

Society of Ohio Archivists Council Meeting

Tuesday, February 24, 2026

9-10 am (EST)

Attendees: Jennifer Long Morehart, Betsy Hedler, Jim DaMico, Stephanie Shreffler, Hannah Kemp-Severence, Emily Gainer, Emily Rebmann, Michelle Ganz, Sophia McGuire, Matt Francis, Julia Teran, Adam Wanter, Kristen Newby, Shelby Beatty (minutes)

1. Welcome

- a. President Jennifer Long Morehart calls the meeting to order at 9:05 am.

2. Minutes

- a. Vote for approval: January 27, 2026 meeting minutes.
  - i. Long Morehart calls to approve meeting minutes from 1/27/2026. Treasurer Sophia McGuire motions, Secretary Shelby Beatty seconds, motion carries.

3. Reports

a. Officers

i. Treasurer

1. McGuire – Nothing to add to report.

b. Committees

i. Advocacy & Outreach

1. Emily Rebmann – Our biggest news is that we've selected the poster theme and will send out a call for photos in early March.

ii. Educational Programming

1. Adam Wanter – Conference posters were accepted yesterday. Silent auction work is ongoing. Please send potential auction partners to Sara Mouch. Not sure when registration will open but it should soon.

iii. Justice, Equity, Diversity, Accessibility, and Inclusion (JEDAI)

1. Hannah Kemp-Severence- We're excited to be accepting applicants for the JEDAI scholarship.

iv. Marketing & Communications

1. Emily Gainer – We decided to discontinue the SOA Pinterest account. It's no longer useful, and one of our goals this year is to assess the value of our social media accounts. We usually put conference videos on our YouTube account, but since there won't be virtual sessions this year, our YouTube account won't get much use this year. 2-3 committee members will be at the annual meeting to take photos. Anyone else at the meeting is welcome to take photos and share them via our Google Drive or on social media with us tagged.

- a. Wanter – Shout out to our YouTube videos. Ginnie Dressler references the SOA YouTube videos in her Kent State classes.

v. Membership & Awards

1. Stephanie Shreffler – Awards cycle is in full swing. We're starting to get applications for scholarships.

vi. Nominating

1. Matt Francis – Call for nominations ends this week. Thanks to MCC for getting communications out. Good response rates so far.

c. Task Forces

- i. Mentorship Task Force
        - 1. Long Morehart – Created a survey for members to assess mentorship needs. It will go out in the next newsletter. We also met with MCC about promoting the survey.
    - d. Newsletter
      - i. Long Morehart – Nothing to add to report.
4. New Business
  - a. Strategic Planning Proposal (Kristen Newby)
    - i. Vice President Kristen Newby – Next year is a SP year. It's a good time to reevaluate how we can serve our members. We solicited proposals from three different prospective facilitators. Ohio Humanities was accepted as they took to heart the opportunity to improve our organization. They acknowledged all of the things impacting out work right now, like AI, work growth, staff cuts, and political polarization. We will start working with them this summer and want to present the plan at the 2027 SOA annual meeting. Two different packages were proposed. We asked them to combine elements from the packages to create Hybrid Option A ½:
      - a. Member Survey + 1 focus group
      - b. Findings report
      - c. 6-hour strategic planning session
        - i. SP committee will be composed of all officers (attend at least 1 focus group meeting)
      - d. Follow-up meeting & revised plan
      - e. Simple action and communication plan with measurable goals
      - f. Two additional focus groups (total of 3)
      - g. Quarterly check-ins for one year
    - ii. Thoughts on Option A ½ and spending \$3,500?
      - 1. Wanter – What did we pay last time? Looks like a solid plan.
        - a. Long Morehart – Less last time, but other bids were more expensive. Ohio Humanities has a more tailored approach.
      - 2. Gainer – The focus groups are a nice addition. Cost seems reasonable.
      - 3. McGuire – We're in a good place financially for the hybrid option.
      - 4. Wanter – One Ohio Humanities staff member or multiple?
        - a. Newby – Not sure. We've met with 2 people so far.
    - iii. Newby calls to add the \$3,500 for Ohio Humanities to our expenditures. JEDAI Co-chair Michelle Ganz motions, Kemp-Severence seconds, motion carries.
5. Old Business
  - a. OHRAB representative update
    - i. Long Morehart – OHRAB did approve McGuire as the SOA representative.
    - ii. Long Morehart – Who could we nominate for the merit awards? Be thinking about this to recognize archivists.
      - 1. Shreffler – No merit award nominations so far.
6. Announcements
  - a. Begin thinking about committee cochairs for next year
    - i. Long Morehart – We would like to vote on this in April.
7. Upcoming Meetings

a. Next Meeting - Tuesday, March 24, 2026, 9-10 am via Microsoft Teams

8. Long Morehart adjourns the meeting at 9:26 am.

**SOA Treasurer's Report**

**2.24.2026**

**Previous Balance**

\$27,572.48

**Deposits**

\$.24 – Interest

\$752.74 – Membership dues

    \$632.74 – Q4 2025 Membership dues minus fees – OHC

    \$120 – Membership dues received via check

**Expenses**

\$106.95 – Reimbursement for Visa gift card – Poster reveal

**Current Balance**

Checking Account - \$28,218.51

Cash Box - \$200

**Society of Ohio Archivists Budget**  
**Tax Year : September 1, 2025 - August 31, 2026**

| <b>INCOME</b>                                   | <b>Budget Amount</b> | <b>9/30/2025</b> | <b>10/31/2025</b> | <b>11/30/2025</b> | <b>12/31/2025</b> | <b>1/31/2025</b>  | <b>2/28/2025</b>  | <b>Total</b>      | <b>Budget Remaining</b>           |
|---|----------------------|------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-----------------------------------|
| Membership Dues                                 | \$1,500.00           | \$0.00           | \$0.00            | \$242.60          | \$0.00            | \$60.00           | \$752.74          | \$1,055.34        | \$444.66                          |
| JEDAI Winter 2025 - Sponsorships/ Donations     | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Spring Conference - Registration                | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Spring Conference - Sponsorship                 | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Spring Conference - Raffle                      | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Spring Conference - Silent Auction              | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Fall Workshop-Registration                      | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Bank Interest                                   | \$2.05               | \$0.23           | \$0.24            | \$0.23            | \$0.24            | \$0.24            | \$0.00            | \$1.18            | \$0.87                            |
| Budget Surplus from 2024-2025                   | \$6,357.09           | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$6,357.09        | \$0.00                            |
| <b>Budgeted Income Total</b>                    | <b>\$7,859.14</b>    | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$7,413.61        | \$445.53                          |
| Unexpected Income                               |                      | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| <b>Actual Income</b>                            |                      | <b>\$0.23</b>    | <b>\$0.24</b>     | <b>\$242.83</b>   | <b>\$0.24</b>     | <b>\$60.00</b>    | <b>\$0.00</b>     |                   |                                   |
| <b>Actual Income So Far</b>                     |                      | <b>\$0.23</b>    | <b>\$0.47</b>     | <b>\$243.30</b>   | <b>\$243.54</b>   | <b>\$303.54</b>   | <b>\$1,056.28</b> | <b>\$7,413.61</b> | <b>Actual Income Rec'd So F</b>   |
|   |                      |                  |                   |                   |                   |                   |                   | <b>\$445.53</b>   | <b>Est. Income Yet to Receive</b> |
| <b>EXPENSES</b>                                 | <b>Budget Amount</b> | <b>9/30/2025</b> | <b>10/31/2025</b> | <b>11/30/2025</b> | <b>12/31/2025</b> | <b>1/31/2025</b>  | <b>2/28/2025</b>  | <b>Total</b>      | <b>Budget Remaining</b>           |
| JEDAI Winter 2025 - Online Event Services       | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| JEDAI Winter 2025 - Speaker Honoraria           | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Spring Conference - Venue                       | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Spring Conference - Food/Catering               | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Spring Conference - Speaker                     | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Spring Conference - Printing                    | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Spring Conference - Equipment Rental            | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Spring Conference - Miscellaneous               | \$1,500.00           | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$1,500.00                        |
| Fall Workshop                                   | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Fall Workshop - OHC Fees                        | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Fall Workshop - MAC Speaker                     | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Awards - Merit Awards - Plaques                 | \$175.00             | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$175.00                          |
| Awards - Merit Awards - Mailing                 | \$25.00              | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$25.00                           |
| Awards - History Day Sponsorship                | \$225.00             | \$0.00           | \$0.00            | \$0.00            | \$225.00          | \$0.00            | \$0.00            | \$225.00          | \$0.00                            |
| Scholarships - New Professionals                | \$2,145.00           | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$2,145.00                        |
| Scholarships - Students                         | \$1,060.00           | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$1,060.00                        |
| Scholarships - JEDAI                            | \$715.00             | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$715.00                          |
| Archives Month Poster - Printing                | \$650.00             | \$0.00           | \$658.00          | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$658.00          | -\$8.00                           |
| Archives Month Poster - Mailing                 | \$150.00             | \$0.00           | \$129.97          | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$129.97          | \$20.03                           |
| Archives Month Poster - Unveiling               | \$100.00             | \$0.00           | \$108.95          | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$108.95          | -\$8.95                           |
| Advocacy and Outreach - Meetups                 | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Ohio History Connection support services        | \$600.00             | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$600.00                          |
| Strategic Planning                              | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Strategic Planning - Retreat - Lunch and Snacks | \$0.00               | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| Administrative Fees                             | \$725.00             | \$0.00           | \$0.00            | \$0.00            | \$725.00          | \$0.00            | \$0.00            | \$725.00          | \$0.00                            |
| Unexpected Expenses                             | \$100.00             | \$100.00         | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$100.00          | \$0.00                            |
| <b>Budgeted Expenses Total</b>                  | <b>\$8,170.00</b>    | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$1,944.92        | \$6,225.08                        |
| Unexpected Expenses                             |                      | \$0.00           | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00            | \$0.00                            |
| <b>Actual Expenses</b>                          |                      | <b>\$100.00</b>  | <b>\$894.92</b>   | <b>\$0.00</b>     | <b>\$950.00</b>   | <b>\$0.00</b>     | <b>\$0.00</b>     |                   |                                   |
| <b>Actual Expenses So Far</b>                   |                      | <b>\$100.00</b>  | <b>\$994.92</b>   | <b>\$994.92</b>   | <b>\$1,944.92</b> | <b>\$1,944.92</b> | <b>\$1,944.92</b> | <b>\$1,944.92</b> | <b>Actual Expenses So Far</b>     |
|   |                      |                  |                   |                   |                   |                   |                   | <b>\$6,225.08</b> | <b>Est. Expenses Yet to Pay</b>   |

|                                      |            |
|--------------------------------------|------------|
|                                      |            |
| <b>FY 2025-2026 Budgeted Amounts</b> |            |
| Income Budgeted                      | \$7,859.14 |
| Expenses Budgeted                    | \$8,170.00 |
| Difference                           | -\$310.86  |
|                                      |            |
| <b>FY 2025-2026 so far</b>           |            |
| Actual Income                        | \$7,413.61 |
| Actual Expenses                      | \$1,944.92 |
| Difference                           | \$5,468.69 |
|                                      |            |

|   |   |                  |                 |                    |
|---|---|------------------|-----------------|--------------------|
| <b>Date:</b>  | February 20, 2026                                     |                  |                 |                    |
| <b>Committee:</b>   | Advocacy and Outreach                                 |                  |                 |                    |
| <b>Co-chairs:</b>   | Christine Liebson (incoming)/Emily Rebmann (incoming) |                  |                 |                    |
| <b>Members:</b>   | Connie Conner   | Jacky Johnson    | Jim McKinnon    | Collette McDonough |
|   | Ken Grossi  | Dana Best-Mizsak | Sarah Aisenbrey | Natalie Fritz      |
|   | Nina Herzog   |                  | Amanda Dowler   |                    |
| <b>Mission/Summary:</b>   |   |                  |                 |                    |
| <p>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.</p> <p><b><i>New mission statement as of December 2024</i></b></p>   |   |                  |                 |                    |
| <b>Goals for the Year:</b>  |   |                  |                 |                    |
| <ul style="list-style-type: none"> <li>• Create the Archives Month poster</li> <li>• Have an unveiling event for the poster</li> <li>• Generate content for the SOA Blog that relates to advocating for Ohio's archives and archivists</li> <li>• Collaborate with other SOA committees as needed</li> </ul>  |   |                  |                 |                    |
| <b>Ongoing / Monthly updates:</b>   |   |                  |                 |                    |
| <ul style="list-style-type: none"> <li>• Poster theme selected via committee vote <ul style="list-style-type: none"> <li>◦ "America 250: Unique Ohio"</li> </ul> </li> <li>• Additional advocacy work for this or a following year? <ul style="list-style-type: none"> <li>▪ Potential collaboration with JEDAI</li> </ul> </li> </ul>  |   |                  |                 |                    |
| <b>Upcoming</b>   |   |                  |                 |                    |
| <ul style="list-style-type: none"> <li>• SOA A&amp;O presence at Statehood Day (upcoming) <ul style="list-style-type: none"> <li>◦ Represented by Connie Conner</li> </ul> </li> <li>• 2026 schedule finalized <ul style="list-style-type: none"> <li>◦ Blog posts related to America 250 or other archival themes to begin in March</li> </ul> </li> <li>• Call for photos will be drafted and sent out in early March <ul style="list-style-type: none"> <li>◦ A form will be created for SOA members to vote on submissions</li> </ul> </li> </ul> |   |                  |                 |                    |

# Society of Ohio Archivists Committee Reports

|  |  |  |  |
|--|--|--|--|
| <b>Date:</b>   | February 24, 2026  |  |  |
| <b>Committee:</b>  | <b>Educational Programming Committee</b>                                 |  |  |
| <b>Chairs:</b>   | Sara Mouch, University of Toledo; Adam Wantner, MidPointe Library System |  |  |
| <b>Members:</b>  | 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                              |
| <b>Mission/Summary:</b>  |  |  |  |
| 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.  |  |  |  |
| <b>Goals for the Year:</b>   |  |  |  |
| <ul style="list-style-type: none"> <li>- Work with the MAC Program and Local Arrangements Committees to help coordinate and plan MAC's 2026 meeting in Columbus.</li> <li>- Develop proposals to help offset the costs the MAC-SOA Conference for SOA members</li> <li>- Determine feasibility of offering additional programming to SOA members, and undertake the development of that programming.</li> </ul>  |  |  |  |
| <b>Ongoing Issues and Challenges:</b>  |  |  |  |
| <ul style="list-style-type: none"> <li>- For 2026: navigating the MAC/SOA collaboration.</li> <li>- Developing and offering a Fall option for programming, starting in 2027.</li> </ul>  |  |  |  |
| <b>Accomplished Tasks (since December Council meeting)</b>   |  |  |  |
| <ul style="list-style-type: none"> <li>- MAC / SOA Program Committee Update <ul style="list-style-type: none"> <li>o Call for posters completed and submissions accepted - notifications going out shortly</li> <li>o Program is in the hands of the designer</li> <li>o Registration should be opening soon - working with MAC &amp; AMC on how to register SOA Members</li> </ul> </li> <li>- MAC / SOA Local Arrangements Committee Update <ul style="list-style-type: none"> <li>o Working on restaurants tours</li> <li>o Looking into shuttle service for those not staying at the Blackwell</li> </ul> </li> <li>- SOA EPC Update <ul style="list-style-type: none"> <li>o Silent auction efforts are underway. As of 2/20/2026: Confirmed 7 gifts</li> </ul> </li> </ul> |  |  |  |

## Society of Ohio Archivists Committee Reports

|                   |  |  |
|-------------------|--|--|
| <b>Date:</b>      | February 24, 2026  |  |
| <b>Committee:</b> | Marketing and Communications   |  |
| <b>Cochairs:</b>  | Emily Gainer, Cummings Center for the History of Psychology (2020-, cochair 2024-2026);<br>Amber Bales, Ohio State University (2022-, cochair 2025-2027) |  |
| <b>Members:</b>   | Janet Carleton, Ohio University (1999-)<br>Julia Teran, Case Western Reserve University (2023-2027)  | Katie Gable (2024-2026)<br><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, LinkedIn, 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. Documenting annual meetings and other events through photographs.

### Accomplished Goals:

- Performed WordPress maintenance & communicated with super admin Phil Sager as needed.
- Performed website content refresh and review
  - Posted 2 blog announcements since the last Council meeting.
  - Last 30 days: 2,352 page views (increase 18% from last month). Most visited 3 pages: 1) homepage, 2) Annual Conferences, 3) Annual Meeting: Call for Poster Presentations
- Managed [SOA Listserv](#).
  - 404 members (-1)
  - Approved requests to join. Posted news and announcements of general interest. Blocked spam.
- Managed Facebook [Page](#).
  - Posted Nominating Committee volunteer call, Merit Award and travel scholarship announcements, SOA/MAC joint annual meeting announcements, job postings, etc.
  - 324 followers (-1)

- Managed [Instagram](#) account
  - 815 followers (+10, -5). 2,135 views in the last 30 days.
  - Instagram takeovers: No takeover scheduled until June. Working on recirculating the information.
- Managed [LinkedIn Page](#)
  - 271 followers (+1). Regular posting of content.
- Managed Pinterest - At the MCC meeting on February 5, 2026, the committee decided to delete the Pinterest account. It was not being updated by the committee, and there was no unique content on that account.
- Managed [YouTube](#) account
  - 44 videos total. 31 subscribers. NOTE: Due to the MAC/SOA joint annual meeting being in-person only, we will not be adding sessions to the YouTube account for the 2026 annual meeting.

| <b>Society of Ohio Archivists Committee Report</b>   |   |  |  |
|--|---|--|--|
| <b>Date:</b>   | February 24, 2026   |  |  |
| <b>Committee:</b>  | <i>Ohio Archivist</i> Newsletter  |  |  |
| <b>Editor:</b>   | <b>Jessica Heys</b> , Independent Archives Contractor,<br>Kettering Foundation & Cincinnati Museum Center<br>(News & Notes Asst Ed, Fall 2017-current;<br>Interim Editor, Spring 2022; Editor-in-Chief, Fall 2022--Spring 2026) |  |  |
| <b>Asst Editors:</b>   | <b>Jessica Heys</b> ,<br>News & Notes<br>(Fall 2017-Current)  | <b>Michelle Ganz</b> ,<br>DEAI<br>(Spring 2023-)   |  |
|  | <b>Penelope Shumaker</b> ,<br>Digital Discussion<br>(Fall 2023-)  | <b>Emily Rinaman</b> ,<br>Features<br>(Fall 2025-) |  |
| <b>Mission/Summary:</b>  |   |  |  |
| <p>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.)</p>  |   |  |  |
| <b>Goals for the Year:</b>   |   |  |  |
| <ul style="list-style-type: none"> <li>• See if anyone else would like to take over the newsletter</li> <li>• I am continuing to do the News &amp; Notes for now</li> <li>• Rethinking and expanding content topic areas</li> <li>• Pay more attention to readership tracking/statistics</li> <li>• Send out regular Guidelines reminders<br/> <a href="https://ohioarchivists.org/ohioarchivist/ohioarchivist_guidelines/">https://ohioarchivists.org/ohioarchivist/ohioarchivist_guidelines/</a> </li> </ul> |   |  |  |
| <b>Ongoing Issues and Challenges:</b>  |   |  |  |
| <ul style="list-style-type: none"> <li>• Involvement / inclusion</li> <li>• Improve as editor</li> <li>• Gain readership</li> </ul>  |   |  |  |
| <b>Accomplished Goals:</b>   |   |  |  |
| <ul style="list-style-type: none"> <li>• Fall 2025 issue published</li> <li>• New Assist Editor Emily Rinaman started Fall 2025</li> <li>• Assistant Editor Emily Ahlin stepped down after Fall 2025</li> </ul>  |   |  |  |



## **Proposal for Strategic Planning Services**

Submitted to the Society of Ohio Archivists (SOA)

Prepared by Ohio Humanities

### **Introduction**

The Society of Ohio Archivists' (SOA) current strategic plan (2023–2026) provides a foundational structure for professional development, advocacy, and organizational growth. Yet the archival landscape has changed dramatically since the last planning cycle, with new pressures on the workforce, heightened political scrutiny, and rapid advancements in digital and AI technologies. These conditions require a strategic plan that is more focused, more adaptive, and more closely aligned with the current and near-future work environments for SOA members.

Ohio Humanities proposes a comprehensive yet streamlined planning process designed to elevate member knowledge, experience, and feedback as essential drivers of the next plan. Because SOA is a member-led, volunteer-driven organization, a successful strategic plan must be shaped by — and accountable to — the voices of archivists across Ohio. Our process ensures that the plan reflects what members need now, as well as their aspirations for the future of the profession.

Ohio Humanities is a natural choice to lead this strategic planning process. Our position as a leader and convener of public humanities, history and cultural organizations in Ohio means we have the relationships statewide perspective and insights into the challenges that organizations like SOA faces. We will bring this expertise and experience to this planning process ensuring SOA remains focused on the issues that will most impact their members careers and the sector as a whole.

### **Why SOA Needs a New Strategic Plan**

#### **1. The Current Plan Is Ambitious but Overly Complex**

The 2023–2026 plan outlines dozens of objectives across five strategic areas. While thoughtful, its breadth makes implementation challenging. Members need a strategy that is clear, focused, and achievable, with priorities that align with SOA's available capacity.

#### **2. New Workforce Data Highlight Urgent Professional Realities**

Recent national data reveal several critical challenges: <sup>1</sup>

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<sup>1</sup> A\*CENSUS II, 2023. Society of American Archivists.

- Only 34% of archivists report being satisfied with their jobs, and just 32% feel valued by their employer.
- Nearly 20% of archivists are considering leaving the field within five years.
- Burnout, workload stress, compensation, and limited professional advancement opportunities are major drivers of dissatisfaction.

Although national labor projections indicate 6% job growth between 2024 and 2034, retention issues and frequent early-career departure point toward a challenging environment for maintaining and growing the profession. Many SOA members likely have had to confront these pressures, underscoring the need for a plan connected closely to the concrete needs of the members.

### **3. Political Polarization Is Increasingly Affecting Archival Work**

The profession is experiencing heightened political scrutiny involving:

- contested histories and community narratives,
- institutional pressures around inclusive collections, and
- emerging forms of censorship and content restriction.

Archivists often find themselves navigating environments where decisions about description, access, and representation are politically charged. Member input is vital to understanding how these challenges manifest across different institutions and to shaping SOA's support and advocacy priorities.

### **4. Workloads Are Growing While Staffing Shrinks**

Archivists across the state — particularly those in libraries, small historical societies, and local government archives — face increased workloads with fewer staff and limited resources. Recent cuts to and ongoing uncertainty with federal and state funding sources, and mounting pressure to balance traditional archival responsibilities with growing digital expectations make insights from members essential to shaping realistic strategies for workforce support.

### **5. AI and Digital Technologies Are Transforming the Profession**

AI-assisted tools are accelerating tasks such as description, transcription, and metadata creation, while also raising ethical questions around representation and bias. Archivists need guidance on how to incorporate AI responsibly, as well as training on how to meet the moment in this dynamic environment. A member-informed approach ensures the plan addresses both enthusiasm and concern about these tools.

### **The Importance of Member Engagement in This Process**

SOA's strength lies in its membership — their knowledge, experience, innovative practices, and understanding of community needs. A successful strategic plan must:

- draw from diverse member perspectives across roles, regions, and institution types,
- incorporate the expertise of early-career, mid-career, and senior archivists,
- reflect the daily challenges and opportunities members see in their work, and
- build broad ownership that ensures the plan is embraced and implemented.

Ohio Humanities’ facilitation process centers members as partners. Through surveys, focus groups, and open conversations, we gather insights that inform priorities, shape strategies, and validate the final plan. When members see their input reflected in the plan, they become advocates and co-owners of its success.

### **The Importance of a Simple, Measurable, Action-Oriented Plan**

In contrast to the highly detailed 2023–2026 plan, the next strategic plan will be:

- concise,
- easy to understand and communicate,
- structured around a small set of priorities, and
- built on clear, measurable goals.

Developing measurable goals benefits SOA by:

- providing transparent benchmarks for progress,
- reducing ambiguity around responsibilities,
- enabling data-informed decision making, and
- ensuring accountability without creating undue strain on volunteer leadership.

An action plan with realistic timelines, clear deliverables, and identifiable metrics allows SOA to monitor implementation meaningfully while remaining flexible as external conditions evolve.

### **The Importance of a Clear Communication Plan**

A strategic plan succeeds only when members understand it, see themselves in it, and know how to contribute. Ohio Humanities will help develop a communication plan that:

- supports the rollout of the strategic plan to all members,
- equips board and committee leaders with consistent messaging,
- reinforces SOA’s mission and value,
- increases transparency and buy-in during implementation, and
- ensures ongoing communication as priorities advance.

This communication infrastructure ensures that the strategic plan is not merely adopted — it is activated across the organization.

### **Potential Objectives for SOA’s New Strategic Plan – Center the Members and Their Needs**

#### **1. Strengthen the Career Pipeline & Professional Development**

→ rooted in member feedback on burnout, retention, and skills gaps.

## **2. Support Archivists Facing Institutional & Political Pressure**

→ informed by real-world member experiences across Ohio institutions.

## **3. Help Practitioners Manage Expanding Workflows with Limited Staff**

→ addressing one of the most pressing issues identified by the profession.

## **4. Prepare SOA Members for AI and Digital Transformation**

→ with training, ethics guidance, and shared resources.

## **5. Ensure Organizational Sustainability**

→ by developing a lean, focused plan that aligns with volunteer capacity.

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### **Proposed Strategic Planning Services**

#### **\*\*OPTION A — Strategic Planning Package (\$2,500)**

A streamlined, high-impact process leading to a concise, measurable, member-informed plan.

#### **Includes:**

- **Member Survey + 1 Focus Group**
- **Findings Report** centered on member priorities
- **6-Hour Strategic Planning Session** (can be held on a weekday or weekend)
- **Follow-Up Meeting & Revised Plan**
- **Simple Action and Communication Plan with Measurable Goals and**

#### **\*\*OPTION B — Comprehensive Strategic Planning & Implementation Support (\$5,000)**

Includes all services in Option A, plus deeper engagement and implementation support.

#### **Additional Services:**

- **Two Additional Focus Groups** (total of 3)  
→ expands representation across the membership
- **Comprehensive Strategic Communication Plan**  
→ ensures consistent rollout and leadership alignment
- **Presentation to Full Membership**
- **Quarterly Check-Ins for One Year**
- **12-Month Follow-Up Member Survey**

### **Conclusion**

The archival profession is navigating complex pressures, and SOA's next strategic plan must be member-centered, realistic, adaptable, and measurable. By grounding the plan in member expertise and experience — and pairing it with clear metrics and a communication strategy — SOA will be positioned to strengthen the profession, support its practitioners, and ensure Ohio's historical record is preserved with integrity and vision.

Ohio Humanities is honored to support SOA at this pivotal moment and stands ready to guide the organization through a collaborative, inclusive, and forward-thinking planning process. We welcome the opportunity to discuss this proposal further and to share additional materials or data at your convenience.

### **About Ohio Humanities**

Ohio Humanities was founded in 1972 by Congressional charter to serve as the state-based partner of the National Endowment for the Humanities. Over the past 50+ years, we have grown to meet the changing needs of the public humanities sector in Ohio as they serve everyday Ohioans in communities across the state.

#### **Mission** (what we do)

- We champion Ohio's cultural and humanities organizations.

#### **Purpose** (why we do it)

- To help everyday Ohioans better understand others, thoughtfully engage with the world, and live rich, inspired lives.

#### **Vision** (the big dream)

- We envision an Ohio where people appreciate each other's unique stories, link the past to the present, and realize a better future together.

#### **Values** (our soul)

- **Inclusivity:** We strive to ensure all Ohioans have access to the humanities by serving all counties and communities across the state.
- **Integrity:** We are dedicated to truth, humanities scholarship, and sharing the extraordinary Ohio stories that define our history, culture, and people.
- **Partnership:** We strengthen other organizations on any project we support by bringing our resources to the table and embracing the tenants of good service: meeting needs, solving problems, delivering on promises, and communicating openly.
- **Curiosity:** We ask questions, are thoughtful listeners, and are committed to lifelong learning.