



Society of California Archivists

Strategic Planning Task Force  
Short Report

April 2013



## **Society of California Archivists Mission**

The Society of California Archivists, Inc. exists to support and develop the education of those who collect, care for, and provide access to the documentary heritage of California and adjoining areas and to encourage public interest in and public support for archival facilities in public and private institutions.

To this end the Corporation shall:

1. act as a vehicle for dissemination of information about archival collections, issues, and methodology to the profession and the public;
2. provide a forum for the discussion of matters related to the creation, preservation, and use of historical documents;
3. develop, offer, and support archival education programs;
4. cooperate with individuals and other organizations on matters of common concern;
5. and advocate the identification, collection, preservation, use and appreciation of historical records and manuscripts.



## **About the Strategic Planning Task Force**

The Strategic Planning Task Force convened in 2012 to examine the state of SCA and its membership, as well as, developments in the archival profession and broader environment. The Task Force was co-chaired by Chuck Wilson, former University Archivist for University of California at Riverside and partner in CWA Consultants and Anne Hall, Archivist for the Federal Reserve Bank of San Francisco.

Sponsored and supported by the Society of California Archivists, the task force had absolute independence and autonomy in its findings and recommendations.

## **Task Force Members**

Brad Bauer, United States Holocaust Memorial Museum

Anne Hall, Chair-San Francisco Federal Reserve Bank

Polina Ileva, University of California, San Francisco

Ellen Jarosz, California State University, Northridge

Nancy Lenoil, California State Archives

Anna Lucas Mayer, Wells Fargo Bank

Genevieve Preston, San Bernardino County Historical Archives

Sara Seltzer, History Associates, Inc.

Monique Sugimoto, Palos Verdes Library

Mattie Taormina, Stanford University

Chuck Wilson, Chair – CWA Consultants



# Executive Summary

Periodically through its existence, the Society of California Archivists has charged a task force with the responsibility to analyze the organization and provide recommendations for how SCA could move forward in the immediate future. The aptly named Committee of the Eighties first undertook this duty when the organization was only a decade old. At the end of the 20<sup>th</sup> Century, the Task Force on Outreach and Organization was formed. Just over a decade later, the current Task Force on Strategic Planning was commissioned (See Appendix A). Although the titles differed, all three of these groups were charged with answering the question, “Where do we go from here?”

The 2012-13 Strategic Planning Task Force hosted a session at 2012 AGM devoted to the role of the Task Force. An initial set of questions based upon the 1980 task force report was addressed at the meeting. An invitation was also issued for those interested in joining the initial members of the Task Force to contact Brad Bauer, who was the liaison between the SCA Board and the Task Force. Those who expressed an interest were added to the core members who had volunteered prior to the meeting. Further members were recruited in the following months.

The complete Task Force consisted of 12 members, representing large and small institutions, lone arrangers, as well as, those with significant archival support, consultants with no institutional affiliation, northern and southern California, and men and women with only a few years archival experience to over four decades. Many Task Force members met in August 2012 in San Diego for an in-person meeting during the Society of American Archivists (SAA) conference and after that time participated in a bi-weekly conference call until early April 2013.



## **Data Collection**

Information gathering was composed of three parts:

- 1) An initial survey questionnaire was distributed to the membership via email in Fall 2012
- 2) Five focus groups were convened across the state
- 3) Interviews with individual members who had served or currently serve in SCA leadership positions

### **Survey Questionnaire**

The survey questionnaire consisted of twenty questions. The survey was sent via email to active members and members whose membership had recently lapsed. It was hoped that sending the survey invitation to members whose membership had lapsed would serve as a reminder that they had not paid their dues for the current year.

Although a direct connection cannot be determined, there were over 40 new or renewed memberships received between the time the membership survey was distributed and the end of January 2013.

To add incentive to complete the survey, three prizes, to be awarded at random, were offered: a free SCA membership for one year, free registration at the AGM, and a \$50 gift certificate.

Two hundred and three surveys were completed and returned. This represents about 50% of the SCA membership. Several included comments.

### **Focus Groups**

Based upon information from the surveys and the comments in the surveys, a short list of five questions was adopted for use in focus groups (See Appendix B). The purpose of the in-person focus groups was to obtain a more complete sense of SCA's programs and needs.

Focus groups were not limited to SCA members, but included a variety of people who worked with archival materials. A wider focus group attendance served two purposes: to collect additional information from a broader group and to assemble groups which could later serve as gatherings for periodic regional archival gatherings of archivists between the Annual General Meetings. The survey indicated there was strong support for regional gathering opportunities.



Five focus groups were held throughout California in a variety of formats. There were morning meetings, lunch events, after work gatherings and both weekday and weekend groups. Attendance at these groups ranged from four to twelve individuals. The information gained from the focus groups was combined with that gathered in the membership survey.

## **Leadership Interviews**

The email survey and in-person focus groups were intended for the general membership and those who worked in the archival field, but might not yet be members. The third tool, Leadership Interviews, were intended for the leadership of the organization (See Appendix C), as it was felt Board members and former Board members would have a better understanding of the administrative workings and needs of the organization.

Eight current and former Board members were selected, representing the present Board, those who had served from 2005 to 2010 and those who had served from 2000 to 2005.

## **Report**

This report, which brings together the information and suggestions from each of the three tools, will be discussed at the Leadership Meeting and at the Task Force Lunch during the 2013 AGM.

A brief presentation will also be included as part of the committee reports at the Membership Meeting.

Additionally, a full copy of this report will be posted on the SCA website.



## Findings

**Communication** -Responses from all three survey tools indicated the major value of SCA was the ability to network and a need for more and better communication. A desire for more frequent face-to-face gatherings was also expressed. The general membership survey listed email as the principal means of communication.

The Focus Groups as well as the Leadership surveys indicated a need for better communication and coordination with other archival organizations and organizations with archival interests. Communication via social media tools were suggested in the Focus Groups and Leadership surveys, and as cheap and effective ways to reach membership.

One way the Society could explore this need is to further implement the many social media tools that exist currently. Although respondents said that email was a preferred method of communication, it is still worth the Society's efforts to begin to grow a social media presence to see if this helps facilitate communication between the Society's many committees and its members.

**Education**-The concept of SCA providing educational opportunities was strongly supported. However, the membership survey indicated that few respondents had attended a pre-conference workshop in the last five years. The phrasing of this question, which limited responses to only those who had attended pre-conference workshops and not all the workshops, could have skewed the responses. The membership survey indicated that 61 of the 187 people responding to this question had attended a workshop.

While none of the surveys mentioned WAI, several people in the Focus Groups mentioned having attended WAI and how valuable this had been for them. Some suggested that a follow up or WAI 2 program which would build on the introductory basic information would be well received.

**Membership** – The survey indicated the majority of those responding had been members for fifteen years or less. This was very similar to the composition of the membership noted in the 1999 Task Force on Outreach and Organization.

**Administration** - The leaders also noted that some of the positions required a good deal of time and something of a learning curve when a new person took over. It was understood that this was a volunteer organization and not a particularly large one. The Leadership survey responses noted the need for an administrative assistant to assist various Board members.

Advances in administration largely associated with the establishment of the Wild Apricot software were noted by several of the leaders. The recent revisions of the Handbook were also mentioned as one of the achievements of the past several years. At least one of the leadership responders felt this was a sufficiently useful tool for the administration of the organization.



# Recommendations

In 1971, the Society of California archivists was established to support and develop the education of those who collect, care for, and provide access to the documentary heritage of California and adjoining areas and to encourage public interest in and public support for archival facilities in public and private institutions, disseminate information, provide a forum for discussion, and cooperate with the Society of American Archivists and other similar cultural and educational organizations.

These general objectives are still relevant today. Previous SCA task forces have recommended similar improvements to make the organization more effective and efficient; the four recommendations as outlined below build upon these earlier efforts. The Task Force believes these recommendations will help grow the organization and address the needs of its members and the larger archival community by supporting and developing the education by providing a forum for discussion, cooperation, and education.





## **Recommendation One – Regional Meetings**

*Promote regional meetings/networks that provide a regular forum for archivists to exchange information about archives and their local repositories.*

California is a large state that is fragmented into more than just north and south, and archivists work in just about every corner. One of the primary reasons people join and retain their membership is for networking. 81% of the members surveyed had attended at least one AGM in the last five years. In addition, convenience of location was frequently cited in the member survey and by focus group participants as a favorite reason for determining attendance at SCA educational programs and meetings.

Regional meetings provide the opportunity for individuals and organizations in the same geographic area to share information and ideas. The support for regional meetings was overwhelming in both the survey and the focus groups. The promotion of regional meetings/networks could facilitate an informal forum for archivists, librarians, and students to exchange ideas and practical information about archives and archival collections.

SCA has previously recognized that it needs to be more proactive in reaching out to the more remote locations of the state. Regional meetings offer a more convenient location for many smaller institutions and for more collaboration among institutions in a local area.

As an example, a group of archivists and individuals who work with archival material in the Sacramento region have been working together since 2011 on the annual “Sacramento Archives Crawl,” a kick-off event for California Archives Month. From the Archives Crawl planning committee an idea has emerged to have a regional group that would meet periodically, perhaps quarterly, to discuss issues of common concern. Formation of the group, tentatively called “Gold Country Archivists” and including archivists in El Dorado, Placer, Sacramento, San Joaquin, Solano and Yolo counties, is in the very preliminary discussion stage. But, if it is established, it might be a group that SCA could connect to.

**Impact: Addresses the responses of the membership to have more contact with others members at their local area.**



## **Recommendation Two –Administrative Assistant**

*Hire an Administrative Assistant to be responsible for some of the organization’s ongoing administrative duties.*

Plans to add an administrative assistant date back to 1980. This position would provide continuity for a board that is comprised of volunteers. A hired administrative assistant allows members energies and volunteer efforts to be put to better use. For thirty years the Board has been considering this position and the benefits it could offer, now is the time to develop and implement such a position.

SCA could contact other regional organizations for information on a paid Administrative Assistant to facilitate the mission of the organization.

The position should come with clearly identified tasks which need to be done, for example some of those mentioned were:

- Could help alleviate part of the Treasurer’s workload
- Assemble board packets and agenda
- Coordinate board training
- Assist with the AGM
- Coordinate site selections, review and contract negotiation
- Printing and proofreading of AGM
- Coordinate session participation needs
- Provide general clerical support for local arrangements prior to AGM
- Assist with Directory of California Repositories

**Impact: Provide continuity to the volunteer based organization. Create a professional core of duties which allows the various board members and committees to focus their energies on the projects at hand and completing the tasks set before them.**



## **Recommendation Three – Enhance Educational Opportunities**

*Develop new educational opportunities to address needs of members and explore the use of technology for these programs.*

SCA needs to develop a robust set of educational opportunities that address the needs of its members. A frequent comment at the focus groups was that the workshops were mainly for beginning archivists. SCA should provide advanced workshops and educational opportunities. Include information on the level for workshops, beginning, intermediate, etc., being offered at all levels.

SCA needs to enhance its educational programming by offering sessions in a variety of media, including webinars. Many survey and focus group participants mentioned the importance of educational programming but had not attended any classes in the last five years, due to the topic not being relevant or the workshop was too far away.

Mentioned topics were a refresher Western Archives Institute (WAI), digitization, born digital collections and records, appraisal of electronic records, use of social media for outreach, and finance and budget for archives.

**Impact: Addresses the immediate needs of the membership and the ongoing development of those within the archival field.**



## **Recommendation Four – Communication**

*Make Communication with Members and others a top priority. Collaborate with other organizations in California and on the West Coast to create a shared network of resources for members and people working with archival collections.*

The Focus Groups as well as the Leadership surveys indicated a need for better communication and coordination with members, archival organizations, and other organizations with archival interests. Communication is an effective way to increase connections. Committees and the Board need to list activities and projects and get the information to the larger membership. The majority of respondents mentioned email as their preferred means of communication, but that they did not read the listserv. The development of various means of communication should be explored to see, what is indeed, the best way to reach SCA's target audience.

SCA should enhance its efforts to work with other organizations within the region and state to build collaboration among cultural heritage professionals working with archives. This may involve the successful marketing of our organization and clearly identifying our mission to organizations such as the California Association of Museums (CAM) and the California Librarian Association (CLA). Both organizations have members who work with archival collections and offer educational classes. Other organizations to open a communication with could be: Cal Humanities (formerly the California Council for the Humanities), California Council for the Promotion of History (CCPH), The Western Museum Association, and the American Association for State and Local history.

Collaboration could include offering joint training and invitations to their members to join SCA's educational opportunities. Other cooperative projects with such groups, could including joint publications, reduced membership fees for members of other regionals, listing of other organizations events on SCAs calendar, and exchange of newsletters between editors and officers. All suggestions should be considered and explored.

**Impact: Making the work done by the various committees and board more visible by means of communication will aid the organization in many ways; it will make the members more aware of what each committee does and how they can help.**