

Society of Ohio Archivists Council Meeting
July 14, 2026
10-11 am (EST)

Attendees: Kristen Newby, Betsey Hedler, Sophia McGuire, Darrell Blevins, Emily Rebmann, Michelle Ganz, Adam Wanter, Katie Gable, Jennifer Long Morehart, Kris Kallies, Amber Bales, Nina Herzog, Julia Teran, Hannah Kemp-Severence, Rachel Sykes, Shelby Beatty (minutes)

1. Welcome

- a. President Kristen Newby calls the meeting to order at 10:02 am.

2. Minutes

- a. Vote for approval: April 28, 2026 meeting minutes
 - i. Amendment: March 30, 2026 vote to approve a budget expenditure for SOA Stickers
- b. Vote for approval: May 15, 2026 meeting minutes
 - i. Amendment: April 15, 2026 vote to approve a budget amendment to the SOA scholarship budget
- c. Newby calls to approve the budget expenditure and amendment. Vice President Michelle Ganz motions, Treasurer Sophia McGuire seconds, motion carries.

3. Reports

- a. Officers
 - i. Treasurer
 - ii. McGuire – \$23,081.40 in checking account. Conference, MAC scholarship registrant, and first strategic planning payments have been processed. Silent auction revenue plus fees was \$681.80 which goes into scholarship budget. \$400 in membership dues for most recent quarter. Check not yet received, but in next month's accountability sheet. \$1,500 to go to MAC for expenses, but no invoice from MAC yet.
 - 1. Adam – That was in case they lost money. They were not on track to lose that full amount, though. I'll check the final budget numbers.
 - 2. Adam – They should be revenue positive.
- b. Committees
 - i. Advocacy & Outreach
 - 1. Emily Rebmann – New committee co-chair. Working on poster design, unveiling event, and collaboration with JEDAI.
 - ii. Educational Programming
 - 1. Adam - Survey results from annual meeting were overall positive. Full new roster of committee members. SOA track for the annual OLHA conference with a full slate of sessions confirmed. Looking for shepherds soon. New co-chair to be approved.
 - a. Ganz – I can be a shepherd for the meeting.

- iii. Justice, Equity, Diversity, Accessibility, and Inclusion (JEDAI)
 - 1. Hannah Kemp-Severence – Welcome Kris as a new co-chair. Report includes tool kit initiative. Does our committee need approval to link out to the tool kit?
 - a. Newby – If you're looking for feedback, we're happy to provide it.
 - b. Kemp-Severence – Just looking for checks. I'll submit the list and questions for council to take a look.
 - c. Newby – Council doesn't need to vote, but we may have suggestions and feedback.
 - iv. Marketing & Communications
 - 1. Katie Gable – Katie replaced Emily as co-chair. Continuing on with Instagram takeovers. Plan to post conference links on Instagram ahead of the Fall newsletter.
 - v. Membership & Awards
 - 1. Julia Teran – One committee member stepped down and we have two new members. Thanks to Rachel Sykes for stepping up to co-chair. We currently have 146 total memberships.
 - vi. Nominating
 - 1. Past President Jennifer Long Morehart – Thanks to Matt Francis, CJ Jacobs, and Toni Vanden Bos for serving on last year's committee. Currently confirming members and need at least one more person.
 - c. Newsletter
 - i. Newby – See report.
 - d. Representatives
 - i. Ohio Historical Records Advisory Board (OHRAB)
 - 1. McGuire – We're meeting again on July 31. Focus will be strategic planning. Announcement for citizen archivist award recently posted.
 - e. Task Forces
 - i. Mentorship Task Force
 - 1. Long Morehart – We met on May 28 after the annual meeting to discuss survey results.
- 4. New Business
 - a. Meghan Crawford as new EPC co-chair, replacing Sara's position
 - i. Newby calls to approve Megan Crawford as Educational Programming co-chair. McGuire motions, Secretary Shelby Beatty seconds, motion carries.
 - b. Rachel Sykes as new Membership & Awards co-chair, replacing Stephanie's position
 - i. Newby calls to approve Rachel Sykes as Membership & Awards co-chair. Ganz motions, McGuire seconds, motion carries.

- c. Nina Herzog as new Advocacy & Outreach co-chair, replacing Christine's position
 - i. Newby motions to approve Nina Herzog as Advocacy & Outreach co-chair. McGuire motions, Kemp-Severence seconds, motion carries.
- d. Advocacy request regarding NARA's closure of the National Archives at Chicago
 - i. Newby – Regarding anonymous request via email to advocate for a public statement about the Chicago office closure.
 - ii. Ganz – Acknowledge and amplify MAC's response on our website.
 - iii. Sophia – I'm on the Issues and Awareness Taskforce for NAGARA. There's a joint working group that includes multiple organizations which are putting together a statement. I'll share their statement once it's ready.
 - iv. Newby – Nina, can Advocacy & Outreach share statements with the SOA listserv?
- e. Review and approve Society of Ohio Archivists - Ohio History Connection Memorandum of Understanding (MOU), July 2026 - June 2028
 - i. Newby – In the current MOU, SOA will give two OHC complementary registrations to annual meeting. Is two enough? More than two?
 - 1. McGuire – We would be out for lunch costs, but that's it. I support this. Would this extend to State Archives?
 - 2. Newby – We could put use guidelines to make sure registrations are equally distributed.
 - 3. Wanter – Having OHC folks at the conference would be great for networking.
 - 4. Nina Herzog – Makes sense from Advocacy & Outreach perspective for SOA to offer OHC staff this opportunity since they're limited in funds.
 - 5. Newby- What's a good number?
 - a. McGuire – Four is fine. Income from membership far exceeds expectations, so it's okay if we lose a little from conference registrations.
 - 6. Newby – Betsey, does four registrations make sense?
 - a. Betsey – Depends on where the conference is in Ohio. I will market these free registrations internally at OHC to increase turnout.
 - 7. Newby calls to change OHC registrations from two to four. Sophia motions, Beatty seconds, motion carries.
- 5. Old Business
 - a. Strategic Planning update
 - i. Newby – Committee solidified. 40 SOA members to participate in 3 focus groups. That includes members and nonmembers. Ohio Humanities also created a survey for SOA members and potential members.
 - b. Mentorship Task Force update

- i. Long Morehart – Report of survey results and suggestions available. Survey distributed through graduate and undergrad programs. Comparable numbers of both mentors and mentees interested. Majority in advanced career stage. Looking for local connections. Majority interested in longer mentorship relationships. Virtual and in-person. A lot of needs, interests, and preferences. Create a group mentoring model and move into peer-to-peer.
 - 1. Sophia – Look into if the program can be eligible for continuing education credits in the future.
 - 2. Long Morehart – Waiting for feedback before next meeting.
 - 3. Newby – I'll put it on the agenda for next month.
- 6. Announcements
 - a. Next meeting we will have a brief cybersecurity/internet safety overview
- 7. Upcoming Meetings
 - a. Next Meeting - Tuesday, August 11 10-11am
 - i. McGuire – Please start compiling budget information for the next fiscal year.

Newby adjourns the meeting at 11:00 am.

SOA Treasurer's Report

7.14.2026

Previous Balance

\$26,691.53

Deposits

\$.22 – Interest

\$30.00 – Membership dues

\$.21 – Interest

Expenses

\$143.24 – Miracle Custom Awards & Gifts

\$287.32 – Dominican Sisters of Peace – 4imprint (conference ribbons)

\$935.00 – MAC – Scholarship Recipient Conference Registrations

\$25.00 – Ohio Secretary of State – Statutory Agent Update

\$2,250.00 – Ohio Humanities Council

Current Balance

Checking Account - \$23,081.40

Cash Box - \$200

Received but not yet deposited

\$681.80 – Selent Auction Revenue

2025-2026 Budget Estimates - Google Sheets

FY 2025-2026 so far	
Actual Income	\$11,212.92
Actual Expenses	\$9,808.08
Difference	\$1,404.84
FYI 2025-2026 - Updates as of 5/14/2026	
Income Budgeted	\$7,859.14
Expenses Budgeted	\$11,957.60
Difference	-\$4,098.46

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	4/30/2025	5/31/2025	6/30/2025	7/31/2025	8/31/2025	Total	Budget Remaining
Membership Dues	\$1,500.00	\$0.00	\$0.00	\$242.60	\$0.00	\$60.00	\$752.74	\$130.00	\$0.00	\$2,564.94	\$30.00	\$0.00	\$393.75	\$4,174.03	-\$2,674.03
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	\$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	\$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	\$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	\$0.00	\$681.80	\$0.00	\$681.80	-\$681.80
Spring Conference - Silent Auction	\$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
Fall Workshop-Registration	\$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
Bank Interest	\$2.05	\$0.23	\$0.24	\$0.23	\$0.24	\$0.24	\$0.21	\$0.24	\$0.23	\$0.22	\$0.21	\$0.00	\$0.00	\$2.29	-\$0.24
Budget Surplus from 2024-2025	\$6,357.09	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$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	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Unexpected Income		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30.21	\$0.00	\$0.00	\$0.00	
Actual Income		\$0.23	\$0.24	\$242.83	\$0.24	\$60.24	\$752.95	\$130.24	\$0.23	\$2,565.16	\$30.21	\$681.80	\$393.75		
Actual Income So Far		\$0.23	\$0.47	\$243.30	\$243.54	\$303.78	\$1,056.73	\$1,186.97	\$1,187.20	\$3,752.36	\$3,782.57	\$4,464.37	\$4,858.12	\$11,212.92	Actual Income Rec'd So Far
														-\$3,356.07	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	4/30/2025	5/31/2025	6/30/2025	7/31/2025	8/31/2025	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	\$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	\$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	\$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	\$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	\$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	\$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	\$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	\$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	\$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	\$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	\$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	\$143.24	\$0.00	\$0.00	\$0.00	\$143.24	\$31.76
Awards - Merit Awards - Mailing	\$25.00	\$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	\$25.00
Awards - History Day Sponsorship	\$225.00	\$0.00	\$0.00	\$0.00	\$225.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$225.00	\$0.00
Scholarships - New Professionals	\$1,762.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,362.00	\$0.00	\$935.00	\$0.00	\$0.00	\$2,297.00	-\$535.00
Scholarships - Students	\$1,477.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,342.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,342.00	\$135.00
Scholarships - JEDAI	\$881.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$681.00	\$0.00	\$0.00	\$0.00	\$0.00	\$681.00	\$200.00
Scholarships - OPC	\$881.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$681.00	\$0.00	\$0.00	\$0.00	\$0.00	\$681.00	\$200.00
Archives Month Poster - Printing	\$650.00	\$0.00	\$658.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$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	\$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	\$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	\$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	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$600.00
Strategic Planning	\$2,250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,250.00	\$0.00	\$0.00	\$2,250.00	\$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	\$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	\$0.00	\$25.00	\$0.00	\$0.00	\$0.00	\$750.00	-\$25.00
Unexpected Expenses	\$556.60	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$156.60	\$287.32	\$0.00	\$0.00	\$0.00	\$543.92	\$12.08
Budgeted Expenses Total	\$11,957.60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,808.08	\$2,148.92
Unexpected Expenses		\$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	
Actual Expenses		\$100.00	\$894.92	\$0.00	\$950.00	\$0.00	\$0.00	\$0.00	\$4,222.60	\$455.56	\$3,185.00	\$0.00	\$0.00		
Actual Expenses So Far		\$100.00	\$994.92	\$994.92	\$1,944.92	\$1,944.92	\$1,944.92	\$1,944.92	\$6,167.52	\$6,623.08	\$9,808.08	\$9,808.08	\$9,808.08	\$9,808.08	Actual Expenses So Far
														\$2,148.92	Est. Expenses Yet to Pay

Date:	July 14, 2026			
Committee:	Advocacy and Outreach			
Chair:	Emily Rebmann/Nina Herzog			
Members:	Connie Conner	Sarah Aisenbrey	Jacky Johnson	
	Collette McDonough	Ken Grossi	Dana Best-Mizsak	
	Natalie Fritz	Nina Herzog	Katrina Neff	Jim McKinnon
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				
Updates:				
• Top ten photographs, captions, and proposed poster text have been submitted to the designer • Unveiling event planning is underway ◦ Tentative date: September 17 • June blog post published				
Upcoming:				
• JEDAI co-chairs to attend July A&O meeting to discuss future collaboration • Solicitation of additional blog posts • Unveiling planning—time, speakers, etc.				

Date:	2026-07-14		
Committee:	Educational Programming Committee		
Chair:	Adam Wanter (2025-2027), MidPointe Library		
Council Liaison:	Michelle Ganz		
Members:	Betsy Hedler (OHC)	Jennifer Greening	Riza Miklowski, Akron Summit County Library
	Stacy Chaney-Blankenship, Ohio Wesleyan	Matt Francis, Ohio Northern	CJ Jacobs, University of Akron
	Penelope Shumaker, State Library	Brian McConnell	Meghan Crawford, Capital University (co-chair nominee)
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:			
- Provide a SOA Track for the 2026 OLHA Annual Meeting - Coordinate and plan the SOA Spring Annual Conference - Evaluate Silent Auction and Sponsorship workflow - Other Goals as assigned			
Ongoing Issues and Challenges:			
- Transitioning from the Joint MAC-SOA - o Roster turnover - Where to hold the conference? - How do we add more value to the conference? - Filling the OLHA SOA Track			
Accomplished Goals:			
- Joint MAC-SOA Meeting 2026! - o Have survey results, if folks are interested ▪ Generally very positive feedback! - Solicited 5 sessions for the OLHA SOA Track - o Need to recruit session shepherds - Recruited a robust roster for the 2026-2027 year, mix of new and returning committee members - First EPC Meeting will be August 2026			

Date:	July 13, 2026	
Committee:	Society of Ohio Archivists Justice, Equity, Diversity, Accessibility, and Inclusion (JEDAI) Committee	
Co-Chairs:	Kris Kallies, (co-chair 2026-2027) Hannah Kemp-Severence, University of Akron (2023- , co-chair 2024-2025; 2025-2026; 2026-2028)	
Members:	Madeline Fix, (2020-)	Niel White, (2024-)
	Savannah Gould, Akron Summit County Public Library (2024-)	Grace Pierce (2026-)
	Melanie Mohler (2026-)	Naidi Valverde-Romero (2026 -)
	Sylvia Beck (2026-)	
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. • Tool kit development – both original content and compilation of already available resources • Updated web presence/newsletter “featurette”		
Ongoing Issues and Challenges:		
• Wordpress/website: plugin for accessibility • Completing tool kit list to add to website – obtaining approval of links to tool kit resources • Possible collaboration with Advocacy committee re: blogs, etc.		
Accomplished Goals:		
• We have selected a committee member (Madeline Fix) to start building out the JEDAI webpage with some new toolkits and work on the accessibility plug-in • Submitted newsletter article re: tool kit initiative for upcoming newsletter issue		

Society of Ohio Archivists Committee Reports

Society of Ohio Archivists Committee Reports

Date:	July 14, 2026	
Committee:	Marketing and Communications	
Cochairs:	Amber Bales, Ohio State University (2022-, cochair 2025-2027); Katie Gable, College of Wooster (2024-, cochair 2026-2028)	
Members:	Janet Carleton, Ohio University (1999-) Julia Teran, Case Western Reserve University (2023-) Emily Gainer, Cummings Center for the History of Psychology (2020-, cochair 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 3 blog announcements since the last Council meeting.
 - Last 30 days: 1,239 page views. Most visited 3 pages: 1) homepage, 2) Internship/Volunteer Opportunities, 3) Ohio Archivist
- Managed [SOA Listserv](#).
 - 407 members (-1, +8)

- Approved requests to join. Posted news and announcements of general interest. Blocked spam.
- Managed Facebook [Page](#).
 - Posted SOA/MAC joint annual meeting announcements, newsletter available, job postings
 - 335 followers (+7)
- Managed [Instagram](#) account
 - 869 followers (+43, -13). 3,022 views in the last 30 days.
 - Instagram takeovers: June - September have scheduled takeovers. With July having two in one month. SOA Annual Meeting content will be posted ahead of fall newsletter to reignite interest/promote upcoming issue
- Managed [LinkedIn Page](#)
 - 304 followers (+30). Boost from joint MAC/SOA meeting. Regular posting of content.
- Managed [YouTube](#) account
 - 44 videos total. 33 subscribers. No new videos will be added from the 2026 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:	7/14/2026		
Committee:	Membership & Awards Committee		
Chairs:	Julia Teran, co-chair 2025-2027; Rachel Sykes, co-chair 2026-2028		
Council Liaison:			
Members:	Devhra Bennett-Jones	Mark Bloom	Helen Conger
	Savannah Moss	Cate Putirskis	Stephanie Shreffler
	Rhonda Wiseman		
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 (2026-2027):			
- Select winners of the Merit, Student/New Professional, JEDAI, and History Day Awards - Membership Drive 2026-27 - write and distribute the membership renewal letter. Communicate with OHC for distributing email blast for membership renewal notifications.			
Ongoing Issues and Challenges:			
- New and Renewing 2026 SOA Memberships - Current: As of 7/13/2026 membership roster: 146 memberships - Breakdown: - Individual: 116 - Student: 17 - Bridge: 5 - Patron: 3 - Sponsor: 3 - Lifetime: 2 Compare to: 2025: 159 (Society of Ohio Archivists Council Minutes, August 19, 2025) 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 Council Minutes May 20, 2022) 2021: 166 (Society of Ohio Archivists Council Minutes June 28, 2021)			

Accomplished Goals:
• We have a new junior co-chair - thank you, Rachel! • Confirmed committee membership (and added two new members to the committee!) • Reviewed timeline and committee tasks for year • Submitted History Day and scholarship winner articles to <i>Ohio Archivist</i>

Society of Ohio Archivists Committee Reports

Date:	July 14, 2026		
Committee:	Nominating Committee		
Chair:	Jennifer Long Morehart, Past President		
Members:	TBD		
Mission/Summary:			
The Nominating Committee annually prepares and submits a slate of candidates for vacant elected positions. The committee is made up of one Council member (Past President) and two additional SOA members appointed by the SOA Council.			
Goals for the Year:			
● Confirm/find 2026-2027 Nominating Committee members ● Coordinate a Coffee Chat providing information for potential candidates ● Submit a slate of candidates ● Help with election processes as needed			
Ongoing Issues and Challenges:			
Accomplished Goals:			
Thank you to the 2025-2026 Nominating Committee—Matt Francis, Cj Jacobs, and Toni Vanden Bos—for a successful 2026 election. Thank you and congratulations to the candidates and winners.			

Society of Ohio Archivists Committee Report			
Date:	July 14, 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—Fall 2026)		
Asst Editors:	Jessica Heys , News & Notes (Fall 2017-)	Michelle Ganz , DEAI (Spring 2023-)	Emily Rinaman , Features (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 2026 issue in the works			

Mentorship Task Force Report
SOA Leadership Meeting
July 14, 2026

Mentorship Task Force: John Dewees, Natalie Fritz, Michelle Ganz, Savannah Gould, Jennifer Long Morehart, Kristen Newby, Katherine Nusbaum, Cate Putirskis

Mentorship Survey Summary

(For survey results, see the  Mentorship Survey (Responses) spreadsheet or [Mentorship Survey Response Charts & Comments](#))

- 38 responses
 - Majority from current SOA members
 - More responders willing to join SOA for mentorship access
 - Strong interest from both potential mentors and potential mentees
 - Majority in advanced career stage, but also includes student, early, and mid-career stages
- Early career responders' interests:
 - Out-of-state grad program, so in-state mentor would be helpful
 - Mentors in similar roles or institutions/organizations
 - Making connections
 - Support/advice
 - Specific topics:
 - Certified Archivist exam
 - Practical project timelines
 - Navigating relationships
- Mentorship preferences
 - Majority interested in 6-month relationship or longer
 - Strong interest in One-on-One, Group, and Peer Mentorship
 - Large majority interest in both in-person and virtual opportunities
- Additional requests
 - Assistance/system for matching people
 - Match mentors/mentees by geographic region, similar institutions, or similar experience
 - Flexibility needed
 - Provide guidance, framework, expectations, resources, and schedule
 - Provide in person visits to archives and hands-on skills
 - Reach out to/visit current graduate students and programs
 - Affirmation of interest in an SOA mentorship program

Mentorship Task Force Thoughts Moving Forward

- Observations
 - A variety of needs, preferences, and interests
 - A challenge to address everything, especially at the beginning
- Suggestions
 - Create sustainability by beginning with a group mentoring model
 - Advantages:
 - Opportunity to both mentor and receive mentorship
 - Eases pressure on both mentors and mentees
 - Sustainable even if individual participants need to miss occasional meetings
 - Some participants may not have specific questions, but can still learn from and contribute to the group
 - Opportunity to demonstrate/observe how to be an effective mentor, preparing potential mentors for future one-on-one mentorship models
 - Potential to evolve to one-on-one mentoring relationships
 - First 2 years may be an experimental stage—allow flexibility to adapt
 - Begin with initial model for 3 years to establish stability before expanding
 - Establish predictable, regularly scheduled program
 - Develop application process
 - Create cohorts, 2-3 mentors per cohort
 - Could create groups around a topic or identity
 - Allow for programming breaks to request feedback from participants
 - Require surveys
 - Analyze recurring themes and topics
 - Create environment in which those who have missed a meeting(s) are comfortable returning
- Additional ideas
 - Establish a mentoring event at SOA Annual Meeting
 - Develop relationships with graduate programs at Kent State, Wright State, etc.
 - Introduce people to regional roundtables
 - Share Mentorship Survey results with SOA members: newsletter, listserv, etc.
- Questions
 - Immediate:
 - What are SOA Leadership's thoughts about: the Mentorship Survey results, Task Force ideas, and future direction?
 - Future:
 - Where to locate the Mentorship Program in SOA structure? Who is responsible for oversight?
 - Suggestion: Create Mentorship Program Subcommittee of Membership & Awards Committee
 - Require SOA membership for mentorship program participation?

***External* Closure of Regional National Archives facility**

From Margaret Lanterman <loglady1954@gmail.com>

Date Sun 6/28/2026 10:16 AM

To jmoreha@bgsu.edu <jmoreha@bgsu.edu>; Kristen Newby <knewby@columbuslibrary.org>; shelby.beatty1@sinclair.edu <shelby.beatty1@sinclair.edu>; sophia.mcguire@gahanna.gov <sophia.mcguire@gahanna.gov>; James.DaMico@cchmc.org <James.DaMico@cchmc.org>; four_dbs@yahoo.com <four_dbs@yahoo.com>; hfkseverence@gmail.com <hfkseverence@gmail.com>; jess.sol.heids@gmail.com <jess.sol.heids@gmail.com>; m-francis.1@onu.edu <m-francis.1@onu.edu>

You don't often get email from loglady1954@gmail.com. [Learn why this is important](#)

EXTERNAL EMAIL WARNING! This email originated from outside of the organization. Use caution with links or attachments unless you trust the sender and know the content is safe. DO NOT PROVIDE YOUR CREDENTIALS!

Dear Society of Ohio Archivists leadership,

I am writing to ask the Society of Ohio Archivists to publicly oppose the National Archives and Records Administration's plan to close the National Archives at Chicago and encourage its members to reach out to their representatives and make their concerns known. While these facilities are located in Illinois, this is a critical issue for Ohio and the broader Great Lakes archival and research community.

The National Archives at Chicago houses more than 140,000 cubic feet of historically significant records of the federal government from six Great Lakes states: Illinois, Indiana, Michigan, Minnesota, Ohio, and Wisconsin. The records span government agencies including the Federal Courts, the Bureau of Indian Affairs, the Immigration and Naturalization Service, the Coast Guard, and so many more.

Earlier this week, the National Archives and Records Administration (NARA) announced its intention to close the Chicago offices along with facilities in San Francisco and Seattle. There are very few details about this available from NARA and little reporting in the news. There is no information about where the records will go or what will happen to the staff. There is no stated consideration to how the move will affect accessibility or what the impact to the communities will be. NARA claims to want to complete this move within a timeline of two years. They have not provided any information on how such a feat could be accomplished without doing irreparable damage to intellectual control.

The materials at the National Archives at Chicago document the history of Ohio and complement the collections of so many SOA institutions. The holdings include records from federal courts, showcasing Ohio's participation in the [Underground Railroad](#) and the [Labor Movement](#). Maritime collections

include information about catastrophic shipwrecks such as the [SS Lakeland](#) and the [SS Edmund Fitzgerald](#) as well as routine paperwork that highlights life on the Great Lakes. [NASA records](#) from John H. Glenn Research Center highlight Ohio's contribution to the United States' scientific achievements. There are innumerable examples to choose from. What is available digitally in the online catalog is a small fraction of the overall holdings.

The archives is also used by Ohioans who need access to records that directly impact their lives today, including people seeking their own naturalization records to prove citizenship status, those who need records of court cases in which they were involved, and veterans looking for information about vessels they served on in the Great Lakes, to name a few.

Archivists and specialists in Chicago have decades of experience with these collections. If the records move and staff is lost all that institutional knowledge will leave the region too. The staff handling the records wherever they land will be unfamiliar with the region and not know the particularities of their new holdings. The records will be less accessible to those who need them most.

Currently, NARA is overseen by an Acting Archivist, Edward Forst. There have been recent Senate committee hearings for Archivist of the United States nominee Bradford Pentony Wilson. Ohio Senator Bernie Moreno is on the The Committee on Homeland Security and Governmental Affairs overseeing those hearings.

SOA and its members should be very concerned about NARA's disinvestment in the Midwest. Please use SOA's platform to encourage membership to reach out to ask their representatives, especially Senator Moreno, to oppose this move.

Thank you for your time and consideration.



**Agreement between the Ohio History Connection and the Society of Ohio Archivists
July 1, 2024**

This agreement is between the Ohio History Connection, located at 800 E. 17th Ave., Columbus, Ohio ("OHC"), and the Society of Ohio Archivists ("SOA").

Whereas, the OHC and the SOA share a common goal of preserving and maintaining historical collections in Ohio through professional development, networking, access to research and resources, and advocacy, and

Whereas, the OHC and the SOA believe that by cooperating toward achieving this goal greater progress can be made.

Now therefore, the Parties agree as follows:

- 1) The OHC will manage and maintain the SOA's membership database and provide registration services for the SOA annual meeting.
 - a. The OHC will maintain and make available in common format (e.g. MS Excel) the SOA's membership database.
 - b. The SOA will retain sole ownership of the database.
 - c. The OHC may use the SOA database for two (2) mailings each year without cost.
 - d. The SOA may use the OHC teacher database for two (2) mailings each year without cost.
 - e. The SOA members who opt out of the membership directory and mailings will also not receive mailings from the OHC.
 - f. The OHC will provide electronic updates of the membership list to the SOA membership committee chair upon request.
 - g. The OHC will not share the SOA membership information with other organizations or individuals.
 - h. The OHC will email membership annual renewal notices and reminder notices to existing members and mail confirmations to new and renewing members. The first notice will be emailed no later than January 15. The second reminder will be emailed to those people who have not renewed between February 15 and February 28. The third reminder will be emailed to those who have not renewed between March 15 and March 31.
 - i. The SOA will provide the information to be contained in the renewal notices to the OHC by December 1.
 - j. The OHC will provide a copy of the mailer for the SOA review by December 15 with all edits/changes completed by December 31.
 - k. The OHC will print mailing labels for the SOA upon request at cost of materials and delivery.
 - l. Upon request of the SOA, the OHC will facilitate online membership renewal. The OHC will distribute the monies paid for SOA membership, less itemized merchant fees, to the SOA Treasurer no later than 30 days after the end of each quarter.
- 2) The OHC will design and produce the SOA newsletter and the Annual Conference program. All materials will include the SOA logo, the OHC logo and the statement, "This Society of Ohio Archivists publication is printed and distributed in partnership with the Ohio History Connection."

Annual Conference Program

- a. The OHC will maintain a production editor who will design the layout and manage the production and distribution of the conference programs.
- b. The production editor and the appropriate SOA representative will negotiate and agree to a production schedule for the program approximately three (3) months prior to the program date. Any changes to the schedule will be negotiated and agreed to by the same parties.
- c. The SOA designated program coordinator will be responsible for supplying the OHC with print-ready content.
- d. The SOA maintains editorial control of the SOA publications, and as such the right to review and approve all items submitted for publication. Materials will be approved within ten (10) business days of submission.
- e. The SOA retains copyright for all SOA-branded materials.
- f. The OHC will provide an itemized cost of production estimate sent to the SOA with the first review copy of the program.
- g. The conference programs will be published via the SOA website. Unless specifically agreed to between the SOA and the OHC, they will not be mailed.
- h. Upon request of the SOA, the OHC will use its web-based e-commerce system to facilitate online registration for the Fall Meeting and/or Spring Annual Conference. Upon request, the OHC will provide reports of persons registered to the SOA. The OHC will distribute the monies paid for SOA registration, less itemized merchant fees, to the SOA Treasurer no later than 30 days after the date of the event.
- i. The OHC will contact SOA membership by mail or email up to two (2) times for annual meeting reminder.

The SOA Newsletter

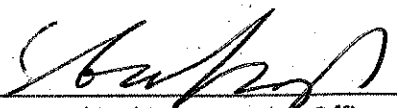
- a. The OHC will maintain a production editor who will manage the design, production, and distribution of the newsletter.
 - b. The production editor and the appropriate SOA newsletter editor will negotiate and agree to a production schedule for each issue approximately four (4) months prior to the publication date. Any changes to the newsletter will be negotiated and agreed to by the same parties.
 - c. The SOA newsletter editor will be responsible with supplying the OHC with print-ready content.
 - d. The SOA maintains editorial control of the SOA publications, and as such the right to review and approve all items submitted for publication. Materials will be approved within ten (10) business days of submission.
 - e. The SOA retains copyright for all SOA-branded materials.
 - f. The newsletter will be published via the SOA website. Unless specifically agreed to between the SOA and the OHC, they will not be mailed.
- 3) The OHC will host and maintain the SOA website, located at <http://www.ohioarchivists.org>.
- a. The SOA will maintain a content editor who will be responsible for adding content to the website using the content management software provided. For content that requires the aid of the OHC to post, the content editor will supply the OHC with appropriate images, text and design information one (1) week prior to posting deadline.
 - b. The OHC will maintain a webmaster who will maintain the website's access and upkeep, post information when the content management software cannot be utilized and make changes requested by the SOA content editor.
 - c. The website's address will remain <http://www.ohioarchivists.org>. The OHC will renew the domain on a regular basis and bill the SOA for the domain registration fees.

- d. The SOA maintains editorial control of the website, and as such the right to post, review and approve all changes.
 - e. Any changes to the current SOA website design will be initiated and approved by SOA Council or its designee.
 - f. The OHC will notify the SOA of any and all planned website upgrades and/or maintenance costs prior to implementation for the SOA approval.
 - g. The SOA Council will approve all website upgrade and maintenance costs prior to implementation.
- 4) The OHC will assist with the Archives Month activities in October, including:
- a. The OHC will maintain a production editor who will manage the design, production, and distribution of the Archives Month poster.
 - b. The production editor and the appropriate SOA representative will negotiate and agree to a production schedule for the program approximately four (4) months prior to Archives Month. Any changes to the schedule will be negotiated and agreed to by the same parties.
 - c. The SOA-designated program coordinator will be responsible for providing the OHC with print-ready content.
 - d. The SOA maintains editorial control of SOA publications, and as such the right to review and approve all items submitted for publication. Materials will be approved within ten (10) business days of submission.
 - e. The SOA retains copyright for all the SOA-branded materials.
 - f. The OHC will provide an itemized cost of production estimate sent to SOA with the first review copy of the program.
 - g. The OHC will provide design and layout of an Archives Month poster, based on content provided by the SOA Archives Month Committee.
 - h. The OHC will provide a draft layout and the design of the poster will be submitted to the SOA Archives Month Committee for review and approval per the agreed upon production schedule (see 4b).
 - i. The OHC will provide mailing of an Archives Month mailer that includes the SOA-approved poster and information about the Fall Meeting as appropriate.
- 5) The SOA may desire to have OHC perform work or render services above and beyond those described in sections 1-4. Such changes may be made by mutual agreement of both parties, and will be documented in an exchange of correspondence between the two parties (such as an email thread) that will serve as an addendum to this agreement.
- 6) The SOA will reimburse the OHC for costs incurred, including:
- a. The SOA will provide the OHC with a \$100 budget for supplies and materials during the contract period. Estimates for all other direct costs will be provided to a designated SOA officer for approval before any costs are incurred. The SOA will make payment to the OHC within 30 days of this agreement being signed.
 - b. The annual maintenance fee for this agreement is \$300. The SOA will make payment of \$600 for the two-year contract period to the OHC within 30 days of this agreement going into effect.
 - c. All non-salary direct costs incurred by the OHC under the terms of this agreement will be billed within ten (10) business days of the end of the quarter following the completion of the activities. Payment will be due within 30 days. These costs include, but are not limited to:
 - 1. All direct non-salary costs for production of SOA publications and printed materials.
 - 2. All postage associated with the SOA activities.
 - 3. All direct costs for website enhancements in addition to those functions detailed above.

- d. In the event of extra work as agreed to in section 5, SOA shall reimburse OHC for additional staff time or other expenses at a rate mutually agreed upon.
 - e. Additionally, the SOA will provide the OHC:
 - 1. Two (2) free SOA Annual Conference registrations.
 - 2. One free exhibit table at the SOA Annual Conference.
- 7) The OHC will assign a liaison who will:
- a. Serve as the primary OHC contact for SOA Council Members and Committee Chairs.
 - b. Assist the SOA with duties listed above in items 1-5 and will work with Committee Chairs to ensure project deadlines are met.
 - c. Attend the SOA Council Meetings as a representative of the OHC.
 - d. Assist with registration for the SOA Annual Meetings.
- 8) The term of this Agreement shall begin on July 1, 2024 and shall end on June 30, 2026. Subject to mutual agreement by both parties, this agreement may remain in force after June 30, 2026, in the event of ongoing discussions or other delay in the renewal of this agreement, until such time as a new agreement is reached. Either Party may suggest modifications to the contract within any two-year contract period by giving the other Party written notice of 30 days.
- a. Either Party may terminate this Agreement for material breach by giving the other Party written notice of termination 30 days prior to the termination date. If the breaching Party is unable to cure the breach, this Agreement shall terminate at the close of business on the 30th day. In the event that this Agreement is terminated by the SOA, the OHC shall be entitled to reimbursement of all expenses associated with the contract which were incurred prior to receipt of the notice of termination.
- 9) The parties agree that in performing its responsibilities under this Agreement, the OHC shall have the status of an independent contractor. Nothing herein shall be deemed or construed to create a joint venture, partnership, agency or employer/employment relationship between the Parties for any purpose, including, but not limited to, the payment of taxes or employee benefits. The OHC will be solely responsible for the payment of all compensation, taxes, withholdings and insurance for staff involved in carrying out the terms of this contract.
- 10) This Agreement sets forth the entire understanding between the Parties and supersedes all prior agreements, whether oral or written. This Agreement may not be modified or amended except by the mutual written agreement of the Parties. No waiver of any provision of this Agreement shall be effective unless it is in writing and signed by the party against whom it is sought to be enforced.
- 11) This Agreement shall be interpreted in accordance with the laws of the State of Ohio.

In witness whereof, the Parties have caused this Agreement to be executed as of the dates set forth below.

Ohio History Connection



Stacia Kuceyeski, Chief Operating Officer
Ohio History Connection

6/25/2024
Date

Society of Ohio Archivists



Matthew Francis, President
Society of Ohio Archivists

June 21, 2024
Date