



5-11 OCTOBER
NEW YORK
ARCHIVES
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CENTER
FOR
JEWISH
HISTORY

SYMPOSIUM: FINANCIAL INSTITUTIONS AND ARCHIVES

Co-Sponsored by The Archivists Round Table of Metropolitan New York, Inc. (A.R.T.) and The Center for Jewish History (CJH) **Tuesday, October 7, 2014** Center for Jewish History, 15 W 16th St, NY, NY 10011

MORNING SESSIONS

8:00–8:30 Registration

8:30–8:45 Welcome Address: Ryan Anthony Donaldson, President, A.R.T. and Rachel Miller, Senior Manager for Collection Services, CJH

8:45–10:00 **SESSION 1. Moving Forward While Looking Back: Two Financial Institutions' Use of the Past to Define The Future**

An organization's history so often informs its present, and financial institutions, while bringing their own set of challenges and business culture, are no different. This session will explore the unique ways that Citi and The Dime Savings Bank of Williamsburgh are leveraging their history to provide fuller opportunities for their stakeholders, researchers, and the general public.

Education Committee Liaison: Sara Lyons Davis, Education Technician, National Archives and Records Administration

Moderator: Gretchen Nadasky, Manager, Optimity Advisors

Using the Past to Define Citi's Future—An Exploration of One Financial Institution's Archives Presented by Kerri Anne Burke, Lead Archivist (created in collaboration with Elizabeth Fox-Corbett, Processing Archivist and Shira Bistricher, Assistant Archivist), The Winthrop Group, Inc.; consultants at Citi Center for Culture

The Last Bank Standing: A Williamsburg Tale. The Dime Savings Bank of Williamsburgh: 150 Years of Connecting with Brooklyn's Rediscovered Neighborhood Presented by Ken Mahon, COO, The Dime Savings Bank of Williamsburgh and Roger van den Bergh, Partner, Onoma Identity & Media Design

10:00–10:15 Speed Mentoring/Networking with Session 1 Panelists

10:15–10:30 Break

10:30–11:30 **SESSION 2. Financial Records Tell the Story: Cultural Archives and History**

Arguably, the history of finance permeates all other aspects of human history. To "follow the money", we need the evidence provided in the archival record. The presentations in this session speak to this. Archivists from the American Jewish Historical Society will demonstrate how financial records illustrate important aspects of American and Jewish life, using examples from their collections. Archivists from the New-York Historical Society will discuss questions raised in the course of a project to process records relating to the economic history of New York City. They will touch on issues, such as re-appraisal and research trends, that apply to a variety of archival institutions.

Education Committee Liaison: Lisa Mix, Head, Medical Center Archives, NewYork-Presbyterian/Weill Cornell

Moderator: Lisa Mix, Head, Medical Center Archives, NewYork-Presbyterian/Weill Cornell

American Jewish Historical Society Financial Collection Records and What They Can Tell Us About American Jewish History Presented by Susan L. Malbin, Director of Library & Archives; Tanya Elder, Senior Archivist; and UJA-Federation of NY Archivists Susan Woodland, Eric Fritzler and Heather Halliday, American Jewish Historical Society

Early Business Records at the New-York Historical Society Presented by Ted O'Reilly, Head of Manuscripts Department and Susan Kriete, Archivist, New-York Historical Society

11:30–11:45 Speed Mentoring/Networking with Session 2 Panelists

11:45–12:30 Tour of Center for Jewish History

12:30–1:30 Lunch (on your own)

AFTERNOON SESSIONS

1:30–2:30 **SESSION 3. How the Culture and History of Financial Institutions Inform Our Future**

This session will reveal the history of our financial institutions with a look at key examples from collections, specific corporations, and recent exhibits displayed at the Museum of American Finance. The presenters will explore how archives help to uncover historical themes and information that can educate both the public and our institutions. This discussion will also evaluate how professional ethics and values correlate to managing financial risk. Through this session, the panelists aim to capture how the history from our past can provide guidance for improving our financial future.

Education Committee Liaison: Liz Marotta, Production Project Manager, Cambridge University Press

Moderator: Rachel Harrison, Processing Archivist, The Center for Jewish History

Cultivating an Ethic of Stewardship in Financial Institutions Presented by John T. Seaman, Jr., Director, The Winthrop Group, Inc.

Money on Display: Interpreting Financial Documents for a Public Audience Presented by Becky Laughner, Director of Exhibits and Archives, Museum of American Finance

2:30–2:45 Speed Mentoring/Networking with Session 3 Panelists

2:45–3:00 Break

3:00–4:00 **SESSION 4. Addressing Institutional Challenges in a Complex Financial System**

As the world's banking models adapt to changing technology, companies are forced to reevaluate the status quo. This session will cover topics that explore the efforts of an investment firm to preserve the audiovisual record of their institutional history and culture; the new design aesthetic emerging in banking, which places more value on visual content as a vehicle to support branding; and the Legal Entity Identifiers will be used to better analyze banking data in the near future.

Education Committee Liaison: Natalie Pantoja, Content Editor, Shutterstock, Inc.

Moderator: Pamela Cruz, Chief Strategist, National Historic Preservation Center, Girl Scouts of the USA

Always Be Closing: The Impact of Business Culture on Preserving Institutional Culture Presented by Joshua Ranger, Senior Consultant, AVPreserve

Legal Entity Identifier "LEI": How LEIs Will Change the Way Financial Services Companies Run and Win on Data Presented by Sammy Chowdhury, PMP, CISA, Partner, enableIT LLC.

4:00–4:15 Speed Mentoring/Networking with Session 4 Panelists

4:15–4:30 Closing Remarks

4:30–5:30 Reception



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The Archivists Round Table of Metropolitan New York, Inc. (A.R.T.) thanks MetLife for being a major sponsor of New York Archives Week since its inception in 1989. A.R.T. also thanks the Lucius N. Littauer Foundation for their generous support of New York Archives Week. A.R.T. thanks the Center for Jewish History (CJH) for their ongoing partnership in co-sponsoring events for New York Archives Week and throughout the year.

A.R.T. would like to thank all of the Symposium presenters and moderators, as well as the members of the New York Archives Week 2014 Symposium Planning Committee: Sara Lyons Davis, Rachel Harrison, Julie Maber, Liz Marotta, Katherine Meyers, Rachel Miller, Lisa Mix and Natalie Pantoja.

About A.R.T.: Founded in 1979, the Archivists Round Table of Metropolitan New York, Inc. (A.R.T.) is a not-for-profit organization representing a diverse group of more than 700 archivists, librarians, and records managers in the New York City metropolitan area. It is one of the largest local organizations of its kind in the United States with members representing more than 375 repositories. www.nycarchivists.org

About CJH: The Center for Jewish History (CJH) is one of the foremost Jewish research and cultural institutions in the world. It is home to five partner organizations—American Jewish Historical Society, American Sephardi Federation, Leo Baeck Institute, Yeshiva University Museum and YIVO Institute for Jewish Research—whose collections total more than 500,000 volumes and 100 million documents and include thousands of pieces of artwork, textiles, ritual objects, recordings, films and photographs. www.cjh.org

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