections Project folders:

- Second Digital Collections Project ("DCP2"): First formulations towards a second project after "DCP1," the first, trial coordinated collection from RLG members created in the 1990s; DCP2 theme was "Global Immigration"; Anne Van Camp joined RLG in the Member Programs & Services department in September 1996 – this file runs from summer [in the northern hemisphere, as we used to clarify] to the end of 1996
- DCP2 – Global Immigration: Work leading up to a proposal submission to NEH (National Endowment for the Humanities) to enable development of DCP2; 7 February – 26 June 1997
- DCP2 – Global Immigration Digital Collections Project: Members that applied to participate and were NOT selected by a project task force; group includes Boston College, Center for Research Libraries, Cleveland Public Library, Howard University, Hoover Institution (East Asia Collection), New-York Historical Society, New York University, Rockefeller Archive Center, Temple University, Stanford University Libraries, University of British Columbia, University of Hawai'i at Manoa; it appears that – without rejection letter on file here, Library of Congress, maybe National Archives and Records Administration, and University of Chicago were out; pretty unclear whether Columbia University was out or in; March-May 1997
- DCP2 – Global Immigration Digital Collections Project: Anne Van Camp's correspondence with the American Jewish Historical Society about participation and budget estimates for contributing to DCP2; March – Mid-September 1997
- DCP2 – Global Immigration Digital Collections Project: Slim correspondence file on the British Library's anticipated participation in the project; 1 April – 11 June 1997
- DCP2 – Global Immigration Digital Collections Project: Very slight correspondence file with Columbia University on project participation – seems to have accepted, but is NOT in the final list of participants; 31 March – 23 May 1997
- DCP2 – Global Immigration Digital Collections Project: Slim correspondence file with London School of Economics about project participation (aka "British Library of Political and Economic Science"); 26 March – 12 June 1997

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- DCP2 – Global Immigration Digital Collections Project: Slim correspondence file with the Minnesota Historical Society on project participation; 1 April – 12 June 1997
- DCP2 – Global Immigration Digital Collections Project: Correspondence file with the National Library of Wales about project participation; 26 March – 30 June 1997
- DCP2 – Global Immigration Digital Collections Project: Correspondence file with the New York Public Library about project participation; 1 April – 26 June 1997
- DCP2 – Global Immigration Digital Collections Project: Correspondence file with the University of California, Berkeley, about project participation; 27 March – 18 June 1997
- DCP2 – Global Immigration Digital Collections Project: Correspondence file with the University of Liverpool about project participation; 1 April – 12 June 1997
- DCP2 – Global Immigration Digital Collections Project: Correspondence file with the University of Michigan about project participation; 31 March – 12 June 1997
- DCP2 – Global Immigration Digital Collections Project: Correspondence file with DCP2 – Global Immigration Digital Collections Project: Correspondence file with the University of Minnesota about project participation; 12 March – 25 June 1997
- DCP2 – Global Immigration Digital Collections Project: Correspondence file with the University of Toronto about project participation; 3 March – 6 June 1997
- DCP2 – Global Immigration Digital Collections Project: Proposal to the National Endowment for the Humanities – "Resources for the Study of Global Immigration – A Digital Collection Project" (two years, $400,000 from NEH plus nearly $200,000 in cost-sharing; includes Anne Van Camp's cover memo, a list of suggested evaluators, list of project participants and content selection task force; 24-page proposal with 52-page set of appendices; 1 July 1997
- DCP2 – Global Immigration Digital Collections Project: Correspondence with project participants in period between proposal submission to National Endowment for the Humanities, through NEH's negative funding decision; 27 July 1997 – 3 April 1998
- DCP2 – Global Immigration Digital Collections Project: Proposal submitted [in parallel to a version sent to IMLS (Institute of Museum and Library Services] to the Content Working Group (CWG) of the Committee on Electronic Information (CEI) of the Joint Information Systems Committee (JISC) [primarily funded by the Higher Education Funding Council for England (HEFCE)], in order to support the UK participants in DCP2; (IMLS was approached to subvene the costs of US participants); CWG-CEI-JISC response was negative; 1 April – 18 August 1998
- DCP2 – Global Immigration Digital Collections Project: Recasting the proposal rejected by NEH -- for submission to the then-new IMLS (Institute of Museum and Library Services); IMLS's decision not to fund; 4 April – 7 October 1998
- From DCP2 to Finding Aids conversion project: Slim and incomplete file on a salvage operation to convert and SGML-encode the finding aids that had been selected as part of the Global Immigration Digital Collections Project, with support from the Gladys Krieble Delmas Foundation; Apex Data Services to process participants' finding aids; 8 October 1998 – mid-August 1999

Access-to-archives folders:

- Archival activity – AMSC (Archives, Manuscripts, & Special Collections Program) "Inaccessible Materials Project": Thoughts towards a "minimum processing level or standard for collection entry" in the MARC Archival Materials format, from William L. Joyce (Princeton University) and LaVonne Gallo (RLG); 6 pages, 23 September 1993
- Archival activity – SGML conversion of archival finding aids using EAD (Encoded Archival Description): Exploration of SGML/EAD conversion service vendors, as part of supporting

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members and accelerating the growth of RLG Archival Resources content; outcome was the selection of Apex Data Services and negotiation of rates for project work and members in general (yes?); file includes 1998 news release and draft (signed) agreement between RLG and Apex; 30 July 1997 – 28 December 1998

- Archival activity – Apex Data Services finding aids conversion: Document (missing cover/title page) that appears to be specifications for a project that Apex called "Job 953," covering work done for any RLG member [see task 4.2.1 on page 32 of the document]; extensive examples of markup provided in 68-page loose-leaf document; "Rev. 0.9, November 22, 1998"
- Archival activity – RLG's Primary Sources Advisory Council (PSAC): Scraps of appointments and work for the beginning of fiscal year 1999; September 1998 – July 1999
- Archival activity – Converting finding aids using EAD (Encoded Archival Description); work done by the Direction des Archives de France (DAF) with funding from the Gladys Krieble Delmas Foundation via RLG, for results to be placed in RLG Archival Resources; includes a five-page, undated proposal; November 2000 – June 2002
- Archival activity – International contacts: RLG meeting with the Netherlands' National Archives and the National Library of Portugal – very slim file, mostly on Koninklijke Bibliotheek (Netherlands library – particular its archival collections); February – April 2002
- Archival activity – EAC (Encoded Archival Context) standard development: Grant award letter and financial reports on this RLG work, conducted through convening international experts with funding from the Gladys Krieble Delmas Foundation; December 2002 – May 2004
- Archival activity – Archival systems & gateways: Correspondence with and support from the Gladys Krieble Delmas Foundation (David Stam, one of the foundation's three trustees), for two meetings on archival intersystems access; (1) "RLG International Archival Gateways Meeting" at the National Archives, UK, 23-24 May 2005; and (2) "RLG Regional Online Archival Access Systems Meeting," at National Archives and Records Administration, 8-9 May 2006; total file, 11 November 2004 – 5 September 2006
- RLG Archival Resources – "Archives for the Nation": Proposal to create an open-to-the-public, freely available Archival Resources service by further developing RLG's system and with the subvention of the operating costs; funding sought from NHPRC (National Historical Publications and Records Commission – part of the National Archives and Records Administration), in proposal submitted 1 October 2004; comments and questions from NHPRC's reviewers, 11 January 2005; responses from Anne Van Camp, 7 February 2005; and a rejection letter from NHPRC, 7 June 2995
- RLG Archival Resources – "Open Archives for the World of Research": Preliminary background notes and a proposal to the Earhart Foundation, developed a bit later than (overlapping) the NHPRC proposal, to enable a period of free access to a redesigned RLG Archival Resources service; initial request for one year of support, dated 17 February 2005; follow-up materials as work went forward, including a news release, team development documents, reporting to the Earhart Foundation, announcements of the new ArchiveGrid service (2006), early usage experience, and plans to continue as a free service; at least 3 June 2004 – 21 June 2006
- User publication – "RLG Focus" – on archival role: Printout of the Web-published version of "RLG Focus" (formerly titled "RLIN Focus") that includes "Shaking the Archival World: RLG's Role in Descriptive Standards Leadership," by Susan E. Davis, University of Maryland; issue 73, April 2005
- RLG Archival Resources to ArchiveGrid: Internal exchanges in the last stages of preparing, releasing, and evaluating ArchiveGrid (far from the full record of development – would complement other files on this work); 12 January – 12 April 2006

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**CARTON 202: Member Programs & Corporate Communications**

1994-2006: Extremely varied set of 26 folders of material from Anne Van Camp; includes planning, strategy, and budget-related material; followed by 16 folders culled from Monique Funnie's files on corporate publications design and production work**.**

Anne Van Camp's folders:

- Member Programs' symposium proceedings – book reviews: Five-page discussion of the published proceedings of RLG symposiums held in 1994, 1995, and 1996 (two that year); by Paul Conway, Yale University Library, in "Library Resources and Technical Services," vol. 41, issue 2, pages 158-162 [issue undated]
- Project funding and budgets – miscellaneous, fiscal years 1996 and 1997: (1) Digital Collections Project ("Studies in Scarlet"), (2) FAST (finding aids SGML tagging) project; brief notes on budget expenditures and reporting, plus lots of budget spreadsheets for these and the projects listed below; funders included the Andrew W. Mellon Foundation, William and Flora Hewlett Foundation, NCAIR Foundation (National Center for Automated Information Research), Gladys Krieble Delmas Foundation, Council on Library Resources; other projects: (3) Distributed Database Initiative [DDI – work related to the development of RLG's "Arches" infrastructure?], funded by the Getty Information Institute; (4) RLG "host transition/network transformation," funded by the Andrew W. Mellon Foundation; (5) automated cataloging development [Diogenes, later called Marcadia?]; and (6) "DCP Law Project" [same as "Studies in Scarlet"?], funded by the William and Flora Hewlett Foundation; materials date throughout 1997
- Member/partner/user prospects in Germany, 1990s: Agenda for a delegation visiting RLG from four archival institutions, 18-19 May 1999; agenda and notes for a Deutsche Forschunggemeinschaft (DFG -- German Research Foundation) delegation's visit (8 visitors including heads of libraries/archives who were members of various DFG subcommittees), 2 September 1998; ideas and exchanges with the Berlin State Library about areas of German-RLG collaboration, September 2005
- Member/Partner prospecting in South Africa, 1999: Preparations, itinerary, presentations, institutions, a bit of R&R undertaken by Member Programs' Linda West (especially regarding library interlending / resource sharing) and Anne Van Camp (especially regarding archives and primary sources); actual trip, 22 October – 2 November, complete file, April-November 1999
- National Library and Archives of Canada: Scrappy folder of some contacts before a visit by RLG in August 2000 (pretty inconclusive – RLG wanted the library and archive as members, but it didn't happen)
- Membership development: Extremely incomplete file of bits found in a couple of folders; 12 June 2000 – 28 December 2000, plus 15 and 19 July 2003
- Member Programs portion of a "GenStaff Briefing": Subset of Powerpoint slides (pages 2-15, but page 9 is missing) for the all-staff briefing of 12 January 2000
- RLG on JISC strategy: Comments from RLG on "JISC Strategy 2001-2005," prior to an 11 December 2000 meeting together in London – a solitary letter from James Michalko to Reg Carr (University of Oxford and an RLG board member/chair), Alice Colban (JISC), and Sonya Bisset (JISC); 14 November 2000
- Branding and brand implementation: 117-page "RLG Branding and Naming, Final Report, 21 December 2000," by Azimuth Consultants; and cover letter from George Jurkowich with a 26-page report from Azimuth on "RLG Branding Project / Short-term Implementing Actions, 24 April 2001"

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- Digital objects and collections activity – METS: Incomplete file on the topic of preparing a draft proposal for RLG's work as new coordinator for the Metadata Encoding and Transmission Standard, intended to go to Michael Lesk at the National Science Foundation's Information Technology Research program; January 2002
- Commission on RLG membership: Background packet created by central staff for this RLG board-appointed commission – includes documents on dues and fees from the past, the new "RLG92" organizational structure of 1991-92, and finds of RLG's 2000 branding study; July 2003
- Commission on RLG membership: Notes and drafts surrounding the RLG board's approval of the charge to this commission – mostly geared to preparing the background packet for the commission appointees; includes actual commission of group by the board and a discussion paper for the group's first meeting;  also, e-mail exchanges and results of extensive Azimuth Consultants' member interviews; 20 June – 22 August 2003; November 2003
- Commission on RLG membership: Anne Van Camp's partial notes on work in 2004 to complete the commission's report and present it to members for discussion at the annual membership meeting; some material here may be more on the line of planning for implementing report outcomes?; January-May 2004
- Commission on RLG membership: "Report to the Board of Directors" – 17 pages plus appendices A-F, two copies (1 stapled, the other ready for photocopying); 10 February 2004
- Board Fiscal Commission – staff work: Concerns the board-appointed and board-populated commission on fiscal structure and strategic framework (as it turned out) – work by RLG staff, with consultant Steve-Anna Stephens, on RLG's approach to annual planning, priority and objective setting, and progress tracking – resulted in the first(?) completed new-style "annual planning calendar: strategic framework with goals and objectives and departmental(?) roadmaps; only the Member Programs' roadmap appears in this file; November 2003 – July 2004
- Board-led advisory groups: Slim file on setting up groups (recommended by Membership commission) – Membership (plus a Membership Development Task Force), Technology, and Business Development; also continuing the Board Nominating Committee and the Budget & Audit Committee; June-August 2004
- RLG and CURL (Consortium of University Research Libraries in the British Isles): Plans and agenda for a meeting on "RLG and CURL / Working Together: Colloquium on Digital Resources"  (slim file); morning to cover RLG Cultural Materials, RedLightGreen, redesigning RLG Archival Resources; afternoon to focus on RLG-CURL exploration of sharing software solutions and opportunities for collaboration; July-October 2004
- Membership Advisory Group: First of two files (inherited from Linda West?) on work with and by an advisory group mandated by the RLG Board in response to the 2003-2004 Commission on RLG Membership's recommendations; advice on determining, shaping, and prioritizing programs and service directions; includes formation of the group plus two conference calls and a meeting in conjunction with the February 2005 board meeting; September 2004 – July 2005
- Membership Advisory Group: Second of two files (inherited from Linda West?) on work with and for an advisory group that came out of recommendations from the Commission on RLG Membership; includes a survey to gather advisory group input and the outcome from a September conference call with the group; July – mid-September 2006
- "RLG Strategic Communications Plan – Final Report": Results of work by Linda West, Jennifer Hartzell, and others; guided Hartzell's unit's work thenceforward; not particularly well-received by some related units, however; used data from earlier branding and membership studies – Azimuth Consultants consulted; 25 January 2005

- "The Future RLG": Establishment of an on-staff design team that later broke into two smaller teams to support James Michalko and the RLG board in looking at a different kind of RLG to shift into – not incrementally, but a considerable shift in size as well as functions; all team members programs and/or new-developments oriented, totaling nine plus consultant Steve-Anna Stephens; [this work was co-eval and complementary to very confidential RLG-OCLC explorations of a potential partnership merger] September-November 2005
- "Miniplans": Fiscal year 2006 (or 2007?) to 2009 financial outlook, assumptions, risks, and opportunities for CAMIO, Trove, RLG Union Catalog, other Eureka (Citations) databases, technical processing, memberships; see also a miniplan for ArchiveGrid in an Earhart grant folder in Carton 201; 13 February 2006
- RLG and Brewster Kahle's Open Content Alliance: Notes, meeting agendas, e-mail exchanges about OCA and various players in that alliance – somewhat indeterminate; late 2005 through April 2006
- RLG Member Forum: "More, Better, Faster, Cheaper: The Economics of Descriptive Practice" – request for funds to defray speaker travel costs to and from the forum in Washington, D.C. (held on 7-8 August 2006); sent to David Stam at the Gladys Krieble Delmas Foundation on 30 March 2006
- Merger of RLG into OCLC: "RLG Programs: Innovation, prototyping, and development" – four-color very early flyer in RLG programs within OCLC; also, "RLG Programs: The next chapter," by Nancy Elkington – pages 18-19 from "NextSpace" [no further provenance]; undated, but evidently from 2006 (the merger officially took place on 1 July 2006?)
- "John Michael Smethurst: Bibliography with Postscript": A posthumous appreciation and tribute to a key figure in the UK and international research library work – gives some sense of the role Mike Smethurst played in developing and nurturing the RLG-British Library-CURL-CERL relationship (he was vital to the development of CERL), including his service on the RLG board; provides a useful entrée into the interrelationship of CURL, RLIN, RLG, and CERL; publication supported by OCLC in the months following the RLG merger into OCLC; edited and with a preface by Anne Matheson, note by Susan Yoder, bibliography compiled by Michael John Crump, essays by Franz Georg Kaltwasser and John W. Haeger, postscript by Henry Leonard Snyder; 38 pages, 2006

Marketing materials (Monique Funnie's work):

- Marketing materials: The AMICO Library from RLG / RLG's CAMIO (Catalog of Art Museum Images Online): Brochures and a few RLG Web site printouts just before CAMIO went live in July 2005; January 1999 – June 2005
- Marketing materials: RLG Archival Resources / ArchiveGrid: Early ad, series of brochures, RLG Web site printouts, free offer postcard; 1998-2006
- Marketing materials: Copies of ads for Ariel, the Internet-based PC program for document transmission developed by RLG and later sold; 1997-200?
- Marketing materials: RLG Cultural Materials: Postcard announcements, introductory event at annual ALA (American Library Association) conference in San Francisco (June 2001), brochures and brochure inserts, Maruzen Japanese brochure copy, articles, ads, labels on subscriber mailings; 2001-2004 (at least)
- Marketing materials: RLG's Eureka Databases (term subsumes all databases accessible through the Eureka searching interface, from the RLG Union Catalog to all the Citations databases formerly advertised as "CitaDel" or "RLG Citation Resources"); reprints of articles and series of later ads, interspersed with brochure insert and series of stand-alone fliers in committee-chosen (i.e., unfortunate) color scheme; 1999 – 2006

- Marketing materials: Copies of ILL Manager brochures, handouts, and ads for this Internet-based PC program for managing interlibrary loan; 1999 – February 2003
- Marketing materials: Marcadia (Originally named "Diogenes") -- Two small brochures and a flier on the joint RLG-MARCLink automated copy cataloging service, run by MARCLink using RLG Union Catalog content; summer 1997 and December 2000
- Marketing materials – miscellany: Ads for RLG, largely covering all data, sometimes services, sometimes programs – several focused on art resources; "E-News from RLG" information cards mailed or handed out at conferences and meetings; RLG's New York Office reception invitation (done online); 1996-2005
- Marketing materials: Fliers for "Moving Theory into Practice: Digital Imaging for Libraries and Archives," book published by RLG in 2000; cover designed by tompertdesign (probably RLG's best external designers); full book is in Carton 67; 2000?
- Marketing materials: RedLightGreen Web site for undergraduates – incomplete sampling of fliers, promotional cards and information "tents," "RLG Focus" articles, and ads; June 2003 – September 2005
- Marketing materials: RLG brochures – two types of "all-RLG" glossy fold-overs –(1) style from 1997 to at least 2000, after John Stoneham's redesign produced the "little r / open-door" logo; (2) folder-over with inserts pocket and card slits (designed by "Artifactory" [right name?] in Palo Alto), introduced by December 2001 (nothing later in this file)
- Marketing materials: RLG annual membership meetings – Invitations, some labels used on gifts to attendees, some signs/posters artwork; first meeting of this type was in 1992, last in 2006 (although OCLC continued to hold annual RLG partners meetings); file content ranges from 1999 to 2006
- Marketing materials: "Fifteen Years of the RLG News, 1984-1999" [but "2000" appears on the poster?] – Reduced artwork representing a large, long poster that hung in RLG's Villa Street, Mountain View office (president's area upstairs) from 2000 to 2003; illustrates the issues done over that period under Hilary Hannon's editorship – she did not include the first three issues of 1980-1981, done by Theo Pryzybyszewski before a three-year budget-related hiatus was imposed; large poster stored after move to Stierlin Court offices and not retained with RLG archives
- Marketing materials: RLIN original script capabilities and the extent of the RLG Union Catalog – postcards, fliers, and special offers describing (touting) Arabic, Hebrew, Chinese, Japanese, Chinese, Korean; "RLIN/RLG Union Catalog Covers the World" fliers identified the countries and languages of publication included in the database; 1991-2005
- Marketing materials: RLIN21 Web interface and Windows client – fliers announcing the replacement of the RLIN searching and cataloging systems with RLIN21, in advance of the March 2005 cutover to fully migrated systems and databases (the big migration off the mainframe computer); also, a "Librarians Yellow Pages" split ad – half on the value of the RLG Union Catalog, and half on the new RLIN21 capabilities; 2003-2004
- Marketing materials: Exhibitions-related, created for ARLIS (Art Libraries Society of North America), CAA (College Art Association), VRA (Visual Resources Association), AAA (American Anthropological Association), OAH (Organization of American Historians), ACRL (Association of College and Research Libraries), and ALA (American Library Association); comprises pre-event postcards, "RLG at [event name]" schedule cards, designs for miscellaneous signs, photos/artwork indicating the look of two of RLG's ALA exhibit booths: one from late-1990s – beginning-of-2000 and the other done as of April 2002, post-RCM (RLG Cultural Materials) [photos incomplete]; all from about 1999 to 2006
- Corporate forms design: Samples of staff benefit summaries designed by Monique Funnie and the final version(s) of the RLG invoices she worked on; also, the office services unit's Shipping

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Request Form required from anyone turning over items for mailing/shipping – to members, users, prospects, the RLG board, publications buyers, etc. etc.; 1996, 2000, 2005

## CARTON 203: Multiple departments

1977-2006: Mixed material of 58 folders. "Organization" is very approximately by date, earliest first -- with the exception of a sort of coherent batch of 13 folders on RedLightGreen development in the 2000s. The rest range from early RLIN computer terminals to creation of the RLIN/RLIN Information Center (RIC), service pricing and marketing, the mid-1990s RLIN network transition, systems/network documentation (especially in 2005-6), and more.  Ends with nine folders that should be housed in cartons 205-209 (dealing with member institutions).

- Zentec computer terminal used for RLIN by RLG: 8-sheet "Logic Diagram ADCCP T-COM I.F.," 1977
- User documentation – equipment installation: "Installation Procedures for RLG40 and RLG90 Video Terminals and Modem-Sharing Devices," prepared by Wayne Davison and Aaron Reizes; iv + 29 pages, loose-leaf, February 1981 – PLUS three sheets of other helpful (?) reference; see also related material in Carton 52 and Carton 122
- Early RLG CJK history – Hideo Kaneko's role: John Haeger to Sachie Noguchi on the part H.K. played in developing automation for Chinese-Japanese-Korean scripts, 1977-2001; written 1 March 2001; see related material in Carton 126
- CJK – RLG and TransTech: Correspondence from David Richard's files on the concepts and technology for a Chinese-Japanese-Korean[-English] workstation as developed by Gary Wang, for application to RLG's development of CJK library processing and searching; material from March 1980 to February 1986; see also larger record of CJK developments in Carton 126
- Zentec computer terminals used for RLIN: Discontinuation of Zentec's ZMS40 – e-mail to members and users from Vice President C. James Schmidt, May 1983; see also related material in Carton 52 and Carton 122
- User documentation – RLG-DIALOG gateway: "Using DIALOG from an RLIN Terminal," 5 pages, February 1987; see probably related material in Carton 106
- Mixed brochures on programs and services, 1981-1992: Contributed from files at the University of Toronto's Faculty of Information [nee "library school"?]
- Marketing RLIN: "Who Uses RLIN?" diagram – undated, late 1980s/early 1990s?
- Creation of RLG's RIC help center: Colored flier announcing the new "RLIN Information Center" for help and information, with a focus on processing/system uses, "beginning May 11, 1987"; PLUS, "Position Opening: Manager, [RLG] Customer Service Center" (what RIC grew into), 3 October 2000
- User documentation – library identifiers: "List of RLIN Library Identifiers (Updated to 06/07/1989)," 40 pages, stapled, two-sided; these were unique four-letter codes linked to each institution or institutional department using RLIN, and appearing in their online records – e.g., CSUG for Stanford University Libraries central processing, CSUB for the business school's library, CSUO for the Hoover Institution's East Asian collection, etc., etc.; list is in two parts – first alphabetical by full institution name, second by LI
- Systems development process, 1989: "Report of the Development Process Task Force, 7 pages, 28 July 1989 and "RLG Systems Development Cycle," iv + 20 pages, also by the task force, 25 July 1989; taskforce work was done as part of a central staff reorganization after James Michalko became RLG president; pointed to more emphasis on prototyping and on defining and enabling various roles across the new organization; see also development process/cycle files in Carton 133

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- User documentation – RLIN PC terminal: "RLIN PC terminal manual," by Jonathan Lavigne – "September 1989" on all pages except copyright, which ends with "Third edition, revised August 1990".… Vi + 91 pages, 3-hole loose-leaf; see also related and maybe duplicate material in Carton 52 or 122
- Systems documentation management: "Development Internal Documentation Control," 10 August 1990 multipage memo by Systems Development department's secretary Matt Blevins on what should be captured in a central file and how to go about it; includes list of then-current system specifications and a list of active development projects; PLUS – earlier Wylbur library printouts listing functional requirements and specifications in existence, as well as the Wylbur directory of RLIN change issues (wyl.bl.rln.changes on RLG020), 1989/1990
- Systems development projects: "Active Development Projects," 1-page brief list, 7 January 1991
- Systems documentation – for ITPS classes, June 1991: Memo and pages of material from programmer Michael Carroll for a series of programmer classes on the "RLIN Integrated Technical Processing System"; extracted from a binder that included various programmer manuals and conceptual-technical overviews already in other cartons – see especially Carton 120
- RLIN pricing: (1) "RLIN vs. [OCLC's] EPIC: Nine 'Reference' Scenarios" (internal document?), 4 pages, results and estimated comparative costs, by programmer/analyst Walt Crawford (for fiscal year 1990?); (2) one-page, one-sided "Typical Costs for RLIN Use: Searching Only," by the RLIN User Services unit, February 1992; see Carton 135 for complete? run of RLG pricing lists and their cover memos
- RLG marketing – RLIN database: Illustrated combination of prospectus and database celebration unique among RLG publications -- "Discovering RLIN: an Introduction to the Research Libraries Information Network," by Hilary Hannon, with illustrations provided by RLG member institutions; glossy, softbound, 49 pages; while focused on descriptive records only, this booklet foreshadowed the pleasure and excitement of seeing the actual materials cataloged; April 1992
- CitaDel (Citations access & document delivery), 1994-1996: CitaDel service documentation and marketing – from product manager Win-Shin Chiang's files; (1) CitaDel files and marketing literature list with attachments, 1994 – December 1995; (2) sample CitaDel Information Packet [in glossy folder] fact sheet sets for 1995 and 1996 on right side, Win-Shin's list of packet contents on the left side together with latest news release, Ariel, CitaDel, Zephyr, and Eureka fliers, 1994-1996 – see also Carton 23, Carton 52, maybe more
- Art & Architecture user documentation: Art & Architecture Thesaurus (AAT) Reference Sheet, May 1990; see Carton 52 for kindred materials?
- "RLIN Network Transition," April 1995: Explanatory, illustrated 15-page document describing a two-year [?] project that transformed the RLIN private X.25 network – deployed in 1988 – into an Internet Protocol network; includes specifications for PCs used as RLIN terminals and a glossary of terms and acronyms; Wayne Davison, Bruce Washburn, and Diana Hall named as contacts for users' questions
- Related to mid-1990s Network Transition project?: Inventories of RLG equipment in Forsythe Hall on the Stanford campus (leased network circuits and Ethernet network[s]), disposable hardware, cryptic floor diagrams; PLUS [unrelated?] memo on new primary domain name, "rlg.ac.uk," for Eureka Web operations overseas
- RLG/RLIN in "Library Journal" annual "Database Markey Surveys," begun 1997: RLG's efforts to be represented in the 1997, 1998, 1999, 2000 (missed 2001), 2002 (missed 2003 but still got a brief mention) … then what?; columnist Carol Tenopir was the surveyor

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- Systems user documentation: "Ariel Technical Support Workshop," unpaginated 1/4-inch document for workshop, distributed at event in New Orleans on 26-27 June 1999; authorship not indicated [perhaps Nilo Enerio?]
- CERL – Hand Press Book database, 2000: (1) Consortium of European Research Libraries (CERL) "Request for Development of an Assisted Searching Capability for the Hand Press Book Database (HPB)," 31 August 2000 – request for services from RLG; (2) spiral-bound HPB users' manual created by CERL – "Manual for the Hand Press Book Database via Eureka on the Web," 56 pages, version 1.5, April 2000
- MARC (MAchine Readable Cataloging) update specifications for RLIN/RLG: (1) "MARC Update Spec / Including Changes from: / UFBD updates 2-3 / MARC21 Bibliographic & Update 1 / MARC21 Holdings / Format Integration of HPB (& CitaDel Files) / Fall 2000 / Ed Glazier"; (2) "Bibliographic File Def.: Fixed Fields / For MARC Update Spec / Fall 2000; rev. 12/00"; "Bibliographic FileDefs: Variable Fields / For MARC Update Spec / Fall 2000 / Rev. 12/00"
- RLG article in 2nd edition of "Encyclopedia of Library and Information Science": Ghosted by Liz Chapman and Jennifer Hartzell for James Michalko; appears to have taken from August 2000 invitation to submit until July 2003 before the 2nd edition appeared in print and online?; Miriam Drake was editor
- A prelude to RedLightGreen(?): Ideas about metadata harvesting, exposing resources to academic users via open search service on the Web; begun with Digital Library Federation (prompted by Don Waters of The Andrew W. Mellon Foundation); RLG mentioned and later in contact; interest at Mellon (Don W.) in what RLG envisioned: "harvest[ing] our own union catalog data and put[ting] it out as a service accessible directly by all Web users"; January 2000 – early February 2001
- Union Catalog on the Web (later, RedLightGreen) beginnings: 21 September 2001 Advisory Group meeting agenda, background, and notes; AG members: Avi Rappaport, Search Tools Consulting; Brewster Kahle, Alexa Internet; and Clifford Lynch, Coalition of Networked Information
- Union Catalog on the Web (later, RedLightGreen) -- Exordium Group ("sponsorship strategists for the IT industry"): Single document – "Phase I Report to RLG for the UCW Project," 4 January 2992; after study and meeting with RLG principal project leaders, Exordium reported on how they saw the project and what they would recommend RLG include in its project plans
- Union Catalog on the Web (later, RedLightGreen) – functional requirements & specifications: RLG Computer Systems department and plumbdesign (contractors): Materials from 5 April to 7 August 2002 – four smaller documents and a 99-page functional spec. from plumbdesign
- Union Catalog on the Web (later, RedLightGreen) – idbias work: Brief reports from consultant idbias on two rounds of testing they conducted on initial wireframes for student-oriented union catalog on the Web; students included (all undergraduates) came from Stanford University, San Jose State University, and University of Santa Clara; 6 May and 24 May 2002; ALSO, an August 2003 "Draft Usability Proposal" to RLG from idbias principal S. Joy Mountford for running more studies of users of pilot service, plus idbias's own review of the RedLightGreen user interface; unclear if proposal was accepted
- RedLightGreen – Recommind involvement: The source company for MindServer software that "automatically categorizes unstructured data using proprietary text-extraction technologies"; documents in this folder are "RLG UCW Project: Recommind Technology Overview and Project Planning Discussion (2002 PowerPoint printout?), and "UCW Search Prototype: Tutorial for RLG, January 2003
- RedLightGreen – interface modification: Solitary document (2002? early 2003?) of screen shots with annotations/questions about usage and alterations to improve for users; done

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BEFORE site design was simplified and palette lightened up; Bruce Washburn's or ???'s work?

- RedLightGreen – Azimuth Consultants involvement: Development of marketing plan for RedLightGreen in pilot rollout at four member libraries, and after; documents cover several stages to reach the final report and recommendations; total project, July-August 2003 (ca. one month elapsed)
- RedLightGreen – Usability Works involvement: "Observation Guide: RedLightGreen Ethnography Study (12 November 2003), Session Checklist (2 December 2003), "Round 1 Report: Evaluations of RedLightGreen Usability" (16 December 2003), Session Checklist for Round 2 (20 January 2004), "Round 2 Reports: Evaluation of RedLightGreen Usability (30 January 2004) – All from Dana Chisnell for RLG's use; PLUS a long classes/homework profile for "Eve" (how compiled?) from RLG's Hava Rubenson Kagle (3 March 2003), PLUS some undated, handwritten session notes;  see also one of the RLG digital media boxes for 5 DVDs comprising videos of a student use session in December 2003
- RedLightGreen – Additional Azimuth work: Project to study and derive information for RLG and for current and prospective project funders, about the on-site uses/users on RedLightGreen at four member libraries; includes proposal, planning meeting, discussion guide, and handout notes [Arnold Arcolio's or Azimuth's George Jurkowich's?] from student discussion groups; PLUS DRAFT Final Report of 7 May 2004 – look for final-final in another carton?; 2 February – 7 May 2004
- RedLightGreen – in the media: Six reviews/reports on RedLightGreen – one before the Web site was openly available, the rest after that point (October 2003 and after); ALSO, news release that RedLightGreen is out of its pilot phase as of August 2004; total folder, April 2003 – June 2005
- RedLightGreen – role of Ted Hill Associates: moving from project to business model for RedLightGreen – Ted Hill's "opportunity analysis" in series of phases, each covered in a document: "Phase 1, Business Analysis" (21 September 2004); "Phase 2, Market Sizing and Analysis" (2 December 2004); "Phase 3, Customer Acquisition Planning: Media Kit Guidelines (10 December 2004); "Phase 3, Customer Acquisitions Plan" (aside from Media Kit efforts) (19 January 2005)
- End of RedLightGreen: E-mail announcing withdrawal of RedLightGreen Web site, with recommendation of LCLC WorldCat.org in its place, send after RLG-OCLC merger; 3 October 2006
- Computer Systems architecture planning and diagrams, late 1999 to 2004: Related to long migration project (which wrapped up more or less in 2005) – scattered documents from Jack Grantham, Wes Ramirez, and Wayne Davison
- Planning/progression of RLG's migration off mainframe computer, August 2001 – April 2006: Set (not complete) of issues, expectations, needs, work-to-be-done notes, work-remaining charts; [actual cutover was done on 1 March 2005 and finishing and fixing results continued through most of 2005]
- Plans for RLG News editing/writing by Dylan Tweney, November 2002: Slight file of notes towards doing an issue of the "RLG News," for Dylan Tweney, who worked on contract in RLG's Corporate Communications unit for about a year; D.T. also contributed considerably to the functionality of the madeover Web site's content management system
- RLG and METS (Metadata Encoding and Transmission Standard): "MARC and Metadata" issue of "Library Hi Tech", vol. 22, no. 1, 2004, with offprint of article by RLG's Merrilee Proffitt: "Pulling It All Together: Use of METS in RLG Cultural Materials Service"; more on METS in other Cartons
- Internal systems documentation: "RLG's Authentication Server Searching Manual," for RLG central staff needing it, from (by?) Brenda Lee, 19 pages, 3 March 2005

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- Systems/network documentation, 2005: Contents of binder from Judith Bush [?]; combination of tabbed, contents-identified materials plus ad hoc inserts – some items planned for binder but not yet there (at least in more than drafty form); about 1 inch of paper with numerous diagrams and lists
- Systems/hardware documentation, 2006: Diagrams and charts, from Wes Ramirez or Judith Bush [?]; complementary to Systems/network documentation, 2005, folder also in Carton 203
- Communications network documentation, 2006: "Network Transition Project: Replace Core Router with Tandem Gateway Routers," 14 February 2006, by Wes Ramirez; paper includes current, historical, and projected diagrams of RLG's communications network with circumstances for each transition, beginning with the network ca. 1981 and continuing through plans to reach newest architecture, presumably in 2006 [no indication of how the RLG-OCLC merger affected this project]
- RLG's active Internet domain names & transfer of registrant responsibility: Transfer made from Wayne Davison to David R. Richards; notice sent to Register.com by James Michalko in February 2006
- [Incomplete] Results of search for RLG copyrights, made in June 2006 – plus inventory of RLG trademarks
- American Academy in Rome – supplements AAS file in Carton 205: This small file shows RLG interest in a Vatican Library cataloging/digitizing project; 1994
- Canadian Centre for Architecture – supplements CCA file in Carton 205: Source seems to be John W. Haeger's files; June 1983 – May 1989 (more in earlier years)
- Smithsonian Institution – supplements Smithsonian file in Carton 207: Covers Smithsonian's opting for general membership in RLG in 2000, which subsumed several earlier member units under the new, more comprehensive membership; from files of Anne Van Camp or Linda West?
- University of Michigan – supplements Michigan file in Carton 209: Single e-mail between James Michalko and Karen Smith-Yoshimura about Michigan consumption of and contribution to RLG programs and services; 21 August 2001
- University of Minnesota – supplements Minnesota file in Carton 209: January 1981 – September 1997 correspondence; includes a "Memorandum of Understanding" regarding development of joint library services, done at time Eldred Smith was University Librarian; but largest share of letters date from Tom Shaughnessy's time as U.L. (ca. 1990 - ?)
- University of Oklahoma – supplements Oklahoma file in Carton 209: Just a little correspondence from February 1982 to July 1996
- University of Pennsylvania – supplements Penn's file in Carton 209: Minimal assorted correspondence, April 1982 – April 1995
- University of Southern California – supplements USC's file in Carton 209: Worth melding into primary file; extends from 12 December 1980 (copy of Special Membership Agreement from USC Law Library) to June 1995 (regarding USC libraries deanship)
- University of Southampton – supplements Southampton's file in Carton 209: Single-topic exchange of December 1996 regarding a meeting held in the UK that involved RLG and OCLC

## CARTON 204: Multiple departments (mostly Member Programs)

1983-2006: Mixed material; folders collected after accessioning and inventorying began, together with folders found misfiled in other cartons. As with so much of the archive, this overlaps/replicates materials in other cartons.  Sixteen folders for RLG annual, Cultural Materials, or board of directors' meetings; a few on international activities.  Also: 23 folders related in some way to work on archival/primary source materials -- from implementing the LC MARC AMC (Machine Readable

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Cataloging Archival & Manuscripts Control) format in the 1980s, through the AMIS (Archives and Museums Information System) project, the Russian Archives in RLIN project, the FAST (Finding Aids SGML Training) EAD markup project, to the redesign of RLG Archival Resources into ArchiveGrid, implemented in early 2006.

- Annual membership meeting tours, 1993 (Mountain View – Stanford campus): Some preparations by central staff for an RLG open house and tours at the 1200 Villa Street, Mountain View RLG headquarters; from Jack Grantham's files; 18 May – 17 June 1993
- 20th anniversary annual membership meeting, 1995 (Cambridge, MA): Invitation to a tea honoring RLG members in Boston, plus an evaluation form for the symposium held in conjunction with this annual meeting; early May 1995
- Annual membership meeting, 1996 (American Philosophical Society, Philadelphia, PA): Registered attendees' packet contents (originally in a two-pocket glossy white folder labeled with a large version of the same annual meeting logo that is on the agenda sheet); 6 May 1996
- Annual membership meeting, 1999 (Los Angeles, CA): Glimpse into developing topic and speakers – miscellaneous materials from Programs manager Anne Van Camp's annual work on meeting content, from around August 1998 to February 1999; see more on 1999 meeting in other cartons
- Annual membership meeting, 1999 (Los Angeles, CA): Contents of registrants' packets, originally presented in beige-and-cream die-stamped RLG folder; 26-27 April 1999
- Annual membership meeting, 2000 (New York, NY): Miscellaneous materials from Programs manager Anne Van Camp's "logistics folder" – far less logistical planning than nearly final registration/meeting materials; see more on 2000 meeting in other cartons
- Annual membership meeting, 2001 (Ottawa, Canada): Materials from registration packet from 30 April – 1 May event
- RLG Cultural Materials Alliance meeting, 29 April 2001 (Ottawa, Canada): Materials distributed to attendees [not sure if these are all the materials – look in other cartons?]
- Annual membership meeting, 22-23 April 2002 (Amsterdam, Netherlands): Some of Programs manager Anne Van Camp's background on developing the meeting program – researching and lining-up speakers; December 2001 – February 2002
- Meeting on key EU information projects and RLG's initiatives, 24 April 2002 (Amsterdam): Background from Program manager Anne Van Camp's files on an RLG-instigated event following the annual membership meeting; meeting was intended to share information and seek connections with EU (European Union) developments; file does not include outcomes; 12 February – 24 April 2002
- Annual membership meeting, 5-6 May 2003 (Boston, MA): Material from Programs manager Anne Van Camp's files about developing the meeting program and speakers; does not get as far as any draft meeting agenda; 24 October 2002 – early February 2003
- Annual membership meeting, 26-27 April 2004 (Washington, DC): Some logistical material from Member Programs manager Anne Van Camp's files; does not include even draft agenda or speaker roster, but might supplement 2004 meeting material in other cartons; January – May 2004
- Annual membership meeting, 18-19 April 2005 (San Marino, CA): Some good background on the speakers arrived at for this meeting, plus various logistical memos; includes reports given at meeting by Board chair James Neal and president James Michalko; January – April 2005
- Annual membership meeting, 16 June 2006 (New York, NY): Varied materials from lead-up to RLG's final annual meeting before the merger into OCLC, from Member Programs manager Anne Van Camp's files; highlights differences in this meeting from others (one day,

single – keynote – speaker, focus on interested guest invitees, involvement of OCLC leaders [at least Lorcan Dempsey] in pre-meeting communications, planning members' RLG program future within OCLC; includes summaries of breakout sessions held at meeting; 9 February – 21 June 2006

- Board of Directors' meeting no. 102, 16-17 February 2006 (Mountain View, CA):  Bound agenda version without any handouts or notes, in loose-leaf form, 71 pages; for more, see also Carton 50
- Board of Directors' meeting no. 103 (last one), 15 and 17 June 2006 (New York, NY): Loose-leaf, 113-page agenda that includes minutes for the 102nd meeting in February 2006 and the results of a board telephone meeting in April 2006; agenda materials reflect the OCLC-RLG merger negotiations [SEE ALSO Carton 136 for more on this]
- "Consideration Points for Prospective International Members of RLG": Mid-1995 version of document created by program officer Nancy Elkington to aid/guide in new-member prospecting (to help both the institution and RLG)
- RLG in the UK/Europe, May 1996: Two-page memo from Nancy Elkington to James Michalko on issues to debrief/discuss with pertinent RLG staff – CURL (Consortium of University Research Libraries) data issues, RLIN access and use (by CURL, the Swiss National Library, and the Biblioteca Nacional de Espana), special collections in member institutions, RLG-CURL relationship, current CURL membership problems and priorities, and membership expansion in Europe
- RLG changes for supporting East Coast and European members, 2001: E-mail explanation from James Michalko to Swiss National Librarian, plus desiderata and job descriptions for posts in Europe and the UK; plus international chart of phase 1 of a new kind of support strategy, showing members by category, location, top 25 accounts; May-June 2001
- RLG and CURL in the 1990s: Four differing reports on this broad topic – (1) RLG Membership Focus Group – UK and Ireland – held in conjunction with the May 1995 RLG annual membership meeting, specifically for CURL members, 1 May 1995; (2) results of an "RLG Matters Questionnaire" given to CURL [directors?] in March-April 1996; (3) PowerPoint presentation printout, "Effective International Collaboration: RLG in Europe," by Reg Carr and Nancy Elkington, May 1996; and (4) "RLG Member Value," memo-report to CURL board of directors from Nancy Elkington, 23 February 1998
- Archival and manuscripts control: "Archives and Manuscripts in RLIN: An Overview of Development in Progress," July 1983; and "Using RLIN II for Archival Processing: A Case History," December 1983
- Stanford University – Silicon Valley Archives Project: Overview, Plan of Work, brief budget, including role of RLIN in receiving online records created (3 pages) – undated [1983 or thereabouts?]; PLUS a Stanford University Libraries brochure, "The Stanford and the Silicon Valley Project," about the archives held by Stanford and entered in RLIN – also totally undated; finally, an August 2011 Annual membership meeting, printout of a page, "The Stanford Silicon Valley Archives" from svarchive.stanford.edu that indicates how this collection is administered; see also Carton 47[?], related to RLIN archival processing developments?
- "Archival Description Standards: Establishing a Process for Their Development and Implementation," February 1990: Report and recommendations of the [multi-organizational] Working Group on Standards for Archival Description," prepublication copy "for discussion purposes only"; 100 pages, softbound, two-sided; Steven L. Hensen represented RLG in this working group, chaired by Larry Dowler, Harvard; other RLG members represented in group included H. Thomas Hickerson, Cornell; Kathleen D. Roe, NYSARA; Leon Stout, Penn State; Richard V. Szary, Yale; final report published in special edition of  SAA's "American Archivist" newsletter.

- Archives, Manuscripts, & Special Collections (AMSC) Program: Cover memo from Alan Tucker and agenda background for AMSC committee meeting of 19 April 1991 in Washington, DC; reflects "RLG's refocused mission … [on] access to primary research resources; see also material in Carton 108?
- RLIN records in the AMC format: Breakdown of records in the Archival and Manuscripts Control USMARC format in the RLG RLIN database, by owning institution, as of August 1998; see more material in Carton 108?
- Archives, Manuscripts, and Special Collections -- Milestones: Two efforts to summarize accomplishments in RLG's primary sources activities: (1) 14 April 1998 e-mail from Jennifer Hartzell to Robin Dale and Nancy Elkington; (2) PowerPoint printout presented by Nancy Elkington at a 2000 "ELAG: ALM Convergence" program: "Supporting Research within Cultural Collections: RLG's Past, Present, and Future"
- "RLG Archives and Museums Information System / Functional Requirements": "Final Report," October 1989, by David Bearman, Archives & Museum Informatics, Pittsburgh, PA; 120 pages, loose-leaf, one-sided; contains some penciled annotations [could be Alan Tucker's or maybe John Haeger's]; more on AMIS in other carton(s)?
- "Archives and Museums Information System (AMIS) / Technical Architecture / Preliminary Technical Overview": 18 June 1990, 29 pages, loose-leaf, one-sided
- "Archives and Museums Information System (AMIS) / Technical Architecture / Remarks on the Data Dictionary": 26 July 1990, 4 pages, one-sided; faint pencil notes: "RLG News #21 #18"; more in other cartons?
- "AMIS / The Archives and Museums Information System": Printout of PowerPoint slides, November 1990, 24 pages, loose-leaf, organized by six questions, starting with "Why AMIS?" through "Why RLG" and ending with "Revenue vs. Expense"
- Partial printout of some AMIS requirements document still in the works: 16 May 1991 – starts with Chapter 4,"User Interface," and continues on "Access to Data," "Data Maintenance," "Output of the System," "Documentation Needs of Users," "Unresolved Issues," "Phasing Issues," "Acquisition Options"; [seems pretty drafty – worth retaining? Look for related documents in other cartons]
- "Enhancing Access to Russian Archives through RLIN," 1993 proposal: Submitted by the Hoover Institution in collaboration with RLG and the Russian State Archival Service (Rosarkhiv) to "create collection-level descriptions of 2,500 newly opened Russian archival collections and include the descriptions in [RLIN]." 112 pages, for two-year project to run from January 1994 through 1995, submitted 8 June 1993
- Re "Enhancing Access to Russian Archives through RLIN" project: Original-language and English translation of "The Russian Federation: Federal Law on Participation in International Exchange of Information," adopted by the State Duma on 5 June 1996 and executed by Boris Yeltsin, President of the Federation, on 4 July 1996
- "Enhancing Access to Russian Archives through RLIN" documents: Basic documents from 20 July 1994 to 19 March 1998 on this RLG – Hoover Institution – Rosarkhiv project, including: news releases, individuals involved, grant reports to the National Endowment for the Humanities (NEH), sample RLIN records in Latin and Cyrillic scripts, descriptions of what automating the Rosarkhiv Central Fond Catalog would entail, correspondence, and draft of an article on the project that was published in "American Archivist" vol. 61, no. 2 (1998)
- Hoover – Rosarkhiv – Chadwyck-Healey microfilming project: Background on a separate project from the one involving RLG; included to indicate that at least some critics confused this with the RLG – Hoover Institution – Rosarkhiv RLIN project – casts light on attitudes towards Russian archival holdings and Western interests in period after dissolution of the USSR/CCCP; September 1994 – August 1996

- Stalin Archive Project: The Soros Foundation, the primary funder of this project, had some discussion with RLG about being a vehicle for providing access; no indication, however, that this went anywhere as far as RLG/RLIN was concerned; February 1998 – May 1999
- Funding by Delmas Foundation of FAST – RLG Archival Resources projects: Work under a $100,000 grant from the Gladys Krieble Delmas Foundation, first to provide Finding Aids SGML Training (the FAST workshops) in encoding finding aids using the Encoded Archival Description (EAD) standard, and also to create the RLG Archival Resources service that made several thousand such aids searchable online; April 1996 – June 2000
- Primary Sources Symposium, "Providing International Integrated Access to Primary Research Materials," 13-14 May 1999 (New Haven, CT): Mix of planning and logistics work, actual agenda materials, Forum evaluations, notes taken at meeting, draft summary; PLUS a mix of not-clearly-related papers at back of folder; January-May 1999
- Society of American Archivists' awards, 2004: C.F.W. Coker Award for Description to RLG's Archival Resources service and EAD Best Practice Guidelines; and an SAA fellowship to Daniel Pitti, University of Virginia, nominated by RLG's Anne Van Camp
- ArchiveGrid proposals and grants, 2004-2005: May be duplicative of material in other cartons – (1) "Archives for the Nation" – RLG proposal to NHPRC (National Historical Publications and Records Commission), 1 October 2004; (2) "International Archival Gateways" – small proposal to the Gladys Krieble Delmas Foundation for a working meeting, 14 December 2004; (3) "Open Archives for the World of Research" – proposal to the Earhart Foundation, February 2005, which resulted in funding for the redesign of RLG Archival Resources for broader and temporarily free access as ArchiveGrid
- Redesign of RLG Archival Resources (resulting in ArchiveGrid): Some documents along the way, from  April 2003 to February 2006 – plus some undated items; complements material on this topic in other cartons
- ArchiveGrid service launch, March 2006: Checklist, launch plan, schedule, marketing contacts, brochure, "RLG News" coverage, results of launch and first uses; November 2005 – May 2006
- ArchiveGrid move to OCLC as part of 2006 merger: Assorted documents from May to November 2006, after RLG and OCLC agreed to combine, regarding status of ArchiveGrid and plans to move it into OCLC's offerings

**NOTE ON CARTONS 205-209:** These contain individual RLG member institution files – a combination of records kept by the corporation's assistant secretary and by Member Programs over the years. For Member Programs, the shift to online record keeping vitiated the value of the paper files, and by mid-2006 they had been repeatedly weeded.  For RLG governance/legal relationships, their value was lost when formal membership documents and service agreements were sent to OCLC's legal office in 2007.  (And weeding had also affected their value for tracking changes in member relationships.)   A number of member withdrawals are noted for 2006-2007; the merger of RLG into OCLC was the catalyst for most of these, but not all.  (A number of members in CURL, the Consortium of University Research Libraries, chose to withdraw once RLG membership was no longer a condition of CURL membership, as it had been for over a decade). [SEE Carton 205 for some general background pertinent to all 5 cartons.]

**CARTON 205: Member Programs & Corporate Communications**

1979 - 2004: RLG member-institution files, facets of member relations and activities, Alabama Department of Archives and History through Duke University; also preliminary general information about dues and fees, international members, comprehensive partnership roster last updated in March 2008 after OCLC – RLG Programs merger of mid-2006.

- General information: Dues & program participation fees, 1975-2004; Considerations for international members, January 1996; Sample response to a special-membership inquiry, July 1997; Roster of OCLC RLG partners (had been RLG members), March 2008; spreadsheets of both withdrawn (former) members and ongoing/new partners in OCLC RLG Programs that shows exit and joining dates; March 2008
- Alabama Department of Archives and History: WITHDREW IN 2003 – Fitful correspondence from point of joining, heavy on RLIN service agreement revisions; views of director Ed Bridges' on RLG's "mid-decade" planning (1983-1984); contents from May 1985 to August 2003
- American Academy in Rome: Continued as partner after OCLC - RLG merger – Includes black and white photos of institution; Retained correspondence (meaning gaps); includes details on the international member/user startup issues of this period); November 1992 – March 1997
- American Antiquarian Society: Continued as partner after merger – Some correspondence, touches on AAS participation in early days and especially in the Eighteenth-century Short Title Catalog (ESTC); April 1980 – December 1998
- [File for American Jewish Historical Society is missing altogether]
- American Philosophical Society: Continued as partner after merger – Slight correspondence on joining and subsequent membership; December 1984 – April 1997
- American University's Washington College of Law Library: WITHDREW IN 1997 – sparse correspondence, from joining to exit; May 1993 – March 1997
- American University in Cairo: Continued as partner after merger – Correspondence primarily about joining; October 1997 – March 2000
- American University of Sharjah: Continued as partner after merger – Just a few exchanges at joining; May-June 2003
- Amon Carter Museum: Continued after merger – Quite incomplete; nothing about joining; does include sample welcome letter from RLG to the Preservation Program, dubbed PRESERV in the 1990s; September 1991 - ? 1997
- Arizona State University Library's East Asian Collection: Arizona State became RLG programs partner after merger, subsuming the smaller previous RLG membership – Some correspondence relation to situation of a university with limited participation in RLG; September 1986 – January 1997
- Art Institute of Chicago: Continued after merger – Slight correspondence in which the tiers of Special, Associate, and Full members are introduced, and indicating strong role of AIC's Daphne Roloff; March 1981 – June 1999
- Athenaeum of Philadelphia: Continued after merger – Slight correspondence around joining, September 1990 – April 1991, plus a couple of memos in 1995 & 1996
- Bard Graduate Center for Graduate Studies in the Decorative Arts (Bard College also eligible to participate, but didn't): Continued after merger – Signup and startup information, including Membership Agreement form and RLG Service Agreement (most active partners' forms are now in OCLC's files); April – July 1999
- Bayerische Staatsbibliothek: Continued after merger – Some correspondence around joining and later on possible withdrawal; November 1997 – September 2004
- Biblioteca Nacional de España: Continued after merger – Exchanges mostly related to joining and then to a comedy of errors in dues billing and payment (effect of too many cooks at RLG and leadership turnover at BNE); spring 1995 – April 2001
- Bibliothèque nationale de France: Continued after merger – Some exchanges in lead up to membership and about joining process; 1992 – April 2002

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- Binghamton University (formerly State University of New York at Binghamton): WITHDREW in 2002 but REJOINED OCLC's RLG programs partnership in March 2006 – Includes black and white photo, plus bits of correspondence that include an early note from President Edward E. Shaw regarding Associate Membership as well as Binghamton's 1996 membership assessment/study; May 1980 – February 2002
- Boston College: WITHDREW IN 1997 (except for Law Library – see separate folder) – Slight correspondence on joining in RLG's 1993 membership drive and then not seeing way to step up to full dues three years later; August 1993 – August 1997
- Boston College Law Library: WITHDREW IN 2003 – Correspondence dealing only with the law library's decision to become a Special Member after Boston College ended its General membership; no paperwork on law library's own withdrawal; August 1997 – July 1998
- Boston Public Library: Continued after merger – Correspondence about joining and membership activities (lots of gaps); May 1992 – June 2002
- Boston University's Pappas Law Library: Continued after merger – Correspondence only begins in year of RLG's governance/member dues changes ("RLG 92") and stops in mid-1990s (unclear why just this subset); still, gives an introduction to one of RLG & RLIN's best loyal critics (Anne Myers), April 1991 – March 1995
- Brandeis University: Continued after merger – Correspondence over joining and staying engaged; August 1985 – March 1998
- Brigham Young University: Continued after merger – Very incomplete correspondence for long-time member (as is the case throughout cartons 205-209); April 1991 – May 1998
- British Library: Continued after merger – Some correspondence from joining through various staff reports and opinings (*much* more about BL and RLG in other President's Office cartons); 2 stray 1982/83 BL memos added here and rest dates late 1991 – November 2001
- Brooklyn Museum of Art: Continued after merger – Very spotty correspondence (how useful?); 1984 – May 2000
- Brown University: WITHDREW IN 1996 (except for special collections; see separate folder) – Assorted correspondence from joining to exit; includes discussion and research on decision to drop membership; December 1979 – September 1996
- Brown University's John Carter Brown Library: Continued after Brown University exited and after merger – Very slight correspondence focused on opening own Special membership; August-September 1996
- California Digital Library: Continued after merger – No file actually found for archiving; this contains one item confirming new member account; October 2004
- California Historical Society: Continued after merger – Correspondence about joining and a bit thereafter (Stanford University's University Librarian Emeritus, David C. Weber, fostered this membership); August 1991 – July 1998
- California State Archives: WITHDREW IN 2002 – Bits of signing-up process only; October 1985 – July 1991
- Canadian Centre for Architecture: Continued after merger – Very slight, with nothing about CCA's joining; October 1991 – May 1999 [see Carton 203 for that]
- Cardiff University: WITHDREW IN 2006 – Signup exchange under guidelines for CURL members; virtually nothing else in folder: August 2004 – November 2006
- Center for Jewish History: Continued after merger – CJH subsumed earlier, separate memberships for the American Jewish Historical Society, Leo Baeck Institute, and YIVO Institute of Jewish Research, as well as adding other Judaica/Hebraica collections; sporadic coverage of June 1986 – October 2002

- Center for Research Libraries: OFF ROSTER AFTER MERGER, 2007 – CLR and RLG had traded memberships, waiving fees to each other; assorted correspondence about membership intentions and the waivers; June 1989 – December 2003
- Chemical Heritage Foundation: Continued after merger – Just 3 items of correspondence about joining (example of period when everything significant went into an online relationship management system, Onyx); August 2005
- Chicago Historical Society: WITHDREW IN 2004 – Miscellaneous correspondence from joining to exiting; includes RLG staff trip reports; November 1992 – November 2004
- Sterling and Francine Clark Art Institute: Continued after merger – Slight, very incomplete correspondence, lacking actual joining documentation; July 1983 – July 1998
- Cleveland Museum of Art: Continued after merger – Includes black and white photo; correspondence lacks any at point of joining; July 1983 – June 1999
- Cleveland Public Library: WITHDREW IN 2003 – Includes black and white photo; covers basics of membership for RLG's preservation program (cost subvened by OCLC; May 1991 – November 1998
- Colorado State University: WITHDREW IN 1994 – materials from joining to exit, but fragmentary; August 1979 – January 1994
- Columbia University: Continued after merger – Includes black and white photo; founding member; miscellaneous correspondence starting with "Take or Pay" services contract; exchanges indicate role of RLG program officer (Win-Shin Chiang's work with Law Program chair James Hoover), facets of the "RLG 92" restructuring, and new service introductions; much omitted or stored online; March 1981 – September 2003
- Cornell University: Continued after merger – Includes photos; episodic/incomplete correspondence, *not* including contractual relationships with Cornell Libraries staff for "RLG DigiNews" or other publications/workshops; nothing earlier than 1989 (why not?); December 1989 – July 2000
- Cornell University contracts with RLG: Not exhaustive; includes Cornell proposal, costing, contracts, etc. for joint book publication ("Moving Theory into Practice: Digital Imaging for Libraries and Archives," aka MTIP) – more production records for this publication exist in at least one Corporate Communications carton; August 1998 – May 2002
- Courtauld Institute of Art: Continued after merger – Single cover memo for membership acceptance (all else stored online), December 2003
- Dartmouth College: WITHDREW IN EARLY 2002 – Some correspondence from initial membership request through withdrawal paperwork; February 1979 – August 2001
- Direction des Archives de France: Continued after merger – Minimal correspondence file at time of joining, plus a couple more exchanges; April 2000 – September 2004
- District of Columbia Office of Public Records (aka Archives): WITHDREW IN 1991 – Scant correspondence covering joining, participation in RLG state archives project; January 1987 – May 1991
- Duke University: Continued after merger – Includes black and white photo; partial correspondence touching on Law Library's joining during the "RLG 92" reorganizational phase, and then the full university coming in the year after (May 1992); plus miscellany; July 1991 – November 1999

## CARTON 206:  Member Programs & Corporate Communications

1977 - 2006: RLG member-institution files, facets of member relations and activities, Emory University through Museum of Modern Art; see note on Cartons 205-209 for more.

- Emory University: Continued after OCLC – RLG merger – Very incomplete bits of correspondence, leaving "joining time" unclear (but it was the end of 1985); April 1991 – February 1998
- Fashion Institute of Technology: Continued after merger – Includes photos; small and incomplete file of correspondence (joined in mid-1985); September 1991 – July 1998
- Florida State University: Continued after merger – Quite incomplete miscellaneous correspondence, with nothing about joining (did so in mid-1986); April 1991 – February 1999
- Folger Shakespeare Library: Continued after merger – Includes black and white photo; slight correspondence; November 1987 – November 1997
- Fordham University Leo T. Kissam Law Library: Continued after merger -- Slight correspondence; March 1992 – February 1996
- Frick Art Reference Library, The Frick Collection: Continued after merger – Includes black and white photograph; partial correspondence on membership and programs participation; September 1984, November 1991 – July 1998
- Getty Trust and various entities: Continued after merger – Member of RLG under various names that all included Getty but represented the affiliation of various entities within, primarily the Getty Research Library; correspondence and background; many gaps, but substantial information on the RLG – Getty Art History Information Program (AHIP) engagement and Getty reorganizations from RLG staff's perspective; May 1991 – February 2002
- Georgetown University: WITHDREW IN 1999 – Some material focused on joining and withdrawing; August 1991 – March 1999
- George Washington University Jacob Burns Law Library: Continued after merger – Very minimal record of joining in 2001, plus information from August 1993; June-September 2001
- Georgia Department of Archives and History (aka Georgia State Archives): WITHDREW IN 2006 – includes black and white photo, some material focused on joining, some on time in Preservation and Archives programs (PRESERV and AMSC), and some on withdrawal; November 1986 – September 2006
- Graduate Theological Union (Berkeley, CA): WITHDREW IN 1989 – Small amount of material from early use of BALLOTS (later RLIN) services, to joining, to withdrawing; includes notes on idea for an RLG Theology (collections) program that didn't materialize; November 1977 – July 1989
- Gratz College (Tuttleman Library): WITHDREW IN 1996 – Slim file from joining for the Jewish and Middle East Studies (JAMES) program to withdrawal; June 1990 – August 1998
- Hagley Museum and Library: Continued after merger – Includes photo; slight file of membership-related correspondence before, but mostly after, the "RLG 92" reorganization, when IRLA (Independent Research Libraries Association) members were offered discounted RLG General Member status; September 1991 – October 1996
- Harvard University, special memberships: Historical relationships – subset of what must have been far larger total, covering special memberships for specific Harvard libraries after Harvard's withdrawal as a founding member when RLG selected BALLOTS as the basis for RLIN; some material for Fogg Fine Arts Library (joined in March 1981), the Law Library (April 1981), Music Library (April 1986), and Radcliffe College (May 1987); all subsumed with full reentry of Harvard at the end of 1988; first of 2 Harvard files, 1981 – 1990
- Harvard University, general membership: Continued after merger – Second of two files for Harvard's RLG affiliations; retained (excluding online filings) correspondence from 1991 to mid-2001
- Hebrew Union College: Continued after merger – Slight correspondence, primarily on initial membership; January 1988 – August 2004

- Historical Society of Pennsylvania: WITHDREW IN 1992-93 – contains only joining and a little membership conditions information plus withdrawal sequence; November 1986 – September 1993
- Huntington Library, Art Collections, and Botanical Gardens: Continued after merger – Includes black and white photo; miscellaneous correspondence; April 1983 – April 1999
- Image Permanence Institute (based at Rochester Institute of Technology): Dropped from membership roster in 2007 (had always had a special relationship that involved no dues) – small amount of material from May 1992 to June 1999
- Imperial College of Science, Technology, and Medicine: Continued after merger – Only slight correspondence from joining (as part of the CURL group); October 1996 – August 1997
- Indiana University, Bloomington: Continued after merger – Slight file of correspondence on lead-up to membership and after (was part of RLG's board-staff 1993 membership campaign); August 1993 – September 1999
- Institute for Advanced Study: Continued after merger – Slim correspondence on joining in 1993 membership campaign, plus dues at end of first 3 discounted years; August 1993; winter 1994 (in "RLG News"); June 1996
- International Institute of Social History (Internationaal Instituut voor Sociale Geschiedenis): Continued after merger – Initial contacts? (Anne Van Camp already known to them) and membership process; April 1995 – January 1997, plus September 1998 note regarding Rosarkhiv (Russian State Archival Service)
- International University Bremen: WITHDREW IN 2005 – Slim file dealing mostly with joining/startup  to a point prior to withdrawal (no specifics on exit included here); November 2001 – September 2002
- Jewish Theological Seminary: WITHDREW IN 2006 – Includes black and white photo; modest file through joining, with nothing related to later exit; January 1988 – March 1998
- Johns Hopkins University: WITHDREW AT END OF 1992 – Forms and correspondence spanning joining, recommitment after "RLG 92" organizational changes, and cordial withdrawal not long after; December 1979 – July 1992
- Keio University (Shonan Fujisawa campus joined first, followed by full institution): Continued after merger; partial correspondence on both membership steps; June 2000 – November 2002
- Kentucky Department for Libraries and Archives: WITHDREW IN 2004 – Includes black and white photo; slim file on joining, with nothing further except a new member-representative designation; June 1988 – October 1996
- Kimbell Art Museum: Continued after merger – Includes 3 black and white photos; slight file of correspondence, including forms, for membership; November 1991 – February 1998
- King's College London: Continued after merger – Correspondence related to joining as a recent new member of CURL; includes some internal memos about signing up CURL UK institutions; September 1997 – March 1998
- (Ernest Orlando) Lawrence Berkeley National Laboratory: WITHDREW IN 1998 – Very slight file, from joining to withdrawal and nothing in between; November 1993 – June 1998
- Library Company of Philadelphia: Continued after merger – Correspondence about original signup and use of RLIN, plus changes in status at and after "RLG 92" organizational changes; February 1986 – September 1996
- Library of Congress: Continued after merger – Includes black and white photo; first of two files of correspondence saved out of long relationship with LC – more exists in other cartons; March 1990 – November 1995

- Library of Congress: Second of two files of intermittent correspondence; January 1996 – (trails off as more was stored online) – December 2003
- Library of Virginia (formerly Virginia State Library and Archives): Continued after merger – includes black and white photo; intermittent correspondence from point of applying to join to changes in program participation and institutional name; May 1988 – July 1998
- Linda Hall Library of Science, Engineering, and Technology: Continued after merger – Correspondence saved from getting them joined up, trailing off rapidly from then on (stored online or in other cartons?); November 1993 – May 1999
- London School of Economics and Political Science: Continued after merger – correspondence specifically on signup; March 1996 – January 1997
- Los Angeles County Law Library: Continued after merger – Includes black and white photo; correspondence saved from very early joining discussions, to exchanges over "RLG 92" organizational and service modifications, to question of continuing membership in mid-1990s (did); December 1980 – August 1997
- Louisiana State University: WITHDREW IN 1992 – Very slim file from joining to withdrawal, with virtually nothing else; February 1986 – August 1991
- Maryland Historical Society: WITHDREW IN 2000 – Very brief trajectory from joining to departing; December 1997 – April 2000
- Massachusetts State Archives: WITHDREW IN 2007 – Includes black and white photo; covers joining; a bit on activity in RLIN state archives project; and subscription in 2006 to RLG's ArchivesGrid service – nothing about withdrawal; April 1986 – July 2006
- McGill University: WITHDREW IN 1998 – Slim file on joining in year of RLG membership drive, followed by decision to depart; August 1993 – September 1998
- Metropolitan Museum of Art: Continued after merger – Slim correspondence on invitation to join and some data use issues for RLIN contributors (may be of independent interest, Met aside); a little more correspondence indicating changes in Met library directors; December 1980 – June 1999 (with many jumps)
- Minnesota Historical Society: Continued after merger – Very slim correspondence file beginning with approval of application to join; December 1985 – June 1998
- Monterey Institute of International Studies: WITHDREW IN 2006 – Contents nearly all concerning joining, with a later bit; withdrew when it was a case of becoming an OCLC RLG Programs Partner; March 1995 – October 2006
- Morgan Library (formerly Pierpont Morgan Library): WITHDREW IN 2006 – Includes black and white photo; minimal correspondence from earliest period to late 1990s; withdrew when it was a case of becoming an OCLC RLG Programs Partner; February 1981 – April 1998
- Museum of Fine Arts, Boston: Continued after merger – Includes black and white photo; slim correspondence file; March 1981 – April 1997
- Museum of Fine Arts, Houston: Continued after merger – Includes black and white photo; slim correspondence from initial membership inquiry through a few staffing changes; October 1985 – May 1999
- Museum of Modern Art: Continued after merger – Includes black and white photo; some correspondence from point of joining, to exchanges on program participation (especially Shared Resources, aka SHARES); February 1981 – December 1998
- Museum of the American West (formerly the Autry Museum of Western Heritage): Continued after merger – Very slim and incomplete correspondence lacking any from point of joining; August 1994 – February 1999

## CARTON 207:  Member Programs & Corporate Communications

1980 - 2004: RLG member-institution files, facets of member relations and activities, Nationaal Archief (Netherlands) through Smithsonian Institution; see note on Cartons 205-209 for more.

- Nationaal Archief: WITHDREW IN 2005 – Netherlands national archives' membership paperwork and decision 3 years later to drop affiliation, a very slim file; September 2002 – May 2005
- National Archives (UK): WITHDREW IN 2006 – Originally joined as Public Records Office – name later changed; some correspondence about membership, joining, some further pedestrian topics, and by 2002 some initial interest in exiting that was staved off; October 1996 – August 2004
- National Archives of Australia: WITHDREW IN 2004 – Slight file on joining, visit there by James Michalko, and withdrawal owing to funds crunch; May 1998 – September 2004
- National Cowboy and Western Heritage Museum: WITHDREW IN 2005 – Slim correspondence on joining; March-April 2001
- National Gallery of Art: Continued after OCLC – RLG merger – Includes black and white photo; very slim file of 1984 Welcome to Membership letter; September 1994 PRESERV communiqué; NGA's 1997 and 1998 Round Robin updates for the Art & Architecture Program group; 1984-1998
- National Gallery of Canada: Continued after merger – Correspondence leading to membership and a few later updates – very far from any history of dealings; summer 1992 – August 1999
- National Library of Australia: Continued after merger – First of two files of saved correspondence (surely out of much more); lead up to and early days of membership; 1992 – January 1997
- National Library of Australia: Includes black and white photos; second of two files of some correspondence; trails off as more was stored/referred to online; January 1998 – March 2005
- National Library of New Zealand: Continued after merger – Early correspondence through member joining; nothing else filed as paper; March 1995 – December 2000
- National Library of Scotland: Continued after merger – Includes color photo; Small amount of correspondence about joining, rest filed online; October 1996 – December 1998
- National Library of Wales: WITHDREW IN 2007 – Correspondence just about joining and an upcoming change in National Librarian; December 1996 – May 1998
- National History Museum (UK): Continued after merger – Correspondence virtually all about their joining; August 1997 – April 1998
- Naval Air Warfare Center Technical Library: WITHDREW IN 2005 – Includes color photos; paperwork on joining, participation in Shared Resources/SHARES program; billing information; no correspondence on withdrawal; September 1994 – April 1998
- Nelson-Atkins Museum of Art: Continued after merger – Black and white photo; minimal file of correspondence; October 1994 – March 1998
- Nevada State Library and Archives: WITHDREW IN 2003 – Includes black and white photo; joining paperwork (step taken initially to be part of second RLG state archives project); cordial exchange on withdrawal; March 1988 – February 2003
- Newberry Library: Continued after merger – Includes black and white photo; miscellaneous member correspondence, pre-membership to mod 1990s (ends before year when Newberry hosted an RLG annual membership meeting); October 1991 – July 1995
- New School (University): File seems to have gone missing; joined on 19 March 2003, so empty file provided in case something turns up

- New York Academy of Medicine: Continued after merger – Limited correspondence, mostly regarding membership and program engagement (or lack thereof); January 1992 – September 1999
- New York Botanical Garden: Continued after merger – Some of correspondence and related background leading up to membership, plus a bit from several years of membership; April 1989 – January 2000
- New York City Department of Records and Information Services: WITHDREW IN 1997 – Coverage of joining and then withdrawal (first discussed in 1993); nothing else; May 1988 – March 1997
- New-York Historical Society: Continued after merger – Includes black and white photo; very incomplete file, with insufficient picture of membership trajectory through various N-YHS vicissitudes; October 1991 – July 2000
- New York Public Library: Continued after merger – Founding member; includes black and white photo; miscellaneous correspondence and notes; August 1980 – May 1999
- New York State Office of Cultural Education: Continued after merger – Includes black and white photo of archives; Office membership subsumed two earlier special memberships for New York State Archives and New York State Library; contents subdivided along those memberships; September 1985 – August 2004
- New York University: Continued after merger – includes black and white photo; varied facets of member correspondence; April 1981 – July 2002
- North Carolina State Archives: WITHDREW IN 2002 – Includes black and white photo; fairly extensive background on joining; mundane exchanges (billing, addresses, etc.); packet for participation in the first RLG Digital Collections Project "Studies in Scarlet"; withdrawal owing to funding constraints; July 1989 – March 2002
- Northwestern University: WITHDREW IN 1997 – Includes original joining, an "RLG/OCLC Evaluation Report" in 1988, decision to reduce affiliation level in 1989, various Northwestern Law Library exchanges, confidential background on early Northwestern loan to RLG (Noel Hanf to James Michalko, 1991), withdrawal exchange; also, Northwestern Law Library's brief flirtation with special membership (lasted 3 months) … joining-then-unjoining to be known later internally as "doing a Simoni"; January 1980 – January 1998
- Old Sturbridge Village: WITHDREW IN 2005/2006 – Includes black and white photo; membership paperwork; letter of withdrawal; November 1988 – December 2005
- Oregon State Archives: WITHDREW IN 1993 – Slight file about participating in phase 2 of the RLG state archives project and consequently joining RLG; only other item is withdrawal letter; March 1988 – November 1993
- Pennsylvania State Archives, aka Pennsylvania Historical and Museum Commission, Division of Archives and Manuscripts: WITHDREW AT END OF 1995 – Very slim file containing application letter to join (already in the first state archives project) and startup exchange, plus withdrawal; September 1985 – January 1996
- Pennsylvania State University: Continued after merger – Facets of Penn State member correspondence (very incomplete); July 1980 – May 1998
- Philadelphia Museum of Art: Continued after merger – four forms/correspondence items; March 1981 – February 1998
- Princeton Theological Seminary: WITHDREW IN 1989 – Very slight file; 2 pages on joining and 2 on withdrawing (for lack of an RLG theology program, originally expected to develop); January 1981 – April 1989
- Princeton University: Continued after merger – Spotty correspondence over first 20 years of membership (actually joined in 1979); March 1981 – April 1998

- Rhode Island School of Design: WITHDREW IN 1991 – Five letters or e-mails, from decision to join and later decision to exit; October 1984 – May 1991
- Rice University: Continued after merger – Correspondence at joining and thereafter very little, other than arrival of Charles Henry and a site visit to him; October 1986, August 1992 – November 1997
- Rockefeller Archive Center: Continued after merger – Minimal correspondence from some point after joining (in 1985); touches on joining Preservation/PRESERV program in late 1990s and role of the member representative; October 1991 – November 1998
- Rosarkhiv (Russian State Archival Service): Dropped from membership roster in 2007) – Minimal correspondence and notes on becoming a member/user and then lapsing (membership became moribund and unpaid-for, but was carried on membership roster for years after that, until the OCLC RLG Programs merger); July 1994 – June 1999
- Rosenbach Museum and Library: WITHDREW IN 1999 – Paperwork on joining; mundane exchanges (address updates); slow exit owing to budget constraints and need to keep making case for membership to new director; February 1986 – September 1999
- Royal Botanic Gardens, Kew: Continued after merger – four pieces of correspondence at time of joining; August 2004
- Rutgers University (The State University of New Jersey): Includes black and white photo; miscellaneous correspondence, from early member RLIN use arrangements to aspects of Shared Resources/SHARES program participation; April 1981 – October 1988
- School of Oriental and African Studies: Continued after merger – Fragmentary correspondence about joining; October 1996 – August 2004
- St. Louis Art Museum: Continued after merger – Includes 2 black and white photos; scant file that touches on joining, billing, and not much else; February 1985 – June 2002
- Smithsonian Institution: Continued after merger – Assorted correspondence about joining of Freer Gallery of Art, Archives of American Art, and Smithsonian Institution Libraries, against background of effort to engage entire organization (finally accomplished in 1999); April 1986 – March 2002

## CARTON 208:  Member Programs & Corporate Communications

1979 - 2006: RLG member-institution files, facets of member relations and activities, Solomon R. Guggenheim Museum through University of Maryland; see note on Cartons 205-209 for more.

- Solomon R. Guggenheim Museum: Continued after OCLC – RLG merger – extremely sparse background on how the Guggenheim finally joined; January 1988 – September 2002
- Southern Methodist University Underwood Law Library: Continued after merger -- contents largely dealing with membership joining and startup; July 1993 – March 1998
- Stanford University: Continued after merger – Includes black and white photo; oddly episodic and fragmentary collection of correspondence (more about the Stanford – RLG relationship exists in other cartons, but not so specifically member-oriented); March 1981 – October 1999
- Stony Brook University (formerly State University of New York at Stony Brook): Continued after merger – Includes black and white photo; scanty correspondence; July 1984 – July 1998
- Swarthmore College: Continued after merger – scant background and correspondence from period of joining and first RLG site visit to the college; February 1999 – March 2000
- Swiss Federal Institute of Technology: Continued after merger – Three items concerning the institute's joining; June-July 2004

- Swiss National Library: Continued after merger – Includes black and white photo; correspondence regarding membership, program participation, data loading by RLG, and a memorandum of understanding between SNL and RLG; file grows skimpier (like most) as more was stored online; January 1995 – July 2000
- Syracuse University: WITHDREW IN 2003 & REJOINED AFTER MERGER IN 2006 – Includes black and white photo; fair amount of paper correspondence on membership, involvement, and interests under first David Stam and later Peter Graham as university librarian; March 1986 – April 2003
- Temple University: Continued after merger – Includes black and white photo; sparse correspondence from early membership commitments (under Joe Boisse), to changes in leadership through John Zenelis and on to Maureen Pastine; April 1981 – November 1998
- Trinity College Dublin: Continued after merger – Snippets of correspondence with focus on joining; September 1993 – April 1998
- Tulane University: WITHDREW IN 1983 – Membership paperwork, some aspects of the early RLG "RLIN take-or-pay" commitment to pay in advance for estimated services use, and withdrawal step – may be only file to contain a "mutual release" documenting terms of separation; April 1981 – February 1983
- United States Holocaust Memorial Museum: WITHDREW IN 2001 – Includes joining paperwork, trip reports to museum, invoicing matters, dataload matters, and decision to withdraw; June 1993 – December 2000
- University College London: Continued after merger – Assorted correspondence with this CURL member, from joining up under Fred Friend to advent of Paul Ayris and change in Friend's role; August 1993 – October 1997
- University of Aberdeen: Continued after merger – Scant paper record with focus on joining as a CURL member; August 1999 – June 2000
- University at Albany, State University of New York (formerly State University of New York at Albany): WITHDREW IN 2001 – Includes efforts to join (over SUNY hurdles); plans for participation as RLG reorganized and shifted agenda in "RLG 92"; example of a SUNY institution contract (fearsome things to renew); and withdrawal letter; March 1983 – February 2001
- University of Alberta (only the East Asian Collection until end of 2006, when full University joined after merger): Includes black and white photo; bare-bones record of joining as Special Member in East Asian Studies Program; December 1988 – July 1997
- University of Birmingham: WITHDREW IN 2006 (when CURL members no longer had to become RLG members) – Includes exchanges surrounding initial membership, not much else; October 1995 – March 1996
- University of Bristol: WITHDREW IN 2006 (when CURL members were no longer bound to RLG) – Paperwork on joining, nothing else; March – April 2002
- University of British Columbia East Asian Library: Continued after merger – Includes black and white photo; scant contents focused on membership take-up; April 1990 – April 1999
- University at Buffalo (formerly State University of New York at Buffalo): WITHDREW IN 1995 – Includes partial membership paperwork and a few later forms and contracts, plus withdrawal routine; June 1984 – September 1985
- University of California, Berkeley: Continued after merger – Includes 2 black and white photos of Doe Library; miscellaneous/spotty correspondence that includes (interleaved chronologically) the contents of program officer Win-Shin Chiang's UCB-School-of-Law-related correspondence on programs and CitaDel citation databases; June 1981 – February 1999

- University of California, Davis (Law Library): University library WITHDREW IN 1991 while UCD Law School Library stayed and continued through merger – Includes black and white drawing/photo; miscellaneous correspondence, lots of gaps; April 1981 – November 1997
- University of California, Santa Barbara: WITHDREW IN 1997 – Slim set of exchanges from joining, through organizational shifts of "RLG 92," to withdrawal; July 1981 – July 1997
- University of California, Los Angeles: JOINED IMMEDIATELY AFTER MERGER – Had been moving towards membership previously; any paper file was created as part of OCLC RLG Programs operations
- University of Cambridge: Continued after merger – Includes 2 black and white photos; mostly background from the Cambridge University Library at joining and records of membership take-up; August 1993 – November 1998
- University of Chicago: Continued after merger – Scrappy collection of correspondence; December 1989 – May 1998
- University of Connecticut School of Law Library: WITHDREW IN 2005 – Includes exchanges on membership and joining to participate in RLG's Law Program; notes on participation in activities and exchanges with law program officer Win-Shin Chiang; a slight exchange with full university on possible membership, but then withdrawal of law library; July 1991 – July 1996
- University of Durham: WITHDREW IN 2006 (when CURL members were no longer bound to RLG) – Includes membership paperwork; preservation topics in exchanges between university librarian John Hall and RLG member services officer Nancy Elkington (prospective Global Migration project); a few other e-mails and a trip report; and a service agreement for using RLG Cultural Materials – nothing filed about withdrawal; December 1996 – November 2002
- University of Edinburgh: Continued after merger – Paper delivered by university librarian at 1984 "RLG International Conference on Research Libraries Cooperation" (convened by then-president Richard McCoy to mark RLG's 10th anniversary); later on, early membership correspondence and some personnel changes; April 1994 – September 1998
- University of Florida: Continued after merger – Includes black and white photo and color photo; spotty correspondence from joining (indicating some ways in which a member might value – or not – RLG activities) to a stray memo in 1998; April 1986 – March 1998
- University of Glasgow: Continued after merger – Includes amateur color photo; scant correspondence, from membership form to a memorial fund in honor of university librarian Henry Heaney (under whom Glasgow joined RLG as a CURL member); November 1993 – August 2000
- University of Hawai'i, Manoa: WITHDREW IN 2004 – Includes black and white photo; Associate membership in 1985, some "issues" memos in the 1990s, upgrade to General Member status, Preservation/PRESERV program entry, various exchanges on billing, sets of contracts, licensor agreement to contribute to RLG Cultural Materials collection/database, and final withdrawal notes; March 1985 – September 2004
- University of Illinois, Urbana-Champaign: WITHDREW IN 1991 – Includes Associate Member paperwork, exchange on providing RLIN records to OCLC, but nothing on where membership went; a letter some years later encourages the university librarian to affiliate anew; April 1984 – July 1994
- University of Iowa: WITHDREW IN 1998 (except for law library – see separate folder) – Includes member paperwork, a few updates, a "CitaDel Service Agreement," intent to review RLG membership, and decision to withdraw; May 1979 – February 1998
- University of Iowa Law Library: Continued after merger – includes exchanges with Law program officer Win-Shin Chiang culminating in library's decision to become a Special

Member and continue in the Shared Resources/SHARES and Law programs after main library ended General membership; see also University of Iowa folder; April 1991 – March 2005

- University of Judaism: WITHDREW IN 2006 – Slim file, from joining, through "RLG 92" organizational changes, and a few process memos, to withdrawal; October 1998 – September 2006
- University of Leeds: Continued after merger – Some correspondence, mostly under university librarian Reg Carr's tenure (later went to University of Oxford), from joining to end-of-1990 billing/payments; August 1993 – May 1999
- University of Liverpool: Continued after merger – includes university crest and proof sheet of color photos; scant correspondence from point of joining (as a CURL member) to joining the Shares Resources/SHARES program; March 1997 – December 1998
- University of London Senate House Library (formerly University of London Library): WITHDREW IN 2007 (CURL members were no longer bound to RLG) – Fragments of correspondence missing anything about joining or participation; February 1999 – June 2002
- University of Manchester: Continued after merger – scrappy file of correspondence, from joining to a few billing exchanges and getting staff on RLG mail lists; August 1993 – February 2000
- University of Maryland: WITHDREW IN 1996 & REJOINED AFTER MERGER, AT START OF 2008 – Materials for joining (used in membership campaign of 1993), paperwork, and exit 3 years later (expressing appreciation for the Preservation/PRESERV program); May 1993 – September 1996

## CARTON 209:  Member Programs & Corporate Communications

1978 – 2006: RLG member-institution files, facets of member relations and activities, University of Michigan through Yeshiva University; see note on Cartons 205-209 for more.

- University of Michigan: Continued after OCLC-RLG merger – miscellaneous correspondence, including 1978 Edward E. Shaw membership invitation letter (first invitation beyond founding/refounding members Columbia, Yale, New York Public Library, and Stanford); 1978 – February 2000
- University of Minnesota, Twin Cities: Continued after merger – miscellaneous correspondence that indicates some of the perceptions/negotiations between RLG and its members on value and communications; includes a site visit report; April 1981 – May 1999
- University of Newcastle: WITHDREW IN 2007 (CURL members were no longer bound to belong to RLG after merger) – Slight correspondence from joining to visit report a year later; September 1997 – November 1998
- University of Nottingham: WITHDREW IN 2007 (CURL members were no longer bound to belong to RLG after merger) – membership paperwork, nothing else of note; November 1996 – January 1999
- University of Oklahoma: WITHDREW IN 2006 after merger – Includes membership paperwork, indications of periodic membership review, final exit letter; of special interest may be 27 August 1982 letter from James Michalko explaining RLG's 1981-1982 "take or pay" advance service billings according to members' projected usage; September 1980 – August 2006
- University of Oxford: Continued after merger – assorted correspondence from joining to involvement in RLG Cultural Materials (very little filed here, not for lack of engagement; should see more in other cartons); August 1993 – January 2002

- University of Pennsylvania: Continued after merger – Combines intermittent correspondence with U. Penn, with the university's Biddle Law Library, and with the Annenberg Research Institute – a Special Member that was later subsumed under co-existing Penn General membership; March 1981 – March 1999
- University of Rochester: WITHDREW IN 2000 – Slim file of membership undertakings, followed by withdrawal steps; June 1984 – May 2000
- University of Sheffield: WITHDREW IN 2006 when CURL members not required to hold dual memberships any more – Includes joining, a few memos, and agreement to subscribe to RLG Cultural Materials; October 1995 – November 2002
- University of Southern California: Continued after merger – miscellaneous correspondence from joining and on; March 1981 – February 2002
- University of Southhampton: WITHDREW IN 2007 (CURL members were no longer bound to belong to RLG after merger) – includes membership paperwork; letter advising CURL/RLG members of shift away from charging separate program fees for SHARES (Shared Resources) and PRESERV (Preservation), as well as of three-year annual-dues discounting; site visit report & visit slides copy; August 1997 – March 1998
- University of Sydney: Continued after merger – three exchanges over starting membership; May-August 2005
- University of Tennessee, Knoxville: WITHDREW IN 1997 – slim file of member paperwork, preparations for UTK review of its membership, withdrawal letters; June 1992 – May 1997
- University of Texas at Austin: Continued after merger – Includes 1 of 2 [?] black and white photos; UT joined after the law library and humanities research center, subsuming their memberships; correspondence, site visits, phone reports regarding joining and becoming engaged in RLG activities and services; September 1991 – April 1998
- University of Texas at Austin, Harry Ransom Humanities Research Center: Includes black and white photo; joined as a Special Member and later came under umbrella of UT General membership; contents limited to process of joining; October 1989 – March 1991
- University of Texas at Austin, Tarleton Law Library: Includes black and white photo; joined as an Associate Member (later changed to Special Member) and eventually came under umbrella of UT General membership; contents start with original joining and go through facets of participation in the Law Program and other RLG activities, the "RLG 92" reorganization, and full UT membership; July 1985 – August 1996
- University of Toronto: Continued after merger – Includes 2 black and white photos; spotty correspondence, starting with invitation to join in East Asian Program; 1982 - 2001
- University of Tulsa (Special Collections): WITHDREW IN 1996 – contains membership paperwork (for participation in the Archives, Manuscripts, and Special Collections Program), memo from RLG about Special-Member participation in the SHARES (Shared Resources) Program; and withdrawal owing to financial hardship; March 1988 – August 1996
- University of Utah Law Library: WITHDREW IN 1997 – Covers joining to withdrawal; besides membership paperwork, has correspondence and notes from the end of 1989 to 1997 on participation in the Law and SHARES programs; January 1981 – January 1998
- University of Warwick: Continued after merger – fairly minimal correspondence regarding initial membership as a CURL member; January 1997 – April 1998
- University of Washington Gallagher Law Library: SUBSUMED IN U. Wash. membership in July 2007 (university joined immediately after OCLC-RLG merger) – Law library materials include black and white photo; correspondence regarding twin involvements – as early CJK/East Asian catalogers and, a bit later, participants in Law Program; also a bit of University of Washington research on General membership; May 1987 – February 1998

- University of Wisconsin (East Asian Library): WITHDREW IN 1991 – Tiny file starting with Associate membership acceptance and then jumping to memo on University of Wisconsin's status as the "RLG 92" organizational changes (and new fees structure) were instituted; March 1984 – September 1991
- Utah State Archives: WITHDREW IN 2000 – slight file of 4 items, last being a dissatisfied withdrawal notice (had joined in 1986); September 1991 – September 2000
- Utah State Historical Society: WITHDREW IN 1993 – includes joining/member paperwork, followed by withdrawal note and one subsequent RLG publication order; May 1988 – February 1996
- Victoria & Albert Museum (formerly identified as the National Art Library, V&A): Continued after merger – correspondence on how the National Art Library joined, plus a few background notes added subsequently; May 1996 – February 1998
- Wayne State University: WITHDREW IN 1997 – Covers invitation to join (part of RLG's 1993 membership campaign) and resulting acceptance, startup member paperwork, and decision not to stay in after initial 3-year commitment; serves as a clear example of the success and then failure to attract and retain a big member; September 1993 – July 1997
- Wellcome Library for the History and Understanding of Medicine: Continued after merger – scraps of correspondence about their joining (as a CURL member); January 1996 – October 1999
- Whitney Museum of American Art: WITHDREW IN 2007, after OCLC-RLG merger – includes black and white photo; scraps of correspondence about joining and not much else; trajectory of participation not indicated (other than being in the Art & Architecture Program); March 1987 – March 1999
- Henry Francis DuPont Winterthur Museum: Continued after merger – Includes black and white photo; mostly correspondence about initially joining for the Art & Architecture Program, and later joining the Archives, Manuscripts, and Special Collections Program; April 1988 – December 1998
- Wisconsin Historical Society (formerly State Historical Society of Wisconsin): WITHDREW IN 2006 before OCLC-RLG merger was public – skeletal file includes black and white photo, membership forms, and withdrawal notice; might note the negative impact on them of the major systems and services migration RLG implemented in 2005, aka "RLIN21"; October 1984 – August 2005
- Wolfsonian Foundation, Florida International University: WITHDREW IN LATE 2007 – Includes black and white photo; mostly correspondence over joining and a few later topics; October 1989 – November 2004
- Yale University: Continued after merger – A founding member; includes black and white photo of Sterling Library; assorted correspondence from early days of RLG's establishment at Stanford to end of 1990s; July 1981 – October 2000
- Yeshiva University: Continued after merger – Includes black and white photo; bits of correspondence including aspects of wider Hebraica/Judaica collections' collaborative activities; January 1986 – July 2004

## CARTON 210:  Corporate Communications & Product Management

1979-2006: First 17 folders saved from files of Monique Funnie; these comprise production notes for the "RLG Focus" newsletter and "RLG News" magazine, set of RLG service price booklets, Marcadia marketing materials, background on a couple of published guidelines and the Trove.net Web site, and files on logos, stationery, external designers used, and colors preferred. Remaining 11 folders saved from files of Susan Yoder; these include AMICO contract information and files on

either revenue assumptions/forecasts or development/marketing plans for products and services from 2004 to 2006.

- "RLG Focus" newsletter: Various productions notes for print version (RLG Focus later became strictly a Web-based publication); issues 52 (October 2001) and 53 (December 2001)
- "RLG News" magazine: Production notes for issues 54 and 55, 2002
- "RLG News" magazine: Production notes for issues 56 and 57, plus summary of production costs for Ellen Dunlap, American Antiquarian Society
- "RLG News" magazine: Productions notes for Issue 58/59 (combined), 2004
- "RLG News" magazine: Production notes for issues 60, 61, 62, and 63 (final issue), 2005-2006
- RLG services price booklets, plus order forms and cover letters (though not in all cases) for fiscal years 1996, 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005, 2006 – and 2007 [? By July 2006, OCLC & RLG had merged under OCLC umbrella; unclear what became of 2007 pricing documents]
- Marcadia automated copy cataloging service: Marketing materials – folder, blank stationery, and information inserts; 1997
- "Cataloging Guidelines for Creating Chinese Rare Book Records in Machine-Readable Form": Some (not all) background on preparation and printing of this softbound book, indicating the many delays in finalizing the English – Chinese content; August 2000 – August 2001
- Trove.net Web site (free access to selected RLG Cultural Materials images, plus ability to purchase use of them): Preparations and design for the site – includes design CD from tompertdesign; May-July 2004
- "Descriptive Metadata Guidelines for RLG Cultural Materials"; Color printout of 64-page document published through RLG's Web site; January 2005
- Principal external designers used by Corporate Communications unit from late 1990s to 2006, including portfolio from tompertdesign, 2005 or 2006
- Business systems: New logo and stationery created by [John] Stoneham Design, 1997 [Created the "red bug"/"open door"/"little r" logo used for RLG through 2006]
- Business systems: Sheet of stationery "designed" by Edward E. Shaw (then-president) in 1979; "compliments" slip with logo designed by Steve Jacobs, Inc., Palo Alto, in 1980; compliments slip, several note cards, and letter envelopes using ad hoc design extrapolated from Stanford Graphics' design of a teal-and-gray RLG prospectus as part of "RLG 92" organizational/agenda reorganization; SG-based designs used from fiscal year 1992 through 1996
- Business systems: Final (re)design of RLG logo and stationery, retaining the "red bug" of the previous 6+ years, done by tompertdesign; samples for Villa Street and Stierlin Court addresses; includes a CD of all [?] designs from the Tomperts; 2002-2003
- Design issues: Corporate Communications' color choices and guidelines, for print and Web; late 1990s, early 2000s
- Logos used/dropped; Miscellaneous pages on some of RLG's corporate and service logos; began to reduce number of logos following 2000 branding recommendations by Azimuth Consultants; evolution over 1990s-2000s
- Onyx Customer Relationship Management System: "Sales Policy & Procedure Information Booklet/Supplement Guide" – sample of internal aids for using Onyx, created by Gina Ballestin?

- AMICO Library contract: Contents of binder used by Susan Yoder, director of Product Management (originally named "Integrated Information Services") department; 1998
- Fiscal year 2004 revenue assumptions: Folder 1 of 2 – first half of binder used by Susan Yoder; July-September 2003
- Fiscal year 2004 revenue assumptions: Folder 2 of 2 – second half of binder used by Susan Yoder; July-September 2003
- Fiscal year 2005 revenue miniplans, profits & loss: From binder used by Susan Yoder; cast within RLG strategic framework and its goals and objectives; July 2004 plus some mid-year updates from March 2005
- Fiscal years 2005-2006 revenue forecasts in Integrated Information Services; Binder used by Susan Yoder (relationship to miniplans?); July 2004
- Fiscal year 2005 database revenue by key accounts: From binder used by Susan Yoder; includes memos/notes from one or more meetings in July 2004 (is this the period of all material in this folder?)
- Fiscal year 2005 key account plans: Tabbed contents of binder used by Susan Yoder; produced by Member Programs staff; September 2004
  (Key accounts included Brigham Young, Columbia, Cornell, and Harvard universities, Library of Congress, universities of Michigan and Minnesota, National Library of Australia, New York Public Library, and Princeton, Stanford, and Yale universities)
- Fiscal year 2005 product/program road maps: From tabbed binder used by Susan Yoder; appears that most pages were filled out in March 2005 or even later; last versions before work began on FY2006?
  (Some information here dates back to August 2004 – just before FY2005 would start on September 1st)
- Fiscal year 2006 road maps and profitability: Folder 1 of 2 from binder used by Susan Yoder; tabbed sections, with related e-mail and notes stored at the front; done under RLG's strategic framework; spring-summer 2005
- Fiscal year 2006 road maps and profitability: Folder 2 of 2 from binder used by Susan Yoder; tabbed sections with materials dating over May-November 2005

## CARTON 211:  Product Management

1999-2004: Materials saved from files of Susan Yoder, who came to RLG in 1998 as director of Integrated Information Services (renamed Product Management department later on); entire carton consists of aspects of RLG's cultural heritage/materials initiative/alliance/service.

- Cultural Materials support: Ford Foundation – paper trail for 1999 $150,000 exploration funding and 2000/2001 proposal leading to $200,000 grant funding over 2 years (extendable); April 1999 – May 2004
- Cultural Materials support: Harcourt General Charitable Foundation -- $250,000 funding grant – paper trail before and after; June 2000 – February 2002
- Cultural Materials support-seeking: Henry Luce Foundation – Paper trail of proposal to digitize specific East Asian cultural content [followed on by similar proposal to IMLS for same purpose; believe was not funded; August 2000 – September 2001
- Cultural Materials sponsorship: Paul Sharpe consultancy – exchanges, contract, and descriptive drafts; October 2000 – March 2002
- Cultural Materials support-seeking: IMLS (Institute of Museum and Library Services) – RLG interest in and proposal (?) to undertake work being funded (a "registry" and/or "repository"?) – but ultimately not pursued? November 2000 – March 2002

- Cultural Materials support: Fidelity Foundation approach to, development of proposal, reports to foundation on grant-supported work; April 2001 – September 2003
- Cultural Materials support-seeking: Intel Foundation – approach involved Paul Sharpe and James Michalko; January 2001 – January 2002
- Cultural Materials support-seeking: IMLS (Institute of Museum and Library Services) – RLG proposal for RLG East Asian Digitization Project (to do rare/unique content); unclear, but think not funded? January-February 2002
- RLG Cultural Materials: Initial shaping of what became the Cultural Heritage Initiative and Alliance, before and after RLG board strategic business planning meeting, all of which preceded the late-1999 selected members' meeting that led to announcements, work, etc.; March-September 1999
- RLG Cultural Materials: Announcements of Cultural Materials Alliance and Initiative; background (in James Michalko message to RLG board) about 8-9 November 1999 meeting of key members; call to members generally to join in by endorsing the Alliance Statement of Intent; press release text; preliminary FAQ; November 1999 – January 2000
- RLG Cultural Materials: Further announcements and promotions planning prior to first trial release of service; includes information and plans for American Library Association meetings and packet from James Michalko to RLG board; spring 2000 – January 2002
- RLG Cultural Materials: Naming the service Web site – e-mail exchanges over domain names; November 1999 – June 2000
- RLG Cultural Materials: Agenda and some background for first meeting of CMA (Cultural Materials Alliance) Policy Group; cover letter, group roster, some financial pages included; March 2000
- RLG Cultural Materials: Database interface ("CHI – Track 3"?) – definitely interleaved with functionality issues, the CHI-5 track; see also Functional Descriptions folder; this folder holds working group's papers, meeting minutes, and exchanges on the ways to structure, relate, present data in the new system; notes on functionality, interface, and access characteristics, early "teapots" PowerPoint, other models to look at, meetings with Museum Informatics Program (Berkeley); September 1999 – August 2000
- RLG Cultural Materials: Determining if the CIDOC Conceptual Reference Model (CIDOC CRM) would be employed in the RCM (aka "CHI" or "CMI") Data Model; background on CIDOC CRM (from Tony Gill); consultancy of Nick Crafts; reactions from Computer Development department; analyses by Arnold Arcolio and Bruce Washburn – needs more to clarify outcome? September 1999 – January 2001
- RLG Cultural Materials: Content – identifying, attracting, tracking, housing content (images and data); a CHI track? (CHI-5?); particular responsibility of Ricky Erway; Content Census and Content Manager devised in the process; November 1999 – July 2003
- RLG Cultural Materials: Cultural Material Alliance Content Development Advisory Group – Anne Van Camp's work with (incomplete?); April 2001 – June 2002
- RLG Cultural Materials: Notes from and tabbed agenda for April 2000 meeting of RLG Cultural Materials Alliance (engaged members); held in conjunction with Annual Membership Meeting of 1-2 May 2000
- RLG Cultural Materials: Release schedules and revisions; includes one-page proposal to make service a benefit of membership (never really done as envisioned in Member Programs); July 2000 – October 2001
- RLG Cultural Materials: "Toolbox of actor profiles that can be slotted into different use scenarios" (Tony Gill) and "Notes on CM searching use cases," from Arnold Arcolio; September-December 2000

- RLG Cultural Materials: Work on Cultural Materials Alliance License prior to its vetting and amendment by the CMA Policy Advisory Group; this involved Wiggin & Dana (Mary Norris), Susan Yoder, Wes Taoka, Ricky Erway, et al. March-September 2000
- RLG Cultural Materials: Work with the Cultural Materials Alliance Policy Advisory Group on the Alliance's License Agreement and a new Exhibit C to the RLG Service Agreement; results in 19 March 2001 versions of these; January-March 2001
- RLG Cultural Materials: How to treat materials that could be added by nonmembers through consortial/multi-institution collections fronted/sponsored by members; includes issues for the "Marriage, Women, and the Law" project, Digital Scriptorium, and National Library of Australia; plus license agreement modifications; June 2001 – April 2003
- RLG Cultural Materials: "CMI Preview 2" development milestones – iterations of features and their status, tracked by Bruce Washburn, from September 2000 to February 2001
- RLG Cultural Materials: CMI Technical Review Meeting – preparations for, background booklets (for attendees plus annotated version for staff), outcomes; important milestone in the project; October 2000 – early 2001
- RLG Cultural Materials: "CMI Preview 2" design documents – from Bill Washington et al.; July 2001
- RLG Cultural Materials: Cultural Materials Service functional description – materials from February 2000 to August 2003
- RLG Cultural Materials: Infrastructure ("CHI Track 4") – working group's papers and discussions of underpinnings such as SPIRES, relationship of AMICO technical infrastructure, what would be needed, what *instead* of SPIRES, supporting hardware, descriptions of technical architecture, Oracle vs. IBM and others, IBM DB2, "Recommendation for CMI DBMS and Applications Framework" (IBM's DB2 Universal Database and WebSphere application server); October 1999 – April 2000
- RLG Cultural Materials: Storage requirements, operations architecture, handling billing and subscriptions, dataloading issues (PowerPoints), hardware/network infrastructure, notes on storage, architecture description, data flow diagrams; November 2001 – September 2003
- RLG Cultural Materials:  Making the RLG XML Schema public? Internal interdepartmental discussion  (Member Programs also interested); only 1 meeting briefly noted here; November 2001
- RLG Cultural Materials: Institutional trial access to service – trial agreement and terms of use; February 2002
- RLG Cultural Materials: Courtesy access to service – issues raised/resolved; January-February 2002
- RLG Cultural Materials: Tabbed agenda for July 2002 meeting of CMA[lliance] Policy Advisory Group; notes from this meeting and also from the June 2002 meeting of the CMA Content Development Advisory Group; copy of presentations and handouts used in the (July?) meeting; July-August 2002
- RLG Cultural Materials: "Improving Access to Cultural Resources: An RLG Project Prospectus"; "RLG's Cultural Materials Initiative" – both short descriptive pieces; April 2000 & October 2002, respectively
- RLG Cultural Materials and TNB Partners: "Place Names Handling: Proposal and Project Report, Evaluation Phase" (Draft); June-October 2002
- RLG Cultural Materials and TNB Partners: Place Names Handling Proposal and Progress/Status Reports, Rapid Prototype/Taxonomy Development Phase (does not cover completion of proposed work); October 2002 – March 2003

## CARTON 212:  Product Management

1997-2006: Materials saved from files of Susan Yoder; folders range across several efforts, from relations with Maruzen in Japan, to grants planning/seeking, revisiting information needs assessments, branding study, relations with the Bridgeman Art Library, the RedLightGreen project, redesigning RLG Archival Resources, discussions with SCRAN and JISC, the Octavo Corporation, idbias consultants, EBSCO publishing, Trove.net, RLIN21 cataloging client, book vendor records in RLG Union Catalog, and international distributor agreements.

- Relations with Maruzen: "Japan Oversight Group" – how RLG pursued and managed dealings with Maruzen as a distributor of RLG services (relations with Keio University and other Japanese entities filed elsewhere); intermittent from March 1997 – October 2002
- RLG's role in members' grant seeking: New York University proposal to IMLS (Institute for Museum and Library Services) for project to demonstrate use of CIMI profile, with assistance from RLG, to integrate in a single Z39.50 client (RLG's) access to and between NYU library and museum data held in different systems; outcome not indicated … proposal only; May 1998
- Proposals for National Science Foundation's Digital Libraries Initiative 2 – RLG's own, for standards work on cultural objects description, and University of Michigan's on a "Digital Library Federation for Cultural Heritage" – with idea of RLG collaboration; includes submitted RLG proposal but no outcome (was either proposal funded? Not RLG's); July 1998
- Foundation grants: Miscellaneous plans for, approaches made, status of, during John Sundell's tenure as chief financial officer with grant-seeking responsibilities; March 2000 – July 2002
- Foundation directions: Miscellany on Andrew W. Mellon Foundation's priorities in 2000 and some RLG readings (fragmented); February 2000 – March 2001
- Information Needs Assessment – next generation: An RLG Project Prospectus, April 2000 (10 years after earlier trio of long-lived RLG information needs assessments); was not funded
- RLG brand: Study and report from Azimuth Consultants (George Jurkowitz); background, kickoff meeting, team work papers, working session, questionnaires, final report (draft and final versions), and short-term implementation project actions; June 2000  - April 2001
- RLG and the Bridgeman Art Library: Relations and points of possible cooperation/competition; correspondence and background from July 1997 to April 1999 and, after hiatus, two notes from James Michalko in September 2002 (includes specifics of Program Officer Katharine Martinez's move from RLG to post at Harvard, October-November 1998)
- Union Catalog on the Web (RedLightGreen) support: Andrew W. Mellon Foundation – part of paper trail for Mellon's grants supporting this project (first planning grant to implementation proposal); March 2001 – January 2002
- Union Catalog on the Web (RedLightGreen) support: National Science Foundation prospects – scarcely any indication of RLG action here; January and March 2002
- Possible METS funding from National Science Foundation: Two drafts of a cooperative proposal (with at least University of California, Berkeley) to test and advance ideas from METS and OAIS in a testbed for a digital objects repository; too incomplete to know what happened; January 2002
- Web-based preservation support-seeking: RLG proposal to NDIIPP (National Digital Information Infrastructure and Preservation Program – LC's) '' "AT RISK: Political Web Archives"; would have involved members International Institute for Social History

(Netherlands), Minnesota Historical Society, and University of Toronto, plus the Internet Archive; not funded; November 2003

- Redesign of RLG Archival Resources: Proposal for "Task-Based Focus Groups Studying the Usability of RLG Archival Resources Service Redesign," from Usability Works (Dana Chisnell) – agreed to and signed by Susan Yoder; arranging for focus groups; June-August 2004
- ArchiveGrid support-seeking: Proposal to NHPRC (National Historical Preservation and Records Commission) to turn RLG Archival Resources into a free national database … not funded? Incomplete outcome; October 2004 – February 2005
- ArchiveGrid: Proposal for "Usability Study of ArchiveGrid" from Usability Works (Dana Chisnell) – agreed to and signed by James Michalko; December 2005
- Earhart Foundation Grant for turning RLG Archival Resources into ArchiveGrid: Usability Works' report on ArchivesGrid usability tests, plus status report to foundation with samples of early user feedback; February and April 2006 respectively
- RLG-SCRAN (Scottish Cultural Resources Access Network): Discussions and relationship, principally involving RLG president and Integrated Information Services department (RLG Cultural Materials as RLG's chief interest); January 1998 – September 2003
- RLG – JISC (Joint Information Systems Committee): Exchanges towards providing a JISC image delivery service for the UK higher education and research community; JISC's "Invitation to Tender" and RLG's "Tender" in response; July 1998 – January 1999
- RLG – JISC exchanges on image delivery service tender: RLG's presentation to judges' panel; JISC decision to reconsider its own specifications; January-July 1999
- RLG – JISC relations: Memorandum of Understanding, revised JISC services and strategies, RLG-JISC meetings and notes from them … more process than outcomes? December 1999 – April 2001
- RLG and Octavo Corporation: Discussions of potential cooperation, memorandum of understanding, further digitizing/collaborating exchanges related to RLG cultural resource services; stops with no specific actions (did plans peter out?); March 2000 – November 2002
- RLG and idbias: Contracting with Joy Mountford (principal) and work on usability/interface/user studies for Eureka, RLG Archival Resources, RLG Cultural Materials, Union Catalog on the Web [RedLightGreen]; March 2001 – August 2003
- RLG and EBSCO Publishing: Partial record of exchanges over a longer time period – interest in providing access through EBSCO Host to RLG databases; use of OpenURL linking; August 2002 – sometime in 2003
- Trove.net and Index Stock Imagery: Executed "Non-Exclusive Stock Photography Agency Agreement Between Index Stock Imagery and RLG" – enabling ISI to license use of images in Trove.net for public uses by ISI's customers (includes cover note from Susan Yoder); 25 May 2004
- Trove.net and Contextual Connections (Hal Espo, president): Contract extensions for consulting services to expand licensing partners for Trove.net – only 1 work statement addendum; for November-December 2004
- RLIN21 client – instruction for users: Two statements of work for contract trainer William J. Kopycki (University of Pennsylvania), plus invoice for two tutorials he created; May 2004 – September 2005
- Book vendor records in RLG Union Catalog: Amendments to contracts for data from Harrassowitz, Istituto Centrale per il Catalogo Unico delle Bibioteche Italiane (ICCU), Blackwell's North America, Puvill Libros, Toshokan Ryutsu Center, Inc., and Casalini Libri,

done by Wesley Taoka; plus letter only to Leila Books (no agreement ever completed?); May 2004 – March 2005
- RLG databases – international distributor agreements: Updates of contracts with Book Promotion and Service Co., Ltd. (Asia), Infoestrategica Latina SA de CV (Latin America), and Cenfor International Srl (Italy and other parts of Europe) for their distribution of RLG databases; done by Wesley Taoka; March 2005 – April 2006

## CARTON 213:  Product Management

1986-2004 (mostly 1990s): Materials saved by Wesley Taoka from the files of Win-Shin Chiang; all dealing with some aspect of what became the RLG Citations Resources database services, which were usually lumped together with Eureka searching/reference access to RLG's non-analytic databases: RLG Union Catalog, English (originally Eighteenth-century) Short Title Catalogue, and Hand Press Book(s). Six folders deal with the evolution of the History of Science, Technology, and Medicine database.

- Confidentiality agreement (one-way disclosure by RLG): Draft? A fax to Director of Finance & Administration Molly Singer from Jennifer A. Shufro, Wiggin & Dana, 28 October 1993
- ESTC (Eighteenth-century Short Title Catalogue: User documentation – ESTC Users Manual, 2nd edition (should also find ESTC user documentation in other cartons); August 1986
- ESTC (Eighteenth-century Short Title Catalogue: Functional requirements, service specifications, various aspects of designing ESTC-in-RLIN (ESTC was originally done quickly as a SPIRES "special database" by Sandy Laws and Lynn McCrae); primarily exchanges between Joan Aliprand, Mike (Michael) Crump (British Library), and John Bloomberg-Rissman (ESTC-North America); February 1990 – July 1995 (with gaps)
- Hand Press Book database: Origins in discussion with Henry Snyder and others on a "European Short Title Catalogue"; correspondence and prospects (involving John W. Haeger, Leslie Hume, Henry Snyder (ESTC-North America), Mike Crump (British Library), and various Europeans); June 1990 – spring 1991
- Hand Press Book database: "Tender for Hand Press Books Hosting, RLG, April 2005"; (RLG had hosted HBP since first creating it; this tender was successful); single-sided copy master responding to Consortium of European Research Libraries' specification issued December 2004
- Eureka end-user searching interface: "First, rough draft of business plan" – project name "Merlin"; prepared by Wayne E. Davison, 9 pages (missing attachments – not yet created?); 12 May 1992
- "Eureka on the Web": Short e-mail from James Michalko to RLG board on new Web-based version of Eureka interface to RLIN databases (using Z39.50 protocol); September 1996
- Eureka end-user searching interface: Release of "modernized, simpler, more functional" version – letters to RLG's database suppliers; February 2002
- Eureka end-user searching interface: Incorporation of OpenURL links to local resources; pointers to press release and article in June 2002 issue of "RLG Focus" user newsletter; May 2002
- Zephyr/Z39.50 access to RLG's databases: Two copies of letter from Win-Shin Chiang to RLG Citadel (Citations Resources) database licensors/file providers, together with Zephyr addendum to the RLIN Service Agreement and Zephyr press release; February-May 1994
- CitaDel/Citations Resources: Mostly e-mail with some other documents on the service, filed by Win-Shin Chiang, who was then on the "CIT92" team to develop this service; others

involved included Connie Gould, Leslie Hume, Linda West, Patti McClung, Michael Carroll, Marilyn Roche; outlines the start of this 15-year service (several Citations Resources databases still offered through OCLC, at least from 2006 through 2008); September 1990 – November 1991

- CitaDel/Citations Resources: Varied materials related to service development and marketing in 1992, from Win-Shin Chiang's files; focus on timelines and requirements, files included, pricing, and product introduction; includes draft business plan – not inclusion of document delivery as part of original CitaDel service; January-September 1992
- CitaDel/Citations Resources: Potential collaboration with British Library Document Supply Centre (BLDSC) – short e-mail from John W. Haeger to Mary Norris, Wiggin & Dana; March 1992
- CitaDel/Citations Resources: Small number of e-mails files by Win-Shin Chiang as "CitaDel General 1993"; all concern CitaDel and document ordering through the Eureka end-user searching interface; February-July 1993
- CitaDel/Citations Resources: Preparations for and aftermath of RLG Annual Membership Meeting (meeting held 2-3 February 1994) panel on "The Unfinished Side of CitaDel: Conditions for Successful Document Delivery in the Academic Research Community"; December 1993 – February 1994
- CitaDel/Citations Resources: Copyright, intellectual property, fair use concerns, filed by Win-Shin Chiang regarding copies for document delivery services (where did CitaDel stand); December 1991 – November 1995
- Strategic planning & directions, 1996-2000: Lead-up to printed overview and a little about additions to the Web site on specific strategic projects, from Win-Shin Chiang's files; May 1995 – February 1996
- Projects as part of fiscal year 1996-1997 budget preparation: Exchanges from Win-Shin Chiang's files on laying out projects needed in 1997; follow-on to work on strategic directions in 1995 – early 1996; April-September 1996
- CitaDel/Citations Resources: Updated Web-site "database fact sheets" used for marketing; includes the RLG Union Catalog, ESTC, and Hand Press Book bibliographic databases; February 2002
- History of Science and Technology database: Origins, discussions and developments with Henry Lowood (Society for the History of Technology – SHOT) and John Neu (History of Science Society – HSS) for contributions to create a shared CitaDel database combining their respective bibliographies for technology and science (HTE and SHOT); from Connie Gould's files, with additions from Win-Shin Chiang; May 1988 – December 1992 (scant for 1992)
- History of Science and Technology database: Exchanges and HST launch in CitaDel; sporadic coverage, including dealings with Henry Lowood, John Neu, and a bit of international reaction; includes perhaps the earliest flyer for new database; Connie Gould and Win-Shin Chiang managing; January 1993 – December 1994
- History of Science and Technology database: Exchanges on database updates and usage; database fixes and tracking of subscriptions; indicates when Connie Gould went on medical leave, mid-April 1995, for ultimately unsuccessful cancer treatment; March 1995 – December 1996 (scant for 1995)
- History of Science and Technology database: "International" facets of HST as filed by Win-Shin Chiang; more may be other folders overlapping this period; April 1995 - ? 1997
- History of Science and Technology database: Addition of BISS (Bibliografia Italiana di Storia della Scienza) to the HST database; looks like a step-by-step exchange of e-mails, including

agreements, specifications, etc. in the course of making this database expansion; Win-Shin Chiang's files; April 1996 – January 1998
- History of Science and Technology database: Exchanges with Henry Lowood, John Neu, and Anna Citernesi on the development of "Guidelines for the History of Science and Technology (HST) File [sic] at the Research Libraries Information Network (RLIN)"; March 1996 – September 1997
(Subject is also addressed in the Carton 213 folder for HST "Ongoing work" in January-June 1997)
- History of Science and Technology database: Ongoing work on HST database, including guidelines for creating the records and handling them in the data-loading process, thinking about more bibliographies to add to HST, user documentation online, reloading files, a free gateway to doing HST searches for the History of Science Society's members (note exchanges between Win-Shin Chiang and HSS staffer Constance Malpas, later an RLG program officer), and some discussions about BISS – see also the Carton 213 folder on "Addition of BISS"; January-June 1997
- History of Science and Technology database: Ongoing maintenance, marketing, and expansion of HST – continuation of folder for first half of 1997; last item in file is background sent by Win-Shin Chiang to David Pearson at the Wellcome Institute, London, holder of History of Medicine records (these later were added to change HST into the History of Science, Technology, and Medicine database); July-December 1997
- History of Science, Technology, and Medicine database: Scraps of information; indicate the addition of Wellcome Library records in December 1999, so that in January 2000 the database was renamed; January 1998 – May 2002
- History of Science and Technology database: Database licensing agreement(s) for RLG's incorporation of the Society for the History of Technology (SHOT) Current Bibliography of the History of Technology file; September 1993 – September 1998
(includes May 2002 exchange with the Getty Conservation Institute, Getty Center, on the terms of the agreement)
- History of Science and Technology database; Database licensing agreement for RLG's incorporation of the History of Science Society's ISIS Current Bibliography of the History of Science and Its Cultural Influences file; folder contents scrappy; July 1997 – July 2001
- History of Science, Technology, and Medicine database: Database licensing agreement for RLG's incorporation of the Wellcome Library's Current Work in the History of Medicine file; July 1998 – July 2004

## CARTON 214:  Product Management

1997-2005: Materials saved by Susan Yoder or Wesley Taoka (earliest come from files of Win-Shin Chiang, Wes T.'s forerunner); 6 folders on database statistics and subscriptions, reported to the file providers, a Strategic Planning notebook, about 4 files of annual revenue/marketing plans; 1 file on RLG's annual offers to largest users ("fixed-price contracts").

- Database statistics & subscriptions: Reports to database providers for fiscal year 1997-1998 – circa 14 Citations/Bibliographic databases – plus "CitaDel Task List" for FY1998 and diagrams of work flow involved in handling such files; Win-Shin Chiang's was turning over responsibility for this to Curtis Lavery (she left RLG in 1998); see also CitaDel/Citations Resources folders in other cartons for more about the databases; August 1997 – October 1998
- Database statistics & subscriptions: Reports to database providers for fiscal year 2000-2001 (folders for 1998-1999 and 1999-2000 not found in carton 213) – circa 15

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Citations/Bibliographic databases – plus smaller reports for RLG's own databases or special cases; September 2000 – November 2001

- Database statistics & subscriptions: Reports to providers for fiscal year 2001-2002 – plus smaller/incomplete reports on RLG Union Catalog, the AMICO Library, RLG Archival Resources, SCIPIO; September 2001 – November 2002
- Database statistics & subscriptions: Reports to providers for fiscal year 2002-2003 – plus smaller/incomplete reports on RLG Union Catalog, the AMICO Library, RLG Archival Resources, SCIPIO, RLG Cultural Materials, and "Latin American (LAS)" [?]; September 2002 – November 2003
- Database statistics & subscriptions: Reports to providers for fiscal year 2003-2004 – without any cover letters; plus more fragmentary data on – plus smaller/incomplete reports on RLG Union Catalog, the AMICO Library, RLG Archival Resources, SCIPIO, and RLG Cultural Materials; September 2003 – August 2004
- Database statistics & subscriptions: Reports to providers for fiscal year 2004-2005 – *includes a CD of "provider mailing"*; reflects mid-year change in systems (migration off the mainframe); includes 13 databases plus a bit on RLG's own SCIPIO; September 2004 – November 2005
- Strategic planning: Contents of notebook for 1999-2003 from Susan Yoder's files; tabbed sections beginning with the RLG board's 25 April 1999 discussion materials, followed by May "RLG Planning Workbook" in sections; focus of Susan Y.'s book is "Cultural Heritage"; other key components of the 2000-2003 strategy were Long-term Retention of Digital Research Materials and New-Generation Resource Sharing -- implication is that workbooks exist(ed) for these other components as well …in Linda West's files, in another carton?
- Revenue assumptions & marketing requirements for fiscal year 1999-2000: Susan Yoder's tabbed materials on all RLG product/service lines; first three-fourths are revenue expectations and what is needed to realize them; last fourth comprises product managers' takes on their services, the market, and getting customers – what's needed; May-August(?) 1999
- Revenue assumptions & marketing requirements for fiscal year 2000-2001: Susan Yoder's tabbed set of documents for key services and some "other activities" (not on same level, but deemed necessary); very rough table of contents with page numbers at front, and only a couple of marketing requirements documents at back of folder; mostly July 2000
- Revenue assumptions & work required for fiscal year 2001-2002: Susan Yoder's tabbed, page-numbered materials; includes one marketing requirements document, for RLG Cultural Materials; mostly July 2001
- Revenue assumptions & work required for fiscal year 2002-2003: Susan Yoder's tabbed, page-numbered materials with table of contents; no separate marketing requirements documents; mostly July 2002
- Fixed-contract offers for fiscal 2005-2006: Approximately 31 "substantially discounted" "scholarly services" packages – offers made annually to RLG's largest member-users and a couple of nonmember users; shows the specific offers, but not who signed up and for just what; offers made in light of, and adjusting for, disruptions in RLG service May onwards, caused by mainframe systems migration and replacements in new computing architecture; June-July 2005

[Carton 215: See note preceding Carton 1 above.]