

Archives WORKBOOK

www.aa.org

Archives Workbook

This workbook is service material, reflecting A.A. experience shared at the General Service Office. A.A. workbooks are compiled from the practical experience of A.A. members in the various service areas. They also reflect guidance given through the Twelve Traditions and the General Service Conference (U.S. and Canada).

Copyright © 2022 by
Alcoholics Anonymous World Services, Inc.
Grand Central Station, Box 459, New York, NY 10163
All rights reserved.

www.aa.org

“We are trying to build up extensive records which will be of value to a future historian...

“It is highly important that the factual material be placed in our files in such a way that there can be no substantial distortion...

“We want to keep enlarging on this idea for the sake of the full length history to come...”

— Bill W., 1957

Contents

Mission and Purpose	7
Introduction	9
A Word About Anonymity	10
How is an Archivist Different from Other Related Professionals?	10
Role of the Archivist	11
Role of the Archives Committee	12
Tools and Suggested Activities for Archives Committees	13
Archives Committee Activities: Shared Experiences	14
What to Collect?	25
Setting Up a Repository	26
Preservation Work in Archives	27
Research in Archives	28
Ownership of Material	29
Deed of Gift Form	30
Thank-You Letter	31
A Note About Copyright	32
Oral History	35
Archives of the General Service Office	36
Access Policies at GSO Archives	39
Photocopying Policy at GSO Archives	45
Policy on Permission to Quote from A.A. Material	46
Sound and Video Access Policies at GSO Archives	46
Classification of Archival Material at GSO	52
Calendar of Holdings at GSO	54
Reference Information and Resources	55
Closing	56

Mission

The mission of the Alcoholics Anonymous General Service Office Archives is to document permanently the work of Alcoholics Anonymous, to make the history of the organization accessible to A.A. members and other researchers, and to provide a context for understanding A.A.'s progression, principles and traditions.

Purpose

Consistent with A.A.'s primary purpose of maintaining our sobriety and helping other alcoholics achieve recovery, the Archives of Alcoholics Anonymous will:

- Receive, classify and index all relevant material, such as administrative files and records, digital materials, correspondence, and literary works and artifacts considered to have historical importance to Alcoholics Anonymous;
- Hold and preserve such material;
- Provide access to these materials, as determined by the archivist in consultation with the trustees' Archives Committee, to members of Alcoholics Anonymous and to others who may have a valid need to review such material, contingent upon a commitment to preserve the anonymity of our members;
- Serve as a resource and laboratory to stimulate and nourish learning;
- Provide information services to assist the operations of Alcoholics Anonymous;
- Promote knowledge and understanding of the origins, goals and program of Alcoholics Anonymous.

Adopted: October 30, 2006
By the General Service Board
of Alcoholics Anonymous
Revised January 2021

Introduction

The idea for organizing an historical collection of the Fellowship's records came from co-founder Bill W. in the early 1950s. Bill was becoming increasingly concerned that "the history of Alcoholics Anonymous is still veiled in the deep fog." Knowing that the office correspondence was loosely maintained in the drawers at the General Headquarters, he set out to arrange our historical records. He personally recorded oldtimers' recollections in the Akron/Cleveland area; he sent out boxes of blank tapes to others, encouraging them to record their recollections.

Bill's far-reaching vision outlined an archival message that is still sound today. As he said: "Every one of the new and unexpected developments (in A.A.) has, lying just underneath, an enormous amount of dramatic incident and experience — stories galore.... It isn't hard to prepare a fact sheet of what happened — that is, dates when people came in, groups started and so forth. The hard thing to lay hold of is the atmosphere of the whole proceedings and anecdotal material that will make the early experience alive."

After many decades of tireless organizing and arranging, the GSO Archives room was opened with a formal ribbon-cutting ceremony in November 1975.

Since then, the GSO archivists and the trustees serving on the Archives Committee of the General Service Board have encouraged the importance of archival service, which is vital to the survival of the Fellowship. As a result of that work, today almost all areas have set up archival collections, and there is a significant growth at the district level.

Historical records help us to sift through our day-to-day experience in recovery and reach back for the shared experience from the past. As we sort out the myth from the facts we ensure that our original message of recovery, unity and service remains the same in a changing, growing, expanding Fellowship that constantly renews itself.

Archives are frequently associated with the past, but they are also to be linked with true value. We maintain records of permanent value so we can go back and consult the original sources again and again.

In the following sections you will read about various aspects of archival work. As mentioned later, there is a natural growth process in the life of an archival collection. Although sharing is helpful, collections are essentially unique entities existing under unique conditions. It is the responsibility of the archivists and the archives committees to address the needs of their collections and set up policies accommodating local conditions.

Your journey of setting up and maintaining an archival collection will be a truly rewarding experience of service to benefit Alcoholics Anonymous.

Like the A.A. program itself, the sections that follow are neither rules nor laws. They are offered as suggestions only and the GSO Guidelines are presented as examples — subject to whatever changes may be necessary to best serve your collection.

A Word About Anonymity

We are often asked by members if, in collecting and writing up their local or area history, full names should be used of group founders, early members or group officers, regardless of whether the manuscripts are to be retained in the area only, or are also intended for sharing with GSO and other area archives. Development of procedures seems to be a matter of local policy decision by the archives committee, but the necessity for protecting the confidentiality of correspondence and the anonymity of the correspondents is without question an important consideration and a trust that falls upon all A.A. archivists and archives committees.

At GSO, the group histories and correspondence files (going back to 1939) contain full names and addresses. It is important to remember that many of these letters were shared as individual opinions and not with the intention of making them public.

When new material arrives from groups and individuals, we continue to protect the anonymity of individuals by placing the incoming material in its category of classification, and monitor carefully each occasion when research permission has been granted a person to review the history files. Also, while adhering to the tradition of first name and last initial may be preferable, confusion can occur where two or even three people have the same first name and last initial.

How is an Archivist Different from Other Related Professionals?

Though archivists, librarians and museum curators share the mission of maintaining recorded information and other materials, their objectives and functions vary. It is important to examine what makes archives work unique among other related professions so as to better understand the overall role of the archivist. Historians and archivists have had a longstanding relationship, but there is an important distinction between the two professions. The task of the *historian* is to gather, organize, analyze, interpret and describe information about the past by drawing on a wide variety of historical resources. Although they do not typically maintain historical materials while performing academic or scholarly work, historians often seek these materials and the services of the archivists who keep them. Archivists do not typically engage in the work of a historian, as that would run the risk of crossing a fine ethical line. More information, support and guidelines for archivists are provided by professional archival organizations such as those listed in the “Reference Information and Resources” section.

Archivists are responsible for collecting, arranging, preserving and providing access to permanent historical records of enduring value, not writing or interpreting history. The nature of the archival materials they deal with is usually unpublished and unique. They may also handle groups of related items. Archivists employ professional standards and practices unique to archiving to ensure the safety, security, integrity and authenticity of the materials under their care. Special procedures and policies permit researchers access to the collections; typically, original items do not leave the archives' premises. Depending on the institution or organization, some archivists conduct historical research for the community they serve.

Librarians collect, preserve and make accessible published information sources such as books, newspaper clippings, magazines, audio- and videotapes, and other published materials. Librarians employ professional standards and practices that are unique to published materials. Materials are usually maintained in open stacks, and most items often leave the library's premises.

Museum curators abide by standards and best practices for professional curatorial conduct in managing the artifacts and other tangible objects under their care. Their functions and responsibilities include a broad range of tasks. Typically, a curator is responsible for assembling, preserving, displaying and arranging for the purchase or exchange of tangible objects for the collection. In most museums, curators are likely to be experts in specific subjects or in particular collections they oversee. Access to museum collections are restricted and usually available through exhibits.

A word about private collectors...

Private collectors within the A.A. Fellowship search out rare, unusual items and memorabilia associated with A.A.'s history for their personal keeping. There are many differences between archivists and collectors, but this does not mean the two roles are in opposition. Collectors often purchase and sell items through rare book dealers or auctions. Conversely, archivists do not typically purchase materials, but instead receive them as donations. There is a thriving market for rare A.A.-related materials, but this can and should remain outside the realm of archives. Collectors sometimes exhibit their collections at A.A. events or offer access to them to interested parties. Sometimes, though, these collections remain privately held and little access is possible. Collectors have the right to decide whether or not to provide access. Archivists cannot make this decision for others' archives, but they must provide the highest possible level of access to their archives to everyone. Based on these differences, in general an archivist should not also be a collector of A.A. memorabilia and literature. While many archivists may own small collections of materials, this can be problematic to be both an archivist and a collector. There is an innate conflict of interest: the heart of a collector wants to own rare materials, whereas the archivist is merely a steward.

Role of the Archivist

The archivist is the focal point of the collection, determining on one hand what to include in the collection, and on the other hand working towards making the collected material available to the greatest extent possible to members of our Fellowship and those in the public realm with a valid interest in A.A.

- The archivist collects, organizes and preserves material of historical interest. Typically, the archivist selects a representative sample of the collection and arranges those into a traveling display.
- The archivist is responsible for both the physical and the intellectual integrity of the collection. It is important to ensure the privacy and protect the anonymity of members whose names are included in the collected documents.

- The archivist is also responsible to report regularly to the area committee or, if it exists, the area archives committee, about new material received and to give updates about ongoing projects at the archives.

Training

It is helpful and desirable for the archivist to have some familiarity with archival procedures or the willingness to learn the basics of such procedures. Depending on the location of the archives, the local college, major library or historical society might offer basic courses in handling historical records.

Who Should Be Selected as Archivist?

Archivists are selected in different ways throughout the areas. Some are elected by the area assembly, some are appointed by the area committee or the area's archives committee. It is the shared experience not to rotate frequently since it takes a considerable length of time to get familiar with the material.

Archivists are usually A.A. members, and areas may differ in sobriety requirements, the right to vote in assemblies and the length of time before rotation.

Role of the Archives Committee

It is a decades-old axiom in our Fellowship that “you can't keep it unless you give it away.” When we first enter A.A., we learn the soundness of this statement as we stay sober and find our own sobriety strengthened as we try to “pass it on” to a newcomer. Many A.A.s active at the general service or intergroup/central office level, who carry the A.A. message through corrections or public information work, or volunteer for telephone answering service, experience a similar awakening by “giving it away.”

A.A. archivists and committee members, too, describe a heightened and enriched sobriety by participating in their type of Twelfth Step work. Archives provide an opportunity for A.A. members to actively share in our history.

Local needs and practices will guide you regarding whether you work primarily through the area and district or through the local central office or intergroup.

The archives committee is responsible for establishing policies, budgets, and procedures. It undertakes and maintains final responsibility and authority for the use of the archives, and exercises its group conscience in regard to matters of general policy. In all of its actions, the archives committee needs to be mindful of and guided by A.A.'s primary purpose. Thus, if non-A.A. friends are asked to serve on the committee, which is possible because of interest, special knowledge and/or expertise, they ought to be people who are thoroughly familiar with our primary purpose, as well as all of our A.A. Traditions.

One of the most important functions of the archives committee is to establish creative parameters for the selection of material to be collected. These parameters will guide the archivist in gathering material of historical significance and will reduce the time and space of preserving random bits and pieces of dubious value.

It is helpful for the committee to meet on a regular basis to aid the archivist and to become familiar with the maintenance of the collection.

Rotation is handled in different ways, with some committees rotating at the same time as area officers while other committees have a staggered rotation so that there is continuity of members with background. If the archivist does not rotate every two years, it seems to work best to have some of the committee members rotate.

Tools and Suggested Activities For Archives Committees

The A.A. Guidelines on Archives and other materials found in this Workbook are helpful resources for Archives Committees. The primary purpose of those involved in archives work is to collect and preserve the message of Alcoholics Anonymous. However, Archives service is more than mere custodial activity; it involves sharing A.A.'s rich and meaningful heritage. Like any other A.A. service, it takes a few dedicated A.A. members willing to launch these efforts. This list provides suggestions for archives committees to commence their work. It is compiled from the experience of A.A. members involved in archives committee work in the various service areas.

- Study Archives Workbook and related materials.
- Show the DVD *Markings on the Journey* in Archives workshops, or other A.A. related events, to inspire interest in A.A.'s history.
- Create presentations about archives committee activities, including photos of your own repository and exhibit area.
- Create portable exhibits that are easily conveyable to various events, such as state or regional A.A. conventions, area assemblies and district or central office meetings.
- Organize oldtimers meetings and invite a number of A.A. members with long time sobriety in your area to share their stories.
- Initiate projects and assign one task per committee member. For example, digitizing analog recordings to digital media, conducting inventories, creating finding-aids, scanning, filing and other archives-related tasks.
- Host an annual Archives Open House and invite other service committees to display their work.
- Host Archives Workshops and include hands-on activities and tours of your archives repository.
- Communicate with other local Archives Committees and archivists to share your own experience and glean suggestions from others involved in archives service work.
- Develop forms, policies or guidelines, as practical, for local needs. These may include, for example: Collection Scope; Deed of Gift Form; Group History Questionnaire; Guidelines for Collecting Oral Histories; Oral History Release Form; Photocopying Policy; and Research and Access Policy.
- Produce an archives newsletter, or contribute to a section in your area's newsletter, highlighting your work or a new and exciting find.

- Distribute flyers at local A.A. events and include contact information for your area or district archives.
- Distribute Group History forms at local gatherings to inspire interest in conducting histories of groups in your area.
- Produce a history book detailing the history of A.A. in your area.
- Begin your archives committee report at area or district business meetings with a trivia game to spark interest and enthusiasm.
- Send sharing on local Archives workshops and events to GSO.

In all of its actions, the Archives committee needs to be guided by A.A.'s primary purpose and Traditions. The committee is also responsible for ensuring the protection of the anonymity of members, and the confidentiality of all A.A. records. For further experience, or for information on contacting area or district archives committees, please contact the GSO Archives at archives@aa.org or 212-870-3400.

Archives Committee Activities: Shared Experiences

Just as each A.A. group is autonomous, so is each area and intergroup or central office. The needs, experiences, and conscience of your own area, large or small, urban or rural, will affect your archives committee's initial plans as well as its growth and development. Below, several archives committees share some of their experiences, ranging from generating local interest to maintaining a large and complex collection in trust for all A.A.s in the area.

This section will be updated from time to time, to reflect new sharing and experience from different areas and districts. If your area or district has a wonderful story to share, please send it to the GSO Archives anytime.

Area 09, Mid-Southern California

The Mid-Southern California Archives (MSCA) serve Area 09. We have a collection policy, archives committee guidelines, inventory forms, deed of gift forms, oral history guidelines, and an access policy. These items can be found on our website and are also available in Spanish.

Some of the materials in the collection area include books/pamphlets about A.A., documents developed locally to support Twelfth Step work, photographs, directories, meeting lists, newsletters (particularly those published by Area 09 and Area 09 districts), audio and video materials, news clippings, magazine articles, correspondence, minutes of service committees, GSO bulletins and reports, Grapevine materials, conference reports, International Convention materials, local meeting minutes, local directories, meeting lists, written histories, biographies, audio recordings, and other items that fill the requirements of the Mission Statement. We collect materials in English and Spanish.

MSCA 09 Archives began in 1991-1996 when the Inland Empire Central Office gave Archives a portion of space to display in Colton, California. From 1997-2001 the Archives occupied the space adjacent to the Inland Empire Central Office and used it as a display

space. In February 2001, the Archives lost its lease and the collection went into storage. From September 2001 to December 2001 an office was rented to display some material while most was still in storage. In January 2002 the archives moved to a separate building in Riverside, California. Archives lost the lease to this space in January 2009 and was in storage until the current location was found in March 2009.

Members in Area 09 disagreed with money being spent for rent for an Archives location. Disagreements rise and fall every through years with members asking for justification for the purpose and need for an area archive. To address the value of archives, the Archives Committee prepares annual reports of outreach, presentations to conferences, gathering group histories, Archives Open House presentations, writing essays for district newsletters, and creating displays/posters/pamphlets to share with district events and members. The publication of the 2018 Open House presentation and poster collection that was entitled *Pioneer Women of Alcoholics Anonymous* has improved the value of the MSCA 09 Archives. Some members have become motivated to advocate for the research available from the Archives and the value they place on the presentations.

The MSCA 09 Archives are housed in a separate location, which has been rebranded as the MSCA 09 Headquarters. The space is a suite in an industrial park adjacent to a county airport. The location has 1034 square feet on the ground and a renovated storage space in an upper level of 306 square feet. The location is open every Saturday from 10 a.m. to 1 p.m. or by appointment. Portions of the collection are accessible from the Archives website.

Digitization began December 2018. Digitization began with area documentation necessary for continuity of business, area minutes, area calendars, guidelines, executive board minutes, agendas, standing committee minutes, flyers, convention programs and flyers, Hispanic Congreso, newsletters, area service events (Servathon, FORO, 4-Area DCM Sharing Session), regional conferences, PRAASA documentation, central office documentation, meeting directories, central office directories, group histories, oral histories and transcriptions.

MSCA 09 Archives has created “finding aids” to collections and archive boxes, scanned material in cloud storage, spreadsheets and MS Access database to search digital files, but an online search option is not available to search and deliver the PDF and audio files. This feature is under development.

Storage of archival copies are in a fire-proof filing cabinet on hard drives (1Tb 3.5in HDD, USB flash drives), hard drives on two computers in the archive office for in-person use, cloud storage to serve website links and One Drive (password access to complete collection, except restricted files).

The area archivist position is appointed by the Archives Committee for a four-year term that can be renewed by the Committee. But the archivist can be removed from the position by the committee prior to the end of the current term. Archives Committee chair has been appointment by the Archives Committee, which is written into the Archives Committee Guidelines. Committee members are self-selecting and the committee is comprised of district archivists and area members interested in being part of area or A.A. history. Area members are invited to work on individual projects, such as developing a presentation on a specific topic.

The Area 09 Archives Committee holds a District Archives Workshop at the beginning of new panels to help new and ongoing district archivists learn more about their

roles and responsibilities. Archivists for other areas have attended the workshops. Materials that were prepared for the workshop can be shared with members, district archivists, and other area archivists. The MSCA 09 Archivist collaborates with Area 05 Intergroup Archives Committee to help them develop file manifests for their processed collection since 2018. Area 09 archivist has visited and met with Area 08 Archives to share work processes, archives collection and policy documents, and oral history documentation and a recorder. MSCA 09 Archivist attends Archives committee meetings at PRAASA and the National A.A. Archives Workshops.

The MSCA 09 Archives Committee prepares a budget for the upcoming year for presentations, in-person events, service events, office supplies and paper for Area Standing Committee use, printing of publications (newsletters, area-level booklets, election ballots), and creating new presentations (posters, traveling displays, videos).

Area 21, District 12, Southern Illinois

At first, Area 21's archives collection was contained in two Rubbermaid tubs. When I and another individual became co-chairs of the Archives Committee, we were extremely excited to see what the previous chairs had maintained and collected. The collection was very humble in nature but we immediately saw the potential to grow.

The passion of becoming involved with the Archives Committee started with a trip to the Akron Archives in Ohio. I was immediately drawn to the exquisite displays, the flow and order of the repository, it led me through a spiritual odyssey, the constant reminder that the collection on display was ours, as well as Akron's, was the most heartwarming feeling. This was the vision we decided to strive for.

When I was looking at the items in the Akron Archives, I noticed a woman's hands in several of the photos, I was looking for a service sponsor and decided to reach out to the office to get her information. As one of our most well-known A.A. archivists, she began to teach me the basics. First was that we needed a committee and an Archivist. A one-person committee isn't a committee. Second, was the need to establish trust between the committee and the Fellowship. Then, we needed to familiarize ourselves with the A.A. Archives Workbook and other relevant A.A. literature on our history. Subsequent was to make a formal inventory on all of the items in the tubs. And lastly, we needed to reach out to other Archivists in our area.

After reading the workbook, we began implementing the suggestions contained in it. The first task we undertook was to make sure we had a Mission Statement, Purpose, Collection Policy, Research and Access Guidelines, and a Deed of Gift form. Since the collection was very small, inventorying the items and later digitizing them went quickly. We created a spreadsheet with multiple tabs on the bottom, we had one for Grapevine magazines, meeting lists, meeting minutes, and flyers. The "What to Collect" section in the workbook inspired us to create several folders to distribute one to each group in our District. We created a flyer detailing the district archives' needs, we stuffed the folders with all of our forms and policies, the A.A. Archives pamphlet, an A.A. Group History form, and a condensed document explaining the oral history process. We also made a small 4x6 photo album of the items in our collection to show groups and members at meetings. The mention of newsletters in the workbook spurred the idea to reinstate the vacant Newsletter committee. We started our requests to the GSO Archives for any information as it related to any of the groups, active or inactive in our district. And we also

placed strong importance to keep the present and future as the main focus, to prevent a gap in history for our district in the future. We were so excited about the response and imagined a flood of items coming back, but what the committee did not possess at that time was the Fellowship's trust.

We moved to the next step, which was to reach out to other archivists. Through another search of local A.A. websites, we were directed to a very passionate, kind and inspirational archivist in District 6, Area 21. They immediately lit a fire under us to research our local members and meetings. They made all of it seem possible, that with nothing, we could trace our area back to the pioneers and founders. We began with newspaper searches first, we were amazed by how many early articles in the newspaper detailed meetings starting, where they were at and what day and time. We found a collection of a psychology professor at a local university that had many items related to Alcoholics Anonymous. The archivists at the university then taught us a lot regarding restricted items in the repository, preservation, ownership of the material, photocopying, and researching guidelines. In this professor's collection, we found names of local members included in letters written to A.A. pioneers in both Chicago and New York. We sought information on one pioneer who edited *Twelve Steps and Twelve Traditions, A.A. Comes of Age*, and the Second Edition of *Alcoholics Anonymous* and within a few hours, we had found how the message was carried to our district.

This is when we realized our committee was forming, we had an archivist, a speaker meeting recorder, newsletter contributors and an editor, another researcher, and eventually, someone to digitize and assist in organizing the collection for display purposes. We started oral history interviews with our long-timers. We used the start dates of groups to help them organize their anniversary parties. At the parties, we would take old books and have members sign them with their anniversary dates, which we were able to display and we took pictures that we put into a digital photo frame that travels with us to represent the District 12 Archives Committee at A.A. events all over. At our first major event, the trust was created between our committee and the Fellowship. Members could see all that we had collected. We were able to tell them it was their collection and their history, and we saw smiles, heard laughs, and had tissues available for the tears. Soon after we began to get donations. We had people dropping off boxes of items to preserve and we finally needed a physical repository. We started to show a need for a larger budget at our district business meetings when we began to attend local A.A. history events and travel to our first National A.A. Archives Workshop (NAAAW) in Chicago, IL, where we were asked to present on Archival presentations. At NAAAW we learned about the creation of archives scrapbooks, protecting anonymity, and most importantly we received experience, strength, and hope from past and present archivists throughout the Northern Territory.

In very little time we now have a permanent and traveling display, our repository is not open to the public, however, we will make appointments with individuals who request access. We have digitized our items to Google Drive under our district email, so the original items are preserved and will always be able to be passed along to those that follow. We were also asked to assist our area archivist in digitizing that collection as well. Our committee chairs will continue to rotate as our archivist currently serves without rotation. We continue to keep the collection aligned with A.A.'s Traditions with the guidance and support of other archivists. And most importantly, we have learned

the significance of how archivists, historians, and collectors can appropriately work together, therefore our collection scope and policy have been adjusted to ensure the committee is only housing items with spiritual value because maintaining the trust between those we serve is our main priority.

In our experience, the power behind the archives is a deep sense of gratitude, service, and love. Our collection provides content and authenticity to the manifestation of our spiritual program, it is our collective memories and our documentation of our history and culture today. It is an honor to share information that we collect and like our individual sobriety we cannot do this alone, it is through the fellowship of Alcoholics Anonymous and God's grace that we continue to uphold our archives' purpose.

Area 37, Mississippi

We have two separate archival repositories, the Area 37 Archives and the archives at the Intergroup of South Mississippi, which serves three coastal districts. We collect all materials related to Alcoholics Anonymous including some Al-Anon materials. Materials we collect document events internationally, from the United States and Canadian service structure, our region, area, and down to the local levels of history.

The South Mississippi Intergroup archives are housed at the central office and our Area 37 archives is housed in separate room within the same building at two separate monthly rental fees. The Intergroup Archives is open during central office business hours and the Area 37 Archives is viewable by contacting the Area Archivist.

Both archives were separately organized and inventoried on hard drives and thumb drives and are periodically updated. Each inventory is broken down into sections that include audio, video, books, periodicals, newsletters, GSO, local and area locations. An effort is given to the chronologic time of the items. Both archives were received stored in totes, old cardboard boxes, old file cabinets, and project boards. The approach in both archives was to sort out the material by type and age, sort out duplicated material, and start some sort of organization. Binders, page pockets, label machine, book shelves, and picture frames were purchased to help with the organization of the material.

The area archivist is currently serving both archives. The archivist needs to have a strong desire to organize and preserve history of Alcoholics Anonymous. They work with the committee chairperson to help improve and advance the presentation of the Archives. Area archives committee chairperson is a two-year commitment with rotation. Area archives committee members are selected by the area chairperson to represent a variety of districts within the state, usually a two-year commitment.

We have received feedback from other state archivists, including Tennessee, Virginia, and Georgia. Our Archives does presentations for our Area 37 State Convention and a couple of local coastal roundups and conventions.

Area 37 Archives is funded by the area and given a budget by the finance committee in which they operate annually. A new budget is completed each year. If the area archives needs additional funds, it may submit a special request. The South Mississippi Intergroup Archives has to have funds approved prior to each expenditure.

Area 38, Eastern Missouri

On October 20, 1974, the Eastern Area of Missouri (EAMO) Assembly voted to establish an archives and appointed Blanche K. as the first archivist. Blanche was fortunate

to have communicated with Nell Wing (non-alcoholic), GSO's first archivist. Blanche worked hard during her 19 years of service, and our archives grew with donations of many local A.A. historical items. Throughout the years, our archivists and archives committees dedicated themselves to preserving, restoring, and organizing the tens of thousands of documents and items. It is our philosophy to establish archives that our local Fellowship could visit, as well as produce traveling archives to take to the Fellowship.

A pamphlet titled "Golden Moments of Reflection" was written to document Area 38's early A.A. groups in 1940 to 1984. A traveling archives using display boards was developed around our large amount of early historical documents, including many photographs. In 2018, the EAMO Archives believed it was important to begin telling Area 38's A.A. story in a more dynamic way by using electronic media, such as Microsoft PowerPoint. A presentation, "The Experience, Strength, and Hope of Alcoholics Anonymous Comes to Eastern Missouri," with speakers, audio recordings, and photographs, was created that detailed our history from 1939 to the present. Another slide show, illustrated through pictures and instrumental music, focused on the lives of our two founders, Bill W. and Dr. Bob. We shared both productions with the EAMO Fellowship and that has increased the interest and continued support for our archives.

In 2016, we began digitizing many of our documents in order to preserve them and to also organize the Archives by combining files and establishing searchable databases. In addition, historical presentations on the early meetings in the EAMO were created that are shown in the Archives on a permanently installed, large flat-screen television. We also have a portable flat-screen TV that is taken to A.A. events throughout the Area. Following the guidelines in the Archives Workbook, we began recording local long-timer interviews using a digital recorder to MP3 format. These recordings are stored in our archives.

In 2019 the Archives Committee decided to hold our own annual Founder's Day Celebration to commemorate the first A.A. meeting that was held on October 30, 1940. This popular event, which included presentations and speakers, attracted many visitors to our archives.

Area 38 has always been incredibly generous and supportive to our archives with time, materials, and a generous budget, and we shall continue to grow, organize, and share our rich history in Alcoholics Anonymous. We look forward to celebrating the 2030 International A.A. Convention in St. Louis, and we hope you will stop by and visit our archives then.

Area 80, Manitoba

We are a small area in numbers with around 150 groups in total in our province, but our land mass is over 251, 000 square miles. We have only one large city, Winnipeg, with around 800, 000 people and only a few smaller centers around the lower half of the province. Our far northern portion of the province has some smaller towns and communities that are accessible by road; northern communities are fly-in, railroad, or winter road. Always find it amazing that Alcoholics Anonymous has found its way into most communities at some level. It's a very interesting story to save and tell. We have proof A.A. was present because of archives.

The members that serve on this archives service committee are the elected area archives chairperson, the area archivist, districts representatives, and group members.

Our whole committee rotates every two years, except for the archivist, who is ratified by the area every two years. There is currently no set term for the archivist.

Our archival repository is located in the Manitoba Central Office in Winnipeg. We have been at this location since 2014. It has two rooms with one totally dedicated to archives. We built it ourselves with the blessing and monetary support of the members from both service entities, and our A.A. membership in Area 80.

The archives is funded and included in the yearly area budget. If there are more funds required for a special project, or travel, then a special request is set up in the budget for that year only. We are also graced with some voluntary contributions from a few groups that, after accumulating their ample reserve, disperse extra funds to some of the service committees.

There have been several attempts in the past to organize our archives, and the boxes have been moved from one home to another, and likely some material has been lost along the way. There has been some progress made over the last 20 years, and our own repository finally came into being in 2014. The Archives Committee has managed to sort and start inventorying box after box. We have identified and sorted our area minutes back to the 1950s. As we progress through the boxes, we try to sort or start a new binder, so that we are not repeatedly moving the same piece of paper. We have been gifted with articles and group minutes from our very first group in Manitoba, which was born in November 1944.

Our collection includes General Service Conference Reports, *Box 4-5-9, Markings*, Grapevine magazines, Manitoba General Service Minutes, Winter Conference, Manitoba/Keystone Conference materials, Keystone News, Groups and districts materials, Central Service Office schedules, Regional Forums and other events.

We also have many reel-to-reel cassettes, CDs and have a separate group of members looking after sorting and storing. This is very tedious work, and we are moving at the “archives pace” (slow, stop, slow). We have a digitizing committee and they are working on interviewing and securing our oral histories that we have accumulated over the last 10 years.

There has been much joy in creating displays for the area to enjoy at assemblies, round-ups, and area or group events. Displays tell a story, and we have created some great stories here. Some of the displays we have built have been all about the International Conventions that began in 1950 in Cleveland right up until today. We used some of the pictures available from GSO. We also made a Bill and Bob board showing their meeting and pictures of Stepping Stones and Akron.

We did a wonderful historical display for the 75th Anniversary of the Winnipeg Group in 2019. Someone described our display as the “jewel in the crown of that evening.” The display was surrounded with grateful and interested members and their families and each speaker made a comment on how they appreciated what the archives committee had built for them. We were bursting with pride and gratitude. We also have done some displays on A.A. trivia...and it’s fun watching members play the game of “Who’s who?” or “Where was that taken?” We also showcase posters from events in the past.

Our biggest event (and a great privilege) was hosting the 2017 National A.A. Archives Workshop in Winnipeg. There was representation from British Columbia/Yukon, Alberta Northwest Territories, Saskatchewan, Manitoba, Ontario, Quebec and 21 U.S. states. This workshop is unique as it does have history topics, but also presentations

from folks with archives experience to help new archives members and archivists with some training, and to answer questions they might have regarding their collections with best-practice solutions on preserving what they have.

There are always lessons to be learned in Alcoholics Anonymous, and archival work is a trusted position that is not to be taken lightly. While we serve, we are serving the area, and when we complete our service, we leave empty-handed, but spiritually nourished and privileged. Nothing belongs to any one person on the Archives Committee or to the archivist. We do this work in trust.

When we look back now, it seemed an insurmountable task, but we bumbled along, box after box.

Area 87, Southwest Quebec

For a little over 10 years, Area 87 has had a team of volunteers working in the archives. A lot of documents dating from the creation of our French-speaking area had accumulated in those boxes. Very little filing had been done, and we were far from able to quickly find the document requested by our delegate. Our area is officially bilingual (French/English) but also serves a dozen Spanish-speaking groups (65 meetings) out of the 500 groups of Area 87. French has become the main language of exchange, and documents in English — present in our documents since our area's beginnings in 1944 — represent half the documents in our precious archives. We have a few documents in Native American languages, since there are a few meetings in these languages in our areas.

In following the A.A. Traditions, we wanted an archive system that would be digitally accessible for us and for the three other areas of our province. From 1944 to 1976, we were one big area, and the archives of this time are shared on a digital storage in the cloud.

The fast evolution of digital tools and file storage capacity has accompanied our work. In the combined effort of passionate volunteers, we digitized an amazing quantity of documents (270 GB on a hard drive, with 113,478 items). Without the use of library index cards, we created set a logical classification that helps us find quickly or search by keywords or key-sentences. There is still a lot to digitize and there's more every day, one day at a time! Some of the classifications are archives audio, publications, international, Quebec Delegates Committee, correspondence, Area 87, Area 88, Area 89, Area 90, and history of A.A. in Quebec.

The documents that have not been “processed” but that have been digitized are still accessible through search by keywords and are always in the search results. It is important to specify that only the archivist and the manager of the digital documents for the area have access to these documents. This is a total of five trusted servants for our four areas. We offer a search service and our doors are open to visitors. We have set guidelines based on the GSO Archives Guidelines.

To establish such a service, we had to use time, software and hardware. Most of the hardware equipment was secondhand, passed on from our committee members or service office, but still functional. We also have a large space to process our archives and the digitization mostly takes place in members' homes, when they have the adequate digital device and digital cameras.

Other members have access to the documents during their service for a committee or district, without access to the rest of the data. We have kept the management to the

simplest, with user ID and passwords for partners, and simple file names in the folders, such as “report,” “finances,” etc.

We have chosen an easy-to-use cloud-based storage application, at minimal cost and with a reputation for being very secure. We have an annual fee of about \$CAN 200 (\$138 US) per gig of data, with a forever storage of deleted documents. Dropbox works on all platforms: Linux, Mac, Windows, Android and iOS. Copies of these documents are saved on the hard drives of the five users for research offline. Cloud service has made a lot of progress since our first year of using it, and now it is possible to do text searches in the documents directly on the internet.

One of the advantages of this storage service is the ability to pass on large files while only sharing one link that directly leads to a specific document in a file, rather than sending the file itself, even when it is located in a secured folder.

Our archives also contain large video and audio documents, including transcriptions of recording of old timers, service meetings, conference, convention, and radio programs welcoming local members of A.A. who share their experience anonymously. Several audio recordings come with an index card, allowing us to spot important parts.

We have chosen to store these documents in MP3, MP4, DOC, XLS, and PDF format. This last format is widely used because it allows us to keep the original layout of documents and to search by keywords. With the appropriate applications, these documents can be modified to offer better preservation condition.

We have an annual budget of approximately \$5,000. Member contributions to Area 87 also allow us to get basic supplies for an archives service and to go to service activities. An annual subscription fee to the Dropbox cloud (\$138 US) and a high-speed Internet connection shared with the service office also has to be taken into account when establishing an operations budget.

Adding to the archivist’s pleasure in their quest, the digital realm – if we can master it a little – adds a layer of light and transparency that truly allows us to “see through the boxes.” It’s also a means to have access to quality archives without them being physically in our possession. This has encouraged shares between the areas of our region.

Below is sharing from local archivists regarding specific topics of archival work.

Area 23, Southern Indiana

On Collection Scopes

Area 23 collects area administrative documents such as agendas, minutes, rosters, guidelines, and financial reports going back to the early days of A.A. in the area. Additionally, we collect histories of A.A. in Indiana, in Southern Indiana and in cities and towns in Southern Indiana; group histories; and early Indiana members’ stories and correspondence. We collect local materials that document current events in Area 23 such as, district and area newsletters and flyers and programs for district and area events. Collections of A.A. literature such as books, pamphlets, service material, conference notebooks and reports; AA Grapevine books are also maintained.

Area 28, Maine

On Committee Structure

The Area 28 archives was stored in the basement of the central service office and in basements and garages of local A.A. members. Once it was discovered that these storage areas were causing damage to the archival materials, we set out to find a new space to house our repository. The committee found a suitable location at a great price, at the Sahara Club, and approached the area for a budget to fund the space.

In Area 28, the archivist and area alternate archivist serve a term of two years with the option to stand for reappointment for an unrestricted number of terms. The committee is composed of the area archivist as archives chairperson, alternate archivist, archives secretary, chairperson of any district archives committee, district chairs as appointed to the committee by the area chairperson, and anyone elected to the committee by a vote of the Area Assembly, Area Committee or Archives Committee. Additionally, the Archives Committee secretary is the Area 28 Panel alternate chair.

Area 34, District 4, Western Michigan

On Collection Scopes

The District 4 collection scope fits the district's members' interests, which primarily consist of local history, documents, audio and photographs. The district also preserves literature that once belonged to members who have passed, as well as our basic texts, including the first through fourth editions of the Big Book, with the anomalies that happened in the printing process. Additionally, first printings of our other A.A. literature are also collected, for example, *Twelve Steps and Twelve Traditions*, *A.A. Way of Life (As Bill Sees It)* and *Living Sober*.

Also collected are group histories; meeting place photos; information on events, including Young People's events and flyers; general A.A. history from our founders; and material concerning individuals who contributed to the expansion of A.A. during the first 25 years.

The district collection scope also allows for collection of non-Conference-approved literature if it was written by an A.A. member, such as the "Golden Books" and a "Big Book" concordance.

The district discussed moving the files to cloud storage, but the district feels the method used at present (storing the data on hard drives) is adequate to protect the collection.

Area 54, Northeast Ohio

On Preserving Digital Material

It has been my experience that it is very easy to lose digitized material due to equipment failure or neglecting migration. Therefore, when part of the Regional archives came to me on 5¼-inch floppy discs in WordPerfect version 1, the floppy disks were transferred to other disks and then to CDs. However, due to incompatible software, the digital material was not accessible. Fortunately, these few items had been printed on

paper. The Cleveland office has a mirrored drive that has sharing capability, but so far, we've only used that for remote access. We keep a periodic copy of the data off-site. They have hundreds of speaker tapes that either came or were converted to MP3s. Using this proprietary form is of some concern, but the frequency range of speech does not justify the much larger WAV format or the difficulty of converting it for distribution.

Area 71, District 30, Virginia

On Making the Archival Collection Accessible

The District 30 Archive is held in the state archives office in Waynesboro, Virginia, approximately 95 miles from our district. Our state's archive office is open to members for visits and research on a limited basis by appointment only. This has made it somewhat difficult to visit, because of the distance and limited hours. The materials housed in our state archives repository have not been fully digitized, which makes them accessible only in person.

Having mentioned the relative inaccessibility of our state archives, our Virginia Archives Committee archivist and chair appear to be working on a virtual tour of the archives that will hopefully be available to all. Finally, our local archives budget has been minimal but remains a small line item so that ad hoc requests can be made for special events and purchases.

Area 79, District 71, British Columbia Yukon

On Gathering Local Histories

What we've begun is a "living, breathing" Archives project, featuring our local long-timers. We received little to no interest in the Individual History form, as modelled after Area 79. The group history forms are more up to date, however, there weren't many "stories" attached to anything in our Archives. This year, we began to interview our long-timers, and ask for their stories. At the same time, we gathered the archival information requested on the oral history form, but that was after we allowed them to just tell their own recovery and service tales. We then turned their stories, into pamphlets — to be distributed and shared among all the groups in our district.

Area 89, District 71, Northeast Quebec

On Being an Archivist

In my first year as assistant to the area archivist, my duties included digitizing material and participating in the annual meetings between archivists and the province. At the beginning of my four-year term, the area asked me to write about the archives, so I followed the guidelines provided by the GSO and adapted them to our area.

After that, I had to create a basic structure for the digitalization. I created documents on the origins of the archives and did a presentation on the archives to the area and the districts. I worked on the organization of documents, the classification methods and the history of A.A. in Area 89. I also created forms for borrowing documents, donations documents to the archives and for loans of documents.

What to Collect?

An archival collection takes form through a natural process that helps to capture the rich texture of our history. We build historic collections that are unique in many ways, through the contributions that the archives receives and through collecting material that is unique to a particular area or district. However, before you begin building a collection, it is recommended that you write an effective collection policy. A collection policy is a plan which explains what material your archives will attempt to collect and how the acquisition and maintenance of the material will be pursued. Typically, a collection policy will include a section on a collection scope, which states the type of material your repository will focus on collecting. This may include the subjects, people, timeframes, and regions of your focus. Other sections will outline how the archives will attempt to acquire, store, and dispose of material, what material will not be collected, and any other information dealing with the administration of collections. These are the common elements outlined for all collection policies but the key to an effective policy is that it takes into account your own area or district's unique purpose and context. Your collection policy may change over time to reflect changes in your organization. It may be helpful to contact other repositories for advice, whether they are within A.A. or are outside institutions. The GSO Archives can provide you with a sample collection policy template to assist you in formulating a plan. There are many items that you will find of interest as you develop your collection. However, before accepting materials, you must first assess them to make sure they really belong in your repository. This review process is called "appraisal." The term "appraisal," in this context, does not refer to placing monetary value on records. Rather, archivists assess materials for their enduring value (historic, intrinsic, administrative, legal) and their relationships with other records in the repository. Archivists should never profit from the records under their care and should avoid commenting on the possible financial value of items in the collection.

The following is a suggested list of materials that you might consider collecting:

- Books/pamphlets about A.A.;
- Documents developed locally to support Twelfth Step work;
- Photographs;
- Directories;
- Meeting lists;
- Newsletters (particularly those published by your area/district);
- Audio recordings;
- News clippings;
- Magazine articles;
- Correspondence;
- Minutes of service committees.

Try to solicit, acquire and accumulate historical material and information about the Fellowship since its inception from early members. Do not forget about nonalcoholics who were helpful in the early years of your area. Reach out for material from past del-

legates and past area committee members. Many archivists report that they got started by putting a notice in the local A.A. newsletter that they were seeking such material. Also, it may be helpful to set up a team of archives assistants or volunteer helpers to record oral histories from oldtimers.

Setting Up a Repository

Experience indicates that the archives should be housed in rented space rather than in a private home. It is particularly advantageous if the space adjoins a central office or intergroup. It seems important that access be available to all A.A. members and researchers during regular hours. This avoids the appearance of being a private collection. Contributors have been shown to be far more generous when the archives are open.

List of Equipment Needed — This is a basic supply list. For more specific information feel free to contact the GSO Archives.

- One or more good general reference material on the preservation of historical documents (see “Reference Information and Resources” section);
- Supplies for preservation and repair — for example: Mylar sleeves, acid-free tape to repair tears, nondamaging adhesives;
- Acid-free storage boxes for letters, papers, pamphlets and magazine articles and/or archival scrapbooks for newspaper articles (available from archival catalogs);
- Shelves to hold material;
- Fireproof file cabinets for vertical files;
- Work table, chairs, desk;
- Display cabinets to hold books and/or memorabilia;
- Framed photos (with acid-free mattes and backing) of events, places and nonalcoholic friends who have been helpful to the group (keep our Tradition on Anonymity in mind!);
- Cabinet for audio recordings and portable recording device.

At the beginning only a few items are necessary, and as your collection grows you might add additional equipment, such as a computer, printer, and/or scanner that can handle various media.

Security

One of the most essential steps is to ensure the safety of the material placed in the archives. The archivist is responsible for the physical integrity of the material. You may consider special security locks on the front door or, at a minimum, on the file cabinets. It is important to remember that most of our collections are virtually irreplaceable.

Financing the Archives

The operational budget for equipment, office supplies, duplicating services, taping and other needs should be part of the area/district overall budget. This way the archival service enjoys the support of the full membership and keeps the perspective as a valued part of Twelfth Step activity.

Preservation Work in Archives

As a general rule, any action on a document or item that is not reversible should never be performed.

The main steps in preservation are cleaning, repairing (if necessary), disinfecting and placing the documents in a clean (dust- and mold-free) and acid-free environment.

Procedures, such as using a deacidifying spray or interfiling acid-free tissue papers between the document sheets, establish the appropriate environment at the document level. The properly preserved documents are then placed into acid-free containers: Mylar sheets and envelopes, acid-free folders and boxes that are easily available from all major archival supply distributors.

Chemically balanced storage boxes have been developed for all media types besides paper, and special cases are available for audiocassettes, reel-to-reel tapes, CD-ROMs, etc.

It is necessary as well to establish a clean and stable environment in the storage facility. Under ideal circumstances, the various record types are kept under special climate requirements in terms of storage temperature and humidity. Based on practical experience and the fact that archival collections typically house a great variety of material, a standard measure has been adopted by the profession that is acceptable to all media types: about 70°F and 45% humidity. Be aware that exposure to natural light represents a danger to archival documents.

The historical development of storage media used for recorded information has evolved from paper through various magnetic and micro formats to our current era of electronic records. Each of these needs to be specially addressed if included in your collection. Keep in mind, however, that electronic media is the least stable format of all. Make sure that the electronic records remain compatible with existing technology. *Modern paper is still considered the most stable medium from a preservation point of view.*

For Guidelines on Preservation and Digitization, please see our website: www.aa.org, or contact us.

Establishing a Preservation Program — or — You Can Make Miracles, But It Takes Time!

Although there may be limitations on your efforts to preserve your collection based on the availability of finances and personnel, it is important to establish an ongoing preservation schedule for your collection. While it may not be possible to take care of all documents in all media types in a single calendar year, you can develop an ongoing program that includes planning for finances, personnel and available work areas for archival processing.

Based on the size of your collection, preservation might seem like an uphill battle, and there is a fundamental conflict between protecting the documents and providing access to them. In some cases, it may be necessary to regulate access to your most precious historical records, recognizing that establishing appropriate research conditions is part of the preservation program!

Does this seem overwhelming? There is plenty of help out there! Join a local historical society or archivist's round table. Functions such as these usually charge a minimal

yearly fee (many of them under \$20). You can also get in touch with fellow A.A. archivists. And remember that it is in the Fellowship's collective interest to maintain the historical records of Alcoholics Anonymous to the best of our capabilities. Whatever you do at your local level, you do for all of A.A.

Although preservation is one of the most visible and best known aspects of the archivist's work, it is only one of the many steps we need to perform in maintaining and organizing our historic records.

Research in Archives

While we can assume that most A.A. members will be mindful of the confidentiality of A.A. records, as will most serious nonalcoholic researchers, the archivist should nonetheless maintain strict rules about accessibility and ensure that researchers adhere to them.

A.A.'s Twelfth Tradition states that anonymity is the spiritual foundation of our Fellowship — in spirit as well as letter. All archives committees should be protective of the anonymity of living people, and even those who have passed on. Those administering the archives must also be scrupulous about anonymity breaks. This responsibility falls essentially to the archivist. Therefore, emphasis should be placed on permanent housing and a rotating archives committee to grant access requests and to establish overall policies.

To relieve the archivist from sole responsibility, the archives committee might consider each request to use the archives individually, in accordance with established policies, to grant or deny permission. The applicant, if possible, should always be familiar with A.A.'s Tradition of Anonymity and how it is applied to writing A.A. history.

Researchers should fill out an application form listing the date of application, how long they intend to spend on the project at the archives and the material being used.

The researcher should also be given all the information needed to clearly understand procedures and policies concerning the use of archives, for example: a statement of policy, information about the categories of classification, and a catalog of archival contents.

All of A.A.'s archival materials, both published and unpublished, are subject to copyright regulations. The archives may own the physical property, but often the copyright is held by someone else, and this can potentially lead to complications.

The archivist and assistant(s) ought to be familiar with the current interpretations of copyright regulations pertaining to fair use and privacy, and so should members of the archives committee. Perhaps one of the committee members could be a lawyer or a professional person in the academic field (here is an instance where a non-A.A. might be a useful committee member). Since the copyright laws are constantly being updated it is important to keep abreast with the changes in the law. See the Copyright section for more information.

Ownership of Material

The trustees' Archives Committee adopted the following suggested guidelines for local archivists regarding archives property on January 27, 1994.

Problem: On occasion, there is confusion as to the ownership of archives materials maintained in local area archives. Such difficulties sometimes arise when an archivist or other service person — who is in possession or has custody of such materials actually belonging to the area — rotates or, even more problematic, is deceased or otherwise incapable of managing personal affairs. Family members, for example, may not be clear regarding which items were the personal property of the deceased or incapacitated person, and which are, in actuality, owned by the area committee.

Suggestions: The following are suggestions which might help to avoid such confusion in the future:

1. All archives material that is the property of the area should be recorded in a written inventory.
2. The archivist should prepare and sign a statement, to be appended to the inventory list, which clearly indicates that ownership of the property listed in the annexed inventory resides in the area, and that such property is not the personal property of the archivist.
3. In addition to the property owned by the area, if there is any archival property that is, in fact, owned by the archivist, but which has been made available to or is "on loan" to the local archives, that property should also be listed, together with an attached, signed statement describing who the rightful owner is.
4. Copies of such statements, with original signatures, should be maintained in the area files, in the archives files and with the archivist's personal papers.
5. If, upon death or incapacitation, the archivist or other custodian wishes to donate to the area those materials which had been on loan to the archives, then such a donation will usually have to be made as a bequest provided for in a valid will, or other document appropriate for effecting a transfer of ownership.

Deed of Gift (Sample)

A deed of gift is a formal and legal agreement between the donor and the archival repository that transfers ownership of and legal rights to the donated materials. Please note that some states may have additional legal requirements to complete a valid Deed of Gift. Note also that the Deed of Gift does not transfer copyright. For more information on transferring copyright ownership, please contact the GSO Archives.

General Service Office Archives

475 Riverside Drive, Floor 11, New York, NY 10015 • (212) 870-3400 • Email: archives@aa.org

— DEED OF GIFT —

I, the undersigned Donor, donate and convey the following material to Alcoholics Anonymous World Services, Inc., a New York non-profit corporation, for the use by the General Service Office Archives of Alcoholics Anonymous ("G.S.O. Archives"):

Description of Donated Material: _____

This Donated Material, and any future additions I may make to it, shall be preserved, organized and made available for research and related uses in accordance with the G.S.O. Archives access and use policies.

The G.S.O. Archives may display any Donated Material in its onsite exhibit room with or without attribution, as may be appropriate, in the sole discretion of the G.S.O. The G.S.O. Archives staff may use the Donated Material, and/or digital surrogates, for presentations or offsite exhibitions at events held within Alcoholics Anonymous. The G.S.O. also may convert the Donated Material into a new medium, for example, a hand written letter may be scanned and converted into a digital file and used in the new format.

G.S.O. Archives, in its sole discretion, is authorized to dispose of the Donated Material outside of its Collection Scope and/or material deemed to be not of enduring historic value, in accordance with the Archives Deaccession Policy.

I transfer, convey and assign any literary and copyright rights, title and interest that I possess to the contents of the above described Donated Material (including future additions I may make to it) to G.S.O. Archives within the limits, if any, stated below.

Additional Terms and Conditions: _____

I affirm that I have the authority to donate this Donated Material and agree to all terms and conditions of this Deed of Gift.

DONOR INFORMATION

Name: _____ Address: _____

Signature: _____ Email: _____ Date: _____

Receipt of the material listed above by Alcoholics Anonymous World Services, Inc., a New York non-profit corporation, for the use by the G.S.O. Archives is hereby acknowledged and accepted. Alcoholics Anonymous World Services, Inc.

By: _____ Email: _____ Date: _____

Deed of Gift Addendum for collections with electronic records

The Donor acknowledges that the G.S.O. Archives acquires the Donated Material with the intent of making it available for an indefinite period of time. The G.S.O. Archives may need to transfer some or all the Donated Material from the original media donated to new forms of media to ensure its ongoing availability and preservation. The Donor grants the G.S.O. Archives rights to make preservation and access copies of Donated Material in the collection and to make those copies available for use, in accordance with G.S.O. Archives policies.

The G.S.O. Archives may need to digitize or migrate Donated Material provided in electronic content or transfer such content from original storage media as donated to another storage device (e.g., hard drive, CD, DVD, USB). In the process of undertaking the above tasks, deleted files or file fragments, passwords, encrypted and personal information may be discovered. The G.S.O. Archives will not retain, preserve or provide access to any data or personal information discovered as a result of the above described processes.

Material Not Retained by the G.S.O. Archives

The G.S.O. Archives reserves the right to reject data transfers at any stage of processing. In the event that the Archives locates duplicative content within the collection or content that is not of enduring historical value, the Archives may remove, discard and/or destroy said material. The Archives will not knowingly accept any content deemed unsafe or dangerous (i.e., various types of computer viruses or malware) and reserves the right to destroy Donated Material containing such.

Please indicate if donated media carriers for born digital content should be returned.

Yes, return to Donor.

No, the G.S.O. Archives may destroy media after content has been migrated to new storage media.

I, _____, understand and agree to the terms and conditions outlined in this Deed of Gift Addendum.

Signature of Donor: _____ Date: _____

Revised 1/16

Thank-you letter (Sample)

This sample thank-you letter and form may be adapted for local use when materials are donated to the archives.

Dear _____,

Thank you for your generous donation to the Archives of Alcoholics Anonymous. Donations such as yours have made it possible for us to continue building a comprehensive history of our Fellowship.

Please know that we are most grateful for your contribution and we will handle it with professional care. We are sure you understand that this is a permanent contribution and we hope you are confident that we will make the best possible use of it.

We encourage you to visit the Archives anytime. Please fill out and sign the attached form and return it to the Archives.

Sincerely,
Jane S., Archives
jane@emailserver.com
(123) 123-4567

A Note about Copyright

It is important for all archivists to realize that most of the materials in archives collections are protected by copyright, and often the archives do not own those copyrights. You may own the physical property, but this does not mean you own the copyrights as well. Copyright laws can limit the way archivists can legally use the materials in their collections.

Copyright law is complex and difficult to navigate. These sections may serve as a basic introduction to the fundamentals of copyright regulations, but we highly recommend that you do some research to learn more about these issues, and consult an attorney whenever embarking on a project that might involve copyright issues.

Please be aware that copyright laws vary significantly from country to country. The specific regulations referenced in this document generally apply to U.S. federal law only. We recommend consulting your country's specific laws where applicable.

What is Copyright?

Copyright is a form of protection provided by the laws of federal, state, and local governments to the authors of any “original works of authorship” — so, these laws generally apply to works such as books, pamphlets, letters and e-mails, memos, newspaper and magazine articles, photographs, sound recordings, web pages, artwork, and more — even doodles and scribbles are protected by copyright. This protection is available to both published and unpublished works.

Today, one does not have to register a work's copyright, nor print a © symbol on the work, to receive copyright protection. Protection automatically extends to any qualifying work, whether published or not, and whether created in the U.S. or in almost any country of the world. Generally, you should always assume that a work is copyrighted.

Rights of Copyright Owners

Copyright laws generally give the copyright owner the exclusive right to do (or to authorize others to do) the following:

- Copy or scan;
- Prepare derivative works (for example, translate into another language, create a musical version of the work, create an abridged version, etc.);
- Distribute copies of the work to the public by sale or other transfer of ownership;
- Public performance (for example, showing a movie at a public event, performing a play or song, etc.);
- Public display.

It is illegal for anyone to violate any of the rights belonging to the owner of copyright. Some possible violations include photocopying/scanning; uploading to Web sites; copying software; sharing or selling audio/video files; putting on public film exhibitions; etc. In most of these cases you must have the written permission of the copyright owner before you can legally do these kinds of activities.

Who Owns Copyrights?

Ordinarily, the author or creator of a work is the copyright owner. Sometimes it is easy to determine who owns the copyright — for example, if you have a letter in your collection, the author of the letter owns the copyright. In the case of a photograph, the photographer is the copyright owner.

Sometimes it is more complex. In the case of a taped talk, many people may be considered “authors” and all of them would have some right to the work: the speechwriter, the speaker, and the person taping the event.

There are exceptions to this, however. For example, when employees create something in the course of their employment, generally the employer is then the copyright owner of that work.

Also, an author can transfer copyright ownership to your archives, but this requires a signed, written document, and a certain amount of legal formality.

Copyright Protection Lasts Many Years

Most copyrights today last through the life of the author, plus 70 years. When a copyright owner dies, the copyright continues as part of that individual’s estate.

Most works that have remained unpublished (manuscripts, letters, etc.) are subject to the basic protection of “life plus 70 years.” Works published before 1978 can have copyright protection for a maximum term of 95 years, though some have shorter copyright periods, and, for some, copyright restrictions that existed earlier may have already expired.

Eventually, a copyright will expire and the formerly protected work will fall into the “public domain,” where it can be used without restriction. But for materials relating to Alcoholics Anonymous, in many cases, works will remain copyrighted for many years.

Can You Use Copyrighted Works without Infringement?

The rights given to copyright owners are not unlimited. The laws include numerous exceptions to the rights of copyright owners, and many allow certain uses for education and research.

The best known exception is the doctrine of “fair use,” which permits works to be copied for purposes such as criticism, comment, news reporting, teaching, scholarship, or research. Fair use may be described as the privilege to use copyrighted material in a reasonable manner without the owner’s consent. Examples of activities that may be excused as fair use include: distributing copies of a section of an article in class for educational purposes; using an excerpt of a film in a film review; or creating a parody of a song. However, there are no hard and fast rules about which kinds of use are “fair” and which uses may be “infringing,” so relying on fair use as a justification for copyright infringement can be risky.

Other exemptions permit libraries and archives to copy some works for their customers on a limited basis, and for the purpose of preservation. There are many other exceptions as well.

For More Information

Note: These sites have been listed for reference only. It does not imply endorsement or approval of the A.A. General Service Office Archives.

U.S. Copyright Office

Website: www.copyright.gov

Canadian Copyright Office

Website: <https://www.canada.ca/en/services/business/ip/copyright.html>

Other helpful resources:

Cornell University Library Copyright Information Center

Website: <http://copyright.cornell.edu>

Stanford University Libraries

Website: <http://fairuse.stanford.edu>

Oral History

History provides accounts of the past through memory, folklore, pictures, documents, artifacts and monuments. Events and stories from the past help provide perspectives that allow for thoughtful decision making today. However, memory is fallible, and if significant events or stories are not captured, we can lose parts of the past.

Oral history refers to the process of recording and preserving of oral testimony of an individual's unique personal experiences. By joining our efforts to record oral testimonies, you are helping to preserve the voices and perspectives of people connected with A.A., for use by present and future generations.

GSO Archives provides basic guidelines on preparing for and preserving oral histories. For a copy of the GSO Archives "Guidelines For Conducting Oral Histories" please see our website www.aa.org or contact the Archives directly.

Bill W.'s suggestions on collecting oral histories

In a letter dated January 23, 1955, Bill W. gave an excellent description of the purpose and method of collecting such recordings. This letter can serve as the basis for oral history collecting, even today:

I would like to have you make a tape recording about your recollections of the old days. There isn't any rush about this as the preparation of a history will have to be done carefully, and gradually over the next two or three years. I have, though, made a couple of trips to Akron and Cleveland and have already interviewed quite a lot of the old folks so as to be sure and get the record straight.

... You can get a good running start at the history by retelling your own personal story, how A.A. came to your attention, what your first impressions were, and how it developed in the first few years in Cleveland. I hope you can dwell at length on the difficulties, as well as the humor of those years, relating as many anecdotes as possible. You can say anything you like, being assured that nothing will be published without your consent.

... The preliminary investigation shows that it isn't hard to prepare a fact sheet of what happened — that is, dates when people came in, groups started and so forth. The hard thing to lay hold of is the atmosphere of the whole proceedings and anecdotal material that will make the early experience live.

When I first set out to gather material I ran into a little resistance. But I pointed out to them that if the oldtimers in Akron and Cleveland wouldn't go on record as to what happened, how in God's name could I, or anyone else, tell an accurate story for the future record. I lived through the experience here at the New York end and can tell about it at length. But if the western end of the story is going to have the importance it deserves, it simply has to be told by those who lived through the experience.

**Archives of the
General Service Office,
New York, NY**

The GSO Archives are concerned with three classes of material: that which is literary, that which is historical, and that which is archival in the literal sense — i.e., administrative, legal and financial. The Archives also contain memorabilia or artifactual items, which include material having a display value, but not necessarily historical value, as well as items significant to the development of A.A. (photographs, awards, citations, displays, art works, sculpture, maps, etc.).

Scope and Purpose

The scope of the GSO Archives is to provide a sense of A.A.'s past to the Fellowship and to create a context for understanding and valuing A.A.'s historical milestones and Traditions. The Archives will continue to serve the interested communities among sociologists, historians and other professionals interested in exploring A.A.'s roots and growth throughout the world.

The main purpose of the Archives, consistent with A.A.'s primary purpose, is to keep the record straight so that myth does not predominate over fact as to the history of the Fellowship.

The purpose of the trustees' Archives Committee is to make recommendations to the General Service Board regarding what should be done and what limitations, if any, should be set regarding access and accommodation of material.

The Archives of the General Service Office of Alcoholics Anonymous is a repository for official and unofficial records that document A.A.'s history in the U.S. and Canada. These include personal collections, manuscripts, correspondence, publications, photographs and memorabilia related to the origin and development of the A.A. Fellowship.

Many local A.A. groups, districts, and areas have vibrant archives collections of their own; for this reason the Archives of the General Service Office generally does not seek to acquire collections with a focus on local groups, districts, or areas, as these may be more significant to archives in those areas.

The Archives' acquisition priorities include, but are not limited to:

- Publications released by AAWS, including books, directories, annual reports, Conference Reports, surveys, booklets, pamphlets, magazines, newsletters, service pieces, public service announcements, press releases and other media relations material, and more.

- The Grapevine magazine, and other material produced by the A.A. Grapevine, Inc.
- Material published outside AAWS that describe the program of A.A., the problem of alcoholism generally, or that otherwise have significance to the organization, such as books, articles, speeches, reviews, television and media programming, and more.
- Audiovisual collections including: photographs, videos, and sound recordings significant to A.A.; recordings of General Service Conferences, International Conventions, and World Service Meetings as well as other significant events; speeches and talks by early A.A. pioneers, AAWS trustees and directors, and other individuals; and more.
- Minutes and other documentation of AAWS Board meetings, committee meetings, Conferences and Conventions.
- Workpapers, subject files, correspondence, reports, and speeches of General Service Office staff and general managers.
- Personal papers of AAWS trustees, directors, and other significant figures, both alcoholic and nonalcoholic, including early A.A. pioneers — these may include correspondence, journals, diaries, scrapbooks, photographs, manuscripts, speeches, obituaries, awards and artifacts.
- Oral histories and stories of figures significant to the national and international operations of A.A.
- Group and area histories, and selected reports and newsletters of groups and areas.

GSO Archives Ownership of Material

Materials donated to the GSO Archives become part of its repository. Most items are subject to the access and reproduction policies of the GSO Archives. These policies are reviewed regularly by the trustees' Archives Committee. Generally, donated items are free of access restrictions unless the contributor stipulates limited access to certain sensitive materials. It is the GSO Archives' policy to protect the personal privacy of the contributor.

Typically, the GSO Archives does not accept items on loan. Also, we generally do not loan any original records. It is the GSO Archives' policy to verify, where appropriate and necessary, rightful ownership of materials being offered to the collection, and to seek title to the donated property. The GSO Archives conforms to professional ethics established by professional archives associations.

For the full Collection Policy of the GSO Archives, please see our website: www.aa.org, or contact us.

Policy on Loans

The mission of the Alcoholics Anonymous General Service Office Archives is to document permanently the work of Alcoholics Anonymous, to make the history of the organization accessible to A.A. members and other researchers, and to provide a context for understanding A.A.'s progression, principles and traditions.

As stewards, we are committed to the preservation and care of A.A.'s unique archives and have instituted the following Policy on Loans to ensure the continued existence of the original primary evidence and its continued availability for all users:

The General Service Office Archives will not lend any original materials from its collections to any individuals or entities, nor will the Archives accept any original materials on loan. This loan policy has been established to ensure the safety, security and integrity of the materials in the collection.

Access Policies at the General Service Office Archives

Adopted by the trustees' Archives Committee
August 2020

Materials Use Policy

The materials in the Alcoholics Anonymous General Service Office Archives are available to all A.A. members and other serious researchers who have an interest in the legacy of A.A. However, access is controlled. Controls are necessary to ensure the anonymity of all persons mentioned in archival materials, in accordance with A.A. traditions. Access also must be controlled in order to protect the materials themselves from loss or physical damage.

The following policies and rules have been established by the trustees' Archives Committee of the General Service Board of A.A. in cooperation with the GSO Archivist. These policies attempt to balance the needs of users, the exclusive rights of copyright holders, and the Archives' own responsibilities toward its collections.

Getting Answers

Visitors and all interested parties are invited to make requests for information about any aspect of A.A. history. Normally the Archives staff will conduct the research, find the answers you seek, and deliver them via mail or email. We get thousands of requests from members and friends of A.A. each year.

Typical requests involve:

- Information about the events that led to the founding of A.A.;
- Biographical information of A.A.'s co-founders and early pioneers;
- Statements and opinions of Bill W. and Dr. Bob;
- The origins and growth of the A.A. steps, traditions, and guiding principles;
- Information about various editions and/or statements in the Big Book and other works;
- The uses of A.A. prayers, slogans and logos, as well as chips, tokens, and medallions;
- Historical group practices and meeting formats;
- Group and area histories, including international;
- Information about the history of A.A. among special populations, minorities, and women;
- Old issues of newsletters;
- Old versions of A.A. pamphlets and literature;

- Published photographs of A.A. founders, pioneers, and events;
- The growth of the service structure;
- Actions of Boards, recorded in meeting minutes;
- Various actions of the General Service Conference since 1951.

We always welcome your questions! Please contact the Archives anytime you are curious about an element of A.A.'s legacy.

Access

All visitors are welcomed to the Archives center. There they can see selected materials and speak with the Archivist about our holdings, about archival activities in their areas and about how they might be able to take advantage of the GSO Archives.

Researchers who would like to physically handle, read, and review a large quantity of archival material should contact the Archives staff ahead of time to make arrangements. In most cases the Archives staff can provide access to *published* information, such as books, newsletters, magazines, pamphlets, service pieces, and reports, in some cases dating to the earliest days of A.A.

However, if a researcher wishes to use any *unpublished* materials in the Archives (correspondence, meeting minutes, financial information, manuscripts, etc.), a written request for access must be made to the trustees' Archives Committee. The user must give full information about the subject, scope, and purpose of the research being undertaken. Each request will be considered on a case-by-case basis. As the committee meets three times each year, on the last weekends in January, July and October, research requests are considered three times a year. In special cases, consideration can be obtained at other times.

Protecting Anonymity

Because of the special nature of the materials in our collection, all researchers must learn and respect all A.A. traditions that may bear on their research; in particular, the preservation of anonymity of all A.A. members.

The permission to conduct research is granted conditionally on your agreement to strictly maintain the anonymity of all A.A. members, alive and deceased, including A.A.'s co-founders. You are respectfully asked, if citing these materials, to quote only the first name and last initial, thus preserving A.A.'s Eleventh Tradition: the anonymity of its members at the level of the public media. No researcher is ever given permission to publish full names of individuals. Anyone who does so will be denied further access to the GSO Archives.

Photoduplication (Scanning and Photocopying)

Photocopies or scans of published materials, such as pamphlets, articles, and newsletters, will be made available if the physical condition of the materials will allow for duplication. Original correspondence, unpublished manuscripts, and some other confidential materials will not be duplicated.

All photoduplication will be done by Archives staff. On-site researchers will not be permitted to use scanners, cameras, photocopiers, or other devices to make copies. Researchers may designate a limited number of pages (of published items only) to be photocopied or scanned by the archives staff. Depending on the quantity requested and the workload of the archives staff, the copies may have to be mailed or emailed to the researcher at a later date.

Copyright and Ownership

The GSO Archives have a large variety of materials, which may or may not be in the public domain. In some cases AAWS does not hold copyright for the materials in its collections. The permission to access and research does not include or imply permission for the use of intellectual property or any right to intellectual property in the Archives' holdings. It is solely the responsibility of the researcher to obtain the permission of the copyright owner before publishing, reprinting, or making extensive use of any copyrighted material. Any agreement as to intellectual property — such as *publishing, reprinting, or quoting from* any archives material — must be separately requested in writing.

WARNING CONCERNING COPYRIGHT RESTRICTIONS

The copyright law of the United States (Title 17, United States Code) governs the making of photocopies or other reproductions of copyrighted material. Under certain conditions specified in the law, libraries and archives are authorized to furnish a photocopy or other reproduction. One of these specified conditions is that the photocopy or reproduction is not to be used for any purpose than private study, scholarship or research. If a user makes a request for, or later uses, a photocopy or reproduction for purposes in excess of “fair use”, that user may be liable for copyright infringement and/or subject to criminal prosecution.

Permission to Publish

As stated above, permission to access our materials and have copies made *does not* signify that a researcher has been given permission to publish, distribute, or further copy the material.

Requests for permission to use materials from the GSO Archives in a publication, performance, or broadcast must contact GSO's Intellectual Property Administrator of AAWS Inc. for information regarding the Archives License Agreement. Contact the I.P. Office at: ippolicy@aa.org.

Researchers who plan eventual publication of their work are urged to make early inquiries concerning publication rights as they begin their research.

If permission is granted to reprint, we request that two free copies of all publications which rely on the Archives' holdings be donated to the Archives as soon as the work is published. In giving permission to publish a manuscript, the Archives does not surrender its own right thereafter to publish the manuscript or to grant permission to others to publish it; nor does the Archives assume any responsibility for infringement of copyright or of publication rights in the manuscript held by others.

Policies For On-Site Research

The following procedures are designed to make the researcher's visit as useful as possible while preserving the archival materials for future generations.

Please note that if you wish to review any *unpublished* materials in the Archives (correspondence, meeting minutes, financial information, manuscripts, etc.), a written request for access must be made to the trustees' Archives Committee, and must receive Committee approval before access will be granted. See the *Collections Access Policies* for more information.

1. All researchers should notify staff of the day(s) they plan to visit. Planning the visit ahead of time will help ensure that the researcher's time is used efficiently. Researchers and archives staff should work together before the visit to identify all relevant materials, so that staff can locate and retrieve them. Some materials are stored off-site and these require advance notice to be retrieved. If we do not receive advance notice of a visit, we will be limited as to how we can assist with research.
2. Researchers must register upon arrival to the Archives. Our staff is available between the hours of 9:00 a.m. – 4:30 p.m., Monday through Friday.
3. Researchers must deposit coats, bags and backpacks, and other personal property not essential to their work with the archival staff.
4. Researchers are not admitted to the archives vault. All materials will be obtained from and returned to the archives vault by staff members.
5. Materials may only be used in the Archives offices, at the tables provided.
6. Researchers may use laptop computers to take notes, or use pencils only. To avoid possible permanent marks on materials, pens are prohibited. Post-It notes, paper clips, and other potentially damaging flags are also not permitted.
7. All photoduplication is carried out by Archives staff. Additional information concerning photoduplication policies is available in the *Collections Access Policies*. Cameras and scanners are not permitted, and researchers are not permitted to make their own photocopies.
8. All material must be handled with extreme care to ensure its preservation for future generations. Always preserve the existing order and arrangement of all materials. Turn pages carefully, make no marks on the materials, and do not rest books or other objects on the surface of items. When handling certain items staff may request that researchers wear cotton gloves
9. Eating and drinking are not permitted in the Archives.
10. Please return all materials to archives staff at least 15 minutes before the Archives closes.

*ARCHIVES OF THE
A.A. GENERAL SERVICE OFFICE*

I hereby apply for permission to consult the following archival recording, for the following stated purpose(s).

Date: _____ (PLEASE PRINT)

Name: _____

Address: _____

Telephone(s): _____

Email: _____

Affiliation (if any): _____

Items requested: _____

Subject of research: _____

Purpose or expected use of moving images or audio recordings (book, article, thesis, dissertation, film, area/local archives use, personal/family research, other):

COLLECTIONS ACCESS POLICIES

ARCHIVES OF THE A.A. GENERAL SERVICE OFFICE

APPLICATION FOR USE OF ARCHIVES RESEARCH FACILITY (contd.)

AGREEMENT

By signing below, I signify that I have read and understood the “Collections Access Policies” and I understand that if I do not adhere to these policies, my privileges as a researcher may be revoked.

I acknowledge and agree that an essential condition of the permission granted to me is that I will abide by the anonymity policy. I will not identify any member of A.A., including its cofounders, other than by the first name and first initial of the last name. I agree that any publication of full names at the level of press and media is a breach of this agreement.

THE RESEARCHER WILL DEFEND, INDEMNIFY, AND HOLD HARMLESS THE GSO ARCHIVES, THE A.A. GENERAL SERVICE OFFICE, A.A. WORLD SERVICES, INC., AND ITS OFFICERS, EMPLOYEES, AND AGENTS AGAINST ALL CLAIMS, DEMANDS, COSTS, AND EXPENSES INCLUDING ATTORNEYS’ FEES INCURRED BY ANY COPYRIGHT INFRINGEMENT OR ANY OTHER LEGAL OR REGULATORY CAUSE OF ACTION ARISING FROM THE USE OF GSO ARCHIVES MATERIALS.

I HAVE READ AND AGREED TO ABIDE BY THE ABOVE TERMS AND CONDITIONS, THE “COLLECTIONS ACCESS POLICIES”

Name: _____ (PLEASE PRINT)

Signature: _____ Date: _____

General Service Office Archives of Alcoholics Anonymous
475 Riverside Drive
New York, New York, 10115
Phone: 212-870-3400; email: archives@aa.org
Website: www.aa.org

Revised 8/2020

Photocopying Policy at the General Service Office Archives

Adopted by the trustees' Archives Committee

October 30, 2011

Revised January 27, 2019

The General Service Office Archives has been entrusted to safeguard the collection of historical, administrative and organizational records of the Fellowship, as well as other historical material that has been compiled since the early existence of the office.

The Archives' photocopying policy has been established to protect the physical and the intellectual integrity of the collection. In addition the policy's purpose is to protect the anonymity and privacy of our members, nonmembers, and to comply with the U.S. Copyright Law as it affects the collection.

Photocopies of copyright material and certain other materials authorized by the Archivist, will be provided at the discretion of Alcoholics Anonymous World Services, Inc. (AAWS), within the minimum standards for fair use, for purposes of private study, scholarship or research, and not for further reproduction. Understandably, we would have to decline any request for photocopying that, we believe, would result in a violation of U.S. Copyright law. It is the responsibility of the person requesting copies to obtain use rights from the copyright holder. If a person makes a request for, or later uses, a photocopy or reproduction for purposes in excess of "fair use," that person may be liable for copyright infringement.

Original correspondence and unpublished manuscripts frequently cannot be reproduced because of:

1. Copyright law prohibitions or restrictions;
2. The need to preserve the anonymity of persons in accord with A.A.'s Traditions;
3. The parties' expectation of privacy; or
4. The physical condition.

Photocopies of early pamphlets and other miscellaneous publications will be made available only when the physical condition of the material allows for photocopying. The physical condition, the fragility of the item or the brittleness of the paper may prevent us from photocopying some of these items.

AAWS in its discretion may refuse to permit photocopying of certain sensitive material.

Policy and Procedure on Permission to Quote from A.A. Material

Requests for permission to quote from A.A. material (books, booklets, pamphlets, audios, videos, etc.) copyrighted by A.A.W.S, Inc. and AA Grapevine, Inc., as well as from unpublished material in GSO Archives, may be directed to the Intellectual Property Administrator of A.A.W.S., Inc.

Sound and Moving Image Policy at the General Service Office Archives

Adopted by the trustees' Archives Committee

January 28, 2007

Revised October 2016

Policy

The GSO Archives collection's sound and moving image recordings include productions by the GSO, individual A.A. members, and friends of A.A. The sound recordings include conferences, meetings, and other special events; speeches by Bill W. and other early A.A. pioneers; oral history interviews; and more. These recordings have great significance to the history of Alcoholics Anonymous, and help carry the message of the Fellowship of A.A.

For any researcher, we will endeavor to provide access to these historical materials. However, we are bound by several factors that may limit our ability to provide access or permitted copy of a recording when requested. In most cases the General Service Office does not hold copyright for the recordings. Many of the items are unique and in some cases the Archives retains the only known copy. In addition, many recordings reveal A.A. members' identities or contain other sensitive content. Because of the one-of-a-kind nature of these items and the GSO Archives commitment to A.A.'s guiding principles, the following policies and restrictions apply to their duplication and use.

Procedures for Access

Researchers wishing to learn about our holdings or wishing to listen to specific sound recordings or view archival film recordings should first contact the archives by mail, phone, or email. Each request will be considered individually. Depending on the needs of the researcher and the types of materials requested, a researcher may have to establish approval with the trustees' Archives Committee before being given access to the materials. The trustees' Archives Committee meets to decide on these requests three times each year. In special cases, consideration can be obtained at other times. If the

request requires this approval, the archivists will direct the user through the application process.

Archives staff may have to view and/or listen to recordings to determine subject content and/or suitability for outside distribution and duplication, paying particular attention to issues of anonymity. This service is simply a preliminary listening/viewing to determine content, and no transcription will result. If the user requires a transcription, this will be done by a professional transcription service and additional charges may apply.

Given our limited staff resources, we ask researchers to restrict their requests for duplication to a reasonable quantity of material. The GSO Archives reserves the right to impose limits on the amount of material that can be requested at any given time and by any one individual. In most cases, due to staff resources and copyright restrictions, a limit of one copy per item per request will be imposed. Duplication requests will be filled in a timely manner based on staff responsibilities. If a separate vendor must be engaged to make a copy, the charge will be passed on to the researcher at cost. Note that certain formats cannot be duplicated because of a lack of compatible duplication equipment.

On-site access

Assuming access is permitted, sound recordings or moving images are available for on-site listening or viewing. Researchers must make prior arrangements with the Archives so that proper playback and listening equipment can be made available.

Access Copies and Restrictions

The GSO Archives reserves the right to restrict duplication due to concerns of copyright, anonymity, privacy, condition of the material, donor restrictions, and policy determinations recommended by Alcoholics Anonymous World Services, Inc., its General Service Office, and the General Service Conference and adopted by the General Service Board through its committee process.

Copyright

If the Archives staff has any reason to believe that duplicating a videotape or sound recording will violate U.S. Copyright Law, they will refuse the request.

The person requesting the reproduction assumes all responsibility for infringement of copyright, or any use that exceeds fair use provisions. Any commercial application, publication or distribution by rental, lease, or lending of copyrighted materials is not fair use and always requires the consent of the copyright holder. This includes but is not limited to distributing CD or DVD copies, streaming, uploading or posting on the Internet. Permission to reproduce does not constitute permission to publish – see below for publication restrictions. For further information about copyright, consult the U.S. Copyright Office: www.copyright.gov.

Anonymity

In keeping with A.A.'s Eleventh and Twelfth Traditions on anonymity, users are restricted from revealing the name of any A.A. member(s), living or deceased. A.A. members' anonymity, including the co-founders, must be maintained at the level of the public

media, including works published in print and on the Internet. In each situation, the final decision to reveal the A.A. membership of a deceased member rests with the family. GSO's Public Information Policy on the Co-Founders' Posthumous Anonymity serves as guidance in Public Information activity surrounding A.A.'s co-founders. A copy of this Policy may be furnished upon request. If applicable, the Archives will require users to commit in writing to preserving A.A. members' identities from disclosure.

Condition

Sound and video recording media (VHS tapes, cassettes, etc.) are typically fragile, and degrade quickly. Frequent use quickens this deterioration. The Archives Department will always act to ensure the survival of its audio recordings, and may deny any request that could not be granted without damaging the original recording.

Donor Restrictions

Some donors of audio or video material may have imposed restrictions on access as a condition of the donor agreement. These will always be respected.

General Service Conference Audio Recording Policy

Access to audio recordings of A.A.'s annual General Service Conference is in accordance with a 2015 General Service Conference Advisory Action:

Audio recordings of General Service Conference presentations published in the General Service Conference Final Report and audio recordings of the trustees' farewell talks given at the closing brunch be made available in accordance with Archives' Policies. Access to all other General Service Conference sessions will continue to be prohibited.

Audio recordings of the General Service Conference, as specified in the Advisory Action above, are accessible for either on-site listening, or an access copy may be created for the user.

Distribution and Publication Restrictions

Permission to access our materials and have copies made *does not* signify that a researcher has been given permission to publish or further copy the material. Users will not be permitted to create duplicate copies of sound recordings or videos for the purpose of selling, re-licensing or widespread distribution. Users are not permitted to duplicate footage of any moving image material via digital devices, cameras, screen capturing, or any other media.

It is the users' responsibility to secure all necessary permissions from the copyright owner before making commercial, broadcast, or other use of this material. Refer to section on "Copyright" above.

GSO Archives restricts use of its recordings in television, video, motion picture, and all other media productions, including posting on the Internet. For use in these media, when we own the copyright, separate permission must be obtained from AAWS. The archivist can assist you in making your request to the right staff. Any reproduction of the material shall be solely for the use described in the submitted ap-

plication and may not be reused in subsequent works without obtaining express written consent from the copyright owner. Furthermore, a researcher may not alter the recordings in any manner.

It is solely the responsibility of the researcher to obtain all necessary permissions from the copyright owner which may own or claim any proprietary rights whatsoever under statutory or common law before publishing any previously unpublished material. In many cases neither AAWS nor the General Service Board holds copyright for the audiovisual materials in its collections. Permission to publish sound recordings or moving images from the collection must be obtained from the copyright owner.

In order to access audio or film materials from the GSO Archives Collection, researchers must complete the Application for Limited Use of Sound or Film Recording and read and agree to the Terms and Conditions.

WARNING CONCERNING COPYRIGHT RESTRICTIONS

The copyright law of the United States (Title 17, United States Code) governs the making of photocopies or other reproductions of copyrighted material. Under certain conditions specified in the law, libraries and archives are authorized to furnish a photocopy or other reproduction. One of these specified conditions is that the photocopy or reproduction is not to be used for any purpose than private study, scholarship or research. If a user makes a request for, or later uses, a photocopy or reproduction for purposes in excess of "fair use", that user may be liable for copyright infringement and/or subject to criminal prosecution.

*APPLICATION FOR LIMITED USE AND
REPRODUCTION OF SOUND OR MOVING IMAGE RECORDINGS
ARCHIVES OF THE A.A. GENERAL SERVICE OFFICE*

I hereby apply for permission to consult the following archival recording, for the following stated purpose(s).

Date: _____ (PLEASE PRINT)

Name: _____

Address: _____

Telephone(s): _____

Email: _____

Affiliation (if any): _____

Items requested: _____

Subject of research: _____

Purpose or expected use of moving images or audio recordings (book, article, thesis, dissertation, film, area/local archives use, personal/family research, other):

AGREEMENT

By signing below, I signify that I have read and understood the “SOUND AND MOVING IMAGE ACCESS POLICIES AND PROCEDURES.” I understand that if I do not adhere to these policies, my privileges as a user of the GSO Archives may be revoked.

I acknowledge that I will be receiving one copy of the following recording, in digital format, on CD/DVD:

Due to copyright restrictions, as specified in the “SOUND AND MOVING IMAGE ACCESS POLICIES AND PROCEDURES,” I agree that the recording I receive will not be published in any medium, nor posted on the Internet, nor otherwise distributed or copied further.

I acknowledge and agree that an essential condition of the permission granted to me is that I will abide by the anonymity policy. I will not identify any member of A.A., including its co-founders, other than by the first name and first initial of the last name. I agree that any publication of full names at the level of press and media is a breach of this agreement.

THE RESEARCHER WILL DEFEND, INDEMNIFY, AND HOLD HARMLESS THE GSO ARCHIVES, THE A.A. GENERAL SERVICE OFFICE, A.A. WORLD SERVICES, INC., AND ITS OFFICERS, EMPLOYEES, AND AGENTS AGAINST ALL CLAIMS, DEMANDS, COSTS, AND EXPENSES INCLUDING ATTORNEYS’ FEES INCURRED BY ANY COPYRIGHT INFRINGEMENT OR ANY OTHER LEGAL OR REGULATORY CAUSE OF ACTION ARISING FROM THE USE OF GSO ARCHIVES MATERIALS.

I HAVE READ AND AGREED TO ABIDE BY THE ABOVE TERMS AND CONDITIONS AND THE “SOUND AND MOVING IMAGE ACCESS POLICIES AND PROCEDURES.”

Name of applicant: _____ (PLEASE PRINT)

Signature of applicant: _____ Date: _____

General Service Office Archives of Alcoholics Anonymous
475 Riverside Drive
New York, New York, 10115
Phone: 212-870-3400; email: archives@aa.org
Website: www.aa.org

Revised and approved by trustees’ Archives Committee 10/2016

Classification of Archival Material at the Archives of the General Service Office

- A. Open to all
- B. Open to A.A. members
- C. Open with approval
- D. Closed (at this time)

A. Open to all

1. Material published outside A.A.

- On A.A. specifically
- Magazine articles on A.A.
- Newspaper articles, TV/video recordings
- Material on alcoholism in general (reprints, talks, newsletters, etc.)

2. Published within the Fellowship (available to the public)

- A.A. books and pamphlets
- Annual reports to the public
- Surveys
- International Conventions and publicity
- Obituaries
- Awards
- Pictures of nonalcoholics, friends of the Fellowship, background
- Access to scrapbook and obit books
- Co-founders' biographical information
- Historical material, background data on A.A.

B. Open to A.A. members

GSO published material (in addition to items in A. above)

- Bulletins, newsletters
- World Directories or listings from them
- Conference reports
- Group history records
- Photos: A.A. events
- Selected tapes or cassettes

C. Open with approval — access requires review and approval of the trustees' Archives Committee

- Financial matters pertaining to GSO
- Financial matters pertaining to the co-founders
- Correspondence between members and GSO
- Correspondence of co-founders, members, groups, friends of A.A.
- GSO administrative papers; minutes, General Service Board matters, discussions
- Oral history tapes, transcripts
- General Service Conference tapes and transcripts—opening and closing sessions only
- International Convention tapes
- World Service Meeting records

D. Closed at this time — not available to anyone because of sensitivity or contributor's request.

Calendar of Holdings Archives of the A.A. General Service Office

Bill W. (1895-1971) — personal correspondence; writings, talks, articles; photographs; audio material; Lois W. material.

Dr. Bob S. (1879-1950) — personal correspondence; writings, talks, articles; photographs; audio material; Anne S. material.

Alcoholics Anonymous — correspondence; industry; institutions; court programs; medical profession; religion.

Alcoholic Foundation — correspondence; reports.

Early Groups — correspondence (historical only); U.S. groups by areas; Canadian groups; foreign groups (historic only).

General Service Board — reports; minutes.

General Service Conferences — reports; manuals.

General Service Headquarters (1945-1968) — correspondence.

Grapevine, The A.A. — correspondence (historical); magazine issues, 1944 to present.

International Conventions — programs; clippings.

Nonalcoholic friends of the Fellowship — correspondence; photographs; Alexander, Jack; Dowling, Rev. Edward S.J.; Ford, Rev. John C., S.J.; Ignatia, Sister Mary; Jung, Carl, M.D.; Maxwell, Milton, Ph.D.; Norris, John, M.D.; Rockefeller, John D., Jr.; Shoemaker, Rev. Samuel; Silkworth, William D., M.D.; Sinclair, Upton; Smith, Bernard B.; Tiebout, Harry, M.D.

Oral history — co-founders; early members; Conferences; Conventions.

Oxford Group — historical material.

Publications — books; drafts; booklets; pamphlets; directories; other.

Regional Forums — reports.

Scrapbooks — 1939 – 1961.

Trustees (Class A and B) — correspondence; reports; talks.

Washingtonians — historical material.

Works Publishing — correspondence; memos.

World Service Meetings — correspondence; reports.

Reference Information and Resources

You are encouraged to consult archival resources regularly. They are readily available both at the national level and at your local level, and you can greatly benefit from both.

For additional information contact the A.A. General Service Office Archives, 475 Riverside Dr., New York, NY 10115, (212) 870-3400, fax (212) 870-3003, www.aa.org, e-mail: archives@aa.org.

Some archivists benefit from attendance at the National A.A. Archives Workshop focusing on A.A. Archives. Date and location of this event are determined on an annual basis. Contact <https://www.naaaw.org>.

The Society of American Archivists maintains a very informative and comprehensive website. National and local archivist organizations and professional resources are listed and regularly updated. Workshops and training seminars are regularly offered both by the national and local organizations. Take advantage of them!

The Society of American Archivists, 17 N. State St., Suite 1425, Chicago, IL 60602-4061, 312-606-0722, toll-free 866-722-7858, fax 312-606-0728, <https://www2.archivists.org>.

For Canada: Association of Canadian Archivists, Suite 1912-130 Albert St., Ottawa, ON K1P 5G4, (613) 234-6977, www.archivists.ca.

Historical A.A. reading:

Alcoholics Anonymous Comes of Age
Dr. Bob and the Good Oldtimers
“Pass It On” The Story of Bill Wilson and How
the A.A. Message Reached the World
Experience, Strength and Hope
The Language of the Heart
Our Great Responsibility

Resources from GSO Archives:

Oral Histories Guidelines
A.A. Guidelines on Archives
Archives Preservation Guidelines
Digitizing Archival Material Guidelines
Archives Checklist
Researching A.A. Group History service piece

Closing

We hope this workbook will help you in your daily efforts of collecting and organizing historical documents, and will assist A.A. members who would like to learn more about the history of our Fellowship.

The archival discipline is a growing field, and this brief guide cannot replace the need for continuous reading and updates.

We would like to invite you to get in touch with the General Service Office Archives if you have any questions regarding any aspects of the material at hand.

Keep in mind:

“Whenever a society or civilization perishes
there is always one condition present;
they forgot where they came from.”

— Carl Sandburg

