



New England Archivists Strategic Plan

1. Increase membership by 10% between March 2010 and March 2015.

NEA relies on its membership base for funding, officers, committee members, and support. The organization needs to increase its membership to make it stronger and more flexible.

Human Impact: Membership Committee will need two additional members

Budgetary Impact: Minimal impact

a. Develop, maintain, and support the Membership Committee's Membership Publicity Plan.

The plan will be reviewed and revised annually and is intended to target students, colleagues, and affiliated professionals, with the goal of recruiting and retaining members.

Assignment: Membership Committee

b. Conduct regular membership surveys.

Survey the membership on a regular basis to encourage ongoing feedback regarding NEA activities and programs; use survey results to inform future NEA planning and programming.

Assignment: Membership Committee

c. Offer an annual job-shadowing program to archival students attending local/regional programs.

This program will replace and expand upon the job-shadowing program created by Simmons GSLIS in spring 2009; it will encompass students in library and information science programs and public history programs in New England and upstate New York.

Assignment: Membership Committee

2. Develop a business plan by March 2011

Develop a business plan to ensure that the organization's goals, plans, and activities are well aligned with its current financial resources and future financial goals.

Human Impact: NEA will need to set up a budget taskforce to assist the Treasurer in completing this work

Budgetary Impact: \$500 estimated cost to hire an accountant as a consultant, minimal cost of establishing corporate credit account.

- a. **Develop strategies to increase revenue**
Develop strategies for keeping the organization financially stable while also investigating new ways of doing business and creating new revenue streams.
Assignment: Treasurer and Budget Taskforce
- b. **Develop corporate sponsorships for the website, awards programs, scholarships, and other relevant areas.**
Work with archival, technology, and other vendors to develop sponsorship programs that support NEA’s work in key areas.
Assignment: Development Coordinator, Web Committee
- c. **Create and implement a transition plan between Treasurer office holders**
Create an accounting structure and documentation for NEA finances that will be consistent for office-holders and transparent to the Board and membership
Assignment: Treasurer and Budget Taskforce
- d. **Establish a corporate credit account.**
Explore the possibility of obtaining a corporate credit account to facilitate payments to vendors.
Assignment: Treasurer
- e. **Create a scholarship program for funding attendance at NEA meetings.**
Create a scholarship program that covers the costs of meeting registration, lodging, and (partial) travel.
Assignment: Membership Committee, Treasurer.

3. Move to 80% electronic communication.

Expand the website to increase its effectiveness in supporting NEA’s goals and services to its members.

Human Impact: Some additional work for existing committees. The greatest impact is likely to fall on Program and/or Local Arrangements Committee and on the Web Committee. The Board will need to institute two ad hoc Committees to complete the standardized policy documents and to create an electronic records policy. The electronic records policy will also impact the NEA Archivist.

Budgetary Impact: Estimated cost of \$3,500 annually for online voting, member registration and dues. Some of this cost may be recouped from printing costs. There may be some unknown costs associated with producing meeting materials via the Web—pod casts, etc., but these costs cannot be estimated without knowing the method of production (NEA produced vs. hired service). Likewise there may be hosting costs associated with electronic records management that cannot be determined.

- a. **Communicate events, workshops, meetings, professional best practices, and case studies via the Internet.**
Develop and implement plans for hosting presentations, workshop materials, and other types of relevant information on the NEA website—using supported media—with the purpose of sharing information with

members who are unable to attend meetings. Investigate the possibilities for offering educational opportunities and information online through the use of webinars, streaming videos, podcasting, etc.

Assignment: Education Committee in consultation with Program Committee, Local Arrangements Committee, Web Committee

b. Promote the use of the online membership directory.

Complete implementation of the online membership directory and investigate the viability of instituting online program registration and online voting procedures that maximize privacy protection. Assess possible vendors for conducting online meeting registration and other registrar activities.

Assignment: Membership Committee, Web Committee and Nominating Committee

c. Create online documentation and communication systems for NEA committees.

Host standardized policy and procedural documents on the NEA website.

Assignment: Board Ad Hoc Committee on Policy and Web Committee

d. Develop an electronic records management policy.

Develop a plan for managing outdated web content including meeting information and organizational policies and procedures.

Assignment: NEA Archivist and Ad Hoc Committee on Electronic Records

e. Provide convenient venues for members to communicate ideas and recommendations to the Board and standing committees.

Evaluate the use of listservs and other tools for enhancing communication among the membership, the Board, and organizational committees.

Assignment: Membership, Listserv Coordinator and Web committee

f. Develop an online infrastructure that assists members in obtaining financial resources.

Create a portal that links members to online sources for relevant grants, scholarships, fellowships, and other sources of funding.

Assignment: Communication Committee and Web Committee

4. Develop three new initiatives to increase awareness of and participation in NEA programs, activities, and events.

Work to develop and improve communication between NEA and its membership and constituents.

Human Impact: Minimal human impact most of the work falls within the scope of existing committees.

Budgetary Impact: Approximately \$300 one-time fee to create calendar of events

a. Develop and implement a comprehensive communications plan.

Create short- and long-term plans for communicating with target audiences, including identifying audiences, determining the messages and communication methods appropriate for each audience, and setting policies, responsibilities, procedures, and timelines for communications.

Assignment: Communications Committee

b. Develop a marketing mailing list.

Collect and solicit, on a regular basis, contact information of target audiences; maintain currency of the contact information, and document its use in communications.

Assignment: Communications Committee and Development Coordinator

c. Create an interactive calendar of events and programs.

Develop a simplified method for posting events, programs, and the like, on the web for members as well as allied organizations.

Assignment: Web Committee

d. Develop an effective method for reaching people without online access.

Provide opportunities for individuals who lack or avoid online communication to self-identify; assess the costs of printing and mailing print communications to this group, and propose, if necessary, a service fee to cover those costs over time.

Assignment: Communication Committee and Membership Committee/Membership Secretary

5. Develop three new initiatives to enhance networking opportunities.

Offer members new opportunities to network—professionally and socially—at meetings and other venues.

Human Impacts: Primary impact will be in the form of additional duties for the Vice President/President Elect who will be charged with setting up networking opportunities and some impact on the Board to develop policies and structures to support and administer the roundtables.

Budgetary Impacts: The need for additional rooms for roundtables could add to the costs of the annual meetings and there could be some costs associated with regional social events, but these would be on a case by case basis, i.e., if a meeting is held some place where there are no room fees or food costs are covered by an institution there may be no direct cost to NEA.

a. Establish organizational roundtables (e.g., on EAD, reference and outreach, museum archives, historical societies, etc.).

Organize roundtables that provide members with opportunities to discuss ideas and issues with colleagues of similar professional backgrounds and interests.

Assignment: Board to create structure and address bylaws if necessary.

b. Develop informal social networking opportunities outside of conferences.

Plan, schedule, and hold informal social networking opportunities for archivists throughout the region; events may include article or book discussions, repository tours, and the like

Assignment: Communication Committee, Vice President, Membership Committee, Outreach Committee

c. Evaluate the use of listservs and other tools for enhancing communication among the membership.

Look at current communication methods and investigate other options for keeping members connected with each other and the Board.

Assignment: Membership Committee, Listserv Coordinator

6. Define NEA's advocacy role and unify our efforts by March 2015.

Work to increase the regional awareness of the archival profession and its mission.

Human Impacts: Primarily impacts the Board to develop policy, create new award opportunities and seek collaborative grant opportunities.

Budgetary Impacts: None

a. Create an advocacy policy

Develop a policy for how NEA communicates with regional political leaders and other elected officials to: make them aware of NEA's presence; educate them about issues and concerns affecting the archival community; and promote relevant activities within their localities (e.g., funding for archives, NEA educational opportunities, etc.).

Assignment: Board

b. Expand the awards program.

Expand the existing awards program to include recipients inside and outside of the archival community. Consider offering awards in areas such as: excellence in government archives; journalism/writing; innovation in archives; National History Day; and most creative use of primary sources, etc.

Assignment: Representatives at Large

c. Seek collaborative grant opportunities with institutions or other organizations that bring resources to the region.

Look for grants that support professional goals and objectives in a range of areas; examples include funding to support volunteer training programs in small repositories, or to establish centrally-located regional processing units for expediting access to "hidden collections."

Assignment: Board

7. Expand educational programming by a minimum of 20% by March 2015.

Increase the number and quality of educational opportunities sponsored by NEA.

Coordinate our educational programming with allied organizations and create a method for sharing case studies and/or best practices.

Human Impacts: Expanding the number of regional workshops will have direct effect on the Education Committee and will likely require an addition of two members to that committee. There will likely be some impact to the Web Committee in terms of putting up online materials also.

Budgetary Impacts: Some budgetary impacts for expanded workshops.

a. Expand the number of regional workshops.

Offer more workshops outside of semi-annual meetings to better serve the needs of the diverse membership; these workshops will be aimed at members with varying degrees of archival knowledge and experience and will feature relevant standards, practices, and technologies.

Assignment: Education Committee

b. Create a more robust educational development structure.

Appoint an Education Coordinator responsible for the following: managing educational initiatives among NEA committees; developing co-sponsorships with allied organizations; exploring the feasibility of specialized and online workshops; and overseeing a process of curriculum review and development for repeating/core workshops.

Assignment: Education Committee

c. Develop educational offerings for the Web

Develop a system for offering a variety of educational offering via the web such as case studies, best practices, as a way of sharing information beyond semi-annual meetings.

Assignment: Web Committee, Ed Committee

8. Create and implement an outreach plan by March 2015

Create an outreach plan to direct the work of the Outreach Committee and coordinate it's efforts with the Communications Committee and the Education Committee. Consider NEA's participation in Archives month, participation in regional and national commemorative events and methods to develop programming for non-NEA members

Human Impacts: Primarily impacts the Board and the Outreach Committee.

Budgetary Impacts: Increased costs to Outreach Committee budget line.

a. Define the scope of the outreach committee

Define the scope, role and activities of the Outreach Committee so as to better serve the needs of the organization

Assignment: Board and Outreach Committee

b. Develop methods to raise the profile of NEA within the region

Enhance outreach to constituents outside of the professional archival community, including librarians, researchers, educators, historical society staff and volunteers, history enthusiasts, potential donors, and the like.

Broaden regional awareness of the role that archives and archivists play in preserving the historical record and making it accessible to the greater community.

Assignment: Outreach Committee

9. Increase collaboration with allied organizations by 50%.

Work closely with organizations serving affiliated professionals including libraries, town and city clerks, museums, historic preservation groups, historical societies, genealogy organizations, and other groups whose missions overlap with that of NEA.

Human Impacts: Primarily impacts the Board.

Budgetary Impacts: None

a. Create ongoing relationship with other regional organizations regarding education and advocacy.

Discuss NEA's educational and advocacy goals with closely allied regional organizations in order to identify potential areas of collaboration, including joint or reciprocal educational opportunities, and advocacy on important issues for which pooled resources may make a larger impact.

Assignment: President/Board

10. Identify the main 3-5 diversity related issues facing the organization and address at least 2 by March 2015.

NEA recognizes the importance of racial, ethnic, gender, regional, and professional diversity and inclusion to its relevance and growth. To tackle this issue NEA needs to identify and address the diversity related issues that affect the organization.

Human Impact: Primary impact will be on the Board.

Budgetary Impact: \$300-\$500 to fund initiatives that may emerge from a and c.

a. Identify the main 3-5 diversity issues facing the organization:

Appoint a Diversity Task Force to identify the main 3-5 diversity related issues facing the organization and make recommendations for addressing them. Human and fiscal resources should be considered when developing the recommendations. The Diversity Task Force submits recommendations to Board within 6 months of convening.

Assignment: Board to appoint a Diversity Task Force, Diversity Task Force to identify issues and make recommendations

b. Articulate what diversity and inclusion mean to NEA

As part of the process outlined in objective a., above, the Diversity Task Force will articulate what diversity and inclusion mean to NEA and develop a diversity statement to be approved by the membership and published on the Website.

Assignment: Diversity Task Force

c. Incorporate diversity considerations into committee activities

Charge each committee with developing 2-3 ways to incorporate diversity and inclusion in their activities and, with Board approval and fiscal responsibility, implementing at least one.

Assignment: All Committees