

# ORGANIZATIONAL STRATEGIC PLAN 2023-2026

Ideas and Actions  
for Today and Tomorrow



# About the Planning Process

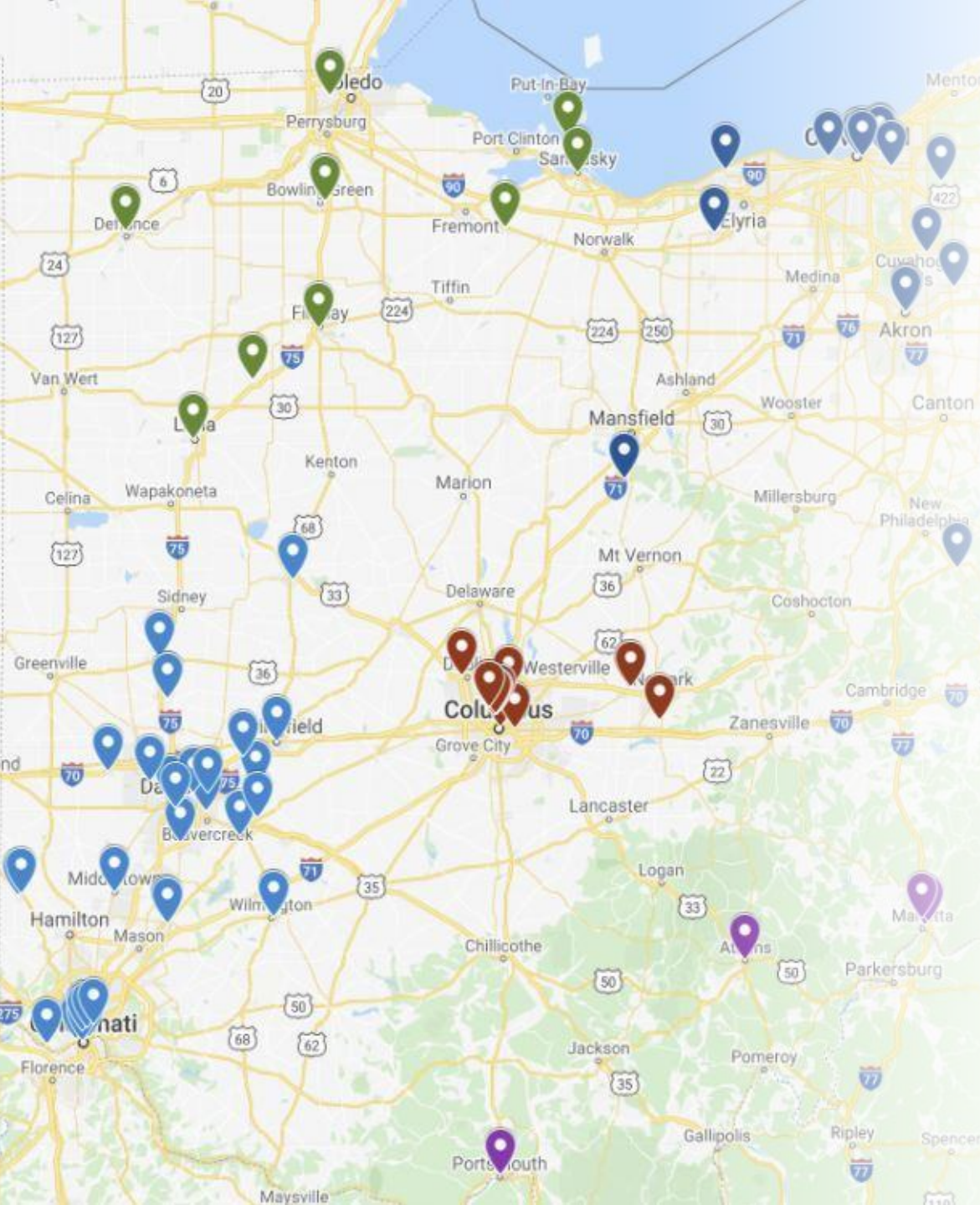
Like the rest of the world, the pandemic had a profound impact on SOA and its membership. As we all became more used to the “new normal,” we wanted to make sure we were responding to the needs of archivists and archives across Ohio by creating a new strategic plan.

We began this strategic planning process in the summer of 2022 with two “concern gathering” sessions: one for those who had been leaders in SOA in the last 5 years and one for our general membership. These listening sessions were designed to gather feedback from stakeholders about what SOA is doing well, areas of concern, and opportunities for growth. Council members and committee heads then began working with a consultant in August and September to begin to develop goals and objectives, focusing on the value SOA provides to the archival community.

After a pause in the process to review internal SOA board structures, we began again in February 2023. The Strategic Planning Committee made the decision to create a lighter, brighter, more flexible plan, which sets goals in each of our focus areas over the next three years, and outlines strategies for successfully achieving these visionary initiatives.

Society of Ohio Archivists Strategic Planning Team, 2023





## Organizational Mission

SOA improves the state of archives in Ohio by promoting the archival profession and providing education and networking opportunities.

## Vision

SOA will be the primary provider of professional development for archivists and historical records professionals in Ohio.

SOA will be a leader in offering educational and collaborative programs, designed both for new and experienced professionals.

Through these services archivists and others working with historical resources in Ohio will gain knowledge and experience, improving public access to historical documents and information, and enhancing historical memory in communities throughout the state.

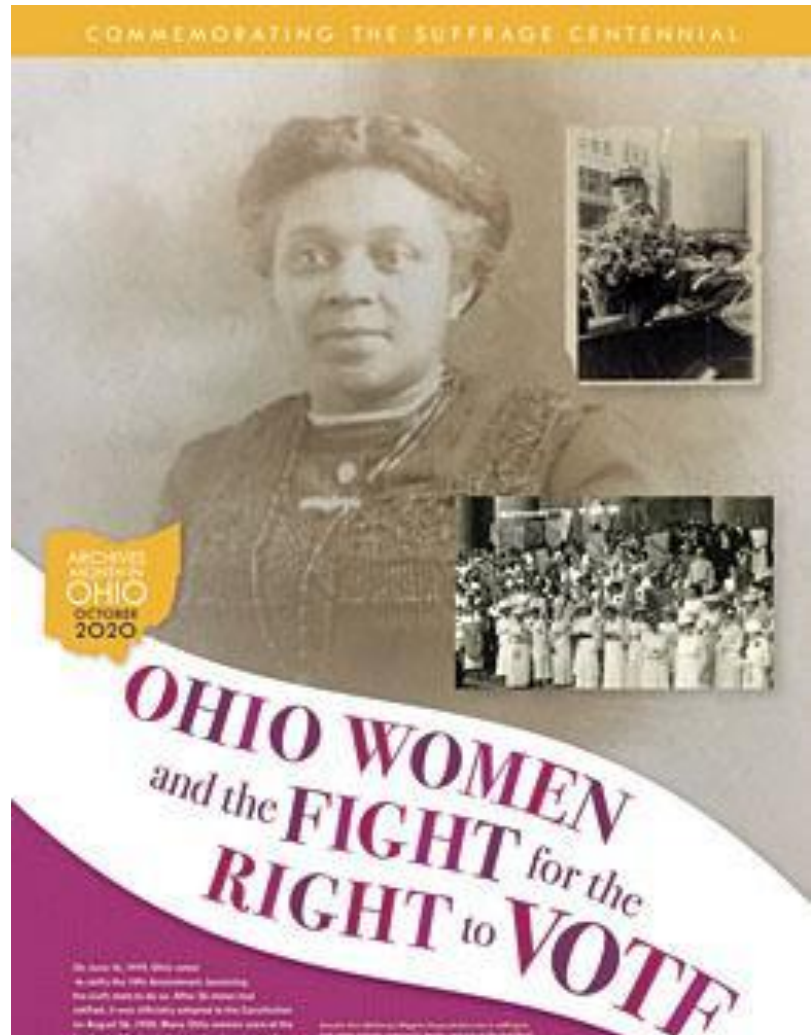
# Core Values

**Education:** The Society of Ohio Archivists strives to create and support continuing education, mentorship, and training opportunities for its members, as well as anyone caring for the archival needs of organizations, communities, families, or individuals. SOA welcomes archivists of all levels of education and experience.

**Collegiality:** Our organization fosters a spirit of camaraderie that accepts, welcomes, and includes a diverse membership from all areas of the archival community and provides them with supportive networking and fellowship opportunities.

**Advocacy:** SOA actively promotes and support the field of archives and the work of archivists and the value of the historical record.

**Collaboration:** SOA seeks and creates opportunities for partnerships with and between organizations and institutions for the betterment of the society and the profession.





# GOALS

1. As a result of joining SOA, people doing archival work in Ohio will access relevant resources, gain cost-effective professional development, and network with a vibrant community of practice.
2. As a result of accessing relevant SOA resources, Ohio communities and organizations without a professional archivist will gain valuable archival knowledge to become confident stewards of their collections.
3. As a result of engaging in SOA outreach and programs, people will develop a deeper understanding of the diversity of human experience and history; and archiving as a practice.





# STRATEGIES FOR SUCCESS

Time-Sensitive Objectives and Measurable Outcomes  
to Help Achieve Our Goals

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# Education, Programs, & Outreach

## First

- **EPC** - Hold SOA's Annual Spring conference and participate in archival tracks at collaborating organization conferences (e.g., MAC, OLHA)
- **OA Ed.** - Publish a semi-annual newsletter
- **MCC** - Regularly update SOA's website and social media with relevant, timely, curated content: blog, DEI resources, internships page, passport, public information, etc.
- **Council** - Field archivists' questions via the listserv

## Next

- **EPC & MCC** - Host or sponsor virtual/in-person workshops or forums on industry best practices and share news of regional and national resources + webinars

## Finally

- **A&O** - Create lesson plans for teachers highlighting archival resources and practices



# Membership & Collegiality

## First

- **M&A** - Analyze membership program benefits in support of increasing membership.
- **M&A** - Have galvanizing answers to the questions:
  - ☐ Why join SOA?
  - ☐ What value does SOA provide for those doing archival work in Ohio?

## Next

- **MCC** - Evaluate and monitor marketing and communication channels making sure they give access to relevant information and resources.
- **M&A** - Connect with graduate programs around the state in archives/library science/informatics/public history to promote SOA resources and membership.

## Finally

- **M&A** - Launch initiative for professional archivists to mentor other dues-paying members
  - ☐ Create program according to best practices and a pipeline directing them to other cost-effective mentoring opportunities.





What do archivists do?

How can teachers incorporate archives into the classroom?

How can I donate materials to an archives?

# #AskAnArchivist Day

October 12

Why are archives important?

What's the oldest item in your collection?

How can I preserve my family photos?

What's the coolest item in your collection?

What should I do to make sure my emails don't get lost?



## Advocacy

### First

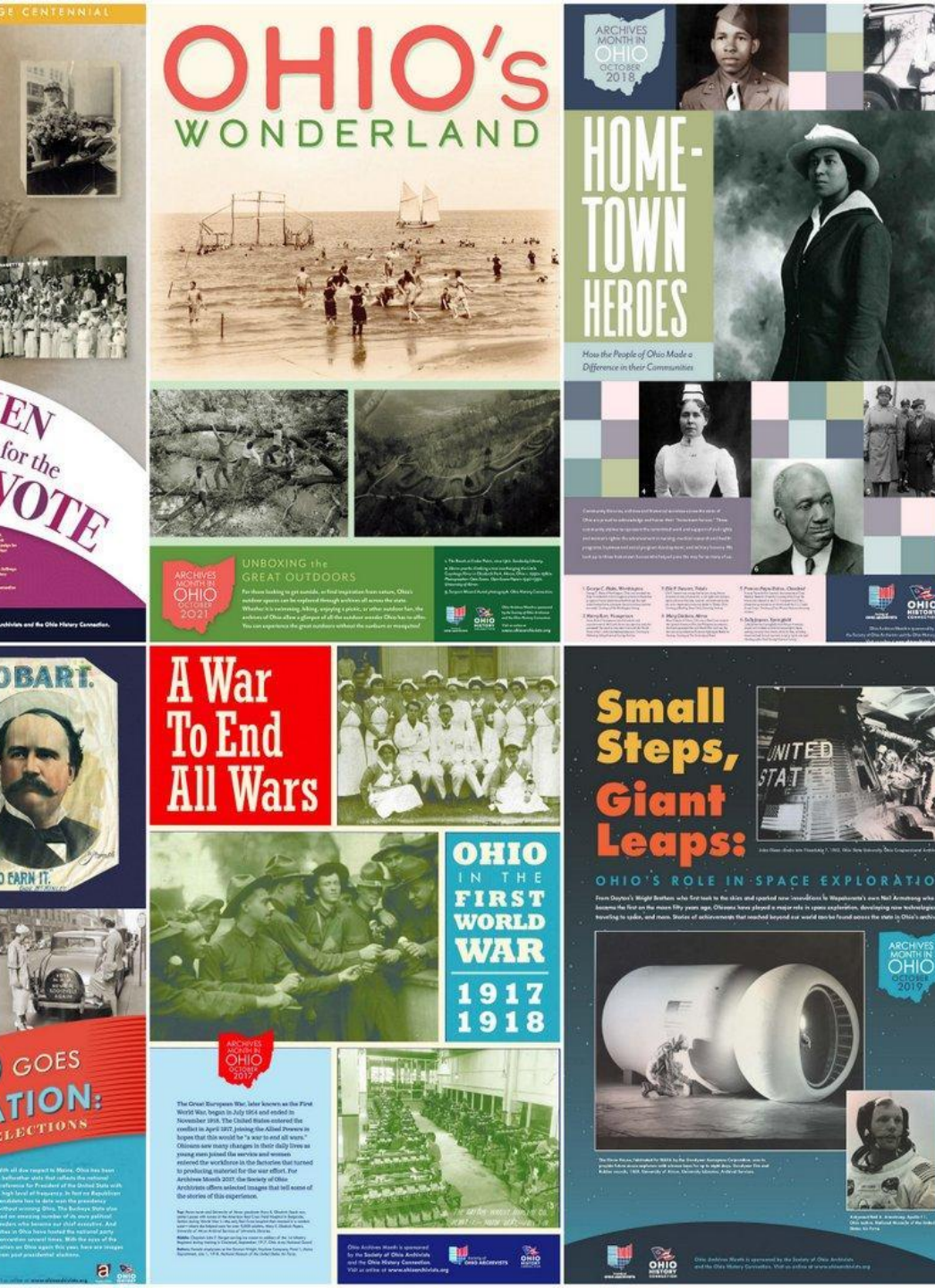
- **Council** - Continue public advocacy efforts, drafting statements on relevant legislation and submitting them to lawmakers.
- **MCC & A&O** - Raise awareness of SOA's public advocacy efforts by sharing news through all SOA media channels.
- **A&O** - Participate as an organization in #AskAnArchivist Day.

### Next

- **A&O** - Participate in public advocacy events with decision-makers, such as at Statehood Day, to maintain and increase funding for Ohio archives.
- **A&O** - Plan and/or promote public programming during Archives Month.

### Finally

- **A&O** - Explore other avenues to increase advocacy on behalf of archives and other cultural heritage organizations.



# Collaboration

## First

- **M&A** - Sponsor Ohio History Day SOA award (senior and junior divisions) for use and citation of primary sources.
- **MCC** - Use SOA convening power to share resources from other entities doing the same work like MAC, LYRASIS, OhioNET, OhioDIG, OPC, ARMA, CARMA, CoSA, and others.

## Next

- **Council** - Create a sustainable, reciprocal partnership with OLHA.

## Finally

- **Council** - Create a partnership liaison to address bandwidth factor (possible council position?)
- **Council** - Access OLHA's regional network (via OHC Liaison) to connect with local history organizations.
- **All** - Provide a platform for community/personal archivists to share their work with the wider SOA membership to build bridges among archival stewards working in formal and informal settings.



# Organizational Structure & Sustainability

## First

- **Council & JEDAI** - Set up a bylaws task force to review and revise existing bylaws and make suggestions for improvement.

## Next

- **Council** - Cultivate greater diversity among SOA leadership.
- **JEDAI & All** - Evaluate internal processes and come up with plans for improvement.

## Finally

- **Council** - Offer new forms of SOA leadership engagement including mentorship, and cultivation of early-career leaders (especially committee chairs).

2022 ANNUAL SPRING MEETING RECAP:

## Archives & Sustainability

Adam Wanter, MidPointe Library, and Katie Jarrett, University of Dayton, Educational Programming Committee Co-Chairs



Photo Courtesy of Adam Wanter

**A**FTER A TWO-YEAR HIATUS, SOA held its Annual Meeting in person again, on May 20, 2022. Masked attendees met at the Main Library of the Columbus Metropolitan Library to engage with topics related to the theme Archives and Sustainability.

The day opened with a quick welcome, followed by concurrent sessions – details and synopsis of which are below. After the

busy morning, lunch was served and the SOA Business meeting was held. During the meeting, Merit Awards were given to Jocelyn Robinson of Miami Valley Public Media, and to the Ohio Digitization Interest Group; New Professional scholarships were awarded to Elizabeth Coots and Alex Sanford, and Student Scholarships were awarded to Kasandra Fager and Kaylee Rigg. Kasandra Fager was designated the first winner of the Ohio

**Preservation Council** scholarship. The results of the election were also announced, with Sue Holder being elected to Council, Brittany Hayes as Treasurer, and Melissa Dalton as Vice President/President-Elect. Finally, new President Amy Rohmiller bid a fond farewell to the following outgoing Committee Co-Chairs and Council Members: Adam Wanter (Past-President), Natalie Fritz (A&O), Jenifer Baker (A&O), Rachael Bussert (EPC), Anne Ryckbost

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Ohio Archivist is designed and published for the Society of Ohio Archivists by the Ohio History Connection.

# Outcome Achievement Timeline

	2023-24	2025	2026
Education, Programs & Outreach	<ul style="list-style-type: none"> <li>• Hold SOA's Annual Spring conference and participate in archival tracks at collab. conferences</li> <li>• Publish a semi-annual newsletter</li> <li>• Regularly update SOA's website and social media with relevant, timely, curated content:</li> <li>• Field archivists' questions via the listserv</li> </ul>	<p>Host or sponsor virtual/in-person workshops or forums on best practices and share news, resources, and webinars</p>	<p>Create lesson plans for teachers highlighting archival resources and practices</p>
Membership & Collegiality	<ul style="list-style-type: none"> <li>• Analyze membership program benefits in support of increasing membership..</li> <li>• Have galvanizing answers to the questions: <ul style="list-style-type: none"> <li>□ Why join SOA?</li> <li>□ What value does SOA provide for those doing archival work in Ohio?</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate/monitor communication channels to ensure they provide relevant info/resources.</li> <li>• Connect w/ grad programs around the state in archives/LIS/informatics/public history to promote SOA resources and membership.</li> </ul>	<p>Launch initiative for professional archivists to mentor other dues-paying members.</p> <ul style="list-style-type: none"> <li>□ Create program according to best practices and direct them to other mentoring opportunities.</li> </ul>
Advocacy	<ul style="list-style-type: none"> <li>• Continue public advocacy efforts, drafting statements on relevant legislation and submitting them to lawmakers.</li> <li>• Raise awareness of SOA's public advocacy efforts by sharing news through all SOA media channels.</li> <li>• Participate as an org in #AskAnArchivist Day.</li> </ul>	<ul style="list-style-type: none"> <li>• Participate in public advocacy events like Statehood Day to maintain and increase funding for Ohio archives.</li> <li>• Plan and/or post public programming during Archives Month.</li> </ul>	<p>Explore other avenues to increase advocacy on behalf of archives and other cultural heritage organizations</p>
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Organizational Strength & Sustainability	<p>Set up a bylaws task force to review and revise existing bylaws and make suggestions for improvement.</p>	<ul style="list-style-type: none"> <li>• Cultivate greater diversity among SOA leadership.</li> <li>• Work with JEDAI Committee to evaluate internal processes and come up with plans for improvement</li> </ul>	<p>Offer new forms of SOA leadership engagement including mentorship, and cultivation of early-career leaders (especially committee chairs)</p>



# Measuring Success

- Progress towards the successful attainment of strategic goals will be measured by tracking individual outcomes.
- Accomplished objectives will be green, unfinished initiatives under way are yellow, and those yet to begin are red.
- Progress on strategic initiatives will be checked during monthly SOA council meetings and council members will report to SOA membership during regular meetings.



# Task Tracking: Complete – On Schedule – Yet to Begin

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# Strategic Planning Committee

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## SOA Board Members

- Melissa Dalton, Preserve It, LLC (Vice President/President-Elect 2022-2023, President 2023-2024, Past President 2024-2025)
- Collette McDonough, Kettering Foundation (At-Large 2021-2023)
- Nick Pavlik, Bowling Green State University Libraries (At-Large 2022-2024)
- Amy Rohmiller, Kettering Health Dayton (President 2022-2023, Past President 2023-2024)

Plan facilitation and production by  
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