

**Society of American Archivists  
Council Meeting  
May 15 – 17, 2013  
Chicago, Illinois**

**Final Report: Summary of Activities Associated with  
SAA’s Strategic Priorities, FY 2006 – FY 2013  
(Prepared by SAA Staff Directors)**

In February 2005, the SAA Council embarked on a strategic planning journey that began with creation of a “radar screen” of 10 to 12 challenges or threats to the profession – disruptive forces that will likely have a significant impact on the profession and that could be harmful if not addressed. Council members narrowed that list to the three highest priorities, defined desired outcomes (i.e., what the world might look like if each issue were resolved), and then developed lists of concrete activities (i.e., what the Society might do) to achieve the desired outcomes.

Each year since then, the Council has reviewed the priorities and associated desired outcomes and measurable activities, sought member input on them, and revised them to address SAA’s ongoing concerns. Interestingly, the three priorities first identified in 2005 – technology, diversity, and advocacy/public awareness – remained at the top of SAA’s “radar screen” until a new strategic planning process was initiated in January 2013. **This is the final report on activities associated with SAA’s Strategic Priorities, FY 2006 – FY 2013.**

So that the Council might measure (to the extent possible) progress toward addressing the three highest-priority issues, following is a summary of activities directed to the three priorities that were accomplished between July 2005 and May 2013. **Activities that were specifically identified by the Council appear in red type.** Where a direct expense (i.e., not volunteer or staff time) was incurred in pursuing the activity, that expense is indicated.

Also included are “bricks and mortar” activities that address the strategic priorities in some way in such program areas as periodical and book publishing, workshop and annual meeting development, governance, and communications technology. These activities are included as an indication of the extent to which the priorities now permeate all of SAA’s programs, services, and products.

Technology:	Begins on page 2.
Diversity:	Begins on page 13.
Advocacy / Public Awareness:	Begins on page 20.
Other “Radar Screen” Issues:	Begins on page 31.
Other Items Related to Strategic Priorities:	Begins on page 35.

**Strategic Priority #1, Technology:  
Rapidly changing information technologies challenge archival principles, practices, and communication protocols, demanding effective leadership from the archives community to access, capture, and preserve records in all formats. [As of May 2010]**

**Desired Outcomes:**

1. SAA will provide education and training to its members to ensure that they are aware of relevant standards and adopt appropriate practices for appraising, capturing, preserving, and providing access to electronic records.
2. SAA will develop standards, or endorse appropriate standards developed by other organizations, to improve the appraisal, capture, and preservation of, and access to, born-digital records, and will promulgate those standards to the archives community.
3. SAA will make increasingly effective use of current and emerging technology in order to enhance communication with internal and external audiences and stimulate collaboration among its constituents. [Internal Radar Screen]

**Technology / FY 2013**

Held 45 DAS workshops, with more than 900 attendees. More than 600 individuals were pursuing the DAS certificate at year-end.

Completed development work to offer **course exams for all DAS offerings** and the first comprehensive DAS certificate examination in August 2013.

TRENDS IN ARCHIVES PRACTICE: This new, open-ended series of modules features brief, authoritative treatments—written and edited by top-level professionals—that fill significant gaps in archival literature. The goal of this modular approach is to build agile, user-centered resources. Each module will treat a discrete topic relating to the practical management of archives and manuscript collections in the digital age. Lots of modules are planned, and readers will be invited to mix, match, and combine modules that best satisfy their needs and interests. The first three modules were launched in February 2013. They have been clustered together in a volume titled *Archival Arrangement and Description* (edited with an introduction by Chris Prom and Tom Frusciano) and it is available in print, PDF, and EPUB formats. In addition, the individual modules—*Module 1: Standards for Archival Description* (Sibyl Schaefer and Janet Bunde), *Module 2: Processing Digital Records and Manuscripts* (J. Gordon Daines III), and *Module 3: Designing Descriptive and Access Systems* (Daniel Santamaria)—are available separately in PDF and EPUB formats.

The Council appointed a Communications Task Force in June 2012 to advise the Council “on practical ways to enhance SAA’s communications with a focus on three areas: intended audiences, content/messages, and tools/channels,” with a final report due in August 2013.

[Internal Radar Screen]

Launched “Off The Record” **leader blog** in September 2012 to provide a new forum for communication with members. [Internal Radar Screen]

Signed agreement with BiblioVault for sale and distribution of electronic books. First eBooks offered: *Archival Arrangement and Description; Module 1: Standards for Archival Description; Module 2: Processing Digital Records and Manuscripts; Module 3: Designing Descriptive and Access Systems; SAA Sampler Series: Law and Ethics; I, Digital: Personal Collections in the Digital Era*; and *Archives and Justice: A South African Perspective*.

“Archives on the Map: Using Historypin to Illustrate the Past and Engage the Public” (by Shannon Lausch and Chad Garrett) published in Jul/Aug 2012 *Archival Outlook*.

“A Year on Facebook: Liking and Learning” (by Nadia Nasr) published in Jul/Aug 2012 *Archival Outlook*.

History Heard: World War II Voices in the Digital World” (by Nicole Milano and Anthony Coccio) published in Jul/Aug 2012 *Archival Outlook*.

“Apps for Archivists” (by Megan Good) published in Sep/Oct 2012 *Archival Outlook*.

“Standard Procedure: Launching the EAC-CPF Pilot Project at Duke (by William Sexton) published in Sep/Oct 2012 *Archival Outlook*.

“DAS One Year Later” (by Solveig De Sutter) published in Nov/Dec 2012 *Archival Outlook*.

“Modules Herald New Publishing Initiative” (by Peter Wosh) published in Nov/Dec 2012 *Archival Outlook*.

“Using iPads in the Reading Room” (Jim Duran et al.) published in May/June 2013 *Archival Outlook*.

Various pieces in *In the Loop* (July 2012 – June 2013).

“Distribution and Consumption Patterns of Archival Moving Images in Online Environments” (by Karen F. Gracy) published in Fall/Winter 2012 *American Archivist*.

“Saving-Over, Over-Saving, and the Future Mess of Writers’ Digital Archives” (by Devin Becker and Collier Nogue) published in Fall/Winter 2012 *American Archivist*.

Book Reviews of *Preserving Digital Materials* (reviewed by Paul Conway); *I, Digital: Personal Collections in the Digital Era* (reviewed by David Kay); and *A Different Kind of Web* (reviewed by Lori Birrell) published in Fall/Winter 2012 *American Archivist*.

“When Archival Description Meets Digital Object Metadata: A Typological Study of Digital Archival Representation” (by Jane Zhang and Dayne Mauney) published in the Spring/Summer 2013 *American Archivist*.

## Technology / FY 2012

Provided “Archivists Toolkit™: Shortening the Path from Accession to Researchers” (webinar, July 7, 2011 / 300 attendees); “EAD Tips and Tricks: Repurposing EAD with XSLT” (webinar, July 21 2011 / 50 attendees); and “Digital Repositories” (July 25, 2011 / 33 attendees).

*The American Archivist* Reviews Portal launched. (July/August 2011)

President’s Message: “DAS: SAA’s New Digital Archives Specialist Program” (by Helen Tibbo) published in July/August 2011 *Archival Outlook*.

Created the Digital Archives Specialist (DAS) Subcommittee of the Committee on Education (Summer 2011). The Subcommittee met monthly via phone and in Chicago (January 26 - 27, 2012) to review DAS courses and exams.

Launched the SAA Standards Portal (August 2011). The Standards Committee, various component groups, and staff have worked together to identify standards to be endorsed and/or added to the portal, as well as update online proposal forms and review procedures.

Provided “Encoded Archival Description” (August 22 – 23, 2011 / 23 attendees); “New SAA Standard: Encoded Archival Context – Corporate Bodies, Persons, and Families” (EAC-CPF) (August 22, 2011 / 11 attendees); “Implementing DACS in Integrated Content Management Systems: Using the Archivists’ Toolkit™” (August 22 – 23, 2011 / 23 attendees); and “Preserving Digital Archives: Concepts and Competencies” (August 23, 2011 / 30 attendees). Provided “Managing Electronic Records in Archives and Special Collections” (September 8 – 9, 2011 / 26 attendees); “Encoded Archival Description” (September 15-16, 2011 / 18 attendees); and “Standards for Digital Archives” (webinar, September 29, 2011 / 125 attendees).

The Fundamental Change Working Group focused on short- and long-term publications product development, a modular approach to content, and distribution options that would include eBooks. (November 2011)

“Open Access Publishing and the Transformation of the *American Archivist* Online” (by Paul Conway and William E. Landis) published in *The American Archivist* (Fall/Winter 2011).

“Building Foundations for Digital Forensics” (by Sherry L. Xie) published in *The American Archivist* (Fall/Winter 2011).

“Using GIS to Manage Philadelphia’s Archival Photographs” (by Deborah Boyer et al.) published in *The American Archivist* (Fall/Winter 2011).

Review of *Digital Curation: A How-to Do-It Manual* published in *The American Archivist* (Fall/Winter 2011).

“Adventures in Digital Curation” (by Amanda Keys) published in Sept/Oct 2011 *Archival Outlook*.

“Terabytes and Beyond: NARA’s Electronic Records Archives” (by Megan Phillips, David Lake, and Deborah Steel) published in Nov/Dec 2011 *Archival Outlook*.

“Setting the Standard: Archival Standards, Guidelines, and Best Practices Portal Launched” (by Marcy Flynn and Cory Nimer) published in Nov/Dec 2011 *Archival Outlook*.

“Facebook Me, Then Follow Me on Twitter: Documentation Strategies in a Social Media World” (by Janet Olson, et al.) published in Nov/Dec 2011 *Archival Outlook*.

“Archives on the Go: Learn How Mobile Technologies Are Being Used to Promote Collections” (by Aimee Morgan) published in Nov/Dec 2011 *Archival Outlook*.

“Keep Cool with Wireless Environmental Monitoring” (by Evan Lubofsky, Terence S. Badger) published in Jan/Feb 2012 *Archival Outlook*.

**Communications Technology Working Group held Social Media Forum at 2011 Annual Meeting, analyzed findings, presented a report to the SAA Council in January 2012.**

Provided “Digital Curation: Creating an Environment for Success” (January 18, 2012 / 35 attendees) and “Information Architecture for Electronic Records” (webinar, February 9, 2012 / 120 attendees).

Provided “Basic Electronic Records” (March 2, 2012 / 22 attendees); “Preserving Digital Archives: Concepts and Competencies” (March 13, 2012 / 17 attendees); “Managing Electronic Records in Archives and Special Collections” (March 15-16, 2012 / 19 attendees); and “New SAA Standard: Encoded Archival Context – Corporate Bodies, Persons, and Families” (EAC-CPF) (March 23, 2012 / 13 attendees).

“Archives in a New Context: The LBJ Presidential Library Debuts a Multimedia Blog” (by Liza Talbot) published in Mar/Apr 2012 *Archival Outlook*.

“Become the Next Webinar Developer” (by Jennifer Johnson) published in Mar/Apr 2012 *Archival Outlook*.

Provided “Basic Electronic Records” (April 18, 2012 / 28 attendees); “Basic Electronic Records” (April 24, 2012 / 36 attendees); and “Digital Curation: Creating an Environment for Success” (April 26, 2012 / 31 attendees).

**Expanded DAS Subcommittee by two members to accommodate workload associated with program growth. (April 2012)**

Work begun on adding search-optimization to online bookstore. (April/May 2012)

Interviewed vendors for conversion/distribution of eBooks. (April-June 2012)

Provided “Digital Archives and Libraries” (June 14, 2012 / 21 attendees); “New SAA Standard: Encoded Archival Context – Corporate Bodies, Persons, and Families” (June 15, 2012 / 13 attendees); “Inreach and Outreach for Digital Archives” (June 15, 2012 / 20 attendees); “Digital Curation: Creating an Environment for Success” (June 15, 2012 / 20 attendees); “Using and Understanding PDF/A as a Preservation Format” (webinar, June 29, 2012 / 200 attendees); and “Digital Forensics for Archivists” (June 29, 2012 / 35 attendees). [Attendee figures as of May 22, 2012.]

“Providing Virtual Services to All: A Mixed-Method Analysis of the Web Site

Accessibility of Philadelphia Area Consortium of Special Collections Libraries (PACSCL) Member Repositories” (by Lora J. Davis) published in *The American Archivist* (Spring/Summer 2012).

“Leveraging Encoded Archival Description” (by Jody L. DeRidder) published in *The American Archivist* (Spring/Summer 2012).

Deployed RSS feeds in Drupal. (May 2012)

Standards Committee commenced review of ISO 16363 (“Space data and information transfer systems—Audit and certification of trustworthy digital repositories”) for possible endorsement by SAA. (May 2012)

“Digitizing the American Black Journal News Program” (by Jesse A. Johnston) published in May/June 2012 *Archival Outlook*.

“CoSA Initiative to Improve Management of Government Electronic Records” published in May/June 2012 *Archival Outlook*.

## Technology / FY 2011

Provided “Style Sheets for EAD: Delivering Your Finding Aids on the Web” (July 7-8, 2010 / 17 attendees); “Managing Electronic Records in Archives and Special Collections” (August 9-10, 2010 / 38 attendees); and two half-day presentations of “Introduction to Basic Imaging: How to Do a Small Digitization Project” (August 9, 2010 / 40 attendees).

Published in the July/August 2010 issue of *Archival Outlook*: “Building Optimal Web Traffic” by Jeanne Kramer-Smyth.

2010 SAA Research Forum addressed a variety of digital initiatives. Research forum presentations (both platform and poster) were published in online proceedings on the SAA website. (August 2010)

Created the Digital Archives Continuing Education Task Force (DACE) of the Committee on Education. (Summer 2010) DACE Task Force met to create the outline of a structured curriculum for digital archives continuing education, including details for making the curriculum a reality. (October 2010)

Provided “Digital Archives and Digital Libraries” (September 28, 2010 / 17 attendees) and “What Is EAC-CPF?” a Web seminar (October 28, 2010 / 41 sites with approximately 202 attendees).

Completed project to digitize 242 back issues of *American Archivist*. (August 2010) [2007 = \$6,075; 2008 = \$2,054; 2009 = \$20,927; 2010 = \$48,502; total expense = \$77,558. Grant totaling \$12,000 received from Gladys Kriebel Delmas Foundation in November 2009.]

Published in the Fall/Winter 2010 issue of *American Archivist*: “Modes of Seeing: Digitized Photographic Archives and the Experienced User” by Paul Conway; “Due Diligence, Futile Effort: Copyright and the Digitization of the Thomas E. Watson Papers” by Maggie Dickson; and reviews of the books *Web 2.0 Tools and Strategies for Archives and Local History* and *Copyright and Cultural Institutions: Guidelines for Digitization for U.S. Libraries, Archives, and Museums*.



Published in the November/December 2010 issue of *Archival Outlook*: SAA President's message on Best Practices Exchange, with theme of "Libraries and Archives in the Digital Era"; "How to Harvest Social Networking Sites" by Jennifer Ricker and Amy Rudersdorf; and "Successes and Challenges of the Montana Digital Newspaper Project" by Molly Kruckenberg.

The Council adopted Encoded Archival Context – Corporate Bodies, Persons, and Families (EAC-CPF) as an SAA Standard and created a Technical Subcommittee on EAC-CPF of the Standards Committee. (January 2011)

Provided "Managing Electronic Records in Archives and Special Collections." (January 27-28, 2011 / 18 attendees); "Encoded Archival Description" (January 27-28, 2011 / 25 attendees); "Electronic Records: The Next Step" web seminar (January 27, 2011 / 18 attendees).

Published in the January/February 2011 issue of *Archival Outlook*: "Born Digital: How Washington State Created State-of-the-Art Digital Archives" by F. Gerald Handfield and Larry Cebula.

Published in the March/April 2011 issue of *Archival Outlook*: "Lending a Hand: Collaboration Helps Humble Shops Undertake Large-Scale Digitization Projects" by Alexis Braun Marks and Andrea Ellis Weddle and "You Are Here: North Carolina Maps Project Injects Interactivity in Online Collections" by Nicholas Graham.

Applied for and received grant of \$4,000 from the Gladys Kriebel Delmas Foundation to support development of Standards Web Portal in Drupal. (April 2010) [Internal Radar Screen]

Provided "Managing Electronic Records in Archives and Special Collections" (April 1-2, 2011 / 25 attendees) and "Encoded Archival Description" (April 26-27, 2011 / 23 attendees).

2011 SAA election conducted via online voting for the third year. (March 11–April 11, 2011).

Published in the Spring/Summer 2011 issue of *American Archivist*: The 2010 Theodore Calvin Pease Award-winning paper, "Archives on the Internet: Representing Contexts and Provenance from Repository to Website" by Emily Monks-Leeson; "What Is the Meaning of 'Archives 2.0'?" by Kate Theimer; "Using Web Analytics to Improve Online Access to Archival Resources" by Christopher J. Prom; "Preserving the H-Net EMail Lists: A Case Study in Trusted Digital Repository Assessment" by Lisa Schmidt; and a review of the book *Web 2.0 Tools and Strategies for Archives and Local History Collections*.

Provided "Managing Electronic Records in Archives and Special Collections" (May 2-3, 2011 / 18 attendees) and "Archon: Making It Work for You," a Web seminar (May 12, 2011 / 50 sites and approximately 300 attendees).

Committee on Education approves DACE Task Force recommendation for the Digital Archives Specialist (DAS) program. (Spring 2011)

Completed development of Phase II Drupal projects, including Standards Web Portal, Consultants Directory, Organic Groups – all of which are intended to enhance communication with internal and external audiences. [\$89,770] [Internal Radar Screen]

## Technology / FY 2010

Provided “Managing the Digital University Desktop,” a one-day workshop exploring the electronic records training tools from the Digital University Desktop (MDUD) project and strategies for training employees to manage their email and other electronic records. (July 17, 2009 / 16 attendees)

Provided Electronic Records “Summer Camp,” an intensive 5-day, hands-on workshop in which participants are introduced to electronic records and the components of an electronic records program. (In collaboration with UNC, NARA, and the University of Maryland, July 27-31, 2009 / 18 attendees)

SAA on Facebook. (August 2009) [Internal Radar Screen]

Published *The Interactive Archivist: Case Studies in Utilizing Web 2.0 to Improve the Archival Experience* by J. Gordon Daines III and Cory Nimer. (August 2009)

2009 SAA Research Forum addressed a variety of digital initiatives. Research forum presentations (both platform and poster) were published in online proceedings on the SAA website. (August 2009)

Provided “Implementing DACS in Integrated Content Management Systems: Using Archon” workshop (August 10-11, 2009 / 25 attendees); “Style Sheets for EAD – Delivering Your Finding Aids on the Web” (August 10-11, 2009 / 16 attendees); “Understanding Digital Scanner and Camera Imaging Performance” (August 10, 2009 / 17 attendees); “Big E-Reference on a Little Budget,” a half-day workshop exploring the use of tools that allow archivists to share information with patrons online. (August 11, 2009 / 11 attendees); and “Achieving Email Account Preservation with XML,” a half-day workshop offered four times. (August, November, December 2009 / 80 attendees)

As a proof of concept, recorded and published via Facebook videos of appropriate 2009 Annual Meeting sessions (August 2009) [\$5,985] [Internal Radar Screen]

Provided “Introduction to Web 2.0...Or What You Need to Know in a Nutshell,” a Web seminar. (October 13, 2009 / 28 sites, 168 attendees)

Applied for and received grant of \$12,000 from Gladys Kriebel Delmas Foundation to subvent digitization of *American Archivist* backfile. (November 2009) [Internal Radar Screen]

Adopted for distribution: *Copyright and Cultural Institutions: Guidelines for Digitization for U.S. Libraries, Archives and Museums* by Peter Hirtle et al. and *Electronic Records in the Manuscript Repository* by Elizabeth Dow. (December 2009)

*American Archivist* backfile digitized and launched online (1938 to date). (2009/2010) [Internal Radar Screen]

Appointed a Communications Technology Working Group (formerly the Website Working Group) to advance efforts to “provide an effective online mechanism to share news and information about existing or developing best practices and standards for electronic records, imaging, and metadata, including commentary on such practices and standards.” (March 2010)



Provided “Basics of Managing Electronic Records...Getting You Started,” a Web seminar. (March 30, 2010 / 62 sites, 200 attendees)

Launched new website content management system, Drupal (April 2010) [\$63,800] [Internal Radar Screen]

Provided “Digital Libraries and Digital Archives” workshop. (April 30 / 29 attendees)

*American Archivist* featured articles on “Long-Term Preservation of Digital Records: Trustworthy Digital Objects” by Henry Gladney and “Managing Electronic Records in Manuscript Collections” by Michael Forstrom (Fall/Winter 2009); “College and University Electronic Records Management (ERM) Programs: Then and Now” by Lisl Zach and Marcia Peri and “Digitization as a Preservation Method for Damaged Acetate Negatives: A Case Study” by Laura Capell (Spring/Summer 2010).

Communications Technology Working Group met in Chicago to develop functional specifications for a technology standards portal. (June 2010) [~\$3,250]

Provided “Disaster Planning for Electronic Records,” a Web seminar. (June 22, 2010)

## Technology / FY 2009

2009 Annual Meeting Call for Proposals: “Sustainability is also a framing concept for conversations that archivists are having within the profession and with their resource allocators: How to manage change now, how to grow our programs to meet complex information ecologies, and how to nourish ourselves professionally to thrive in the unfolding information environment. Today’s archival holdings exist within environments in which recorded information is swiftly becoming more compressed, wired, and remote. Organizations are constantly redesigning their communications infrastructure to stay in sync with external change while preserving their essential mission and values.”

Provided two offerings of Electronic Records “Summer Camp,” an intensive 5-day, hands-on workshop in which participants are introduced to electronic records and the components of an electronic records program. (In collaboration with SDSC, NARA, and the University of Maryland, July 7-11 and August 4-8, 2008)

**Technology Best Practices Task Force reported:** “We discussed some of the issues surrounding our charge to ‘identify competencies and standards and collect, review, and clarify best practices relating to all areas of archival practice that are affected by electronic records and digital asset issues.’ We are finding that there are currently few, if any, true best practices for electronic records. We are reviewing the resource list we compiled last year and will refine it to focus on standards and practices in use.... We used our methodology for identifying common and best practices to compile a draft report on Commonalities of Policy for Managing E-mail Records and will shortly send it out to a selected group of archivists and organizations actively managing email in ongoing programs.” (August 2008 report to the Council)

Provided “Implementing DACS in Integrated Content Management Systems: Using the Archivists’ Toolkit™” workshop (August 2008, October 2008, January 2009 / 94 attendees); “The Essentials of Digital Repositories,” a one-day workshop that focuses on defining, selecting,

and implementing digital repositories (August 2008, 37 attendees); and “Implementing DACS in Integrated Content Management Systems: Using Archon” (September 2008 / 25 attendees).

Published in the September/October issue of *AO*: “Digitizing Entire Collections in Georgia” (Minchew) and “Working in a Digital World: Suggested Guidelines” (Troup).

Provided “Digital Libraries and Digital Archives” (October 2008 / 28 attendees); “Basic Electronic Records” (November 2008 / 13 attendees); and “Digital Objects Modeling and Representation: Using the Archivists’ Toolkit™” (November 2008 / 17 attendees).

Publications Board issued request for proposal for books on Web 2.0. (*AO*, website, *Online News*, Annual Meeting, Jul/Aug 2008) and approved proposals for *The Interactive Archivist: Case Studies in Utilizing Web 2.0 to Improve the Archival Experience* (Daines/Nimer) and *A Different Kind of Web: New Connections Between Archives and Our Users with Web 2.0* (Theimer). (November 2008)

**Technology Best Practices Task Force final report:** “We surveyed the websites of institutions and organizations, SAA instructional materials, reports to granting agencies, some laws and policies, and bibliographic databases looking for practices that would give us a place to start. We found some standards, many reports on projects, some policies, and a few practices. In most cases, organizations have not made their practices publicly available. We feel that best practices simply have not emerged yet in most areas of electronic records and digital asset management.” Task Force then recommends that: “The Standards Committee chair create working groups to identify common practices and best practices in focused areas of electronic records and digital asset management.....” (Agenda Item III.A., February 2009 Council agenda)

## Technology / FY 2008

Publications Board approved proposal for *Archives in the Digital Age* (Gilliland). (August 2007)

**Technology Best Practices Task Force reported:** “We have completed our initial survey of available resources and have compiled a draft list of best practices, guidelines, reports, publications, and other resources. The draft, *Managing Electronic Records and Assets: A Bibliography*, will be posted on the SAA website prior to the Annual Meeting so that members can begin using it and contributing to it.... The next steps for the task force are as follows: 1) Incorporate feedback (Sep-Dec 2007); 2) implement a new listserv in conjunction with SAA’s migration to new listserv software (Fall 2007); 3) explore possible collaboration with a group that is looking at how best to make archives case studies more available (Sep-Oct 2007); 4) improve the appearance and navigation of the site. This work would include some basic Web design and enhanced annotation. We hope to be able to recruit library school students for this work (Oct 2007-May 2008). (August 2007 report to the Council)

Published “Interaction in Virtual Archives: The Polar Bear Expedition Collection Next Generation Finding Aid.” (Krause and Yakel, AA, Fall/Winter 2007)

*Campus Case Studies*, user-generated and timely online posting of ongoing digital projects at college and university archives, debuted on SAA website. Eleven case studies posted to date. (January 2008)

**Technology Best Practices Task Force reported:** “The *Managing Electronic Records and Assets: A Bibliography* website went live just before the SAA Annual Meeting. (See <http://www.archivists.org/saagroups/bptf/index.asp>) We posted a message to the SAA Leader List requesting feedback from SAA groups and members and sent a message to the ARMA members for comment. A number of constructive suggestions were received and are being incorporated into the website.... Our work going forward consists of two phases: 1) completing our charge to survey and report out current best practices, and 2) make a recommendation to the SAA Council for the future of this resource.” (February 2008 report to the Council)

Published “iRODS Offers Open-Source Approach to Managing Data.” (Tooby, *AO*, May/June 2008)

**Technology Best Practices Task Force reported:** “The Task Force reviewed several guidelines for identifying best practices. This process caused us to revise the next steps outlined in the previous report. We have better defined ‘best practices’ in the context of our charge and drafted criteria for selecting practices for inclusion in the site. This work has been written up as a draft statement of Scope, Methodology, and Criteria.... A subgroup has started to identify knowledgeable groups and individuals (including SAA Sections and Roundtables), which we will contact for input on how well the best practices identified by the Task Force meet the criteria outlined above and to suggest practices and sources of practices that the Task Force may have overlooked. Another subgroup is testing the draft scope, methodology, and criteria by working to identify best practices for email based on policy statements and guidelines published on the Web.... The next steps for the Task Force: 1) complete and review the pilot on email (June 30); 2) present the pilot and draft scope, methodology, and criteria to identified groups and individuals for comment (July 1-Aug 30); 3) revise the pilot and publish it on the Web (Fall 2008); and 4) make a recommendation to the SAA Council on how to proceed in light of what we have learned (Fall 2008).” (May/June 2008 report to the Council)

Provided “Managing the Digital University Desktop,” a one-day workshop exploring the electronic records training tools from the Digital University Desktop (MDUD) project and strategies for training employees to manage their email and other electronic records (August 2007 / 26 attendees); “Advanced Electronic Records” (August 2007 / 40 attendees); “Digitization Matters,” a one-day symposium (in collaboration with OCLC) (August 2007 / 202 attendees); “Implementing DACS in Integrated Content Management Systems: Using the Archivists’ Toolkit™” (March 2008 / 8 attendees); “Building Digital Collections” (May 2008 / 30 attendees); “A Beginner’s Guide to Metadata” web seminar (May 2008 / 33 sites; 235 attendees; 16 online, on-demand registrations); “Basic Electronic Records” (June 2008 / 13 attendees); “Digitization of Archival Materials” (June 2008 / 25 attendees); and “Introduction to Digital Libraries and Digital Archives” (June 2008 / 27 attendees).

## Technology / FY 2007

Published “New Skills, New Knowledge, and New Attitude for a Digital Era.” (President’s Column, *AO*, Jul/Aug 2006)

Published “Toward the Appraisal of Web Records.” (Thomas Brown, *AO*, Jul/Aug 2006)

Provided “Working Together: A Workshop for Archivists, Records Managers, and Information Technologists,” a two-day pre-conference workshop emphasizing teamwork in addressing electronic records and archives at institutions. (July 2006 / 13 attendees)

Provided first offering of **Electronic Records Summer Camp**, an intensive 5-day, hands-on workshop in which participants are introduced to electronic records and the components of an electronic records program. (In collaboration with the San Diego Supercomputer Center, NARA, and the University of Maryland) (August 2006 / 25 attendees)

DC 2006 Plenary II featured Pearce-Moses's Presidential Address, "Janus in Cyberspace: Archives on the Threshold of the Digital Era," and remarks by Internet Archive founder Brewster Kahle. (August 2006)

Provided IT Series course: "Digital Libraries and Digital Archives." (October 2006 / 35 attendees)

Provided "Building Digital Collections" workshop. (October 2006 and April 2007 / 59 attendees)

Appointed a **Technology Best Practices Task Force** to "work with appropriate groups to identify, collect, and assess best practices in all areas of archival practice that are affected by electronic records and digital asset issues." The task force was directed to compile an annotated bibliography and/or summary report for posting on the SAA website. (December 2006)

Provided "Electronic Records: Preservation Options of PDF" web seminar (Huth) (February 2007 / 181 sites; 1,000 people; 49 online, on-demand registrations) and "Basic Electronic Records Management" workshop (March 2007 / 15 attendees).

Published "Janus in Cyberspace: Archives on the Threshold of the Digital Era," Pearce-Moses's Presidential Address. (AA, Spring/Summer 2007)

Provided "Thinking Digital: A Practical Session to Help You Get Started" web seminar (Colatis). (June 2007 / 40 sites; 120 attendees; 34 online, on-demand registrations)

Publications Board approved proposal for *Electronic Records Management* (Bantin). (May 2007)

## Technology / FY 2006

Provided "EAD Tips and Tricks: Converting Data Between MARC and EAD" Web seminar (July 2005 / 46 sites; 175 attendees; 13 online, on-demand registrations) and "Building Digital Collections," a one-day workshop offering an overview of basic decisions that must be made before starting and developing digital collections and a digital collection repository program (August and September 2005 / 60 attendees).

Published in September/October 2005 issue of *Archival Outlook*: "An Archivist's Response to the Digital Era" and "What Must Archivists Do to Remain Vital and Essential in the Digital Era," in which Pearce-Moses encouraged readers to discuss with colleagues what they think are the new skills that archivists need in the digital era and to share their ideas via *AO*.

Published in the November/December 2005 and March/April 2006 issues of *Archival Outlook*: "PAT Project Lessons Learned: Archivists' Perspectives" (parts 1 and 2) reporting on the Persistent Archives Testbed Project whose goal is to "conduct case studies that test the feasibility of using data grid technology to manage electronic records, with archival and technological functions practically and appropriately allocated in a distributed network."

Provided “Archival Perspectives in Digital Preservation,” a two-day workshop that connects fundamental archival principles and the idea of digital preservation as it has evolved since 1996 (November 2005 and April 2006 / 56 attendees); “Basic Electronic Records Management” workshop (January and May 2006 / 63 attendees); two IT Series courses: “Understanding Web Technologies” and “Networking and Telecommunications for Archivists” (March 2006 / 12 attendees); and two additional IT Series courses: “Digitization of Archival Materials” and “Digital Libraries and Digital Archives” (May 2006 / 50 attendees).

Published in the May/June 2006 issue of *Archival Outlook*: “Becoming an Archivist in the Digital Era” (Pearce-Moses President’s Column) and “Archival Science and Archival Engineering: Building a New Future for the Past” (“The archives of the future will not be a physical building, but a virtual repository in cyberspace that will preserve and provide reliable access to all types of authentic electronic records without regard to any specific hardware or software”) by Ken Thibodeau.

Supported the “New Skills for a Digital Era” colloquium (May/June 2006), held in conjunction with NARA and the Arizona State Library, Archives, and Public Records, and published the proceedings (edited by Pearce-Moses and Susan Davis) via the SAA website when they became available in 2008.

## **Strategic Priority #2, Diversity:**

**The relevance of archives to society and the completeness of the documentary record hinge on the profession’s success in ensuring that its members, the holdings that they collect and manage, and the users that they serve reflect the diversity of society as a whole. [As of May 2010]**

### **Desired Outcomes:**

1. The Mosaic Scholarship will evolve into a program that encompasses a broad set of activities, including conference attendance, enhanced mentoring, and cohort development, and the number of Mosaic Scholarships that SAA (and/or the SAA Foundation) offers will increase to ten by FY 2013.
2. Identify and promote existing models and develop new methods for assisting archives and archivists to diversify the documentary record within their repositories and to promote archives to diverse communities.
3. In cooperation with appropriate communities, develop SAA guidelines and resources on managing cultural property that will assist the broader archives community in dealing with cultural property issues.
4. SAA will adopt a Statement on Diversity, develop new programs, and enhance existing programs that promote diversity as a value while fostering an organizational environment of inclusiveness.

## Diversity / FY 2013

The Diversity Committee issued a call for diversity case studies to begin populating the Committee's microsite with information about "unique efforts to collect and document a variety of individuals, groups, and organizations." As noted in the call, "These case studies will be made available on SAA's website so that archivists, other information professionals, teachers, and communities can use them as resources and references."

The Institute of Museum and Library Services will fund the \$487,000 proposal from SAA and the Association of Research Libraries to collaborate on expansion and enhancement of SAA's Mosaic Program. Implementation of the grant begins in June 2013.

"Finding Puerto Rico's Past: Digitization Project Provides Insights into Puerto Rican History" (by Suzanne Zack and Marisol Ramos) published in Sep/Oct 2012 *Archival Outlook*.

"Bridge Over Troubled Water: How the Archivists and Archives of Color Roundtable Created Change at the Center for Black Music Research" (by Steven D. Booth) published in Nov/Dec 2012 *Archival Outlook*.

"In Real Time: Documenting the January 25, 2011, Uprising in Egypt" (by Stephen Urgola and Carolyn Runyon) published in Nov/Dec 2012 *Archival Outlook*.

"Coloring Outside the Lines: Tattoos as Personal Archives" (by Rand Jimerson) published in Nov/Dec 2012 *Archival Outlook*.

"Diversity in the Historical Record: Increasing African American Collections in the Southwest" (by Donna Guerra) published in Nov/Dec 2012 *Archival Outlook*.

"What to Do About Privilege: Reflections on Diversity from One Archivist's *Beyond Borders* Experience" (by Adrienne Harling) published in Nov/Dec 2012 *Archival Outlook*.

"Outreach in Oregon: Tribal Archives Institute Breaks New Ground" (by Anne Hartman) published in Jan/Feb 2013 *Archival Outlook*.

"A Spot in History: Milwaukee Transgender Oral History Project Diversifies an Archives" (by Anne Hartman) "Outreach in Oregon: Tribal Archives Institute Breaks New Ground" (by Anne Hartman) published in Jan/Feb 2013 *Archival Outlook*.

"Becoming an Archivist of Influence: What the Mosaic Scholarship Means to Me" (by LaNesha Gale DeBardelaben) "Outreach in Oregon: Tribal Archives Institute Breaks New Ground" (by Anne Hartman) published in Jan/Feb 2013 *Archival Outlook*.

"The Beat Goes On: Tanzania Heritage Project" (Anne Hartman) published in May/June 2013 *Archival Outlook*.

Various pieces in *In the Loop* (July 2012 – June 2013).

"A Defense of Native Americans' Rights over Their Traditional Cultural Expressions" (by Kay Mathiesen) published in Fall/Winter 2012 *American Archivist*.



“Documenting Regional Latino Arts and Culture: Case Studies for a Collaborative, Community-Oriented Approach” (by Tracy B. Grimm and Chon A. Noriega) published in Spring/Summer 2013 *American Archivist*.

“Documenting Maryland Women State Legislators: The Politics of Collecting Women’s Political Papers” (by Elizabeth A. Novara) published in Spring/Summer 2013 *American Archivist*.

Review of *Tribal Libraries, Archives, and Museums: Preserving our Language, Memory, and Lifeways* (reviewed by Jonathan Pringle) and *Make Your Own History: Documenting Feminist and Queer Activism in the 21<sup>st</sup> Century* (reviewed by Elizabeth A. Novara) published in Spring/Summer 2013 *American Archivist*.

## Diversity / FY 2012

Publicized availability of and awarded Mosaic Scholarships (Helen Kim and Rose Chou), Forman Scholarship (Nidya Gonzalez), and Pinkett Minority Student Award (Kelly Lau and Melvin Collier). (August 2011)

Provided the third in a series of three annual forums to discuss *Protocols for Native American Archival Materials*. The 2011 Forum focused on “the future” with presentations on “The United Nations Declaration on the Rights of Indigenous Peoples, Human Rights, and the *Protocols*” (by Ally Krebs), “Potential Changes to the Language in the *Protocols*” (by Jennifer O’Neal), and “Inclusion of the *Protocols* in Archival Education Curricula” (by Kelvin White). (August 2011)

Translated the 2012 *Beyond Borders* Call for Proposals into Spanish and appended the translation to the conference website. (September 2012)

Conducted conference calls with Immediate Past President Helen Tibbo, Diversity Committee Chair Bergis Jules, and Association of Research Libraries Director of Diversity and Leadership Programs Mark Puente to explore alternatives for collaborating with ARL in applying for an IMLS grant to support development of the Mosaic Program. (November 2011 – May 2012)

“Crippling the Archives: Negotiating Notions of Disability in Appraisal and Arrangement and Description” (by Sara White) *The American Archivist* (Fall/Winter 2011).

“‘Picture Me Rollin’: Hip Hop and the Tupac Amaru Shakur Collection at Atlanta University Center” (by Courtney Chartier) published in Nov/Dec 2011 *Archival Outlook*.

“Digitizing the American Black Journal News Program” (by Jesse A. Johnston) published in May/June 2012 *Archival Outlook*.

## Diversity / FY 2011

Invited presentation by NARA’s V. Chapman-Smith, entitled “Achieving Positive Diversity Outcomes,” at 2010 Annual Meeting. (August 2010)

Provided the second in a series of three annual forums to discuss *Protocols for Native American Archival Materials*. The 2010 Forum focused on “what is happening with regard to use of the Protocols in actual situations.” The Forum was developed and led by a work group made up of

representatives from the Diversity Committee and the Native American Archives Roundtable. (August 2010)

Lanesha Debardeleben (Indiana University-Bloomington) and Susan Gehr (San Jose State University) were recipients of Mosaic Scholarships (funded out of the SAA operations budget); Miranda Rivers (Simmons College) and Vivian Wong (UCLA) were awarded Harold T. Pinkett Minority Student Scholarships; and Elaine Goh (University of British Columbia) received the Oliver Wendell Holmes Travel Award. (August 2010)

The Council adopted the “SAA Statement on Diversity.” (August 2010)

The Council approved a Standards Committee recommendation to endorse “Best Practices for Working with Researchers/Archives Employees with Physical Disabilities.” (August 2010)

The SAA office hosted two archivists from the Guangzhou Municipal Archives, China. (October 1, 2010)

Established with the General Commission on Archives and History of the United Methodist Church the Josephine Forman Scholarship to support minority students pursuing graduate education in archival science. One scholarship of \$10,000 to be awarded annually beginning in 2011. (November 2010)

The SAA office welcomed a delegation of 24 archivists from China who were in the U.S. as part of an exchange program with the Bentley Historical Library. The afternoon program was organized by SAA and Chicago Area Archivists. (November 9, 2010)

Published “Improving Accessibility for People with Disabilities” by Mark A. Greene in *Archival Outlook* (November/December 2010).

The Council approved a “vision statement” and proposed work plan for an expanded Mosaic Program designed to increase minority representation within the profession and SAA. (January 2011)

Published “Island Outreach: Establishing the National Archives Authority of Saint Lucia” by Margot Thomas in *Archival Outlook* (March/April 2011).

## Diversity / FY 2010

Janet Ceja (University of Pittsburgh) and Harrison Inefuku were awarded the first-ever Mosaic Scholarships (funded out of the SAA operations budget); Ricardo L. Punzalan (University of Philippines in Manila) received the Oliver Wendell Holmes Travel Award; and Krystal Appiah (UCLA) and I-Ting Emily Chu (New York University) were awarded Harold T. Pinkett Minority Student Scholarships. (August 2009)

Provided the first of a series of three annual forums to discuss *Protocols for Native American Archival Materials*. The 2009 Forum focused on ensuring that “the SAA membership had full opportunity to voice concerns about, support for, or any other views and opinions related to the Protocols and their relationship to SAA and to archives and archivists in general.” Forum was developed and led by a work group comprised of representatives from the Diversity Committee and the Native American Archives Roundtable. (August 2009)

Published *Guia para donar los registros de su organización a un depósito*, Spanish version of brochure introducing potential donors to the importance of donating organizational records to a repository. (September 2009)

Mary Caldera and Kathryn Neal signed contract with SAA to edit *Archives Diversity Reader*, with manuscript delivery date of September 15, 2010. (November 2009)

Eleven contributors to *Women's Archives Reader* signed publishing agreements with SAA. (Fall 2009)

Gottlieb solicited SAA group comments on American Library Association's draft "Traditional Cultural Expressions" document, synthesized comments, and forwarded SAA document to ALA. (January 2010)

*Archival Outlook* featured articles on "Strategies for Accommodating People with Physical Impairments and Disabilities in Archives" by Daria D'Areinzo and Debra Kimok (Nov/Dec 2009); "A Lasting Tribute: The San Antonio African American Funeral Program Collection" by T. Matthew De Waelsche (Jan/Feb 2010); "Archivists and Cultural Property" by Peter Gottlieb; "A Stamp in Time: Discovering a Love for Baseball and a Piece of African American History at the Negro Leagues Baseball Museum" by Jenny Schooley; "Someone You Should Know: Ervin L. Jordan Jr." (March/April 2010); and "Someone You Should Know: Louis Jones" (May/June 2010).

Twenty-five contributors to *Archives Diversity Reader* signed publishing agreements with SAA. (March 2010)

Provided "Understanding Photographs: An Introduction to Principles and Practices," at a loss in order to serve the needs of registrants from three Oklahoma tribes. (March 4-5, 2010 / 11 attendees)

*American Archivist* featured articles on "'Closing the Circle': Native American Writings in Colonial New England, a Documentary Nexus between Acculturation and Cultural Preservation" by Jeffrey Mifflin (Fall/Winter 2009) and "Documenting the Immigrant and Ethnic Experience in American Archives" by Dominique Daniel (Spring/Summer 2010).

## **Diversity / FY 2009**

The Council established the Mosaic Scholarship and agreed to fund up to two \$5,000 scholarships out of operations. (August 2008)

The Council charged the Diversity Committee and Native American Archives Roundtable to develop plan for Native American Protocols Forum at annual meetings in 2009, 2010, and 2011. (August 2008)

The Council created the Task Force on Cultural Property. (August 2008)

Published the 2008 Pease Award winner for best student paper: Mary Samouelian for "Embracing Web 2.0: Archives and the Newest Generation of Web Applications," slated for publication in the spring/summer issue of *American Archivist*. (May 2009)

Pursued appropriate photos to make Spanish-language brochure on organizational records available both in print and online. (May 2009)

Identified selected website content to translate into Spanish to create “welcome mat.”

## Diversity / FY 2008

The 2007 Annual Meeting featured Adkins’s Presidential Address, “Our Journey Toward More Diversity – And a Call to (More) Action.” (August 2007)

Greene issued call for all component groups to provide an update on their work related to diversity (December 2007) and reported to the Council (January 2008).

Appointed Task Force to Review Protocols for Native American Archival Materials, which issued call for comments on document. (December 2007)

Published “Access to Archives: The Japanese and American Practices,” papers from a JUSFC grant-sponsored conference held in Tokyo in May 2007. (SAA website, January 2008)

Council committed to Forum on Protocols for Native American Archival Materials at 2008, 2009, and 2010 Annual Meetings. (February 2008)

Published “Protocols for Native American Archival Materials.” (President’s Column, *AO*, Mar/Apr 2008)

Published “Our Journey Toward More Diversity – And a Call to (More) Action.” (Adkins Presidential Address, *AA*, Spring/Summer 2008)

Published “Diversity and the *American Archivist*: A Call for Papers” by Journal Editor Mary Jo Pugh. (*AA*, Spring/Summer 2008)

Translated donor brochure on personal papers into Spanish and made it available both online and in print. (August 2007)

Publications Board issued call for proposals for books on Diversity and Religious Archives (*AO* and website, Sep/Oct 2007) and approved proposal for *Diversity Reader* (Wurl/Caldera) which will examine: Why does diversity matter? What do we mean when we speak of diversity or lack of diversity in the archives? What does workforce diversity and diversity of archival collections and perspectives look like? (August 2007)

Appointed task force to develop criteria for awarding Minority Student (Mosaic) Scholarship. (October 2007)

Translated donor brochure on organizational records into Spanish. (June 2008)

## Diversity / FY 2007

Implemented Year 2 of NHPRC-funded grant for Tribal Archivists’ participation in DC 2006.

Provided “Ethnographic Archives, Communities of Origin, and Intangible Cultural Heritage,” a two-day symposium during DC 2006 that explored issues relating to managing, preserving, and providing access to multi-format collections, focusing on the special challenges posed by materials pertaining to Native American and indigenous communities. (August 2006 / 50 attendees)

Provided “The Lessons of Pilgrim Baptist Church: Preventing the Loss of Your Heritage,” a two-day workshop held in Chicago to address with “the community of churches” protecting church archives and records in the wake of the tragic fire that destroyed Chicago’s historic Pilgrim Baptist Church. (25 attendees, October 2006) Attempts to plan for a similar offering to the community of churches in Philadelphia did not go forward for various reasons.

Incorporated diversity reporting requirements into the SAA Council’s routine business, including setting aside time at each Council meeting for a report from the Council liaison to the Diversity Committee; requirement that the Vice President provide a demographic analysis of appointments made; and that the Program and Host committees include – report on – diversity considerations in programming and repository tours. (November 2006)

Published “Defining Diversity.” (President’s Column, *AO*, Nov/Dec 2006)

Appointed a task force to “produce specialized and bilingual promotional materials for college placement offices and fairs, with primary target audiences of Hispanic colleges and universities and historically Black colleges and universities.” (December 2006)

Staff developed for task force review a list of SAA’s current diversity-based efforts for possible inclusion in a website-based fact sheet. (December 2006)

Diversity Brochure Task Force Chair Leon Miller reported: Task force research indicated that college and university placement offices were not interested in receiving hard-copy promotional materials for distribution. Recommended that material be developed and posted on SAA website. (March 2007)

## **Diversity / FY 2006**

Began implementation of an NHPRC-funded grant that brought Native American and tribal archivists to the 2005 and 2006 SAA annual meetings via scholarships to “enable the continued development of Native American tribal archivists’ professional knowledge and access to a peer-assistance network in order to enhance their effectiveness in preserving and managing records held in tribal archives.” The Native American Archives Roundtable was petitioned for and approved at the 2005 Annual Meeting.

**Strategic Priority #3, Advocacy / Public Awareness:**  
**Archivists must take an active role in promoting the importance of archives and archivists in order to increase public support, shape public policy, and obtain the resources necessary to protect the accessibility of archival records that serve cultural functions as well as ensure the protection of citizens' rights, the accountability of organizations and governments, and the accessibility of historical records. [As of May 2010]**

**Desired Outcomes:**

1. By FY 2013, SAA will identify its public policy priorities in a legislative agenda that 1) describes each priority in an "issue statement" that defines the challenge and explains SAA's objectives related to it and 2) includes an action plan for accomplishing each public policy objective.
2. By FY 2013, SAA will have a greater understanding of key stakeholders' and audiences' level of awareness of archives and archivists and of the challenges that compromise archivists' ability to ensure the accessibility of the American historical record, and will use that information to craft public awareness plans going forward.
3. Using American Archives Month as one communication vehicle, plan and implement a public relations campaign, directed to the users of archives, whose goals are to 1) increase users' appreciation of archives; 2) continue to "brand" American Archives Month as a profession-wide opportunity to build public awareness; and 3) increase archivists' involvement in public awareness activities.

**Advocacy / Public Awareness / FY 2013**

Contributed to the National Coalition for History for advocacy representation. (July 2012 – June 2013) [\$11,000] Beaumont served as first non-historian chair of NCH from January 2011 through January 2013.

Beginning in December, participated actively in joint working group of the Council of State Archivists, National Association of Government Archives and Records Administrators, and SAA to develop strategies for pursuing issues and awareness priorities shared by the three organizations. Early work included drafting a statement regarding NHPRC funding priorities.

The SAA Council and/or its Executive Committee signed on to a variety of advocacy efforts and/or commented on the following issues:

- Funding for the National Archives and Records Administration and the National Historical Publications and Records Commission (July 2012 – May 2013);
- Archival and legal issues surrounding the Belfast (oral history) Project at Boston College (October 2012 – January 2013);



- Opposed provisions in the FY 13 Intelligence Authorization bill that would reduce access to information and threaten free speech rights (November 2012);
- Endorsed submission by the Intellectual Property Working Group of a response to the Copyright Office's Notice of Inquiry regarding Orphan Works (January 2013);
- Signed on to a letter thanking the House Oversight and Government Reform Committee for its February 4 letter to the Office of Information Policy (OIP) at the Department of Justice posing important questions regarding OIP's role in government-wide FOIA policy implementation, compliance, and enforcement (February 2013);
- Signed on to a letter asking President Obama to bring renewed attention to issues that continue to plague government-wide implementation, compliance, and enforcement of the FOIA (February 2013);
- Signed on to a letter urging the House Permanent Select Committee on Intelligence to fix a provision in the Cyber Intelligence Sharing and Protection Act (CISPA) that cuts off all public access to cyber threat information before the public and Congress have the chance to understand the types of information that are withheld under the bill, thus undermining the right to know under FOIA (March 2013);
- Signed on to a letter in support of a petition to the Food and Drug Administration (FDA) filed by Public Citizen regarding the FDA's FOIA deletions policy (March 2013);
- Signed on to a letter in support of reintroducing legislation, the Congressionally Mandated Reports Act, that will require the Government Printing Office to maintain a website that the public can use to search, sort and download all congressionally mandated reports for free (March 2013);
- Signed on to a letter urging President Obama to appoint a White House-led steering committee to spearhead classification reform, as recommended by the Public Interest Declassification Board (April 2013);
- Signed on to a letter in support of HR 1133, the Presidential Library Donation Reform Act, which was recently passed by the House Committee on Oversight and Government Reform and would require quarterly reporting of entities that have contributed large sums towards a presidential library (April 2013); and
- Signed on to a letter thanking the Department of Justice for providing data from its recently released report on FOIA cases filed and decided in the previous year in an open, machine-readable format, which is viewed as a major step toward more openness and accountability (April 2013).

### ***I Found It In The Archives! 2013:***

- Destination on SAA website: ([www2.archivists.org/initiatives/i-found-it-in-the-archives](http://www2.archivists.org/initiatives/i-found-it-in-the-archives));
- P.R. Kit ([http://files.archivists.org/advocacy/2012-13\\_IFIITA-PR-Kit.pdf](http://files.archivists.org/advocacy/2012-13_IFIITA-PR-Kit.pdf)).
- Twitter feed: #foundarch; messages tweeted on a regular basis.
- *Archival Outlook*: I Found It In The Archives! full-page ad (July/August 2012); "Fabulous Finds" by Anne Hartman (Sept/Oct 2012); "Participate in I Found It In The Archives!" in *Around SAA* (Jan/Feb 2013); and "I Found It In The Archives! National Contest to Kick Off in April" in *Around SAA* (Mar/Apr 2013).
- *In the Loop*: Steady stream of pieces with links to website running from July 2012 until June 2013 announcement of winner of the national contest.
- Promos posted to various listservs, including A&A and CoSA.
- Facebook: Messages posted on a regular basis.
- A letter encouraging participation was mailed to every state archivist.
- Press releases were prepared and disseminated for each of the five national contestants.

- The sponsoring institutions for each of the national contestants distributed the respective press release to their media contacts.
- Contestants offered to distribute the press release to local outlets (e.g., hometown newspaper, alma mater, etc.).
- *Off the Record* blog post by Teresa Brinati (April 18): “They found it!! Now help us spread the word ...”

“Embracing the Globe: Establishing a U.S. Chapter of Archivists Without Borders” (by Joel Blanco-Rivera et al.) published in Jul/Aug 2012 *Archival Outlook*.

“Inspired by Archives: Creating and Selling Archives Mementoes” (by Marianne Martin) published in Jul/Aug 2012 *Archival Outlook*.

“Fabulous Finds: Discover How You Can Participate in the 2013 *I Found It In The Archives!* Contest” (by Anne Hartman) published in Sep/Oct 2012 *Archival Outlook*.

“The Universal Declaration on Archives: New UNESCO-Endorsed Document Is a Powerful Archives Advocacy Tool” (by Kim Eberhard and Colleen McEwen) published in Jan/Feb 2013 *Archival Outlook*.

“Thinking Big: Launching a Statewide Collections Education and Advocacy Initiative” (by Dyani Feige and Katherine Magaziner) published in Mar/Apr 2013 *Archival Outlook*.

“White Gloves Sessions: Towson University Raises Awareness About Unique Collection” (by Nadia Nasr and Joyce Garczynski) published in Mar/Apr 2013 *Archival Outlook*.

Various pieces in *In the Loop* (July 2012 – June 2013).

“Archival Document Packets: A Teaching Module in Advocacy Training Using the Papers of Dick Thornburgh (Richard J. Cox et al.) published in Fall/Winter 2012 *American Archivist*.

“The Economic Impact of Archives: Surveys of Users of Government Archives in Canada and the U.S.” (by Elizabeth Yakel et al.) published in Fall/Winter 2012 *American Archivist*.

“Students as Donors to University Archives: A Study of Student Perceptions with Recommendations” (by Jessica Wagner and Debbi Smith) published in Fall/Winter 2012 *American Archivist*.

Review of *Many Happy Returns: Archival Advocacy and the Development of Archives* (reviewed by Jeremy Brett) published in Fall/Winter 2012 *American Archivist*.

## **Advocacy / Public Awareness / FY 2012**

Contributed to the National Coalition for History for advocacy representation. (July 2011 – June 2012) [\$12,500]

Conducted year 2 of the *I Found It In The Archives!* campaign, inviting SAA members to join in a collaborative effort to raise awareness about archives and archivists. Featured Archivist Martha Briggs of Chicago’s Newberry Library in a poster/flyer that was co-mailed with the July/August

issue of *Archival Outlook*, and online-only materials that included complete instructions and forms for conducting a local campaign. Completed the national campaign (with eight entries and 8,414 votes cast, compared with six entries and 1,153 votes cast). (July 2011 – May 2012) [\$8,020]

Published via the SAA website “Using Archives: A Guide to Effective Research” (by Laura Schmidt) and publicized its availability to members as “an excellent new resource from SAA for teaching the public about archives. It is designed for first-time archives users (and others who’ve already conducted research in archives). Share this resource with your users!” (July 2011)

Awarded the 2011 J. Franklin Jameson Advocacy Award (nominated by the Issues and Advocacy Roundtable) to the television program “Who Do You Think You Are?” for its “realistic and supportive presentation of archival work.” (August 2011)

Awarded the 2011 Council Exemplary Service Award to *The American Archivist* Editor Mary Jo Pugh (2006 – 2012), whose tenure saw publication of the journal online and digitization of the entire backfile of 242 issues, making it accessible worldwide.

“Advocacy Is . . . The Editor of *Many Happy Returns: Advocacy in the Development of Archives*, Offers a Few More Observations” (by Larry J. Hackman) in Mar/Apr 2012 *Archival Outlook*.

“Making a Splash: Tips to Help Your Archives Hit the Front Page” (by Dawn Youngblood) in May/June 2012 *Archival Outlook*.

The SAA Council and/or its Executive Committee signed on to a variety of advocacy efforts and/or commented on the following issues: funding for the National Archives and Records Administration and the National Historical Publications and Records Commission (July 2011 – May 2012); Research Works Act (H.R. 3699, February 2012); CIA decision to charge fees for opportunity to challenge secrecy claims (February 2012); CIA’s Mandatory Declassification Review process regulations (February 2012); various iterations of Cyber Intelligence Sharing and Protection Act of 2011 and Cybersecurity Act of 2012 proposed legislation (March – May 2012); New Jersey governor’s intent to separate the state’s archives and records management functions (March 2012); submitted a letter opposing the decision by the Canadian government to eliminate the National Archival Development Program and the Canadian Council on Archives (May 2012).

### **Advocacy / Public Awareness / FY 2011**

Contributed to the National Coalition for History for advocacy representation. (July 2010 – May 2011) [\$12,500]

Published in July/August issue of *Archival Outlook*: “Raising the Bar for SAA” by Peter Gottlieb, which addressed the new strategic plan and then-proposed dues increase as parts of a whole that are essential to SAA’s future.

Held contest for theme of SAA’s 75<sup>th</sup> Anniversary celebration in 2011. With more than 50 submissions, Rick Blondo of the National Archives snagged the prize with “SAA@75: Then, Now . . . WOW!” (July 2010)

Provided “Advocacy, Archives, and Archivists” pre-conference workshop by Kathleen Roe and David Carmicheal (August 10, 2010 / 50 attendees).

Awarded 2010 Council Exemplary Service Awards to David Carmicheal and Kathleen Roe for their advocacy efforts on the Joint Task Force on Preserving the American Historical Record (PAHR) since its inception in August 2006. (August 2010)

Awarded the 2010 J. Franklin Jameson Archival Advocacy Award to the Gladys Kriebel Delmas Foundation for its long-term support of and involvement in the archives profession’s work to address the challenges of managing, preserving, and providing access to archival records. (August 2010)

Awarded the 2010 Theodore Calvin Pease Award to Emily Monks-Leeson, a student at the University of Toronto, for her paper, “Archives on the Internet: Representing Contexts and Provenance from Repository to Website.” (August 2010)

Published in the September/October 2010 issue of *Archival Outlook*: “The Value of Public Archives: How Vermont State Archives Leverages Current Events,” by Gregory Sanford.

Provided “Archives Overview,” a one-day workshop developed for librarians, museum staff, administrators, and volunteers in small repositories with historical records and without archives training. (October 8, 2010 / 26 attendees)

Launched *I Found It In The ARCHIVES!* campaign, inviting SAA members to join in a common effort to raise awareness about archives and archivists. The campaign runs through August 2011. (October 2010) [\$9,015]

Published in the November/December 2010 issue of *Archival Outlook*: “Public ‘Crawls’ to Oregon’s Archives: An Innovative Idea to Raise Public Awareness of Archives” by Diana Banning.

Published the book *Many Happy Returns: Advocacy and the Development of Archives* edited by Larry Hackman. (January 2011).

Established a new department – Advocating for Archives – in January/February 2011 issue of *Archival Outlook*.

Published “Blog-a-thon Mania: Smithsonian Raises Awareness with Blog and Archives Fair” by Rachel Woody in January/February 2011 issue of *Archival Outlook*.

SAA Executive Director elected chair of the National Coalition for History’s Policy Board. (February 2011)

Published “Advocating for Archives” department in March/April 2011 *Archival Outlook*.

## **Advocacy / Public Awareness / FY 2010**

Contributed to the National Coalition for History for advocacy representation. (July 2009 – May 2010) [\$12,500]

Supported and publicized grassroots involvement in obtaining additional House co-sponsors of the “Preserving the American Historical Record Act” (HR 2256) and lead sponsors for introduction of S 3227 in the Senate (on April 19, 2010). Maintained PAHR pages with frequent updates on SAA website; assisted in implementing distribution of information to the profession via SAA groups. (July 2009 – June 2010)

Published *fourth* annual American Archives Month Public Relations Kit and poster (AAM 2009), with a special emphasis on “The Impact of Archives” (including “Make an Impact!” contest and survey to determine number of visits to archives in October 2009). (July 2009) [\$11,040]

Published *Orphan Works: Statement of Best Practices* by Intellectual Property Working Group. (July 2009)

Published *Archives Power: Memory, Accountability, and Social Justice* by Randall C. Jimerson. (August 2009)

Provided “Raising Private Monies to Support Archival Programs,” a half-day workshop. (August 11, 2009 / 23 attendees)

Government Affairs Working Group met to discuss subjects and formats for issue statements and to assign preparation of statements to working group members. (August 2009)

Published Boles’s Presidential Address: “But a Thin Veil of Paper.” (August 2009)

Published “Celebrate the American Record,” Peter Gottlieb’s President’s Message, in September/October 2009 issue of *Archival Outlook*. (Sep/Oct 2009)

Published “SAA Council Seeks Comment on Advocacy Agenda” in *Archival Outlook* and on the website. (Sep/Oct 2009)

SAA signed on to OpenTheGovernment.org letter praising Senator Patrick Leahy for his long-standing defense of the Freedom of Information Act.

Gottlieb attended Congressional hearing on nomination of David Ferriero to be Archivist of the United States. (October 2009) [\$1,200]

Larry J. Hackman signed contract with SAA to edit *Many Happy Returns: Advocacy and the Development of Archives*, with manuscript delivery date in 2010. (January 2010)

Gottlieb and Beaumont met with Archivist of the United States David Ferriero to discuss issues of mutual interest, including advocacy and public awareness. (January 2010) [\$1,100]

Published “American Archives Month ‘Make an Impact!’ Contest Winners” in *Archival Outlook* and on the website. (January/February 2010)

Working from an Intellectual Property Working Group draft, sent a letter to Intellectual Property Enforcement Coordinator who requested public comment on the costs that IP infringement imposes on the U.S. economy, the threat to public health and safety posed by IP infringement, and recommendations for a U.S. government strategic plan for dealing with IP infringement. (March 2010)

Gottlieb and Beaumont participated in monthly conference calls with Ferriero and other NARA staff to discuss items of mutual interest. (March – June 2010)

Beaumont attended meeting of National Coalition for History Policy Board to discuss PAHR, other advocacy priorities. (April 2010)

### **Advocacy / Public Awareness / FY 2009**

Contributed to the National Coalition for History for advocacy representation. (July 2008) [\$12,500]

Council created Government Affairs Working Group, charged to begin its work by drafting an advocacy agenda for Council approval. (August 2008)

Published online Frank Boles's remarks on advocacy at 2008 closing plenary session. (August 2008)

Published "Not the 'D' Word!": "...involvement in the political environment is not optional – it is fundamental to what we are called to do when we decide to become an archivist." (Boles, President's Column, *AO*, Sep/Oct 2008)

Published "American Archives Month Picture This! Contest Winners." (*AO*, Sep/Oct 2008)

Published "Archives in Tough Times": "As times get tougher, it's critical that we use our advocacy skills to remind those around us that archives matter." (Boles, President's Column, *AO*, Nov/Dec 2008)

Published call from Intellectual Property Working Group for member opinion on the Digital Millennium Copyright Act. (December 2008)

Refreshed the SAA website to update background information in anticipation of rallying the grassroots to advocate on behalf of NHPRC funding. (December 2008)

Sent letter to the director of the Office of Management and Budget to advocate for NHPRC funding. (January 2009)

With CoSA, NAGARA, and NCH representatives, met with the Obama transition team to discuss "A New Archivist of the United States: Qualities of a Successful Candidate," as well as perspectives on NARA. (January 2009) [\$1,800]

Sent "thank you" letter to President Obama upon learning of his overturn of EO 13233 and issuance of a memorandum to federal executive departments and agencies that "the Freedom of Information Act should be administered with a clear presumption: In the face of doubt, openness prevails." (January 2009)

**Maintained and enhanced PAHR pages on SAA website. (February 2009)**

### **Advocacy / Public Awareness / FY 2008**

Contributed to the National Coalition for History for advocacy representation. (July and November 2007) [\$10,000]



Published and distributed to all members via co-mailing with *Archival Outlook* the *second* annual American Archives Month Kit, “Celebrating the American Record” (AAM 2007), with basic public relations tips and a special section on “Celebrating the American Record with Young People” focusing on reaching out to students in elementary through high school. Per the Kit: “By informing students about the value and power of archives, you can: 1) help educate young people about the importance of preserving their own cultural heritage – thus contributing to the completeness of America’s documentary record; 2) help expand your repository’s user based; and 3) help “refresh” the graying archives profession by stimulating an interest in archives as a career. The mailing to members included one folded copy of an American Archives Month poster. Members were encouraged to share their events with others via the SAA website. (August 2007) [\$17,155]

Publicized winner of “Elevator Speech” contest associated with 2007 American Archives Month. (AO, website, *Online News*, Nov/Dec 2007 and ongoing) Elevator speech contest winner: Lisa Lewis of Catholic Diocese of Baton Rouge: “Archivists bring the past to the present. They’re records collectors and protectors, keepers of memory. They organize unique, historical materials, making them available for current and future research.”

Issued public statement on concerns about status of Iraq National Library and Archives, and sent letters raising the issue to the White House, appropriate Congressional committees, and the Department of Defense. (August 2007)

Sent letter to District of Columbia mayor and submitted op-ed to *Washington Post* (not published) regarding DC mayor’s mandate to purge city government emails after six months. (August 2007)

Issued Statement on Delay by Federal Government Agencies in Responding to FOIA Requests. (August 2007)

Published articles on American Archives Month 2007: “Celebrating the American Record: October Is American Archives Month!” (AO, Sep/Oct 2007) and “October Events Draw Visitors to Archives Nationwide” (AO, Nov/Dec 2007)

Worked with the Science, Technology, and Health Care and Privacy and Confidentiality roundtables to prepare and send comments to the Senate Health, Education, Labor and Pensions Committee about concerns with “HIPAA II” draft legislation that would restrict access and use of health information for purposes of research. (November 2007)

Posted background information and rallied the grassroots via the SAA website to participate in advocating on behalf of NHPRC funding. (February/March and June 2008)

Sent letter to United Nations Ambassador at Large for War Crimes regarding concern that records of several recent international tribunals established by the UN were in jeopardy. (February 2008)

Publications Board issued call for proposals for books on Outreach and Advocacy (AO and website, Sep/Oct 2007) and accepted proposal for *Many Happy Returns: Advocacy and the Development of Archives* (Hackman). (March 2008)

Rallied SAA members to write to Congress about the Artist-Museum Partnership Act. (March 2008)

Released statement, prepared jointly with the Association of Canadian Archivists, on the fate of records captured or otherwise obtained by the U.S., and those removed by private parties, during the first and second Gulf wars. (April 2008)

Published and distributed to all members via co-mailing with *Archival Outlook* the *third American Archives Month Kit*, “Celebrating the American Record” (AAM 2008), with basic public relations tips and a special section on “Celebrating the American Record with Photographs” focusing on both tips that archivists can use when working with photo collections and tips that they can pass on to patrons about preserving their family photos. The kit included one folded copy of a 2008 American Archives Month poster and supplemental online-only materials. Members were encouraged to share their events via the SAA website. Contest: 1) best Archives Month/Week poster or 2) best “successfully implemented Archives Month Campaign” or 3) best idea for celebrating American Archives Month. The kit was published in May in order that members would have time to plan for American Archives Month activities in October. (May 2008) [\$18,755]

Supported and publicized introduction of the “Preserving the American Historical Record Act” in the U.S. House of Representatives (May 14, 2008). Maintained PAHR pages with weekly updates on SAA website.

Following notification from Lee White of NCH that SAA could provide comments at an oversight hearing on NARA/NHPRC, worked to find someone to testify and then assisted former Maine state archivist Jim Henderson in preparing and delivering comments at the hearing. (May 14, 2008) [\$1,200]

Issued draft of Intellectual Property Working Group’s “Orphan Works: Statement of Best Practices” to Congressional staffers working with House and Senate draft legislation on orphan works. (May 2008)

Commented on U.S. Department of Education proposed rule changes to the Family Educational Rights and Privacy Act, and specifically on the fact that the lack of clear statement in the definition of “Eligible Student” regarding the effect of death upon FERPA privacy rights often leads to confusion and inconsistent policies among institutions that hinder the public’s search for historical information. (May 2008)

Sent letter to Office of Deputy USD for Laboratories and Basic Sciences regarding concerns about the review process that was to be put in place to select from proposals submitted to Minerva Research Initiative, and specifically requesting that a trained archivist be included on the evaluative panel. (June 2008)

Submitted letter to National Endowment for the Humanities executive director expressing concerns about cuts in archives-related programs.

Celebrated Maureen Dowd’s characterization of archivists as “the new macho heroes of Washington.” (August 2007)

Participated in a lawsuit, led by Citizens for Responsibility and Ethics in Washington (CREW), to require Vice President Richard Cheney to preserve all records related to his office and official duties. Cheney was ordered by Judge Colleen Kollar-Kotelly to preserve his records (September 23, 2008), but ultimately the judge found in favor of Cheney et al. (December 2008)

## Advocacy / Public Awareness / FY 2007

Contributed to the National Coalition for History for advocacy representation. [\$7,000]

Posted background information and rallied the grassroots via the SAA website to participate in advocating on behalf of NHPRC funding.

DC 2006 Plenary I featured public awareness and advocacy, with CoSA President David Carmicheal and C-SPAN founder Brian Lamb. (August 2006)

Sponsored SAA President's advocacy reception at DC 2006. [\$1,700]

Published and distributed to all members via first-class mail the *first* American Archives Month Kit, "Celebrating the American Record" (AAM 2006) with basic information on communication planning, ideas for reaching out to your community, talking points, four easy steps for developing a successful Archives Month event, creating and maintaining good media relations, and other general public relations tips. Members were encouraged to share their events with others via the SAA website. (September 2006) [\$11,400]

SAA President spoke at public hearing on a proposed reduction in NARA's reading room hours (August 2006) and thereafter submitted written comments. (September 2006)

Published "October Is American Archives Month!" (AO, Sep/Oct 2006)

Published "American Archives Month in Review: Posters, a Bell Ringer, and More..." (AO, Nov/Dec 2006)

Appointed an American Archives Month Task Force to "create a short-term communication plan for American Archives Month 2007 and a longer-term strategic direction for future years' events." (December 2006)

Appointed two SAA members to a Joint Task Force to Advocate for the Partnership for the American Historical Record. Task force members developed and distributed an advocacy plan for PAHR. (December 2006)

Working with the Joint Task Force on PAHR, drafted materials for member use in advocating for PAHR and placed all materials on the SAA website.

Sent letter to director of Smithsonian Business Ventures requesting clarification and expressing concern about Smithsonian agreement with Corbis. (March 2007)

SAA Past President Steven Hensen testified before Subcommittee on Information Policy, Census, and National Archives, Committee on Oversight and Government Reform, regarding Executive Order 13233 and "Further Implementation of the Presidential Records Act." (March 2007) [\$750]

Sought clarification via letters to the Archivist of the US and the Chief Judge, US District Court for the District of Columbia, of protective order issued in 2004 on Guantánamo case files. (April 2007)

Issued public comment on increase in NARA reproduction fees. (April 2007)

Sent letter to Permanent Observer, Mission of Palestine to the United Nations, seeking information about alleged destruction of Nablus municipal archives during Israeli military action. (April 2007)

Sent letter to Smithsonian Secretary Lawrence Small questioning details associated with Smithsonian agreement with Showtime/CBS and impact on access to records.

## Advocacy / Public Awareness / FY 2006

Contributed to the National Coalition for History for advocacy representation. [\$5,000]

Posted background information and rallied the grassroots via the SAA website to participate in advocating on behalf of NHPRC funding.

Worked with American Association of Museum Directors to distribute information about the Artists' Fair Market Value Deduction legislation that would be considered by Congress in November 2006, and packaged the material so that the Acquisitions and Appraisal and Manuscript Repositories sections and the Congressional Papers Roundtable could forward it to their members for action. Information posted on SAA website.

Published "Raising Public Awareness: Passing on Our Passion for Archives," by Tawny Ryan Nelb: "The hook comes when explaining the... thrill archivists get from discovering documents that fill in the pieces to historical puzzles, even as we balance it against the more mundane requirements of our profession." (AO, Jan/Feb 2006)

Published "Identity and Diversity: What Is an Archivist?": "We must be able to tell others who we are and what we do in terms that they understand and – if we want their support – in terms that they find compelling." (President's Column, AO, Mar/Apr 2006)

Sent a letter to Archivist of the United States Allen Weinstein regarding concerns about reclassification of NARA records, and prepared a letter to the editor of the *New York Times* in support of Weinstein's decision to place a moratorium on reclassification of records at NARA that previously had been released to the public. Posted on SAA website. (April 2006)

Joined in an *amicus curiae* brief for an appeal to the California Supreme Court in a matter that could set a precedent for the indefinite liability of archives and libraries for potentially libelous statements in oral histories.

Joined in an *amicus curiae* brief on behalf of the National Geographic Society in the case of *Greenberg v NGS* (11<sup>th</sup> Circuit Court of Appeals). [\$1,000]

The Intellectual Property Working Group prepared a response to proposed changes in Section 108 of the copyright law, which governs reproduction of materials by archives and libraries. Pearce-Moses represented SAA's view at a March 8, 2006, public roundtable discussion of the proposed changes.

Signed on to testimony presented to the House of Representatives regarding a proposal to amend copyright law to address the issue of orphan works.

## **OTHER “RADAR SCREEN” ISSUES**

### **Disaster Preparedness / FY 2013**

Awarded five grants (via the SAA Foundation’s National Disaster Recovery Fund for Archives) to Eyebeam, the Museum of Reclaimed Urban Space, Printed Matter, the Sebago Canoe Club, and the National Guard Militia Museum of New Jersey for recovery from Hurricane Sandy. (November – December 2012)

Promoted participation in MayDay and National Preservation Week. (March – May 2013)

“Tools for Preservation” (Kara McClurken) published in Nov/Dec 2012 *Archival Outlook*.

“MayDay: Saving Our Archives” in Nov/Dec 2012 and Mar/Apr 2013 *Archival Outlook*.

Various pieces in *In the Loop* (July 2012 – June 2013).

### **Disaster Preparedness / FY 2012**

Awarded a \$2,000 grant (via the SAA Foundation’s National Disaster Recovery Fund for Archives) to the Slate Valley Museum in Granville, New York, for recovery from damage caused by Hurricane Irene in August 2011. (October 2011)

Published “Opportunities for Cooperation and Collaboration” by Gregor Trinkaus-Randall in the Jan/Feb 2012 *Archival Outlook*.

Promoted participation in MayDay and National Preservation Week. (March – May 2012)

### **Disaster Preparedness / FY 2011**

Published “Big Ideas to Battle Monster Disasters” by Tom Clareson in *Archival Outlook* (March/April 2011).

Promoted participation in MayDay and National Preservation Week (March – May 2011).

### **Disaster Preparedness / FY 2010**

Continued work to enhance MayDay outreach and annotated bibliography on SAA website. (March – May 2011)

Monitored activities of U.S. Committee of the Blue Shield, International Council on Archives, and other organizations in evaluating needs following Haitian earthquake, and provided information to SAA members (via the website) as it became available.

SAA Council signed on as a partner in the American Library Association/Library of Congress/IMLS-sponsored National Preservation Week, May 9 – 15, 2010. (February 2010)

### **Disaster Preparedness / FY 2009**

Continued work to enhance MayDay outreach and annotated bibliography on SAA website.

### **Disaster Preparedness / FY 2008**

Enhanced MayDay outreach by providing Heritage Preservation and its member organizations with logos customized to “Libraries,” “Museums,” and “Cultural Heritage”; working with Australian organization to release materials for its use; and developed annotated bibliography on website to provide list of resources for MayDay planning and administration. [\$500]

Broadened scope of Emergency Disaster Assistance Fund to National Disaster Recovery Fund for Archives, a fund that “makes grants in support of recovery of archival collections from major disasters, regardless of region or repository type” (August 2007) and announced via SAA media. (AO, website, *Online News*, August – December 2007)

Publicized availability of funding through NDRFA to those struck by midwest floods and Hurricane Ike. One grant awarded to Rosenberg Library in Galveston, Texas. (November 2008) [\$2,000]

Publicized availability of Carmicheal’s “Rescuing Family Records,” published by the Council of State Archivists. (AO, Sep/Oct 2007)

Published “Through Hell and High Water: Hurricane Katrina’s First Responders Provide Eyewitness Accounts.” (Mark Cave, AO, Nov/Dec 2007)

### **Disaster Preparedness / FY 2007**

DC2006 Plenary III featured the topic of disaster preparedness, with NAGARA President Mary Beth Herkert and Mississippi State Archivist Hank Holmes. (August 2006)

Publicized availability of Heritage Preservation’s *Field Guide to Emergency Response* at DC 2006 and via periodicals and website. (August 2006)

Published “The Legacy of Giving: How the SSA-SAA Emergency Disaster Assistance Grant Fund Has Helped Archives in Need.” (Leon Miller, AO, Nov/Dec 2006)

Recognized establishment of the U.S. Committee of the Blue Shield, which “supports values that are consistent with those of SAA: to protect the world’s cultural heritage by coordinating preparations to meet and respond to emergency situations.” (November 2006)



Published enhanced materials on SAA website about members' preparations for MayDay, as well as "MayDay Focuses on Emergency Preparedness" (AO, May/June 2007)

In response to the destruction of the landmark Pilgrim Baptist Church in Chicago, volunteers and staff worked with DuSable Museum of African American History to provide a workshop for Chicago's "community of churches" highlighting the value of archives and gave attendees practical tips on identifying, documenting, and maintaining church records. (October 2006)

### **Disaster Preparedness / FY 2006**

Pearce-Moses participated with Debra Hess Norris (Heritage Preservation) and David Carmicheal (Council of State Archivists) on team that assessed the impact of Hurricane Katrina on recordkeeping facilities in the region. Reported in *Archival Outlook* (September 2005) and full report published on SAA website. [\$1,200]

Created SAA website page for information on hurricane recovery, updates from Preservation Section chair and Heritage Emergency National Task Force, media coverage, SAA's open letter to Louisiana governor regarding destruction of archival records, and (once established) contributions to EDA Fund. (September 2005)

In conjunction with the Society of Southwest Archivists, established and administered the Emergency Disaster Assistance Fund. (October 2005)  
Awarded 17 grants totaling \$27,750 to facilities struck by Hurricanes Katrina and/or Rita. [\$27,750]

SAA Council adopted a one-year dues waiver to members in hurricane-affected areas of the Gulf Coast, and staff attempted to contact all 50 eligible members by phone, email, and/or mail to notify them of the waiver option. (October 2005)

Published "First Responders: LSU Assists New Orleans with Hurricane Recovery Efforts" and "Recovering Records in the Wake of Hurricanes Katrina, Rita." (AO, Nov/Dec 2005)

Launched MayDay via *Archival Outlook* and the SAA website. (AO, Mar/Apr 2006)

### **Professional Identity / FY 2013**

"The Archivist as Scholar: Ethics, Challenges, and Rewards" (by Elena Danielson, Phil Eppard and Sue Hodson) published in Mar/Apr 2013 *Archival Outlook*.

"An Accidental Archivist: A Graduate Student Reflects on Landing in the Archives Profession" (by Renee Neely) published in May/June 2013 *Archival Outlook*.

"'Dust Clouds of Camels Shall Cover You': Covenant and the Archival Endeavor" (by Scott Cline) published in Fall/Winter 2012 *American Archivist*.

## Professional Identity / FY 2012

Working with the 75<sup>th</sup> Anniversary Task Force, the Oral History Section, and others, conducted a celebration of “SAA @ 75: Then, Now...Wow!” (July – December 2011)

“The Society of American Archivists at Seventy-five: Contexts of Continuity and Crises, A Personal Reflection” (by Brien Brothman) published in *The American Archivist* Fall/Winter 2011.

Published “Road to the Future: Cooperation and Collaboration” by Gregor Trinkaus-Randall in the Sep/Oct 2011 *Archival Outlook*.

The SAA Council adopted the Committee on Ethics and Professional Conduct’s revision of the Code of Ethics for Archivists and agreed to co-publish it with Core Values for Archivists: “Statements of ethics emerge from the core values of a profession. The *Core Values of Archivists* and the *Code of Ethics for Archivists* are intended to be used together to guide archivists, as well as to inform those who work with archivists, in shaping expectations for professional engagement. The former is a statement of what archivists believe; the latter is a framework for archivists' behavior.” (January 2012)

Submitted “Documenting a Profession in Transition: A National Forum for A\*CENSUS II” to the Institute of Museum and Library Services under the “National Forum Grant” category with support from ten affiliated organizations. (February 2012)

Published “Cooperation and Collaboration: An Initial Step” by Gregor Trinkaus-Randall in the Mar/Apr 2012 *Archival Outlook*.

Formed Joint Task Force (with Society of California Archivists) to develop agenda and issue invitations for first Regional Summit to be conducted at the 2012 Annual Meeting in San Diego.

“On the Occasion of SAA’s Diamond Jubilee: A Profession Coming of Age in the Digital Era” (by Helen R. Tibbo) published in *The American Archivist* (Spring/Summer 2012).

## Professional Identity / FY 2011

Task Force on Developing a Statement of Core Values for Archivists presented draft for Council discussion at its August 2010 meeting. The draft was distributed for members’ and others’ feedback following the Council discussion (through October 2010) and was adopted by the Council at its May 2011 meeting.

## Professional Identity / FY 2010

Task Force on Developing a Statement of Core Values for Archivists presented draft for Council discussion at its May 2010 meeting. The draft will be distributed for members’ and others’ feedback following the Council discussion. (May 2010)

## Professional Identity / FY 2009

Published “Identity, Mission, and Character.” (President’s Column, *AO*, Jul/Aug 2008)

ARCHIVES 2008 Plenary featured Greene’s Presidential Address: “The Power of Archives: Archivists’ Values and Value in the Post-Modern Age.” (August 2008)

Published “The Power of Archives: Archivists’ Values and Value in the Post-Modern Age.” (*AA*, Spring/Summer 2009)

SAA Council created Task Force on Developing a Statement of Core Values for Archivists, charged to “develop a ‘Core Values’ statement with full consultation and participation by SAA members and other archives associations.” (February 2009)

## Professional Identity / FY 2008

Published “Hello, My Name Is....” (President’s Column, *AO*, Sep/Oct 2007)

Published “*E Pluribus Unum.*” (President’s Column, *AO*, Jan/Feb 2008)

Published “Who Am I? Why Am I Here?” (President’s Column, *AO*, Mar/Apr 2008)

## OTHER ITEMS RELATED TO STRATEGIC PRIORITIES

Published “Strategies for Survival.” (President’s Column, *AO*, Jul/Aug 2005)

Published “The Archival Radar Screen: Strategic Issues Identified by SAA Council,” by SAA President Rand Jimerson: “If you would like to share your perspectives with the subgroup assigned to deal with each strategic issue, contact: Technology – Richard Pearce-Moses; Diversity – Kathryn Neal; Public Awareness – Peter Gottlieb; Other Issues on Radar Screen – Peter Wosh.” (*AO*, Jul/Aug 2005)

**FY 2006 Budget:** Included \$10,000 in Advocacy program for “Funding of issues/projects related to strategic priorities as identified by the SAA Council. Examples may include: Development of public awareness tools for member use, such as American Archives Week, public relations kits, or career promotion kits and kiosks; development of education programs that could assist members in coping with change in critical areas.”

Published “SAA’s Strategic Priorities ‘Radar Screen’ Reviewed, Updated.” (*AO*, Mar/Apr 2006)

**FY 2007 Budget:** Included \$25,000 in Advocacy program for “Funding of issues/projects related to strategic priorities.... Examples may include: Development of public awareness tools for member use; development of education programs to assist members in coping with change in critical areas; convening of issues-focused conference; advocacy training for key groups.

Published “Facing the Future: SAA’s 2006-2007 Strategic Priorities” (Pearce-Moses and Jimerson). (*AO*, Jul/Aug 2006)

Published “Top 10 Reasons for SAA to Continue to Reach Out to Government Archivists,” including reference to SAA’s strategic priorities. (President’s Column, *AO*, Sep/Oct 2006)

Published “SAA’s Strategic Plan: An Update.” (President’s Column, *AO*, Jan/Feb 2007)

2007 Annual Meeting Call for Proposals: “Proposals that incorporate the following will receive special consideration: A focus on SAA’s top three strategic priorities: technology, diversity, and public awareness.”

**FY 2008 Budget:** Included “lump sum amounts in Advocacy program for funding activities associated with top three radar screen issues: Technology at \$4,000, Diversity at \$4,000, and Public Awareness at \$4,000, plus \$9,000 for expenses associated with producing and distributing the 2008 American Archives Month Public Relations Kit.”

2008 Annual Meeting Call for Proposals: “Proposals that incorporate the following will receive special consideration: A focus on SAA’s top three strategic priorities: technology, diversity, and public awareness.”

**FY 2009 Budget:** Included funding in Advocacy program for “activities associated with SAA’s top three ‘radar screen’ issues: Technology at \$4,000 for activities to be determined; Diversity at \$5,000 for funding of minority scholarship award (that may ultimately be moved to SAA Foundation); and Public Awareness at \$16,000 for publication and distribution of the 2009 American Archives Month Public Relations Kit and Poster.”

Published “Strategic Priorities Proposed for Next Three Years” (Gottlieb, *AO*, Jul/Aug 2009, and via the SAA website)

2009 Leadership Forum discussion of strategic priorities. (August 2009)

**FY 2010 Budget:** Included funding in Advocacy budget for American Archives Month activities (\$11,040). Included funding in Governance budget for 1) working group to develop effective online mechanism to share news/information regarding standards related to electronic records (\$4,230); 2) grant writer to assist in preparing proposal to NHPRC for funding of online standards portal/collaboration capacity (\$2,000); 3) as prototype/proof of concept, record and provide audio and video podcasts of appropriate 2009 Annual Meeting sessions (\$5,986); 4) fund up to two Mosaic Scholarships out of operations (\$10,000); and 5) grant writer to assist in preparing proposal for grant funding to support Mosaic Scholarship program (\$2,000).

Distribute revised Strategic Plan to members via website and newsletter. (June 2010)

**FY 2011 Budget:** **Advocacy budget** includes funding for 1) working with members and PR counsel to determine method(s) for measuring the impact of archives, or ROI of archives, to craft compelling message to resource allocators (\$5,000); 2) develop and produce single-issue-focused public relations campaign using American Archives Month as key medium (\$18,040); and conduct benchmark survey of resource allocators to determine their level of awareness of the “value” of archives/archivists and to understand challenges to improving awareness, increasing funding (\$5,000, B List). **Governance budget** includes funding for 1) grant writer for funding of Web portal for standards (\$2,000); 2) grant writer for proposal on virtual access to annual

meeting (\$2,000, B List); 3) work group to develop plan for evolution of Mosaic Scholarship program (\$4,575); 4) grant writer for proposal to fund development of Mosaic Scholarship program (\$2,000); 5) funding for up to two Mosaic Scholarships (\$10,000); 6) funding for Diversity Committee subgroup to develop IMLS grant proposal for minority student fellowships (\$7,430).

**FY 2012 Budget:** Included funding for the following strategic-priority-related activities:

- The Publications budget (Program 104) includes development and sale of three new books related to the strategic priorities: *Different Kind of Web: New Connections Between Archives and Our Users* (Kate Theimer, editor); *I, Digital: Personal Collections in the Digital Era* (Cal Lee, editor); and *Exhibits in Archives and Special Collections* (Jessica Lacher-Feldman). [\$23,250, primarily from Publications Fund]
- The Education budget (Program 105) includes funding for development and implementation of Phase I of a new Digital Archives Specialist curriculum, per Technology, DO #1, Activities e. and f. [\$32,205, of which \$15,600 is from Education Fund]
- The Advocacy/Public Awareness budget (Program 107) includes funding for: 1) a benchmark survey of resource allocators to determine their level of awareness of the “value” of archives and archivists, per Advocacy/PR, DO #2, Activity a. [\$5,000 for consultant]; 2) work with members and PR counsel to determine methods for measuring the impact of archives, per Advocacy/PR, DO #2, Activity b. [\$3,000 for consultant]; and 3) development and production of a single-issue-focused PR campaign (*I Found It In The Archives!*) using American Archives Month as a key medium, per Advocacy/PR, DO #3, Activity b. [net of \$14,040].

On the “B List” for this program are: 1) a mid-year meeting of the Government Affairs Working Group to continue development of the advocacy agenda and supporting issue briefs, per Advocacy/PR, DO #1, Activity b. [\$5,210], and 2) a benchmark survey of archives users to determine their level of awareness of the “value” of archives/archivists, per Advocacy/PR, DO # 2, Activity c. [\$5,000 for consultant].

- The Governance budget (Program 108) includes funding for: 1) a grant writer to prepare a funding proposal for development of the Mosaic Scholarship program, per Diversity, DO #1, Activity e. [\$2,000], and 2) funding for one Mosaic Scholarship out of operations in FY12 [\$5,000] and a request for funding of a second scholarship out of the SAA Foundation’s Mosaic Scholarship Fund [\$5,000].

On the “B List” for this program is funding for a grant writer to prepare a proposal to support virtual access to the Annual Meeting, per Technology, DO #3, Activity f. [\$2,000].

Not included expressly in the budget, but planned for FY12 in response to Technology, DO #3, Activity b., is an open forum at the 2011 Annual Meeting that will assist the Communications Technology Working Group in conducting an environmental scan of communication technologies now in use by SAA and assessing their effectiveness.

Prepared for and conducted a Member Needs and Satisfaction Survey to establish a baseline for understanding members’ perceptions of the value of belonging to SAA, its various products and services, and needs going forward. Analyzed results and developed a communication plan for

sharing data with various stakeholder groups and the general membership. (October 2011 – June 2012)

Launched a new strategic planning process in January 2013; drafted high-level goals and strategies for member input (to be addressed at May 2013 Council meeting). The Council and staff will continue to work on development of the Plan, with a goal of Council adoption in August or September 2013.