

Society of Ohio Archivists Council Meeting
Tuesday, September 23, 2025
9-10 am (EST)

Attendees: Jennifer Long Morehart, Michelle Ganz, Adam Wanter, Betsy Hedler, Emily Rebmann, Christine Liebson, Stephanie Shreffler, Sophia McGuire, Hannah Kemp-Severence, Shelby Beatty (minutes)

1. Welcome
 - a. President Jennifer Long Morehart calls the meeting to order at 9:06 am.
2. Minutes
 - a. Vote for approval: August 19, 2025 meeting minutes.
 - i. Long Morehart calls to approve meeting minutes from 8/19. Secretary Shelby Beatty motioned, JEDAI co-chair Michelle Ganz seconds, motion carries.
3. Officer, Committee, and Newsletter Reports
 - a. Treasurer
 - i. Treasurer Sophia McGuire – Nothing additional to add. One transaction of \$0.23 in interest.
 - b. Advocacy & Outreach
 - i. Christine Liebson – Nothing additional to add. Focus on poster unveiling event on Thursday 9/25. Welcoming and coordinating Emily Rebmann as incoming co-chair. Working on October blogs for Archives Month. Extending invite to write a blog for Archives Month to anyone that wants to help promote the month.
 - c. Educational Programming
 - i. Adam Wanter – Planning for 2026 MAC/SOA conference has begun. Met with MAC programming co-chair. Call for conference proposals has gone out and the deadline is 10/17 with no extensions. Goal for a smaller organizations/lone arrangers track and significant SOA involvement.
 - d. Justice, Equity, Diversity, Accessibility, and Inclusion (JEDAI)
 - i. Ganz - Working on JEDAI scholarship.
 - e. Marketing & Communications
 - i. Long Morehart – No representative present.
 - f. Membership & Awards
 - i. Stephanie Shreffler – Discussed scholarship details with JEDAI. Continued discussions about scholarships for the next annual meeting.
 - g. Nominating
 - i. Long Morehart – No representative present.
 - h. Newsletter
 - i. Long Morehart – No representative present. The newsletter looks great! Thank you, Jessica and editors.
4. New Business
 - a. SOA Operating Budget 2025-2026 [2025-2026 Budget Estimates - Google Sheets](#)
 - i. McGuire – One main difference this year is that we did not factor in income related to the spring conference with MAC. Let's leave it at no income and be pleasantly surprised if we receive some. Max out of pocket should be \$1,500.
 - ii. Wanter – MAC conference will be more expensive. Do we want to raise scholarship amount to cover increase costs to attend?

1. Shreffler – Membership & Awards has been discussing this.
 2. McGuire – I'm comfortable with scholarships being increased. Once we factor in carryover, we come out comfortably in the green.
 3. Shreffler – What will conference fees be?
 4. Wanter – Student registration will be \$50, and hotels are at \$170 per night.
 5. Ganz – \$200 for general registration.
 6. Wanter – Single day registration will be around \$125.
 7. McGuire – We could approve budget without increased scholarship amounts. We can wait until later to approve those.
 8. Betsy Hedler – We usually register scholarship winners for the conference for free.
 9. Wanter – With the way MAC registers, we can use their system to register scholarship winners. We will have to pay out for winners ahead of time.
 10. Hedler – For OHLA, we had winners register and submit a check for reimbursement.
- iii. Long Morehart calls to approve the budget and amend as needed. Ganz motions, JEDAI co-chair Hannah Kemp-Severence seconds, motion carries.
- b. Honoring Robin Heise
 - i. Long Morehart – We voted via email to send a monetary contribution to the American Heart Association in Robin's memory. Any ideas to further honor her? Annual meeting resolution, advocacy, etc.?
 1. Liebson – A resolution would be welcomed.
 2. Long Morehart – We can prepare that for the spring meeting.
 - ii. Long Morehart calls to approve a resolution to honor Robin Heise at the annual meeting. McGuire motions, Beatty seconds, motion carries.
5. Old Business
 - a. Mentorship Task Force update
 - i. Long Morehart – We have enough people to create a taskforce. More information to come.
 - b. SOA/OLHA conversation update—prep
 - i. Long Morehart – In preparation stage. We're meeting with past presidents and preparing to talk to different committees and individuals involved.
 6. Upcoming Meetings
 - a. Next Meeting - Tuesday, October 28, 2025, 9-10 am via Microsoft Teams
 7. Long Morehart adjourns the meeting at 9:30 am.

SOA Treasurer's Report**9/23/2025****Previous Balance**

\$29,106.67

Deposits

\$.23 – Interest

Expenses

None

Current Balance

Checking Account - \$29,106.90

Cash Box - \$200

Pending

\$100 – Donation to American Heart Association in memory of Robin Heise

Date:	September 23, 2025			
Committee:	Advocacy and Outreach			
Co-chairs:	Christine Liebson (incoming)/Emily Rebmann (incoming)			
Members:	Connie Conner	Jacky Johnson	Jim McKinnon	Collette McDonough
	Ken Grossi	Dana Best-Mizsak	Sarah Aisenbrey	Natalie Fritz
	Nina Herzog		Amanda Dowler	
Mission/Summary:				
The mission of the Advocacy and Outreach Committee is to advocate for archives and archivists by responding to issues impacting the role of archives and archivists in society and to provide outreach programming throughout the state of Ohio relating to Statehood Day, Archives Month, and communicating news from local, state, and national archives-related outlets.				
<i>New mission statement as of December 2024</i>				
Goals for the Year:				
● Create the Archives Month poster ● Have an unveiling event for the poster ● Generate content for the SOA Blog that relates to advocating for Ohio's archives and archivists ● Collaborate with other SOA committees as needed				
Ongoing / Monthly updates:				
● Emily Rebmann approved as cochair (to fill vacancy from Sarah Aisenbrey stepping down) following August meeting ● Updated membership roster and listing on committee web page ● Coordination of poster mailing and details for unveiling event ● Blogs ○ It has been challenging to create content on a monthly basis. Open to collaboration with other committees.				
Upcoming				
● Poster unveiling event date - September 25 at 3:30 PM				

Society of Ohio Archivists Committee Reports

Date:	August 19, 2025		
Committee:	Educational Programming Committee		
Chairs:	Sara Mouch, University of Toledo; Adam Wanter, MidPointe Library System		
Members:	Nora Blackman, Case Western Reserve University	Matt Francis, Ohio Northern University	Jennifer Long Morehart, Bowling Green State University (President)
	Stacy Chaney-Blankenship, Ohio Wesleyan University	Betsy Hedler, OHC/SOA Liaison	Kristen Newby, Columbus Metropolitan Library (VP)
	Meghan Crawford, Capital University	Riza Miklowski, Akron-Summit County Public Library	Dan Noonan, The Ohio State University
Mission/Summary:			
Plan the annual SOA spring annual conference and professional development workshops. Activities include choosing a conference theme, solicitation and selection of session presenters, selection of plenary speaker, publication and distribution of conference announcements, collecting conference evaluations, and planning professional development workshops of interest to members. Support for the Fall OHLA/SOA virtual conference.			
Goals for the Year:			
- Work with the MAC Program and Local Arrangements Committees to help coordinate and plan MAC's 2026 meeting in Columbus. - Develop proposals to help offset the costs the MAC-SOA Conference for SOA members - Determine feasibility of offering additional programming to SOA members, and undertake the development of that programming.			
Ongoing Issues and Challenges:			
- For 2026: navigating the MAC/SOA collaboration.			
Accomplished Tasks (since August Council meeting)			
- MAC / SOA Local Arrangements committee will be meeting soon - MAC Program Committee Co-Char was appointed and CFP was crafted - o Finalized SOA PC members, will be meeting as soon as MAC finalizes their members - MAC / SOA 2026 Joint meeting is fully underway			

Date:	August 23, 2025	
Committee:	Society of Ohio Archivists Justice, Equity, Diversity, Accessibility, and Inclusion (JEDAI) Committee	
Co-Chairs:	Michelle Ganz, Dominican Sisters of Peace (2025- , co-chair 2025-2027) Hannah Kemp-Severence, University of Akron (2023- , co-chair 2024-2025; 2025-2026)	
Members:	Madeline Fix, (2020-)	Meghan Crawford, Capital University (2024-)
	Austin Hall, University of Cincinnati (2024-)	Savannah Gould, Akron Summit County Public Library (2024-)
	Arjun Sabharwal, The University of Toledo (2023-)	Michele Jennings, University of Dayton (2024-)
	Niel White, (2024-)	
	Kelly Hummingbird, Association of Tribal Archives, Libraries, and Museums (ATALM) (2025-)	
Mission/Summary:		
The JEDAI Committee is responsible for identifying, promoting, developing, and educating on antiracist and social justice efforts, actions, and resources for SOA Council, Committees, and Membership.		
Goals:		
- Evaluate SOA internal processes and come up with plans for improvement. - Coordinate with the Membership and Awards committee to draft the description, criteria, and rubric for a JEDAI scholarship. - Using feedback from Crucial Conversations: Archival Work and Advocacy in the Current Political Climate 2025 annual meeting session, design some support systems for SOA members – possibly mentorship, tool kits, or self-care and determine where to best focus our efforts		
Ongoing Issues and Challenges:		
Developing a description, application, rubric, and financing strategy for JEDAI scholarship		
Accomplished Goals:		
- Met with co-chairs of Awards Committee; all agree on basic description of scholarship and the desire to move forward for this year with JEDAI committee drafting updated application and rubric. Scholarship winner for this year to be chosen jointly by Membership and Awards and JEDAI committees with JEDAI in advisory role for future years' selections - Met with SOA/MAC local arrangements committee to ask questions about costs, scholarship sharing, and registration fees - Reducing student cost from \$75 to \$50		

- Regular registration was \$200 for the last conference and expected to be the same
- SOA and MAC scholarships will remain separate
- Parking will be about \$20/day at the Union

Society of Ohio Archivists Committee Reports

Society of Ohio Archivists Committee Reports

Date:	September 23, 2025	
Committee:	Marketing and Communications	
Cochairs:	Emily Gainer, Cummings Center for the History of Psychology (2020-, cochair 2024-2026); Amber Bales, Ohio State University (2022-, cochair 2025-2027)	
Members:	Janet Carleton, Ohio University (1999-) Julia Teran, Case Western Reserve University (2023-2027)	Katie Gable (2024-2026) <i>Open</i>

Mission/Summary:

The Marketing and Communications Committee is responsible for public relations and outreach for SOA through the process of generating content and maintaining the tools to communicate SOA information. Duties and responsibilities include updating the SOA website, maintaining social media accounts (Facebook, Flickr, Instagram, ISSUU, LinkedIn, Pinterest, YouTube), moderation of SOA Listserv, responding to SOA email inquiries, and documenting SOA events through photographs.

Goals for the Year (based on 2023-2026 Strategic Plan):

- Regularly update SOA's website and social media with relevant, timely, curated content: blog, DEI resources, internships page, passport, public information, etc.
- Evaluate and monitor marketing and communication channels making sure they give access to relevant information and resources.
- Raise awareness of SOA's public advocacy efforts by sharing news through all SOA media channels.
- 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.

Ongoing Issues and Challenges:

- Deciding what social media platforms to join or devote less effort toward. Creating content for different social media platforms.

Accomplished Goals:

- Performed WordPress maintenance & communicated with super admin Phil Sager as needed.
- Performed website content refresh and review
 - Posted 6 blog announcements since the last Council meeting.
 - Last 30 days: 2,232 page views (increase 55% from last month). Most visited 3 pages: 1) homepage, 2) Archives Month, 3) Annual meeting
- Managed [SOA Listserv](#).
 - 404 members (+3)
 - Approved requests to join. Posted news and announcements of general interest. Blocked spam.
- Managed Facebook [Page](#).
 - Posted Archives Month poster unveiling, SOA/MAC joint annual meeting announcements, job postings, and other announcements.
 - 226 likes; 312 followers (+12; +27)

- Managed [ISSUU](#) account. We will no longer be using ISSUU to post the SOA newsletter due to changes in the free account structure.
- Managed [Instagram](#) account
 - 755 followers (+30). 3,254 views in the last 30 days.
 - Instagram takeovers: Openings in November, December, and into 2026.
- Managed [LinkedIn Page](#)
 - 264 followers (+6). Regular posting of content.
- Managed [Pinterest](#)
- Managed [YouTube](#) account
 - 44 videos total. 31 subscribers

Society of Ohio Archivists Committee Reports

Date:	9/23/2025		
Committee:	Membership & Awards Committee		
Chairs:	Stephanie Shreffler, co-chair 2024-2026; Julia Teran, co-chair 2025-2027		
Council Liaison:			
Members:	Marsha Miles	Devhra Bennett-Jones	Mark Bloom
	Rachel Sykes	Cate Putirskis	Helen Conger
Mission/Summary:			
The Membership & Awards Committee supports and recognizes the work of SOA members. Responsibilities include the general recruitment of new members, leading the annual membership drive, soliciting and reviewing award applications for the SOA Merit Award and meeting scholarships, supporting Ohio History Day including the issuing of SOA History Day awards, special projects in support of membership goals, and responding to general membership inquiries.			
Goals for the Year (2025-2026):			
● Select winners of the Merit, Student/New Professional, and History Day Awards ● Membership Drive 2025-26 - write and distribute the membership renewal letter. Communicate with OHC for distributing email blast for membership renewal notifications.			
Ongoing Issues and Challenges:			
● <u>New and Renewing 2025 SOA Memberships</u> ○ Current: As of 8/14/2025 membership roster: 159 memberships ○ Breakdown: ▪ Individual: 132 ▪ Student: 13 ▪ Bridge: 5 ▪ Patron: 4 ▪ Sponsor: 3 ▪ Lifetime: 2 Compare to: ○ 2024: 155 (Society of Ohio Archivists Council Minutes, June 20, 2024) ○ 2023: 142 (Society of Ohio Archivists Council Minutes, March 28, 2023) ○ 2022: 153 (Society of Ohio Archivists business meeting minutes May 20, 2022)			

- 2021: 107 ([Society of Ohio Archivists Council Minutes, March 10, 2021](#)); 166 ([Society of Ohio Archivists Council Minutes June 28, 2021](#))

- Working with EPC to possibly adjust scholarship amounts or number of scholarships to better assist our members with attending the MAC/SOA joint meeting in May 2026

Accomplished Goals:

- Continued conversation with JEDAI co-chairs about the JEDAI scholarship, working out the details of how we will award it
- Finalized our annual goals

Society of Ohio Archivists Committee Reports			
Date:	September 23, 2025		
Committee:	<i>Ohio Archivist</i> Newsletter		
Editor:	Jessica Heys , Independent Archives Contractor, Kettering Foundation (News & Notes Asst Ed, Fall 2017-current; Interim Editor, Spring 2022; Editor-in-Chief, Fall 2022--Fall 2025)		
Asst Editors:	Jessica Heys , News & Notes (Fall 2017-Current)	Michelle Ganz , DEAI (Spring 2023-)	Emily Ahlin , Features (Spring 2023-)
	Penelope Shumaker , Digital Discussion (Fall 2023-)	Emily Rinaman , Welcome Emily! (Fall 2025-)	
Mission/Summary:			
The <i>Ohio Archivist</i> is the official newsletter of the Society of Ohio Archivists. Its primary mission is to serve as a conduit for information about SOA and its membership. The <i>Ohio Archivist</i> also publishes articles containing general information about the archival profession, especially as it relates to archivists located within Ohio and the Midwest. (Approved by Council on 2/12/2010.)			
Goals for the Year:			
• See if anyone else would like to take over the newsletter • I am continuing to do the News & Notes for now • Rethinking and expanding content topic areas • Pay more attention to readership tracking/statistics • Send out regular Guidelines reminders https://ohioarchivists.org/ohioarchivist/ohioarchivist_guidelines/			
Ongoing Issues and Challenges:			
• Involvement / inclusion • Improve as editor • Gain readership			
Accomplished Goals:			
• Fall 2025 issue published • New Assist Editor started Fall 2025			

EXPENSE PROJECT

EXPENSE PROJECT

EXPENSE ITEM

Workshop - Fall 2024	Workshop - Fall 2025	OHC Fees
Workshop - Fall 2024	Workshop - Fall 2025	Speaker
Workshop - Fall 2024	Workshop - Fall 2025	Miscellaneous
Workshop - Spring 2025	Mixer - Spring 2026	Venue / Catering
Workshop - Spring 2025	Mixer - Spring 2026	Virtual Event Services
Workshop - Spring 2025	Mixer - Spring 2026	Speaker(s)
Workshop - Spring 2025	Mixer - Spring 2026	Printing
Mixer - Spring 2025	Mixer - Spring 2026	Mixer
Conference - Spring 2025	Conference - Spring 2026	Venue
Conference - Spring 2025	Conference - Spring 2026	Catering / Food
Conference - Spring 2025	Conference - Spring 2026	Virtual Event Services
Conference - Spring 2025	Conference - Spring 2026	Speaker(s)
Conference - Spring 2025	Conference - Spring 2026	Printing
Conference - Spring 2025	Conference - Spring 2026	Equipment Rental
Conference - Spring 2025	Conference - Spring 2026	Miscellaneous
Awards - Merit	Awards - Merit	Plaques
Awards - Merit	Awards - Merit	Mailing
Scholarships	Scholarships	New Professionals
Scholarships	Scholarships	Students
Awards - History Day	Awards - History Day	Sponsorship
Archives Month - Poster	Archives Month - Poster	Printing
Archives Month - Poster	Archives Month - Poster	Mailing
Archives Month - Poster	Archives Month - Poster	Unveiling
Meet Ups	Meet Ups	Meet ups and renting fees
Admin - Support Services Contract	Admin - Support Services Contract	Ohio History Connection support services
Admin - Other	Admin - Other	?
TBD	TBD	
TBD	TBD	
Strategic Planning	Strategic Planning	
Strategic Planning Retreat	Strategic Planning Retreat	Retreat
Unexpected Expenses		

Total

Description	Committee / Task Force	2024-2025 Budget
Zoom, tech support, registration support	Educational Programming	\$0.00
MAC speaker	Educational Programming	\$0.00
another fall workshop	Educational Programming	\$0.00
Ohio History Connection Zoom Support	Educational Programming	\$0.00
	Educational Programming	\$0.00
	Educational Programming	\$0.00
	Educational Programming	\$0.00
	Educational Programming	\$0.00
Ohio History Connection Zoom Support	Educational Programming	\$1,500
	Educational Programming	\$7,000
	Educational Programming	\$75
	Educational Programming	\$1,500
	Educational Programming	\$0.00
	Educational Programming	\$500
Purchase snacks for breaks	Educational Programming	\$350
2 x \$100 each 2 x \$100 each \$200 + \$25 OHC Admin fee	Membership & Awards	\$175.00
	Membership & Awards	\$25.00
	Membership & Awards	\$200.00
	Membership & Awards	\$200.00
	Membership & Awards	\$225.00
Unveiling the Archives Month Poster/Visa Gift	Advocacy & Outreach	\$650.00
	Advocacy & Outreach	\$150.00
	Advocacy & Outreach	\$100.00
	Advocacy & Outreach	\$0.00
	Advocacy & Outreach	\$0.00
\$600 per 2-year contract (due in Summer 2026)	?	\$0.00
Filings with State Auditor etc.	?	\$0.00
	Marketing & Communications	\$0.00
	Nominating	\$0.00
Strategic Planning Faciliator	Strategic Planning	\$0.00
Lunch and Snacks	Strategic Planning	\$0.00
		\$100.00
		\$12,750.00

2024-25 Actual Expenditure	2025-26 Estimate/ Request
\$0.00	\$0.00
\$0.00	\$0.00
\$0.00	\$0.00
\$0.00	\$0.00
\$0.00	\$0.00
\$0.00	\$0.00
\$0.00	\$0.00
\$0.00	\$0.00
\$550.00	\$0
\$2,342.60	\$0
\$17.07	\$0
\$0.00	\$0
\$0.00	\$0.00
\$0.00	\$0
\$1,129.75	\$1,500
	\$175.00
	\$25.00
\$200.00	\$200.00
\$100.00	\$200.00
\$225.00	\$225.00
\$623.00	\$650.00
\$91.21	\$150.00
	\$100.00
\$0.00	\$0.00
\$115.85	\$600.00
\$725.00	\$725.00
\$0.00	\$0.00
\$0.00	\$0.00
\$0.00	\$0.00
\$0.00	\$0.00
\$100.00	\$100.00
\$6,219.48	\$4,650.00

INCOME PROJECT	INCOME ITEM	Description
Membership Dues	Renewals and New Members	
Discussion Panel - JEDAI Winter	Registrations	free to members, estimate 20
Discussion Panel - JEDAI Winter	Sponsorships	
Workshop - Fall 2024	Registrations	Free to members in good stand
Workshop - Spring 2025	Registrations	
Mixer - Spring 2025	Mixer Registrations	
Conference - Spring 2025	Registrations	
Conference - Spring 2025	Sponsorships	
Conference - Spring 2025	Silent Auction	
TBD	?	
Admin	Bank Interest	
TBD		
TBD		
TBD		
SURPLUS FROM 2023-24		
BUDGET		
Unexpected Income		

Committee / Task Force	2024-2025	2024-25	2025-26	Notes/
Membership & Awards	\$1,500.00	\$4,379.54	\$1,500.00	SOA typically estimates \$1,500
Justice, Equity, Diversity,	\$0.00	\$0.00	\$0.00	
Justice, Equity, Diversity,	\$0.00	\$0.00	\$0.00	
Educational Programming	\$0.00	\$0.00	\$0.00	
Educational Programming	\$0.00	\$0.00	\$0.00	
Educational Programming	\$0.00	\$0.00	\$0.00	Proceeds go
Educational Programming	\$6,200.00	\$4,378.87	\$0.00	
Educational Programming	\$600.00	\$200.00	\$0.00	
Educational Programming	\$500.00		\$0.00	
Advocacy & Outreach	\$0.00		\$0.00	
	\$2.05	\$2.56	\$2.05	
Marketing & Communications	\$0.00		\$0.00	
Nominating	\$0.00		\$0.00	
Strategic Planning	\$0.00		\$0.00	
	\$3,619.25		\$6,357.09	
		\$3,525.60		
		\$90.00	\$0.00	
	\$12,421.80	\$12,576.57	\$7,859.14	

FY 2025-2026 Budgeted Amounts	
Income Budgeted	\$7,859.14
Expenses Budgeted	\$4,650.00
Difference	\$3,209.14