

Strategic Plan for the South Carolina Archival Association, 2011-2016  
02 December 2010

## Introduction

The South Carolina Archival Association (SCAA) was founded in 1999, the first formal organization of professional archivists in the state. The objectives of SCAA were and continue to be to foster cooperation and exchange of information among individuals and institutions interested in archival and related activities; to promote the preservation and use of manuscript and archival resources of the state; to share information on archival theories and practices; to provide a forum for discussion of matters as they pertain to the archival profession; and to cooperate with organizations and professionals in related fields.

After ten years of serving the state's archival community, SCAA, in conjunction with other archives related organizations in the state, conducted a survey to assess member needs. The results of the survey showed weaknesses in areas such as communication, program quality, involvement/outreach, collaboration, and support from employers. In April 2010, an ad hoc committee was appointed to create a strategic plan for SCAA, using the survey results, the Spring workshop brainstorming results, and other input.

SCAA has a problem with name recognition in the state. SCAA has relied on SC State Historical Records Advisory Board (SHRAB) and other groups to conduct continuing education workshops without any connection (i.e. sponsorship) to SCAA. There is a definite lack of communication with members and related regional groups within the state. SCAA has not been pro-active in advocacy for the State's archival institutions.

In terms of strengths, SCAA has held regular biannual meetings of both an educational and business nature. It provides networking opportunities through its meetings and its annual Summer Social. SCAA has a solid financial record, which will allow it to explore alternate educational opportunities for its members. And there is a loyal member base to help SCAA meet its future goals.

In order to address the weaknesses, this strategic plan was developed as a five year plan. There are significant changes suggested within that cannot be accomplished in a single year. With a multi-year plan, built-in reviews require periodic assessment of both recommended changes and of the progress toward goals.

The primary goal of this plan is for SCAA to become the premier archival association in South Carolina by 2015. In order to accomplish this goal, several steps need to be taken.

## **1. Review organizational structure and make changes to improve officer workload, member participation, and transparency in governance**

While the basic structure of President, Vice President, Secretary, and Treasurer are necessary and should not be changed, it is in the area of educational programs, membership, communication, outreach, etc. that changes are warranted. SCAA will need working committees to move the organization forward. Working committees spread the workload beyond one or two people. They also involve members in a way that is more comfortable for those who are unable to be a committee chair or officer. They also provide a means of nurturing future officers. Establishing working committees will require a change in the Bylaws to identify the standing committees and their structure. SCAA should establish committees in the following areas: Communications (newsletter, website, social/professional networking sites, listserv; co-chaired by the newsletter editor and webmaster), Finances (budget, financial review, scholarship committee under this) Programming and Education (annual meeting, annual workshop, continuing education), Membership (maintain, promote, and recruit membership) Outreach/Advocacy (publicity, summer social, outreach and advocacy, etc).

SCAA should foster greater consistency and transparency in governance. The concern is that officers may take office without fully understanding the responsibilities of their positions, or without understanding what resources may be available to them in that position. Parliamentary procedure should be followed and practices should be codified. Governing documents should be reviewed to ensure they explicitly state the accountable actions of each officer and any penalties for not carrying out their duties. The governing documents also should answer questions of parliamentary procedure for contingencies, such as the mid-term replacement of a resigned officer.

Recommended timeline for Board actions:

2011 – review structure, update board positions and responsibilities, define committee responsibilities, and present changes to Bylaws to membership for vote at annual meeting; consider having elections mirror proposed changes

2011 – review parliamentary procedure, especially as it relates to financial reports and budgets

2012 – populate new committees and provide them with guidance to move SCAA forward (the committees may need to be ad hoc for this year until elections – a parliamentary procedure question)

2012 – make certain elections mirror new organization

2013 – review committee performance and adjust as necessary

## **2. Planning for educational programs and expanding offerings**

Perhaps the most significant issue regarding programs is the planning system. Currently there is a very short timeframe for planning workshops and meetings. If the quality of programs is to improve, the planning process needs to be reworked. Program planning

should be done at least a year in advance and longer for some meetings. Advance planning allows for soliciting notable speakers and educators and for adequate promotion. Working in advance also will help SCAA formulate its annual budget and ensure there are sufficient funds. Advance promotion provides members with information when making their own annual budget requests for education and travel purposes. To provide consistency for members, SCAA should make the Spring program a true hands-on workshop and keep the Fall program as a multi-session educational and business meeting. The current Directors and immediate future Directors will have to be willing to work to accomplish the changes; having a working committee will help greatly.

For too long, SCAA has relied on SHRAB for archival training programs. SHRAB was very generous with financial support of SCAA's programs during the Association's early years. SCAA now has a solid financial basis and can support bringing in respected archival leaders and teachers. Through collaboration with other organizations, SAA workshops can be offered. Proper promotion of educational programs will legitimize SCAA as a source of professional development. Offering continuing education credit for workshops and other educational programs will help to attract certified archivists and records managers.

Keeping the cost of workshops and meetings low has been beneficial to its members. It is recommended that SCAA continue to offer good value to its members. However, the cost of programs for non-members should be reviewed. If non-members receive a one year membership for attending an SCAA program, does the registration cover the program and membership and provide a modest income? If not, SCAA is losing money. It would be interesting to know if those receiving a membership continued beyond that year.

The Directors need to know what other educational programs the various organizations in the state are planning to offer in a given year. This will help alleviate duplication and improve offerings. Once SCAA begins to plan in advance, other organizations will be looking to see what SCAA is offering as they plan. This will provide opportunities for joint sponsorship of programs as well holding events in various parts of the state.

Recommended timeline for Programming and Education Committee actions:

2011 – the Directors will need to plan programming for 2011 and 2012; look into collaborating to bring in SAA workshop

2011 – the Directors should make contact with program planners for PALMCOP, SHRAB, CALM, etc.

2011 – review past SCAA budget and fee structure for educational programs

2012 – the Directors should be planning for 2013 and 2014

### **3. Open communication within SCAA and beyond**

One of the weaknesses identified in the survey was that of communication, both within SCAA and with rest of the State. Members feel information about events and meetings

often arrives too late for them to budget time and money. Members without access to email and/or the Internet do not receive advance notices, only mailings. They also see a need for ways to leave feedback about the Association, not just meetings and programs.

SCAA should be the central clearing house for archival information. Currently there is no single source for information generated by the various archival related groups within the state. SCAA should solicit information from other organizations and maintain an open statewide calendar of events. Such a calendar would help to minimize duplication of programs and foster a more collaborative spirit within the state.

There are five avenues of communication already available to SCAA: website, listserv, newsletter, social networking sites, and mailings. Each of these can be used in a variety of ways to promote programs, inform members, and receive member feedback.

- Website – should be run by SCAA with own domain to make it easier to post information, especially time-sensitive materials; should be a resource for anyone looking for archival know-how, whether professional or amateur, with online publications and/or links to other sites such as NEDCC information pamphlets; should provide easy access to leadership for queries and suggestions; should maintain statewide calendar of archival events
- Listserv – open to non-SCAA members to provide forum for SCAA activities and preservation issues; can also be used for member feedback through informal surveys
- Social networking sites – SCAA has a Facebook page; should look into other applications such as Twitter and LinkedIn (both can be linked to Facebook) and blogs
- Newsletter – have available on website; have calendar of events for year; spotlight members/institutions; committee updates
- Mailings – continue to use for those members without electronic access; use for outreach and advocacy (see below)

Recommended timeline for Communication Committee actions:

2011 – continue work on website; begin collecting information for calendar

2011 – reach out to other S.C. groups for collaboration on educational programs

2012 – include committee news in newsletter

2012 – have formal liaison or other system with PALMCOP, SHRAB, SGA, SNCA, etc. in place

2013 – review content of website, especially resources area, and adjust as necessary

2014 – have multiple targeted brochures or standard letter ready for outreach and advocacy (see below)

#### **4. Outreach and advocacy for archives**

As SCAA moves toward its goal of becoming the premier archival association in the State, it needs to promote itself as the central organization for anything archival. SCAA should look beyond the usual venues to places such as churches, historical societies,

small museums, college students (undergraduate and graduate) and professors, and corporations for potential members and supporters. It should remind its members of the professional benefits of being an active member, for such things as tenure and promotion, continuing education credits, and vita enhancement. SCAA should be recognized by employers as a legitimate professional education provider and a good value for the money, especially when compared with SAA or NAGARA.

Advocacy is an important issue. Even before the recent economic downturn, this state was not very supportive of archives. SCAA needs to step up and help to promote the importance of archives. This also will make SCAA a leader in the archival community within the state. If members know they can seek support from SCAA when faced with political issues, it will make for a stronger Association. Actions such as co-sponsoring Archives Month with State Archives, writing in support of State budget items for the Archives and history related programs, and making contact with Legislators for support of local history are a few examples of advocacy.

Recommended timeline for Outreach Committee actions:

- 2011 – reach out to other S.C. groups for collaboration on educational programs and appoint a national advocate/liason to SAA (someone from the Outreach committee)
- 2011 – maintain current membership list on “members only” section of website
- 2012 – promote SCAA’s new “look” and target possible new members in the state and region (i.e. dual membership w/ other state organizations, SGA, and SNCA)
- 2013 – create brochure and cover letter to use for outreach and advocacy
- 2014 – assess outreach and advocacy efforts

## 5. Finances

SCAA is on a solid financial footing at this time. In order for SCAA to meet the proposed changes and goals, monies will need to be expended. Therefore, it is recommended that SCAA review its dues with the idea of creating a structure that will allow for differing levels of giving. SCAA also should think about promotional items that will support its programming. An incentive to serving as an officer might be covering travel expenses, many of which are paid currently out-of-pocket by Board members. As mentioned earlier, workshops and meetings should not be considered as significant money-making ventures, but they should not sap the Association’s resources either. Collaboration can help cut costs, but it should not be the standard. Corporate sponsorship is another avenue of potential support. Quality programs take funding and fiscal planning yet the benefits to the Association go beyond the balancing the budget.

Recommended timeline for Treasurer/Financial Committee actions:

- 2011 – review dues structure to allow for levels of giving
- 2012 – explore potential sources of monetary support for programming (i.e. corporate sponsorship)
- 2013 – review new programming to make sure of financial success

SCAA should be the leader in continuing education, networking, and communication for archivists and related professionals working with archival materials. This strategic plan is not the only means by which SCAA can attain this status, but it will assist the Association in its endeavors. The work outlined above is based on the premise that working committees will be established and will take on the bulk of the work. SCAA should continue to seek and respond to member input, as they are the true voice of the group.

### **Strategic Plan Timeline**

Year One/2011:

Board responsibilities:

- Review Bylaws and propose changes to membership at Fall business meeting
- Review finances and investments and explore other options (include all SCAA accounts and funds – checking, CD, scholarship fund)
- Review strategic plan and make changes if necessary

Treasurer/Financial Committee responsibilities:

- Review dues levels and structure, make recommendations at Fall business meeting
- Review fee structure for educational programs

Directors/Continuing Education Committee responsibilities:

- Directors will need to plan programming for 2011 and 2012; look into collaborating to bring in SAA workshop
- Directors should make contact with program planners for PALMCOP, SHRAB, CALM, etc.

Newsletter editor/Outreach Committee responsibilities:

- Work on website; begin collecting information for calendar
- Contact other organizations for information for newsletter
- Use website to promote SCAA and educational/preservation activities around state
- Use listserv and website as conduit for information to and from members

Year Two/2012:

Board responsibilities:

- Review strategic plan and make changes if necessary

Board and Committee chairs responsibilities:

- Populate new committees and provide them with guidance to move SCAA forward (the committees may need to be ad hoc for this year until elections – a parliamentary procedure question)
- Make certain elections mirror new organization
- Review committee performance and adjust as necessary
- Include committee news in newsletter

Board and Outreach Committee responsibilities:

- Have formal liaison or other system with PALMCOP, SHRAB, SGA, SNCA, etc. in place; continue outreach efforts with other groups

- Promote SCAA's new look

Board and Financial Committee responsibilities:

- Implement new dues structure
- Explore potential sources of monetary support for programming

Directors/Continuing Education Committee:

- Program planning should reflect new timeline for planning

Year Three/2013:

Board responsibilities:

- Assessment of other changes and progress toward other goals
- Review strategic plan and make changes if necessary

Continuing Education Committee:

- Have educational offerings for year identified and advertise early in year so members can plan their budgets

Outreach Committee responsibilities:

- Review content of website, especially resources area, and adjust as necessary
- Create brochure and cover letter to use for outreach and advocacy

Financial Committee responsibilities:

- Review new programming to make sure of financial success

Year Four/2014:

Board responsibilities:

- Implementation of actions identified in Year Three
- Review strategic plan and make changes if necessary.

Continuing Education Committee:

- Have well-developed partnership with regional, statewide, and national groups to provide workshops

Outreach Committee

- Begin using brochure and other means for outreach and advocacy
- Have well-developed partnership with SCDAH for Archives Month

Year Five/2015:

SCAA should be the premier archival association in the state. It should be the primary conduit for information about archives and the profession.

This report of the Ad Hoc Committee for Strategic Planning is respectfully submitted,  
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