

Society of Ohio Archivists Council Meeting

Tuesday, March 24, 2026

9-10 am (EST)

Attendees: Jennifer Long Morehart, Michelle Ganz, Stephanie Shreffler, Jim DaMico, Amber Bales, Sophia McGuire, Julie Teran, Emily Gainer, Christine Liebson, Matt Francis, Betsy Hedler, Hannah Kemp-Severence, Darrell Blevins, 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: February 24, 2026 meeting minutes.
 - i. Long Morehart calls to approve meeting minutes from 2/24//2026. Secretary Shelby Beatty motions, Treasurer Sophia McGuire seconds, motion carries.

3. Reports

a. Officers

i. Treasurer

1. McGuire –\$28,348.72 in our checking account. It's been a slow month for money coming in and out. No expenses.

b. Committees

i. Advocacy & Outreach

1. Christine Liebson – Reminder that that deadline for submitting photos for the Archives Month poster is upcoming on April 4. Please spread the word. We're getting the poster process underway. We're getting together with JEDAI next week and thinking about co-chair planning for next year.

ii. Educational Programming

1. Long Morehart – MAC/SOA meeting registration is live. 124 people registered as of last Tuesday with 12 using the SOA rate. New hotel block has opened. 11 confirmed gifts for the silent auction.

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

1. JEDAI Co-chair Michelle Ganz – We're working with committees to update the website with an accessibility widget. Also looking into how JEDAI can contribute to the strategic plan. We're also starting a featurette in the newsletter.
 - a. Vice President Kristen Newby – What does the widget do?
 - b. Ganz – It can change the font, colors, turn off images, point out hyperlinks, etc. 12-13 general accessibility tools for overall website functionality.

iv. Marketing & Communications

1. Amber Bales – Instagram proves to be the best place to market SOA content. We're looking for more takeover institutions. We're prepared for the conference. We will take photos and work out process for attendees to submit photos they take.

v. Membership & Awards

1. Stephanie Shreffler – We chose winners for scholarships and merit awards. Are any reps from SOA planning to attend Ohio History Day? Will you present the SOA awards?
 - a. Long Morehart – Yes, I will be there and can present the award.

2. Shreffler – Is it okay to give out two merit awards? Do we have the budget? \$175 for plaques (\$125 in 2023).
 - a. McGuire – It’s budgeted, so that’s fine. Send invoices my way and I’ll send out checks.
 3. Shreffler – For scholarship winners, we don’t want duplicate winners with MAC. Who do we contact in MAC to confirm their scholarship winners?
 - a. Long Morehart – I can reach out.
 - b. Shreffler – I’ll send you a list of names.
 - vi. Nominating
 1. Past President Matt Francis – Slate of nominees is finalized and submitted (see below). We’re going to look through committee documentation and update as needed.
 - c. Task Forces
 - i. Mentorship Task Force
 1. Long Morehart – Finishing touches on the mentorship survey.
 - d. Newsletter
 1. Long Morehart - Spring Newsletter in progress.
4. New Business
- a. Approve/appoint slate of candidates for SOA Election (Matt Francis)
 - i. **Vice President/President-Elect** - Michelle Ganz* (Dominican Sisters of Peace)
 - ii. **Treasurer** - Sophia McGuire (City of Gahanna)
 - iii. **At-Large Council Member** - Jim DaMico (Cincinnati Children's Hospital Medical Center)
 - iv. **JEDAI Co-Chair (2026-2028 term)** - Hannah Kemp-Severence (University of Akron)
 - v. **JEDAI Co-Chair (remainder of 2025-2027 term)** - Kris Kallies (Museum & Collector Resource)
 - vi. *Due to Michelle's current role as JEDAI co-chair (term expiring 2027), we will need to hold an election to finish the remainder of her term. Consequently, if Michelle's nomination is approved, Kris Kallies will step in as co-chair.
 1. Long Morehart calls to approve nominees for 2026 election. McGuire motions, Newby seconds, motion carries.
 - b. Ohio Museums Association request
 - i. Long Morehart – Email from OMA asking if we had swag to hand out at their annual conference. 150 copies needed. Due date is April 8.
 1. Betsy Hedler – We no longer have physical copies of brochures. We have done quarter sheet conference announcements in the past. Old pencils?
 - a. Ganz – Stickers?
 - i. Hedler – We need to consider brand colors, available on our Google Drive.
 - ii. Ganz – Sticker Mule has a quick turnaround. I’m happy to look into designing vinyl stickers.
 - iii. Long Morehart – Look out for email on voting for this.
5. Old Business
- a. Robin Heise resolution (Sophia McGuire)
 - i. McGuire – I sent out a draft resolution to honor Robin Heise. I’d appreciate any feedback. This needs to be finalized by April 21.
 - b. Strategic Planning (Kristen Newby)

- i. Newby – Last meeting, we voted to approve Ohio Humanities as the SP facilitator. I received updated pricing for the hybrid option. Instead of \$3,500, it will be \$4,500. We can make installment payments.
 - 1. McGuire – We have the \$3,500 budgeted and can pay that out. If we vote on the new number, we can split the \$4,500 into two payments (one this budget year, one in September).
 - a. Newby – Timing works well for the SP timeline. Are we still well positioned fiscally?
 - b. McGuire – We need to make sure we have a payment plan in place before moving forward with the updated pricing/split payments. Splitting payment into two chunks makes it more palatable for us.
 - c. Newby – Wait until the April meeting to vote.

6. Announcements

- a. Committee cochairs for next year–let President know for April meeting’s agenda
 - i. Long Morehart – Please let me know before the April meeting if you have committee co-chairs ready.
- b. Long Morehart – Please pass along conference sign up info
 - i. Newby – Local arrangements committee is putting together a table during the conference. Sign up to work the table will be sent via email.
 - 1. Ganz – Participation makes you eligible for ACA recertification points.

7. Upcoming Meetings

- a. Next Meeting - Tuesday, April 28, 2026, 9-10 am via Microsoft Teams

8. Long Morehart adjourns the meeting at 9:42am.

SOA Treasurer's Report
3.24.2026

Previous Balance

\$28,218.51

Deposits

\$.21 – Interest

\$130 – Membership dues

Expenses

None

Current Balance

Checking Account - \$28,348.72

Cash Box - \$200

Society of Ohio Archivists Budget										
Tax Year : September 1, 2025 - August 31, 2026										
INCOME	Budget Amount	9/30/2025	10/31/2025	11/30/2025	12/31/2025	1/31/2025	2/28/2025	3/31/2025	Total	Budget Remaining
Membership Dues	\$1,500.00	\$0.00	\$0.00	\$242.60	\$0.00	\$60.00	\$752.74	\$130.00	\$1,185.34	\$314.66
JEDAI Winter 2025 - Sponsorships/ Donations	\$0.00	\$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	\$0.00
Spring Conference - Sponsorship	\$0.00	\$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	\$0.00
Spring Conference - Silent Auction	\$0.00	\$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	\$0.00
Bank Interest	\$2.05	\$0.23	\$0.24	\$0.23	\$0.24	\$0.24	\$0.21	\$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	\$0.00	\$6,357.09	\$0.00
Budgeted Income Total	\$7,859.14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$315.53
Unexpected Income		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Actual Income		\$0.23	\$0.24	\$242.83	\$0.24	\$60.00	\$0.00	\$0.00		
Actual Income So Far		\$0.23	\$0.47	\$243.30	\$243.54	\$303.54	\$1,056.49	\$1,186.49	\$7,543.61	Actual Income Rec'd So Far
									\$315.53	Est. Income Yet to Receive

EXPENSES	Budget Amount	9/30/2025	10/31/2025	11/30/2025	12/31/2025	1/31/2025	2/28/2025	3/31/2025	Total	Budget Remaining
JEDAI Winter 2025 - Online Event Services	\$0.00	\$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	\$0.00
Spring Conference - Venue	\$0.00	\$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	\$0.00
Spring Conference - Speaker	\$0.00	\$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	\$0.00
Spring Conference - Equipment Rental	\$0.00	\$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	\$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	\$0.00
Fall Workshop - OHC Fees	\$0.00	\$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	\$0.00
Awards - Merit Awards - Plaques	\$175.00	\$0.00	\$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	\$0.00	\$25.00
Awards - History Day Sponsorship	\$225.00	\$0.00	\$0.00	\$0.00	\$225.00	\$0.00	\$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	\$0.00	\$2,145.00
Scholarships - Students	\$1,060.00	\$0.00	\$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	\$0.00	\$715.00
Archives Month Poster - Printing	\$650.00	\$0.00	\$658.00	\$0.00	\$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	\$0.00	\$129.97	\$20.03
Archives Month Poster - Unveiling	\$100.00	\$0.00	\$106.95	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.95	-\$6.95
Advocacy and Outreach - Meetups	\$0.00	\$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	\$0.00	\$600.00
Strategic Planning	\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,500.00
Strategic Planning - Retreat - Lunch and Snacks	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Administrative Fees	\$725.00	\$0.00	\$0.00	\$0.00	\$725.00	\$0.00	\$0.00	\$0.00	\$725.00	\$0.00
Unexpected Expenses	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00
Budgeted Expenses Total	\$11,670.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,944.92	\$9,725.08
Unexpected Expenses		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Actual Expenses		\$100.00	\$894.92	\$0.00	\$950.00	\$0.00	\$0.00	\$0.00		
Actual Expenses So Far		\$100.00	\$894.92	\$994.92	\$1,944.92	\$1,944.92	\$1,944.92	\$1,944.92	\$1,944.92	Actual Expenses So Far
									\$7,780.16	Est. Expenses Yet to Pay

FY 2025-2026 Budgeted Amounts	
Income Budgeted	\$7,859.14
Expenses Budgeted	\$11,670.00
Difference	-\$3,810.86
FY 2025-2026 so far	
Actual Income	\$7,543.61
Actual Expenses	\$1,944.92
Difference	\$5,598.69

Date:	March 24, 2026			
Committee:	Advocacy and Outreach			
Chair:	Christine Liebson/Emily Rebmann			
Members:	Connie Conner	Sarah Aisenbrey	Jacky Johnson	
	Collette McDonough	Ken Grossi	Dana Best-Mizsak	Amanda Dowler
	Natalie Fritz	Nina Herzog	Katrina Neff	Jim McKinnon
Mission/Summary:				
<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><i>New mission statement as of December 2024</i></p>				
Goals for the Year:				
<ul style="list-style-type: none"> ● 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 				
Updates:				
<ul style="list-style-type: none"> ● Connie Conner attended Statehood Day, distributed posters ● Katrina Neff joined - membership of 11 plus 2 chairs ● Advertised call for poster photo submissions ● Receiving incoming submissions (Deadline is April 4) 				
Upcoming:				
<ul style="list-style-type: none"> ● Meeting with JEDAI co-chairs (April) ● Creation of voting form ● Voting for 2026 poster photos 				

Society of Ohio Archivists Committee Reports

Date:	March 24, 2026		
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:			
<p>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.</p>			
Goals for the Year:			
<ul style="list-style-type: none"> - 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:			
<ul style="list-style-type: none"> - For 2026: navigating the MAC/SOA collaboration. - Developing and offering a Fall option for programming, starting in 2027. 			
Accomplished Tasks (since December Council meeting)			
<ul style="list-style-type: none"> - MAC / SOA Program Committee Update <ul style="list-style-type: none"> o Registration is live. <ul style="list-style-type: none"> ▪ As of Tuesday, March 17, registration was at 124 people with 12 specifically using the SOA rate. o Another hotel block has been opened. - SOA EPC Update <ul style="list-style-type: none"> o We have reached out to most of the names on the Silent Auction list and we have 11 confirmed gifts at this time. 			

Date:	March 24, 2026	
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-)
	Arjun Sabharwal, The University of Toledo (2023-)	Savannah Gould, Akron Summit County Public Library (2024-)
	Niel White, (2024-)	Grace Pierce (2026-)
	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:		
<ul style="list-style-type: none"> • Evaluate SOA internal processes and come up with plans for improvement. • Tool kit development – both original content and compilation of already available resources • Updated web presence/newsletter “featurette” 		
Ongoing Issues and Challenges:		
<ul style="list-style-type: none"> • Maintaining committee membership 		
Accomplished Goals:		
<ul style="list-style-type: none"> • We had 7 applicants for the JEDAI scholarship. Winner was selected 3/19 • We have selected a committee member (Madeline Fix) to start building out the JEDAI webpage with some new toolkits • Started talking about JEDAI and the upcoming strategic planning cycle 		

Society of Ohio Archivists Committee Reports

Society of Ohio Archivists Committee Reports

Date:	March 24, 2026	
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, College of Wooster (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, 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: 2,176 page views (decrease 25% from last month). Most visited 3 pages: 1) homepage, 2) Annual Conferences, 3) Scholarships
- Managed [SOA Listserv](#).
 - 405 members (+1)
 - Approved requests to join. Posted news and announcements of general interest. Blocked spam.
- Managed Facebook [Page](#).
 - Posted Annual meeting registration, Merit Award and travel scholarship announcements, SOA/MAC joint annual meeting announcements, job postings, etc.
 - 324 followers (-0)

- Managed [Instagram](#) account
 - 825 followers (+10). 2,503 views in the last 30 days.
 - Instagram takeovers: Looking for someone for April. MCC will post annual meeting content. June - September have scheduled takeovers.
- Managed [LinkedIn Page](#)
 - 271 followers (+0). Regular posting of content.
- Managed [YouTube](#) account
 - 44 videos total. 33 subscribers. No new videos will be added from the Annual Meeting due to it being in-person only. Is there other SOA content that could be posted this year?

Society of Ohio Archivists Committee Reports

Date:	3/24/2026		
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:			
<p>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.</p>			
Goals for the Year (2025-2026):			
<ul style="list-style-type: none"> ● 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:			
<ul style="list-style-type: none"> ● Will SOA have a representative attending Ohio History Day? ● We wanted to confirm, is it okay if we award the Merit Award to two people? (We wanted to double check that there was funding for two plaques). ● We have chosen winners for the Student, New Professional, and JEDAI scholarships. Who should we talk to at MAC in order to confirm that we haven't chosen duplicate awardees? 			
Accomplished Goals:			
<ul style="list-style-type: none"> ● <u> </u>New and Renewing 2026 SOA Memberships <ul style="list-style-type: none"> ○ Current: As of 3/19/2026 membership roster: 124 memberships ○ Breakdown: <ul style="list-style-type: none"> ▪ Individual: 100 ▪ Student: 14 			

- Bridge: 2
- Patron: 3
- Sponsor: 3
- Lifetime: 2

Compare to:

- 2024: 104 ([Society of Ohio Archivists Council Minutes, March 1, 2024](#))
 - 2023: 116 ([Society of Ohio Archivists Council Minutes, February 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](#))
- Winners for the scholarships and the Merit Award have been chosen. Thank you very much to the committee for their work reviewing the applications and nominations; we had a record number of scholarship applicants (19!)

Society of Ohio Archivists Committee Report			
Date:	March 24, 2026		
Committee:	<i>Ohio Archivist</i> Newsletter		
Editor:	Jessica Heys , Independent Archives Contractor, Kettering Foundation & Cincinnati Museum Center (News & Notes Asst Ed, Fall 2017-current; Interim Editor, Spring 2022; Editor-in-Chief, Fall 2022--Spring 2026)		
Asst Editors:	Jessica Heys , News & Notes (Fall 2017-)	Michelle Ganz , DEAI (Spring 2023-)	
	Penelope Shumaker , Digital Discussion (Fall 2023-)	Emily Rinaman , Features (Fall 2025-)	
Mission/Summary:			
<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>			
Goals for the Year:			
<ul style="list-style-type: none"> • 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:			
<ul style="list-style-type: none"> • Involvement / inclusion • Improve as editor • Gain readership 			
Accomplished Goals:			
<ul style="list-style-type: none"> • Fall 2025 issue published • Spring 2026 issue in the works 			

SOA Election 2026 – Proposed Slate of Nominees

Vice President/President-Elect – Michelle Ganz* (Dominican Sisters of Peace)

Treasurer – Sophia McGuire (City of Gahanna)

At-Large Council Member – Jim DaMico (Cincinnati Children’s Hospital Medical Center)

JEDAI Co-Chair (2026-2028 term) – Hannah Kemp-Severence (University of Akron)

*Due to Michelle’s current role as JEDAI co-chair (term expiring 2027), we will need to hold an election to finish the remainder of her term. Consequently, if Michelle’s nomination is approved, we will also have the following election:

JEDAI Co-Chair (remainder of 2025-2027 term) – Kris Kallies (Museum & Collector Resource)

[Logo]

**A RESOLUTION HONORING ROBIN HEISE, PRESIDENT OF THE SOCIETY OF
OHIO ARCHIVISTS, 2017–2019**

Whereas, Robin Heise, former President of the Society of Ohio Archivists, was a dedicated archivist, records management expert, and public servant who helped shape the public and historical records community in the State of Ohio; and

Whereas, Robin Heise collaborated extensively with records managers and archivists throughout the State of Ohio and beyond, through organizations such as the Society of Ohio Archivists (SOA), the Ohio County Archives and Records Management Administrators (CARMA), and the Miami Valley Archives Roundtable (MVAR); and

Whereas, Robin Heise contributed significantly to several major initiatives, including advocating for improved access to court records and expanding the use of archives in local schools through her work for Greene County Records Center & Archives; and

Whereas, Robin Heise was a respected colleague and leader whose work left a lasting impact on the archival and records management community; and the Society of Ohio Archivists wishes to honor her legacy and contributions to Ohio’s historical records;

Therefore, be it resolved that the Society of Ohio Archivists recognizes and celebrates the life, service, and professional accomplishments of Robin Heise at its 2026 Annual Meeting in Columbus, Ohio.

[Signature lines]



Proposed Strategic Planning Services

****OPTION A (Base Price) — 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**

****A LA CART PRICING**

Added onto Base Price of Option A Package

- **Two Additional Focus Groups (Total of 3) - \$500**
- **Comprehensive Strategic Communication Plan - \$250**
→ Ohio Humanities will develop a comprehensive communication plan that outlines clear objectives and communication strategies that are aligned to SOA's calendar. The plan will also leave space for SOA leadership to assign roles to assure ease of implementation.
- **Presentation to Full Membership - \$500**

→ Ohio Humanities leadership will present the strategic plan to SOA membership at a designated meeting, designing slides, handouts and other necessary materials.

- **Quarterly Check-Ins for One Year** - \$1,500

→ Ohio Humanities will meet with Strategic Planning Committee quarterly, providing two hours of pre-time and two hours of meeting time to assess the strategic plan, how it is working, and discuss adjustments that should be made to improve its implementation.

- **12-Month Follow-Up Member Survey** - \$500

→ Current members will be surveyed to assess their engagement in and satisfaction with the strategic plan.

Timeline:

Summer 2026 – Information Gathering

→ Member Survey

→ Focus Groups

Late Summer/Fall 2026 – Plan Development

→ SOA Strategic Planning Retreat (hosted at CML)

→ Ohio Humanities Develops Draft Plan

→ Strategic Planning Committee/Ohio Humanities Review Draft Plan – Feedback Given

Winter 2027 – Finalize Plan

→ Ohio Humanities Develops Final Plan

→ Communication to Membership is Planned

Spring 2027 – Plan Launched

→ Plan is launched at Annual Meeting

Ongoing – Implementation/Assessment/Continuous Improvement

Ohio Humanities – 2024 Strategic Communications Plan Example

The plan below was developed to integrate strategic and development goals; however, it is a good example of how SOA can extract communications themes from a strategic plan to support member engagement in organizational objectives. The plan below outlines two of five objections from the 2024 theme, and a partial year communication calendar.

2024 COMMUNICATIONS THEME

Ohio Humanities messaging emphasizes that Ohio's stories have value, and by sharing stories we are strengthening the cultural fabric of our state.

To build on this messaging foundation and to connect with more of the organization's grantmaking and programming, we should dive more deeply into *how* stories are found, preserved, and shared. Communications and development should feature "STORYTELLERS," connecting the Ohio Humanities audiences with the people and organizations behind programs and projects.

2024 Theme:
Stories, made possible by
STORYTELLERS

Rationale:

- Connects people to people
- Underscores the roles of Ohio Humanities in investing in stories, storytelling, and storytellers
- Creates new engagement and giving opportunities
- Aligns well with the proposed *Lumen* theme: Being Seen

2024 COMMUNICATIONS CHAPTER THEMES

Bringing the "Storytellers" theme to life across the year in chapters helps to keep communications relevant, compelling, and aligned to the program and development strategies. These chapters divide the year's communications by quarter so there are four chapters that cover three months each. While each chapter has a specific focus, they all reflect the 2024 messaging theme. These messages are specific enough to provide guidance, yet broad enough to be adapted to the current context.

Note: The "Spark Something" theme introduced with the 2023 EOY campaign can be extended into 2024 and supports the 2024 messaging theme.

<p style="text-align: center;">2024, Q1 <i>Behind the story is a storyteller</i> Showcasing storytellers and the valuable role they play in our communities and culture</p>	<p style="text-align: center;">2024, Q2 <i>The mission to tell stories</i> What drives storytellers and the impact they make through storytelling</p>
<p style="text-align: center;">2024, Q3 <i>Finding stories, Starting conversations</i> Spotlights how stories are told, and how people engage with them</p>	<p style="text-align: center;">2024, Q4 <i>Sharing stories, Supporting storytellers</i> Celebrating those who are committed to telling Ohio's stories</p>

2024 ENGAGEMENT OPPORTUNITIES

In service to the goals, the 2024 engagement and outreach should continue building momentum and offer new, special opportunities. Ohio Humanities should continue activities that have proven successful such as book and film festivals, annual report, Lumen, and Ohio Humanities happy hours.

Special Activities

- *Marching On Project* community events
 - Visits around the state to showcase the *Marching On Project* (film, book, materials)
- Special recognition of the *Brown v Board 70th Anniversary, Brown at 70*
 - Ohio Humanities recognition of the anniversary will run February through May, culminating with an event on May 9; ongoing recognition of the anniversary will continue through March 2025
 - Connecting it to the *Marching On Project* and the impact it made in Ohio as part of the February kick off to the anniversary recognition
 - Opportunity to engage all audiences throughout the events and activities
- "Meet the Storyteller" Features
 - Special opportunities (virtual or in person) to hear about a storyteller's process in bringing stories to life, underscoring the value of stories and how powerful stories are told and shared
 - Give people an opportunity to learn how to be storytellers and share stories they think are important (ties to becoming a "Conversation Starter")
- Launch an "Untold Stories" Project
 - Consider a special focus on emerging stories or storytellers, creating giving/funding opportunities

2024 DEVELOPMENT PROGRAM STRATEGIES

In service to the 2024 objectives, the development program should expand and fortify its strategies.

OBJECTIVE 1: Retention

- Build loyalty – continue focus on donor retention
- Continue recapture efforts for lapsed donors who last gave in 2020+, and former board members

Strategies:

- Begin Q1 with a stewardship mailer to current donors with a thank you and a look ahead to 2024
- Invite current donors to give feedback in February via a short survey
- Ask Board members to place thank you calls to donors and write thank you notes as part of every Board meeting (provide talking points, materials, and call note forms)
- Call lapsed donors of \$500 or above from 2021 - 2023 (depending on the number)
- Send a targeted email to all lapsed donors from 2020+ in Q1, inviting them to return in 2024 (not an ask, but an invitation for engagement and participation)
- To accompany the annual report, host a webinar with donors to share the information and discuss
- Conduct two donor-only special events in 2024, one scheduled for March 7 and another in the fall
- If possible and appropriate, invite a few donors to attend grant award celebrations with partners
- Send a second special donor thank you/stewardship in fall
- Notify donors about special events first, such as the *Marching On Project* screenings and *Brown v Board Anniversary*

2024 DEVELOPMENT PROGRAM STRATEGIES

In service to the 2024 objectives, the development program should expand and fortify its strategies.

OBJECTIVE 2: Increase major gifts

- Cultivate current donors to increase giving levels
- Launch acquisition efforts
- Add a new \$25,000 giving level (*Patron, Steward?*)

Strategies:

- Activate the major gifts portfolio management practice with current major gift donors, donors who gave between \$500-\$1000 in 2023, and qualified prospects
- Set a goal of at least two house parties per quarter hosted by board members throughout 2024 – have board members sign up in January
- In Q1, launch a focused acquisition effort: Identify 30-40 people who actively and significantly support humanities and arts around the state by first creating lists of 25+ individual donors/philanthropists in Cincinnati, Columbus, Cleveland, and other cities, and next narrow those down to about 10 qualified prospects per city
- Develop an introduction piece for major donor prospects that coordinates with the case for support and includes an overview of the giving program
- Consider using special opportunities to cultivate new major gifts, such as the *Brown v Board* anniversary or the "Untold Stories" Project
- Consider hosting "Storyteller" or "Storytelling" workshops or salons, perhaps with a funding partner

2024

