

The Ian McLean Wards Memorial Trust Scholarship

By Sarah Welland and
Amanda Cossham

INTRODUCTION

Since its inception in 2013, the Ian McLean Wards Memorial Trust Scholarship has been one of the more generous scholarships available in Aotearoa New Zealand for archives, records and information professionals. It provides \$10,000 towards research that supports the management of heritage materials in particular, archives, records and manuscripts.¹ The research generated by scholarship holders has made a notable contribution to professional knowledge but it has been awarded only three times. The Trust is keen to see more use made of this funding and a diversity of research generated. The Scholarship is open to those working in archives, libraries, museums, information and records, and galleries. This article provides some background to both the Trust and the Scholarship and highlights the research of past holders.

THE IAN MCLEAN WARDS MEMORIAL TRUST

The Trust, a registered charity, was established in 2010 to honour the “outstanding cultural contributions of the late Ian McLean Wards (1920-2003)”.^{2,3} Ian Wards was Chief Government Historian between 1968 and

1983,⁴ and a life member of ARANZ (Archives and Records Association of New Zealand) and Friends of the Turnbull Library.⁵ He was widely remembered for his “untiring campaigns to safeguard the nation’s historical records and the integrity of the institutions holding them”.⁶ The Trust is made up of trustees who have demonstrated “an interest in the arts sector, cultural matters generally and the preservation and effectiveness of archives and libraries”.⁷ Current trustees are Donald Gilling, Jim McAloon, Lindsay Fergusson, and Brad Patterson. Kathryn Patterson was co-opted to the Trust to provide professional advice.

The Trust’s current mission is the provision of “tangible support for, and defence of, cultural institutions holding historical records”.⁸ This includes advocating for the work of archives, records and libraries and providing grants and bursaries for the heritage-related education and training of individuals. This may include sponsoring visits within New Zealand.⁹

The Scholarship is a vehicle by which the Trust can support practitioners, researchers and academics in the heritage sectors in Aotearoa New Zealand to undertake a specific research project that will advance knowledge or improve practice “relating to the recording, care,

or conservation, of historical research materials”.¹⁰ The scholarship will help recipients with research expenses or expenses that arise as a result of the research (e.g., travel for interviews, software licences for data management or analysis, publication of results (for example, editing and design-work), koha, additional childcare).^{11,12} It is open to any New Zealand resident. While not intended to support post-graduate study directly, appropriate proposals can be considered.¹³ Potential applicants do not need to hold a tertiary qualification, although they need to “provide evidence of ability to carry out research leading to a research report suitable for scholarly, professional, or popular publication, whether in print or electronic form”.¹⁴ This can be through previous experience of research and publication, or through attestation of an employer or senior colleague.

The process is straightforward. Applicants provide a curriculum vitae and the names of two referees who can comment on both the applicant and the proposed research project. A research proposal of two to four pages will outline the proposed programme of research, including a provisional budget and a timeline indicating significant milestones.¹⁵ Applicants are interviewed, and the Trustees may seek additional clarification including advice from others in the industry on the merits of any proposal.¹⁶ If there are two

outstanding proposals, Trustees may divide the Scholarship between them, or allocate one to the following year.¹⁷

SCHOLARSHIP PROJECTS

Sarah Welland, Open Polytechnic lecturer and information management consultant, was the recipient of the inaugural Scholarship in 2013. She used the scholarship money to fund research into five types of small community archives. This resulted in the 2015 report *The role, impact and development of community archives in New Zealand: A research paper*.¹⁸ The key result of her research was that those responsible for small community archives focused more on practical day-to-day management issues rather than areas of greater concern to archivists more widely, such as digitisation, training, and marketing. While the causes behind this polarity of viewpoints are varied, it continues to create implications for the ongoing role and purpose of community archives generally.

The Scholarship was awarded to Elizabeth Charlton in 2014, who investigated the management of digital archives in small community collections, based on her experience as an Archivist for the Society of Mary Marist Archives in Wellington. This resulted in Elizabeth being able to demonstrate how digital archives can be collected and managed even within a small archives

collection with a limited budget. Elizabeth gave presentations and wrote articles, including at the Society of American Archivists 2016 Research Forum (available online).¹⁹ This experience led her to write a book chapter in *Reappraisal and Deaccessioning in Archives and Special Collections* in 2019.²⁰

There were no applications in 2015 or 2016. In 2018, Sean McMahon (Alexander Turnbull Library) and Dylan Owen (National Library: School Services) were awarded the Scholarship to aid the ongoing management and preservation of horse-racing archives. This research project resulted in the publication *Racing This Time: Guidelines for the Care and Preservation of Records and Archives in New Zealand Thoroughbred Racing Clubs*.²¹ It was “designed for New Zealand thoroughbred racing club members whose responsibility it is to manage their club records”,²² but has also been used to inform the ongoing management and care of heritage records owned and kept by other small groups and organisations. The Scholarship was awarded in 2019 but was not used due to ongoing travel issues caused by Covid-19.²³ No scholarships have since been awarded.

WHAT IS THE ONGOING VALUE OF THE SCHOLARSHIP?

In the Trust Minutes of 2023, the Trust Chairperson, Brad Patterson, asked whether

the Trust should reconsider the “general objectives set out in the Trust deed and other appropriate ways in which [the Trust] might contribute to industry”.²⁴ Since the scholarship is one of the key ways in which the Trust has contributed to industry, three recipients were interviewed to see whether they consider the Scholarship to be a worthwhile initiative for the Trust to maintain long term.

1. How did you find the experience of applying for the Scholarship?

Elizabeth: As an early career archivist at the time, it was a bit intimidating, especially when I was called to an interview to discuss my application. However, I was fortunate to have trusted colleagues, who gave me useful feedback while I was preparing.

Sean: I found the process of applying for the Scholarship easy enough and the contact with the Trust board members was effective and helped the process of applying correctly.

Sarah: It seemed a bit daunting to start with because I didn't think I was knowledgeable enough or experienced enough to ‘deserve’ to apply, but once I started the actual process, it went smoothly. The process also made me think further about what I planned to do, and whether it would be manageable.

2. What was it like doing the actual research?

Elizabeth: The actual research was relatively easy as I'd found a gap with my own

skill set, so I was motivated to solve the problem. I did have to pivot during my research from what I had initially intended to do, because I found that it was not achievable within the time frame and finances provided by the Scholarship. However, the research methodology I'd selected covered this eventuality, so it all worked out.

Sean: The work was fun for Dylan and myself, as we got to travel to race courses to talk to committee members about caring for their records. We also took photographs, which appeared in a related exhibition and in the *Racing This Time* publication. The most difficult and time consuming part of our project was working on the publication. Luckily the Trust took over arranging this as we did not have the editing and publication skills to print a manual like this. We did, however, provide all the content for it.

Sarah: My research took an entire year, so I found I was thinking about it constantly. I was also doing most of the research, writing and travel around my normal (part-time) work, so it led to a number of late nights. Saying that, I met some wonderful people and gained real insight into and a real appreciation of small community archives. Up until that time, apart from one or two significant exceptions,²⁵ the area had not been researched much.

3. What skills did you learn?

Elizabeth: Accepting feedback

from peer-reviewers! It also helped me gain new technical skills in the digital preservation space. Overall, the skills I gained helped me to demonstrate that it is possible even for very small institutions to take charge of their born-digital material.

Sean: As we were visiting racing club members, we got to learn a lot about the racing clubs, how they work and how they look after (or don't look after) their records. We also learnt a lot about the racing industry itself and its politics, as the industry was being restructured at the time. As we progressed, we found we developed good communication and networking skills, particularly when it came to finding the right people to contact for our questions. We also learned a lot about putting on a photographic exhibition, and how to create a records management guideline for organisations.

Sarah: I increased my understanding of research skills such as planning for and conducting interviews, and transcribing and analysing results. I also learnt a lot about how to write more professionally, because writing up research has its own rules and guidelines. And I had the opportunity to use a research approach, the Delphi method, that was completely new to me, which was a lot of fun.

4. Was there anything you would do differently if you had the opportunity to do it again?

Elizabeth: Yes, very likely, as there was an iterative approach to my research. Furthermore, considering my research topic, resolving what was my research problem in 2014 would look very different today, given further changes to technology and the fact that many technological solutions created during the time of my research are no longer supported and current.

Sean: If the goal was to produce a publication, then yes, there would be things we would do differently, as we realise now that this process takes a lot of work and energy to keep driving forward. We were not aware of this at the time, so we would now factor this into the initial application. Also, publication costs being what they are, we realise that if we did it again it might require more money than we got from the grant itself. We were lucky at the time that the Trust provided further funding to make the publication happen.

Sarah: I don't think there is much I would do differently, however, on reflection, I think I would spend a lot more time on initial planning and research, to save having to learn things 'on the job', and potentially doubling up on effort.

5. Do you think this scholarship has helped you in your career?

Elizabeth: It assisted in widening my professional network. For example, I had two peer-reviewed articles produced from it and I presented my research

in New Zealand and the United States. I have also continued to apply non-technical skills gained from this research into my daily professional practice.

Sean: I am not so sure it has helped my career as such, but it certainly has helped me in other ways, such as growing my understanding of organisational groups and their records-keeping and conservation practices. It was great that the research has been written up as a guide, as there is not a lot of guidance available for small organisations and groups like the racing clubs. One unintended benefit from the publication is that it can be useful for a diverse range of groups, and not just racing clubs. For example, I have been giving it out to iwi and other groups who are interested in managing their own records.

Sarah: Yes, definitely. Getting the Scholarship gave me confidence to be a 'real researcher'. It also gave me the opportunity to dive into an area of archives that I was really interested in, and I have been carrying out research into different aspects of community archives ever since. The skills I learnt (and continued to learn) have also helped me to be more confident in doing research and have strengthened my knowledge in terms of what I can teach others.

6. What would you say to others who may be considering the Scholarship?

Elizabeth: Go for it!

Sean: I would say go for it!

This is a wonderful opportunity to be supported in a project. I feel that \$10,000 is very generous and a large enough amount to actually achieve something good. I don't understand why more people don't make applications for it. Maybe it needs to be better promoted? Or explained. It is records based but this can be quite broad and with the changing technology environment there's lots of scope. Maybe someone should do something on the effect of AI of records management and creation, values, authenticity of knowledge etc. People just need to think outside the square when applying for the funding.

Sarah: Yes, definitely, go for it! It is an opportunity to create some research and make an impact in a really important area, particularly since the value of records, archives and information are often undervalued in wider society, and the ramifications of mis-management can play out across generations.

7. Anything else you want to add?

Elizabeth: Long term, what my

project really brought home to me was to keep the following quotes at the front of my mind: "What is good enough in your situation?" This keeps things manageable for me as a lone archivist. "Records preservation starts from the moment of creation." I need to plan before diving in!

Sean: We got really good support from the Trust Board and it was a worthwhile project. I hope organisations keep using our guide (there are still copies available from the Trust). On another note, I think it was important to have some defined outcomes for the scholarship. We gave quarterly reports to the Trust, and while this wasn't a stipulation of the grant at the time we felt it helped keep the project on track.

Sarah: The Scholarship is a fabulous opportunity, and it needs to be more widely promoted and explained. I also found that reporting back to the Trust on a regular basis helped me to keep focused and keep to the schedule of work, so like Sean, I think this is something that future recipients would find useful to do as well.

CONCLUSION

There is little doubt that the mission and purpose of the Trust and the scholarship can have a significant positive impact on the heritage sectors, and the value of the scholarship is such that quite large projects can be developed. Those who have completed the Scholarship see it as worthwhile in terms of professional development, and in terms of advancing and developing new information about the heritage sectors. We also think the Scholarship still has an important part to play.

The Trust is considering how to promote and advertise the Scholarship more widely, and how they can support people to put together an application for a funded piece of research. Potential applicants could think about the problems they encounter in their work and the ways in which solutions could be sought as a starting point. They should also be prepared, as Sean said, to think outside the square when applying, and to consider this as a professional development opportunity for themselves as much as a chance to generate new knowledge about

heritage institutions, practices, and situations in Aotearoa New Zealand. Is there a project in your workplace that you could take on? A problem that can't currently be solved, or a collection with specific preservation issues to be explored? There is still plenty of scope to address these and other areas. For example, research tackling issues around representation and diversity; collaborative and co-created research with local communities and iwi; projects addressing gaps or backlogs in digitisation; user studies; work that aids the development of finding aids and /or training guides, and research addressing key issues impacting heritage and information. For example, as Sean mentioned, conducting research into the impact of AI in its many forms on heritage in galleries, libraries, archives, museums and records.

Anybody interested in applying for the Scholarship in 2024 or 2025 should contact the Ian McLean Wards Memorial Trust. info@e-recordkeeping.com.

We encourage you to take the plunge!

ENDNOTES

1. LIANZA, 'The Ian McLean Wards Scholarship: Support for Research in Librarianship, Archives & Records Management', 2019, available at <https://lianza.org.nz/wp-content/uploads/2019/11/WARDS-SCHOLARSHIP-Background.pdf>, accessed 22 July 2024.
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6. *ibid.*
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16. LIANZA
17. *ibid.*
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21. McMahon, Sean, and Dylan Owen, 'Racing This Time: Guidelines for the Care and Preservation of Records and Archives in New Zealand Thoroughbred Racing Clubs', Ian McLean Wards Memorial Trust, Wellington, 2019.
22. *ibid.*, p. 5.
23. Communication with Ian McLean Wards Memorial Trust Chairperson.
24. Ian McLean Wards Memorial Trust Chairperson's report, 2023.
24. See for example, Newman, Joanna, 'Sustaining Community Archives' Master of Arts, Victoria University of Wellington, 2010, available at <http://researcharchive.vuw.ac.nz/bitstream/handle/10063/1398/thesis.pdf?sequence=1>.