



Society of California Archivists

Strategic Planning Task Force  
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 provide a forum for the discussion of matters related to the creation, preservation, and use of historical documents;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



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# 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.

# Results

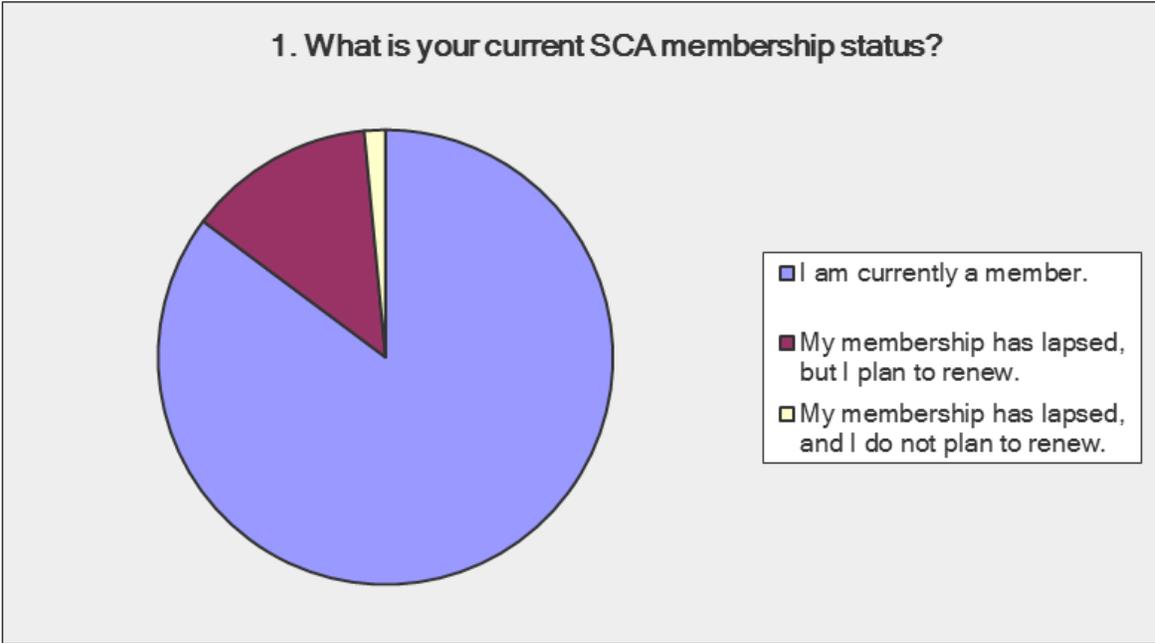
## The Survey

The questionnaire utilized the Survey Monkey application, which provided the opportunity to compile the statistics for the questions and graph the results.

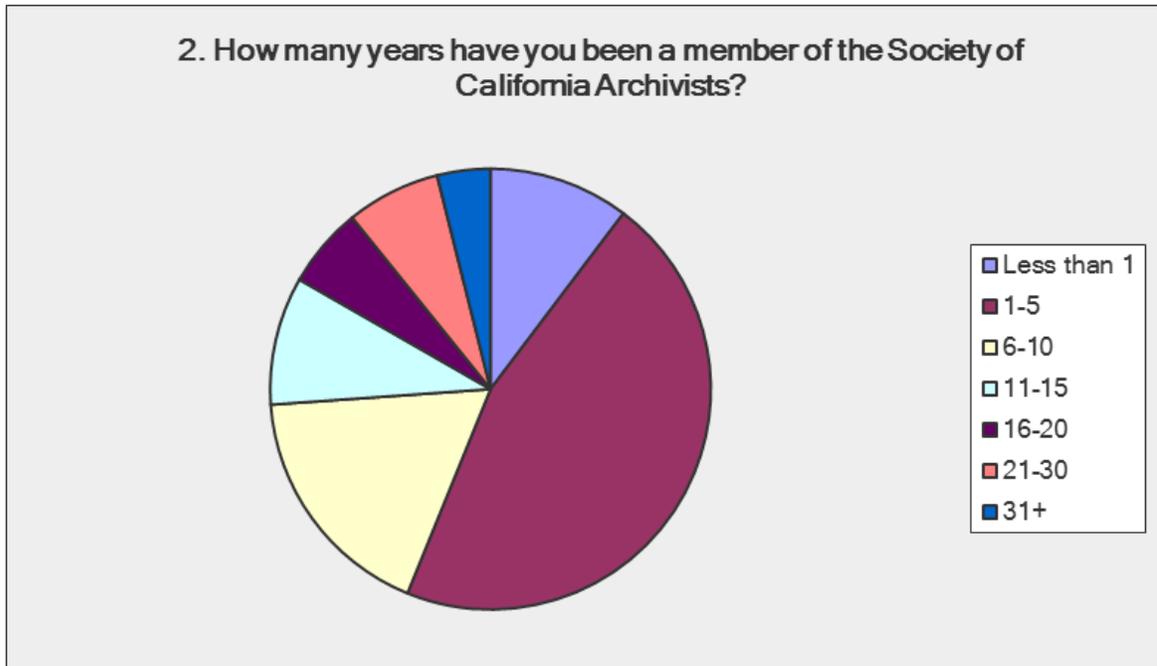
A summary of the survey results is given below.

## Membership

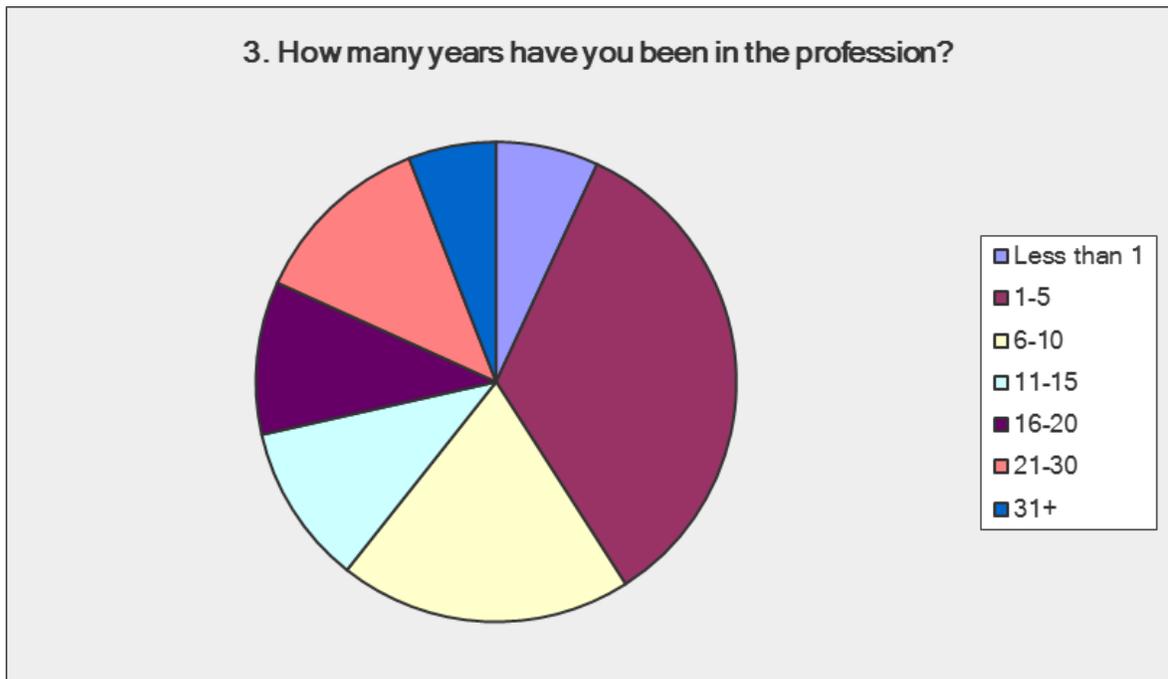
Over 98% of the respondents were either member (85.2%), or were planning to renew their memberships (13.3%):



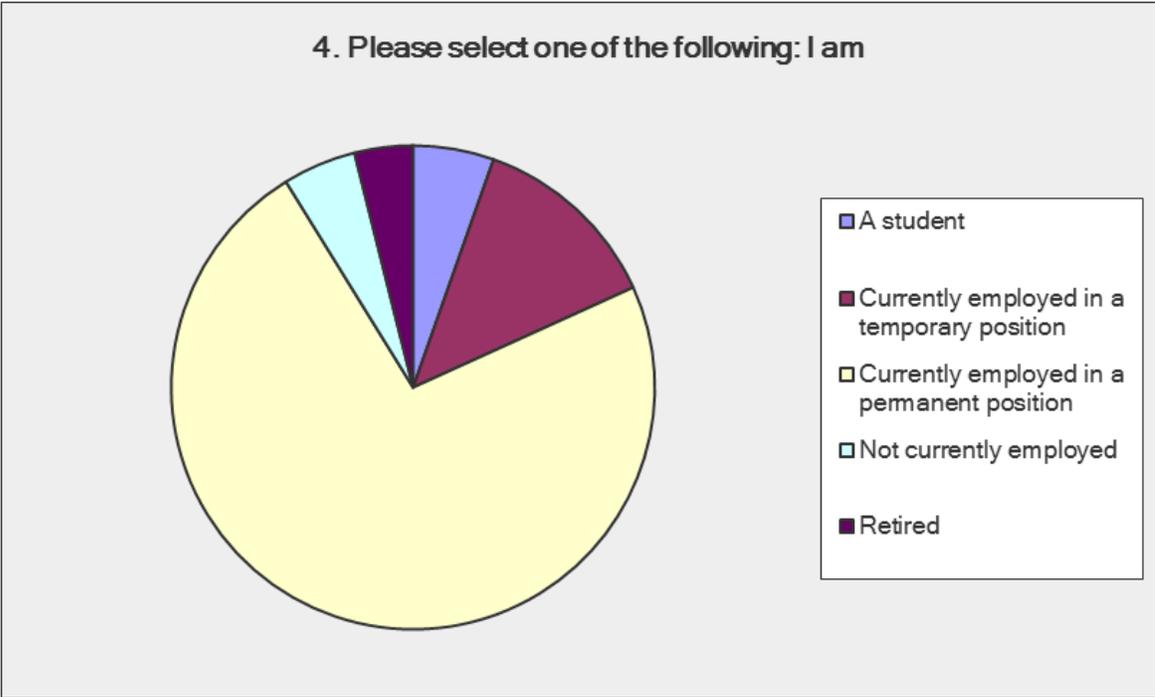
The majority (73.8%) of those taking the survey had been members of SCA for 15 years or less. Of this group, the largest portion of the group (45.8%) had been members from 1-5 years. Ten percent had been members less than a year:



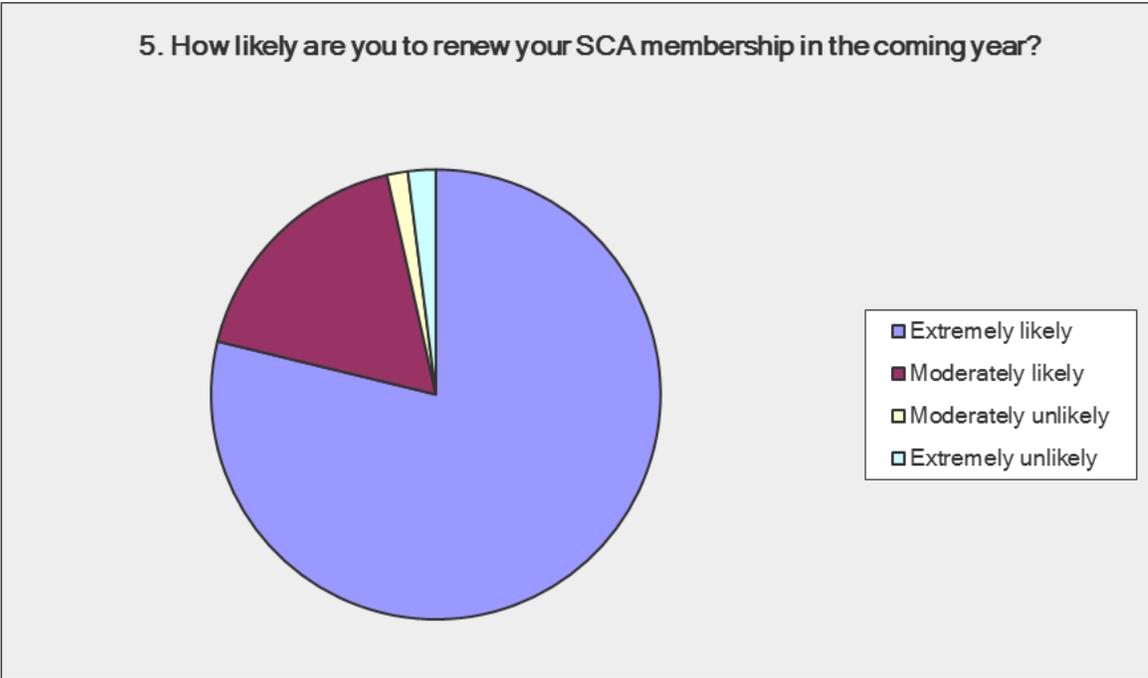
53.7% of respondents had been in the profession from 1 to 10 years. 6.9% indicated they had been in the profession less than a year and 5.9% listed over 30 years as an archivist:



Most of those responding were employed, 72.9% reported permanent position employment and 12.8% were employed in a temporary position. Students constituted 5.4% of the respondents and 3.9% were retired:

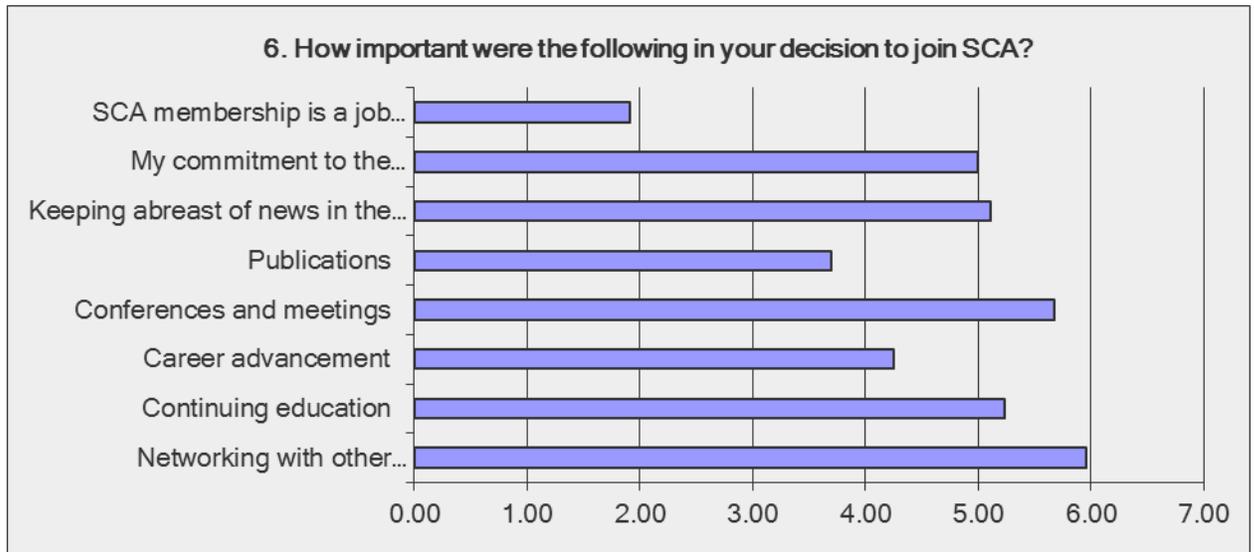


Over 96% indicated they were extremely or moderately likely to renew their SCA membership in the coming year:

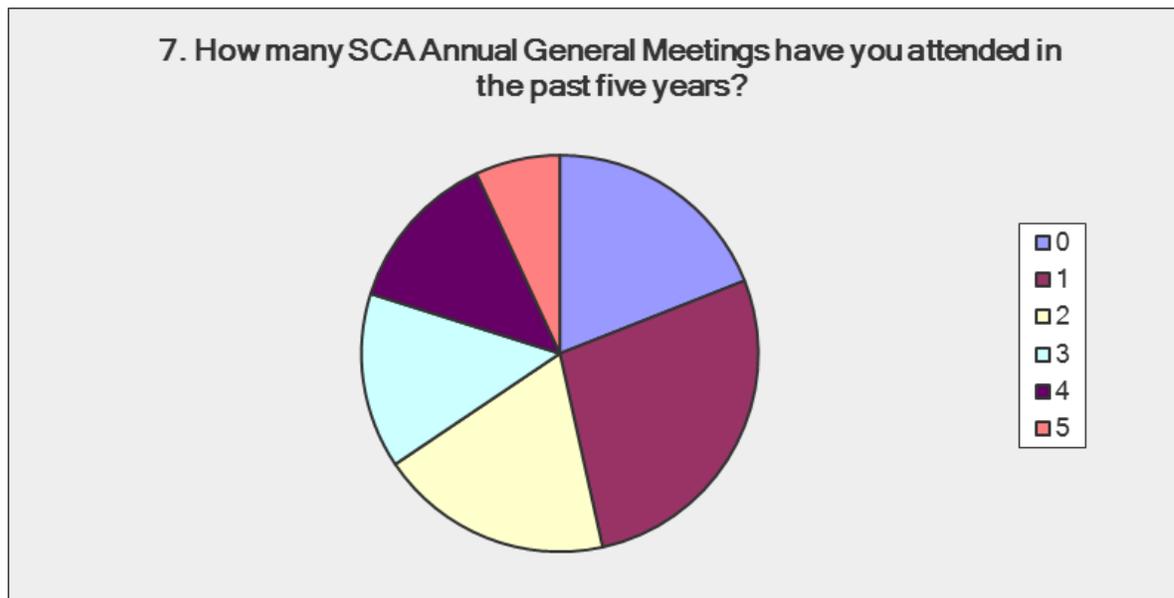


## Annual General Meeting

Networking with other professionals and attendance at conferences and meetings were the two most frequently mentioned reasons for joining SCA:

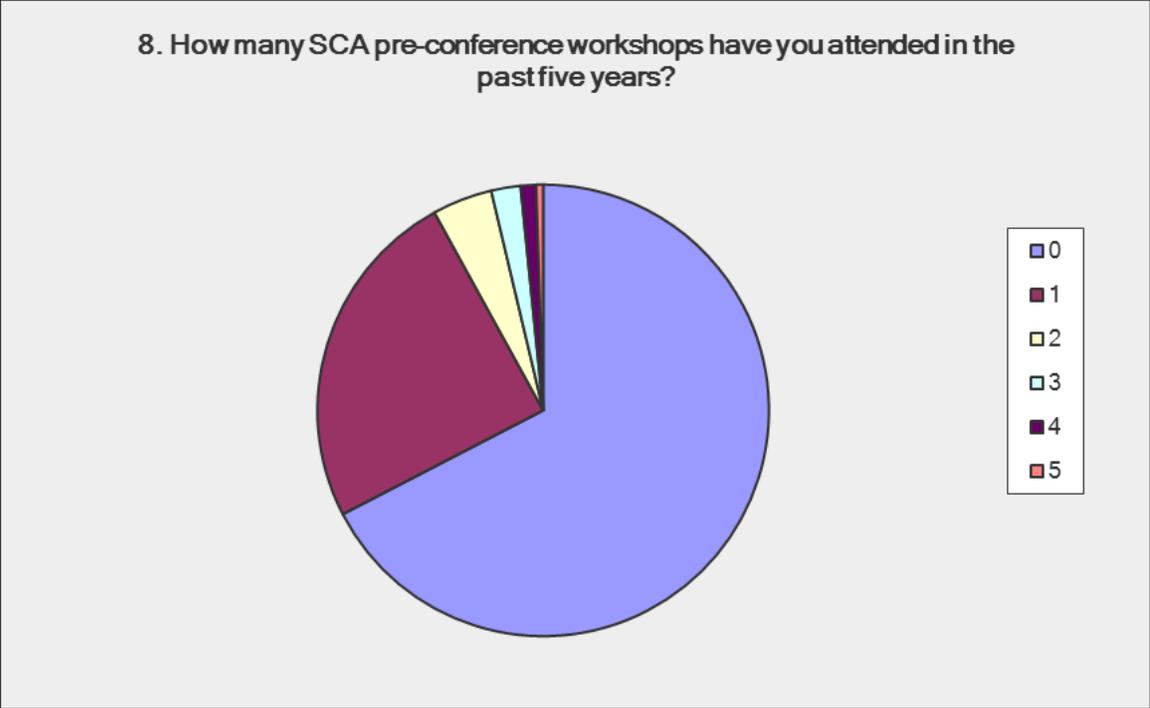


While the vast majority (81%) had attended at least one AGM in the last five years, 19% had attended none and 6.9% had attended all five:

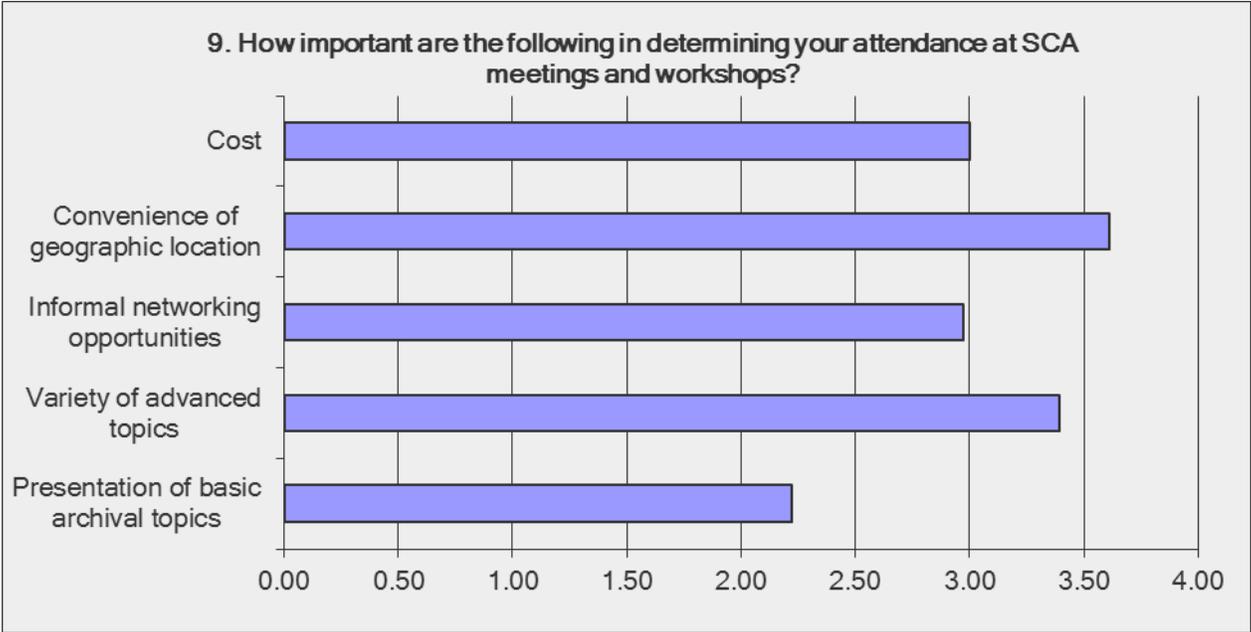


# Education

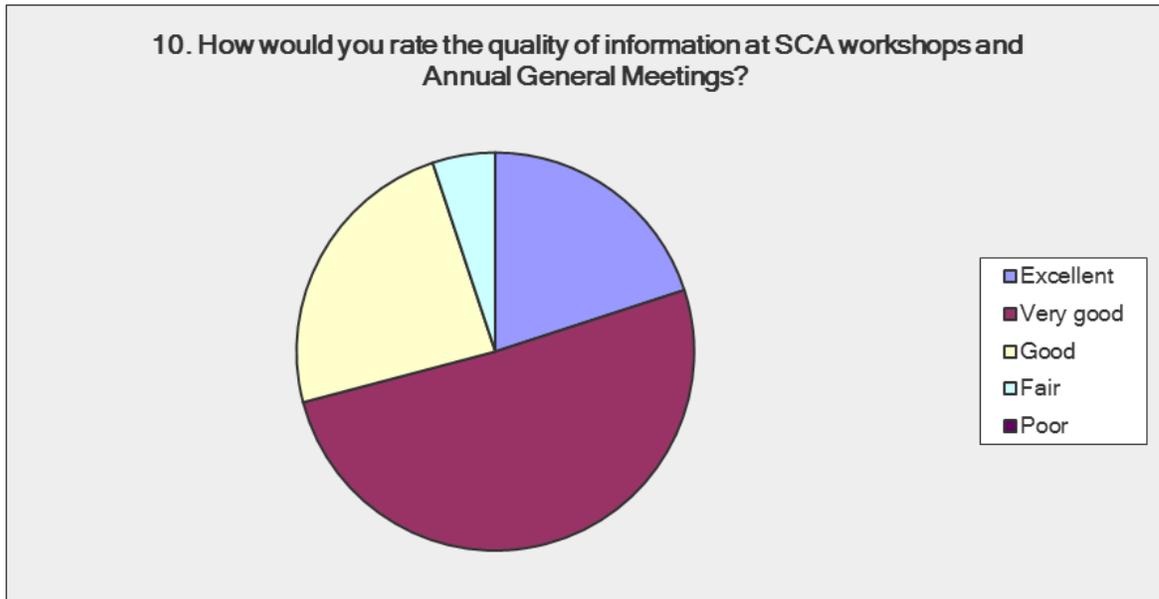
Those who had attended a pre-conference workshop within the past five years totaled 32.6% with 24.6% having attended only one. The majority (67.4%) had not attended a workshop:



Convenience of location and variety of advanced topics were the two favorite reasons for determining attendance at SCA meetings and workshops:

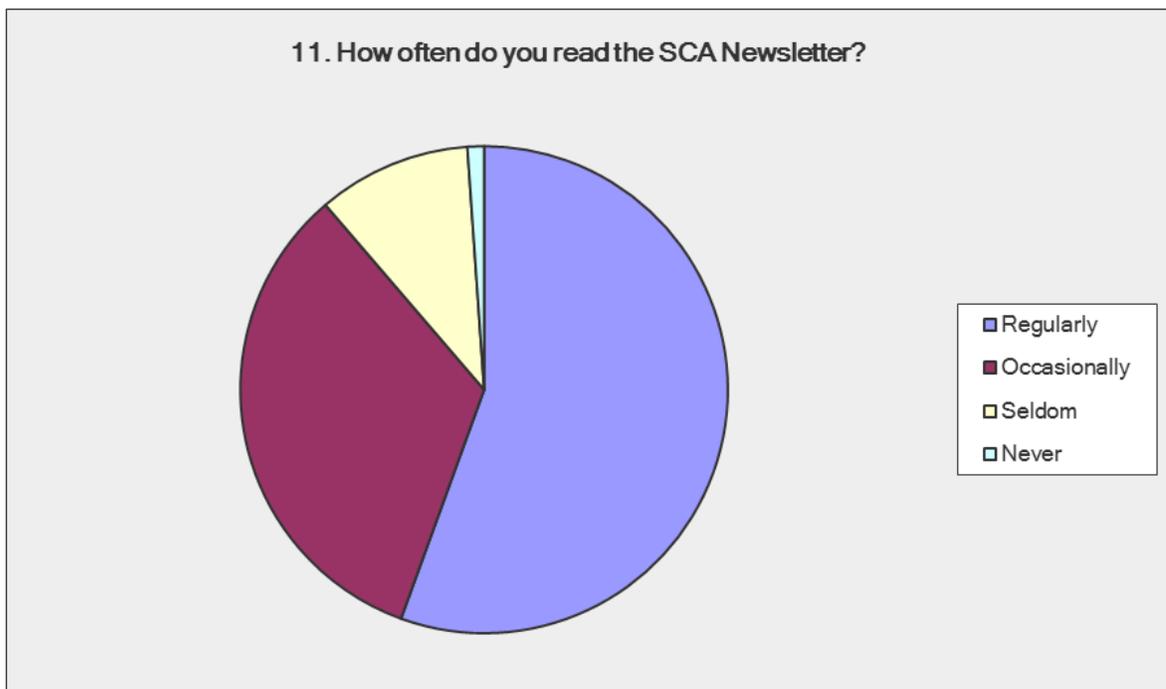


94% of the respondents found the quality of information at SCA workshops and meetings to be Good, Very Good or Excellent, with the Very Good response (50.9%), the most frequent:

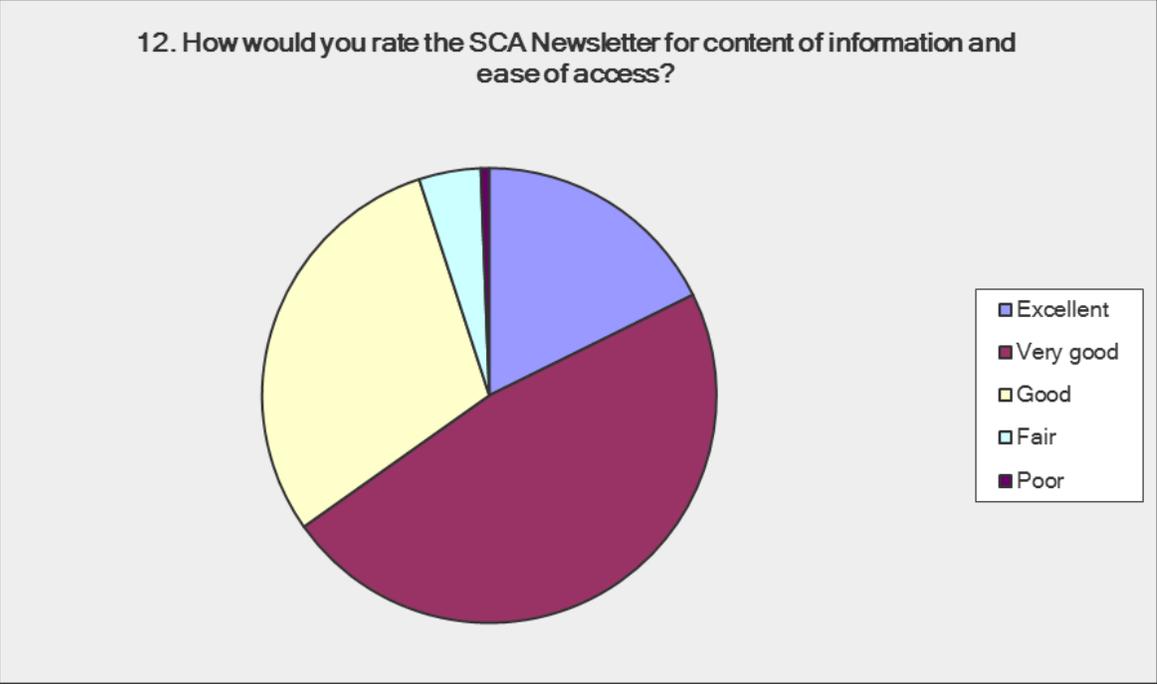


## Communication

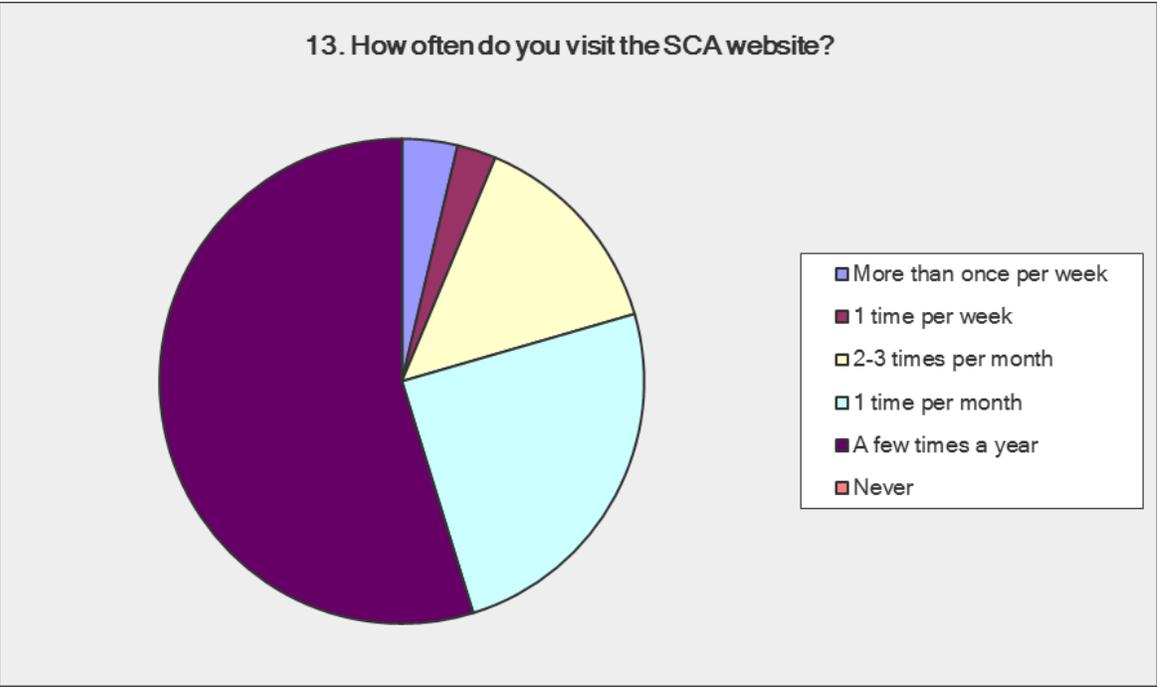
The newsletter was frequently read by 55.6% and occasionally read by another 33.2%:



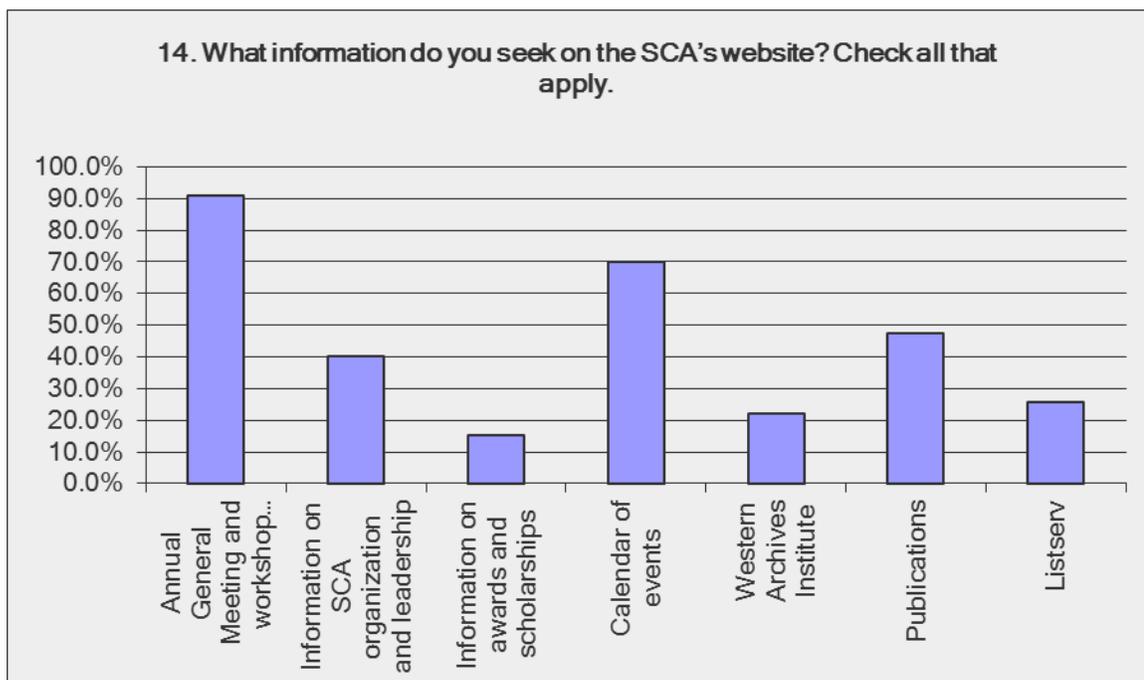
95% of respondents rated the newsletter Good, Very Good, or Excellent for content and ease of access:



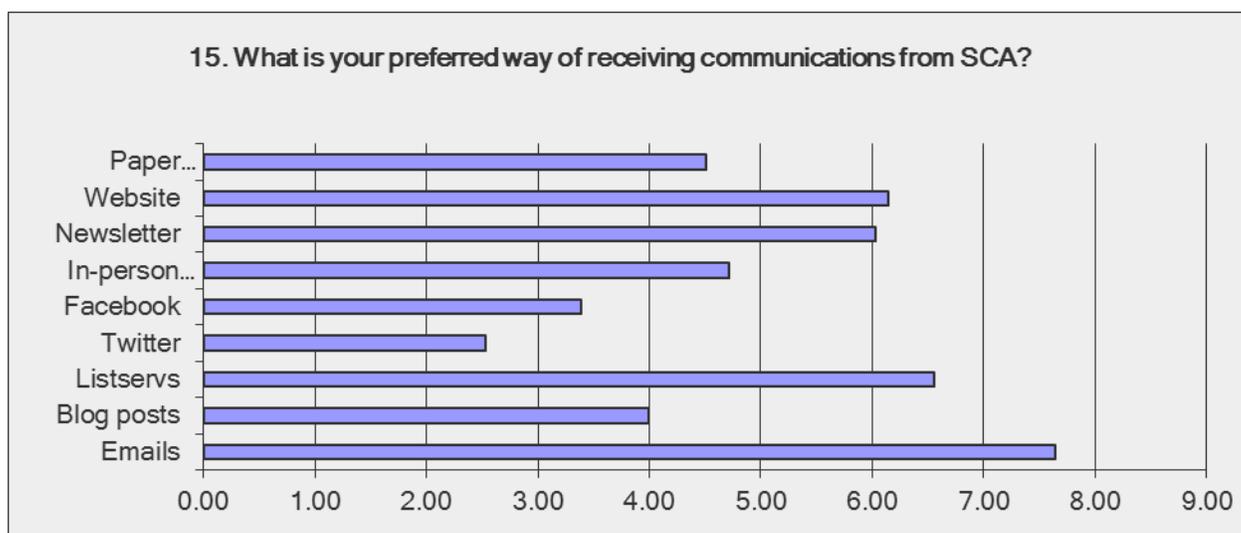
The SCA website was visited only a few times a year by 54.7%, while another 24.7% listed once a month as the frequency of their visit:



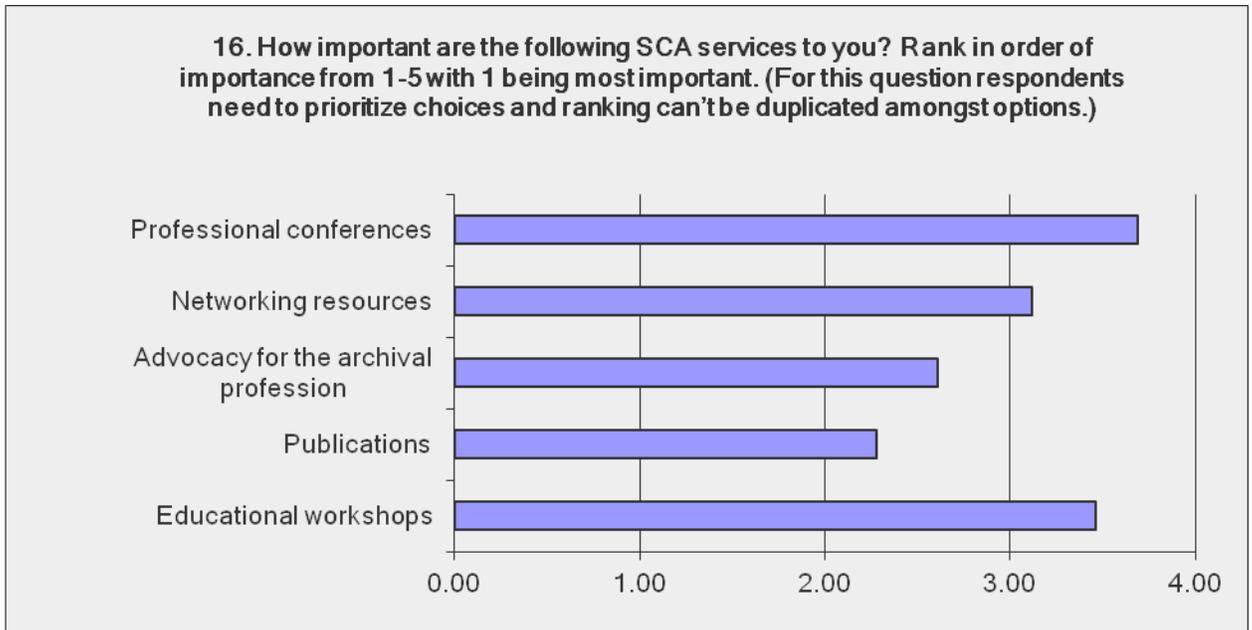
Information on the annual meeting and workshops and the calendar information were the two most important reasons for visiting the website. Publications and information on the organization were the next most important:



Email was by far the most important form for communication, followed by listservs and the website or newsletter. Social media – Twitter, Facebook, and blogs - rated far down the list:

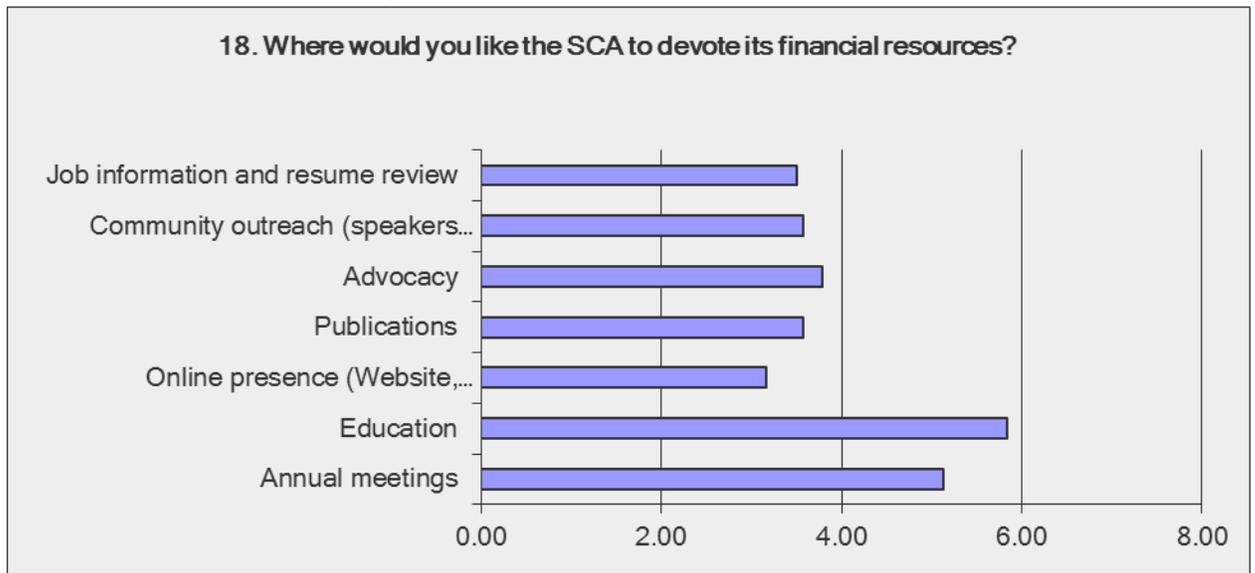


The most important SCA services were professional conferences and educational workshops:

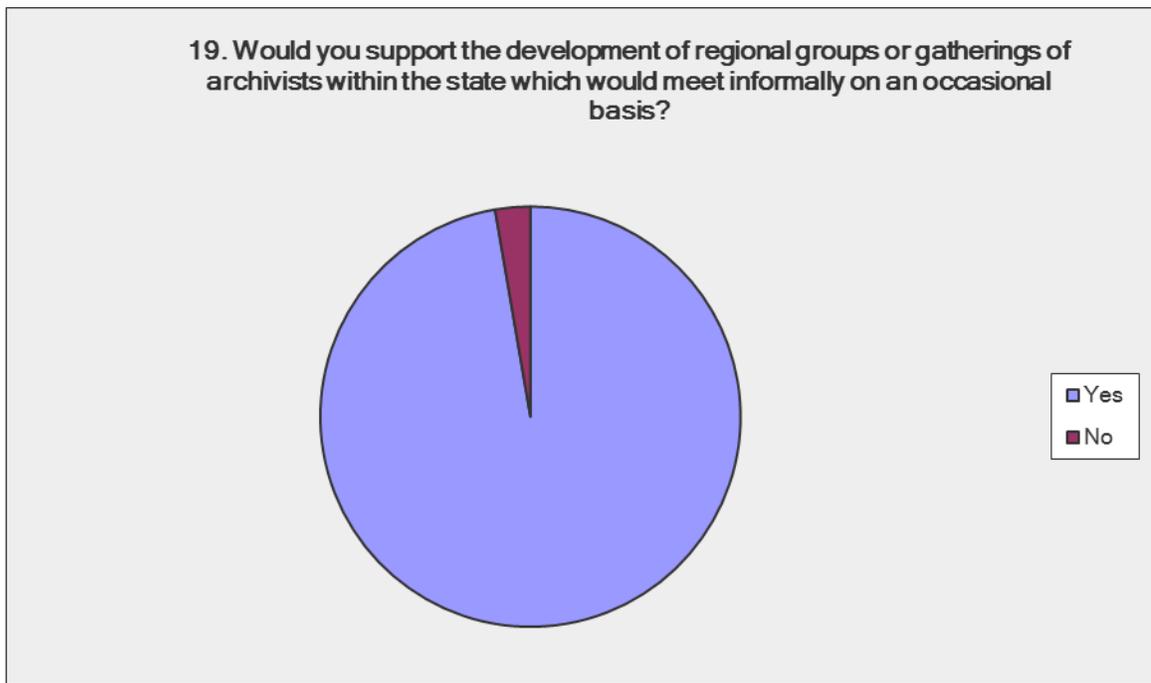


Question 17 was an open-ended question. "What other SCA services are important to you?"

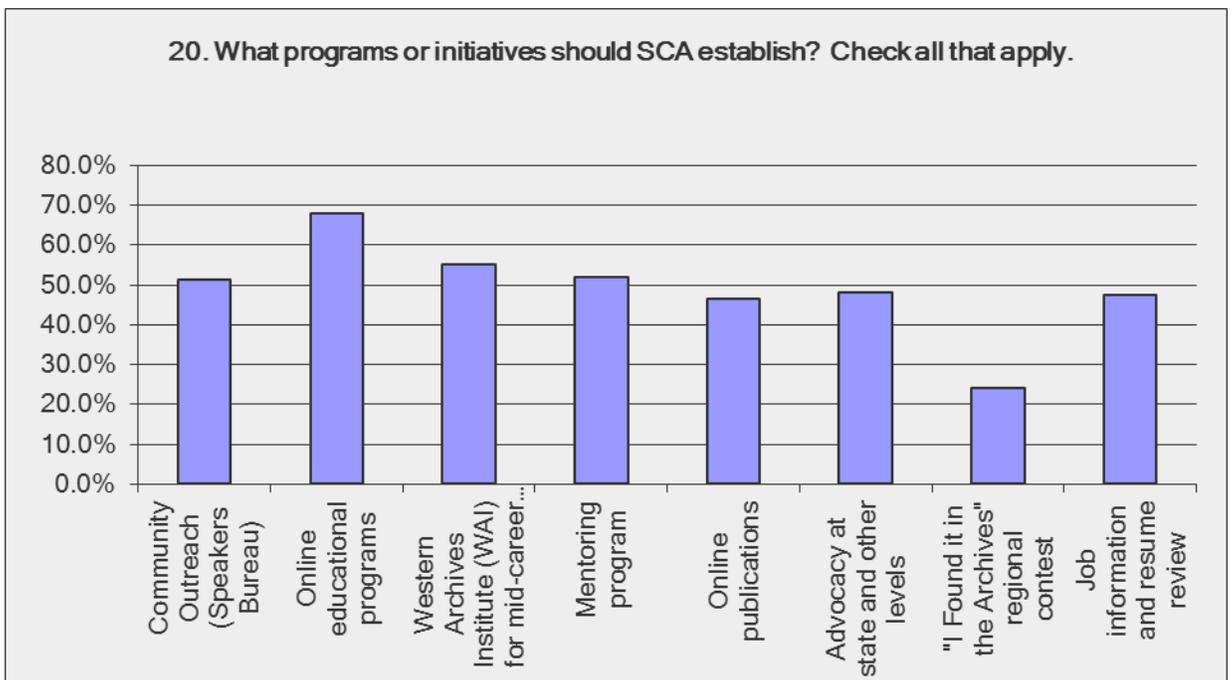
When it came to the allocation of financial resources, education was the first choice, followed by annual meetings:



Regional meetings were favored by 97.3% of those responding to the survey:



There was fairly even distribution among the choices for programs or initiatives for the organization to establish. Online educational programs was the most popular choice (67.9%), followed by Western Archives Institute for mid-career professionals (55.1%):



Question 21 was an open-ended question. "Please share any additional comments and concerns."

144 of the 203 people who responded chose to be included in the drawing for one of the prizes.

## **Focus Groups**

Focus Groups provided additional insights into current SCA programs and possible future programs.

Focus Group leaders were provided with a series of basic questions (See Appendix B) upon which to initiate discussion. The topics and responses included the following.

### **Have you attended an educational workshop? Why or why not?**

Reasons for attending included professional development, keeping up with current practices and standards, learning the basics of archival practice. Other responses were:

A suggestion was made that the frequency of workshops be increased, including the basic archives workshop. Workshop advertising should indicate the complexity/level of workshop.

“Don’t attend that often as it is another whole day at the hotel”

“I have to pay for workshops/conferences myself”

“Don’t get approval/funding unless it is directly work related”

As a paraprofessional, workshop needs to apply directly to area or else can't get authorization or funding to go. Ends up having to pay own way and take own vacation time. Hard enough just to get authorization to go to conference.

“Feel like they (workshops) are geared towards beginners/early career people. No progression of skills.”

### **Comments on SCA’s workshops and education included:**

Topics are good and relevant.

Would like webinars; free, no cost, different format, way to go; no time away from office.

Webinars are becoming more and more popular. SCA should make more use of this format. Can get good mileage out of recordings. Need to have combination of both in person and webinar formats.

Webinars good for students since students have time restraints and can look at the webinar later.

### **Another group responded to the webinar question differently.**

“I’m going to the AGM so I’d rather have a face-to-face”

“No time or energy while at work”

“Can’t make time to do it online” (this was seconded)

“Hard to be engaged with the screen that long”

“Too much temptation to check email and interrupted while at work”

## **What is your favored form of communication?**

Survey respondents mentioned that their favored form of communication was email and listservs, with social media being the least favored form:

“Email and listserv. Dedicated, personal email will get me every time. I don’t pay attention to social media”

“Email. Very bad at reading listservs”

“Email or email blast via the website. I haven’t read the newsletter that much since it went paperless.

## **Another group, which included a student, a new professional, a practicing professional and a researcher who uses archives, responded:**

Focus group loves twitter, Facebook, etc. all social media.

Suggested SCA be much more active tweeter. Eq. need to tweet at least 10 x day and make only 1 of the 10 tweets about the organization; other tweets should be about archival world. "Don't just tweet about yourself.

SLA had an interesting model of one person in charge of each social media site (Facebook, twitter, LinkedIn, etc.) Each person would ping out to the other site to get the information across. The first step is to create an information source. The next step is to create a community.

The once/month newsletter is not enough.

## **What role do you think SCA should have with other archival organizations?**

When asked about SCA and relationships to other organizations, responses included:

Link with museums and historical societies who don’t get that much attention

Focus group members want to hear what affiliated groups are offering in terms of training and workshops.

Suggest one major website that would link to list of major professional organizations including both federal, state, regional, and local levels; one go-to website. One is available at SAA but one should be available at SCA.

Focus group members want to hear what affiliated groups are offering in terms of training and workshops. Thought SCA would be a good vehicle to pass this information on to membership.

Joint "get-togethers" with affiliated groups would also be important and useful especially in regional areas.

Other groups’ meetings posted on west\_arch or one shared calendar.

## **SCA could create a “Public Speaker’s Bureau” with the speaker being a local archivist?**

Discussion on the development of a Speakers Bureau was mixed. Some groups supported it. There was some concern over just what this would entail. Many questions arose including: Would it have an advocacy or information role? If it was advocacy, just what and where would it advocate? Was there a perceived need for such a bureau?

### **Some comments were:**

Good idea. I’d be willing to serve

Is there a need for this? Or are we trying to create a need?

Politically a good idea. Need for this in the genealogist community and among community college

Good idea especially networking with local archivists, practitioners, and professionals.

Need to promote it; inform public about it; huge market; promote ourselves, profession, and institution

“Reverse of social media”; a one-two-punch!

Focus group did not support regional symposiums

Feeling it would decline or disappear with lack of demand – would need some central organization, ongoing promotion; would be a BIG undertaking

Attendees saw pitfalls with respect to the management of the Speakers’ Bureau, vetting and training speakers, and the question of endorsing speakers.

### **SCA’s role as an advocate also produced a mixed response:**

SCA should be advocating supporting archivists and archival education and deepen ties with archival education programs

SCA should be a proactive advocate , lobbying legislators

What should SCA be advocating for? – Digital archives – how to do it, collaboration

Could SCA piggyback on advocacy efforts of California Association of Museums (CAM)

Advocacy also on jobs and job creation

Letters are something but is it the best advocacy?

Do we keep it broad or just CA issues or keep it regional and not involved in outside-CA issues?

We have to be careful of what we say and who we represent, who is going to train people?

SCA hasn’t had a directed effort to date. No clear path of action

Is there a way to channel items you wish to see SCA respond to for response?

## Leadership Interviews

Leadership questions focused on administrative issues (See Appendix C). They inquired about the use of an Administrative Assistant, the challenges facing the organization, SCA's accomplishments, and what SCA does best.

Both the Committee of the 80's and the Task Force on Outreach and Organization suggested utilizing an administrative assistant. One of the key questions given to leadership was the possible use of an Administrative Assistant to help with some of the tasks which currently fall upon Board or Committee members.

Some concern was expressed about the possible need to increase membership fees and the potential for turnover in the administrative assistant position.

### **If the Society could afford an administrative assistant, how would you see this position best used?**

The leadership was asked in what areas an Administrative Assistant could be used,

- a. Assisting with long term local arrangements planning
- b. Assisting with membership
- c. Assisting with AGM registration
- d. Assisting the Treasurer
- e. Coordinating communication – social networking, etc.
- f. Other

The responses to the potential use of an administrative assistant from Board members who have served within the past seven years included:

All of the above (a-e), perhaps minus electronic communications. They can streamline all these other functions, rather than having turnover with terms. Each new person has to relearn the position.

All of the above. Traditionally we thought it could help with membership. Have a central contact person. But with the membership system, it may not be necessary. AGM registration especially.

All of the above. An administrative assistance could really take on the drudgery and help all the volunteers focus on what they need to do, communicate. The Administrative assistance would also provide continuity. The problem is many people get burned out and then the person following them in that position has no guidance or support. It is really important to have a job where one has the support and time to devote to the job.

To help the Treasurer with writing checks, general bookkeeping, so the Treasurer can accomplish other managerial tasks and to make that position more "big picture."

When I was president I tried to create a more professional tone for the board, a paid administrative assistant would be a boon to the society. With some roles on the board there is a high learning curve that could be taken over by this paid staff member.

**When the leadership was asked how they felt SCA best served its members, they responded:**

In two ways. First, it provides educational opportunities mostly for newer archivists, though it's starting to get into more advanced topics. Second, it provides a place and an opportunity for archivists to meet and network, get to know one another. Then you get the informal connections. You can contact people to ask how they've dealt with similar issues, etc.

SCA best serves its membership through Community events and educational venues for people to meet face to face and connect. For the majority of people it is these connections that prove beneficial. Educational opportunities are great up to a point because they do no addressing what you are dealing with at work

Through organizing workshops and educational events, SCA should collaborate with SAA to use their existing courses. AGM is a great resource for education and to meet colleagues.

**The leadership survey asked respondents to list the greatest challenges to the organization.**

**Responses included:**

Getting people to run for office. Huge issue with people wanting to run for Board positions that take a lot of time. Having people want to invest their time in the organization – finding out how we get people to want to run.

SCA needs to think of ways to continue to be relevant, and then work better on marketing to people, showing them why they should join.

Continuity and avoiding burn-out, these are really big issues in a volunteer based organization. If you do not have guidance or support you could, and people often do, go in a completely different way from your predecessor who received the task force report, or the survey, or the whatever.

Biggest challenge is to find ways to fill in the shortage of volunteer time.

SCA Volunteers are getting tapped out. They cannot keep it all going. We are also facing a problem in finding qualified people to teach workshops. We are a small membership and we need to continually demonstrate “what is the perceived value” for people to continue their membership.

To bring new people in is the challenge. People coming in really want to participate. How to “breathe new life into the organization.”

The goal of the Board is to find the niche for SCA – SAA can do a lot, but SCA wants to regionalize the society; promote California resources, jobs, identifying the needs within our state that will help members. SAA fills the broader spectrum. Culling the resources for the state together and displaying them on our website.

**Responses to what the leadership saw as opportunities to which SCA could be more responsive included:**

SCA does a great job of helping to bring young archivists into the fold – giving opportunities for learning, meeting other archivists, etc., but SCA hasn't done that much to keep experienced long-term archivists there, except for the networking part of it. That points to a need for workshop and program planning geared towards seasoned professionals.

More responsive to working with SAA and the other regionals. We need to do more to reach out to some of the other regionals across the country. More collaboration.

I really wish we had small groups like the LA as subject where people could get together, the Archives Crawl in Sacramento is another great example. We are a big state and it seems very divided.

SCA needs to be responsive to the internet, and social media. We also need to be working with other organizations and exploring the possibilities of various group efforts for educational opportunities, sharing workshops and making these connections.

Working with other regionals, sharing resources, establishing networks.



## 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.**

## **Appendix A - Charge**

The Strategic Planning Task Force will examine the state of SCA and its membership, as well as developments in the archival profession and broader environment.

After analyzing how these developments impact SCA and its membership, it will recommend a specific plan of action that will ensure that SCA remains effective in its mission of supporting professional development for its membership and advocating on behalf of archival programs in the region.

The Task Force will strive to present its final report to the Board and membership at the 2013 Annual General Meeting, which will complete its term of service.

## Appendix B– Focus Group Questions

1. Have you attended an educational workshop? Why or why not? Do you have any comments to share on the workshops' format, location, topic, etc.
2. What is your preferred method of communication and why? How do you view the Society's social media presence? Are there any improvements you would like to see?
3. What role do you think SCA should have with other archival organizations (cooperate on programming, events, etc.)? What role should SCA have with other allied, non-archival organizations? What role should SCA have with advocacy (what position should we be taking if any on things)?
4. How best do you see SCA getting people involved with the Society? Do you feel your group (i.e. corporate, lone arranger, medical, etc.) is involved in SCA in general (committee, leadership, board, task forces, etc.)? How best can we serve all parts of the membership and make people feel comfortable and welcome in the organization?
5. SCA could create a "Public Speaker's Bureau" with the "speaker" being a local archivist who would address questions about archives and the profession to fraternal organizations, local historical societies, colleges, K-12 schools, etc. Do you think this is a good idea? Would you be willing to serve as a speaker in your local area?

## Appendix C- Leadership Interview Questions

1. When were you on the Board?
2. What was your position on the Board?
3. During your time on the Board, what was the most important issue you encountered?
4. List three things the Board accomplished during your tenure.
  - a.
  - b.
  - c.
5. If the Society could afford an administrative assistant, how would you see this position best used?
  - a. Assisting with long term local arrangements planning
  - b. Assisting with membership
  - c. Assisting with AGM registration
  - d. Assisting the Treasurer
  - e. Coordinating communication – social networking, etc.
  - f. Other
6. How do you think the Society best serves its membership?
7. What do you think is the area in which SCA has potential for the greatest improvement?
8. What do you see as the biggest challenges facing SCA, and in particular, challenges to its sustainability and viability as a volunteer, archival organization?
9. What do you see as opportunities that SCA can be more responsive to?
10. Since your time on the SCA Board, do you feel that SCA as an organization has changed much, and if so, has the change been for the better or the worse? Please explain