



TAKING THE PAST INTO THE FUTURE

NEA STRATEGIC PLAN 2016-2020 | newenglandarchivists.org/Strategic-Plan

New England Archivists is pleased to present the Strategic Plan 2016-2020, which provides the blueprint for NEA's efforts and growth for the next five years. This plan builds on the success of the 2010-2015 Strategic Plan, gaining momentum from our previous achievements and continuing our work on key initiatives.

1. Vision Statement

New England Archivists is a diverse, New England-based community of practice fostering daring and innovative stewardship of the recorded past with a focus on the future.

2. Mission Statement

Our mission is to connect and support the diverse individuals and organizations in New England responsible for the care of cultural heritage and the documentary record, through advocacy, education, communication, and the forging of a strong, inclusive professional network.

3. Core Organizational Values

New England Archivists is committed to:

- » Visibility and advancement of archival practice and all individuals engaged in archival work and study.
- » Community building with an emphasis on diversity and inclusion.
- » Encouraging collaboration, innovation, experimentation, and creativity across institutions and areas of expertise.
- » Stewardship of history and the historical record.
- » Transparency, integrity, and professional ethics.

4. Goals and Strategies

- » **4.1. ADVOCACY AND OUTREACH**
Advocating for policies and resources that support archival practice and all individuals engaged in archival work and study. Increasing public appreciation and understanding of archives, archivists, and the archival and related professions.
- » **4.2. COMMUNITY**
Creating opportunities for NEA members to build their professional networks and join together in collaborative, innovative ways.
- » **4.3. DEVELOPMENT**
Building a coherent and executable development and member services strategy to maximize contributed income and meaningful engagement.
- » **4.4. EDUCATION**
Cultivating and providing lifelong learning opportunities for our membership throughout all stages of their careers.
- » **4.5. INCLUSION AND DIVERSITY**
Building an organization welcoming to, and representative of, all of New England's archivists.

4.1. Advocacy and Outreach

GOAL STATEMENT

Advocating for policies and resources that support archival practice and all individuals engaged in archival work and study. Increasing public appreciation and understanding of archives, archivists, and the archival and related professions.

STRATEGIES

1. NEA will develop an advocacy agenda outlining how the organization can provide leadership and support around advocacy issues to archivists and archives in the region, including connecting archivists to funding opportunities, influencing and educating policy makers, releasing statements on timely advocacy issues, collaborating with allied organizations, and facilitating learning opportunities for archivists around advocacy.

- a. By ~~January 2016~~ ~~March 2017~~ **June 2017** the NEA Executive Board liaison to the Regional Archival Associations Consortium (RAAC) will take responsibility for monitoring and soliciting in the areas of archival advocacy and working with the Communications Committee and the RAAC to release statements on behalf of NEA.

STATUS: COMPLETE

- b. By ~~June 2016~~ **June 2017** the NEA Executive Board, in collaboration with the Membership and Communications Committees, and/or a task force (if appropriate), will develop workflows to facilitate raising awareness of archival advocacy issues through the RAAC.

STATUS: COMPLETE

- c. By January 2019 the Education Committee will offer workshops on topics relating to archival advocacy and grant writing.

2. NEA will create programming, communications, and resources to increase public appreciation and understanding of archives, archivists, and the archival and related professions.

- a. By ~~January 2017~~ ~~March 2017~~ ~~June 2017~~ **January 2018** NEA will establish the Community Engagement Coordinator (CEC) as a non-voting Executive Board Member, to increase public appreciation and understanding of archives.

STATUS: COMPLETE

- b. By ~~June 2017~~ ~~June 2018~~ **June 2019** the CEC will work with the NEA Web Coordinator to create a space on the website for general resources about archives for the general public.

- c. By ~~December 2017~~ **January 2019** the CEC will develop guidelines for organizing a day of service, defining responsibilities for volunteers, host institutions, and organizers, which will allow members, either independently or in conjunction with the Roundtable for Early Professional and Students (REPS), to initiate days of service throughout New England.

- d. By ~~March 2018~~ **March 2019** the CEC will be responsible, in collaboration with the Spring Meeting Program Chair, for overseeing the NEA Spring Meeting Day of Service and implementing low-cost or free educational opportunities for non-archivists (such as how to care for personal records or how to use archives) at the annual meeting (or when requested or required).

- e. By January 2020 the CEC and/or a task force (if appropriate) will create and promote a speakers bureau to present information on the field of archives and network with groups such as school, historical societies, related professions, and allied organizations.

4.2. Community

GOAL STATEMENT

Creating opportunities for NEA members to build their professional networks and join together in collaborative, innovative ways.

STRATEGIES

1. Building on the work of the Mentoring Task Force (MTF) pilot program, establish support for both formal and informal mentoring opportunities with NEA's membership.

- a. By ~~March 2016~~ **January 2018** create a sustainable dedicated leadership structure for NEA's Mentoring initiative within the Membership Committee.

STATUS: COMPLETE

- b. By September 2016 launch a formalized mentoring initiative based on the recommendations of the MTF.

STATUS: COMPLETE

- c. By ~~June 2017~~ ~~September 2018~~ **June 2019** create a method for NEA members to independently identify opportunities for informal, one-on-one mentoring, so that members of any experience level or career stage may seek out mentoring relationships.

2. Create opportunities for NEA's membership to engage more easily with the organization and with each other, with an emphasis on enabling more localized regional collaboration in an effort to strengthen NEA's overall community.

- a. By ~~June 2016~~ **March 2017** the Executive Board will create a list, to be added to the meeting manual for consideration by Program Committee chairs when planning bi-annual NEA meetings, of inclusive and participatory activities and strategies to encourage increased mingling and participation within meetings.

STATUS: COMPLETE

- b. By January 2017 the Representatives-at-Large will create an updated organizational chart for the website, improve the transparency of the application process for volunteering and nominating, and formalizing the process so that members have a clear sense of how to get involved in NEA leadership service.

STATUS: COMPLETE

- c. By ~~January 2017~~ ~~January 2018~~ ~~September 2018~~ **June 2019** the Membership Committee, in collaboration with the Web Administrator, will investigate an expansion of the functionality of the membership database to include more detailed information — such as profile pictures, skill-set descriptions, geographic data, and self-identified one-on-one mentoring interest — so that members can better connect with nearby colleagues and those with expertise relevant to their work.

- d. By ~~June 2017~~ **September 2017** the Executive Board will implement, based on the findings of the Conference and Educational Platform Task Force (2015), a more robust long-distance communication and collaboration infrastructure to make non-Boston area collaboration more effective.

STATUS: COMPLETE

- e. By ~~June 2017~~ ~~September 2018~~ **June 2019** in conjunction with the IDC, the Executive Board will develop a plan to target non-Massachusetts members for volunteer opportunities.

STATUS: IN PROGRESS

- f. By ~~January 2018~~ **January 2019** and building on the work of the Constituency Task Force (CTF), the Executive Board and/or a task force (if appropriate) will identify geographic areas within NEA and propose a structure for localized leadership, which will ultimately have responsibility for coordinating locally focused programming and events.

4.3. Development

GOAL STATEMENT

Building a coherent and executable development and member services strategy to maximize contributed income and meaningful engagement.

STRATEGIES

1. Restructure Membership Committee to include membership engagement and development duties.

- a. By ~~January 2017~~ **August 2017** the Executive Board will restructure the Membership Committee to give each member a specific role/area of responsibility, such as:
 - » Chair(s)
 - » Development
 - » Membership survey creation and analysis
 - » Mentoring
 - » Meet-up organization
 - » Outreach to new and lapsed members
 - » Membership Secretary (non-voting Board Member)

STATUS: COMPLETE

- b. By ~~January 2018~~ ~~September 2018~~ **January 2019** the Membership Committee should consider whether to rename the committee (i.e. Membership and Development Committee or Member Services Committee), based on new duties and charge.

2. Draft and implement a development charter.

- a. By ~~June 2018~~ **June 2019** members dedicated to development on the Membership Committee will, aided by membership survey data and the Development Task Force final report (2013), define development for NEA, identify priorities for funding opportunities, identify new and existing sources of funding, and explore, in cooperation with the NEA Treasurer, sustainable and responsible financial planning, defining areas that will benefit from development.

STATUS: IN PROGRESS

3. Create a culture of continued and meaningful fiscal engagement.

- a. By ~~January 2017~~ ~~June 2017~~ ~~September 2017~~ ~~January 2018~~ ~~September 2018~~ **January 2019** the Executive Board will institutionalize Board and member time and fiscal contributions to NEA awards and scholarships through new online donation tools, with targeted outreach and increased publicity.

STATUS: IN PROGRESS

- b. By ~~January 2018~~ ~~June 2018~~ **January 2019** the development member(s) of the Membership Committee and/or a Task Force (if appropriate), will perform a comprehensive review of newsletter and other NEA outreach tools in light of vendor support.
- c. By January 2020 the Vendor Coordinator will increase vendor support of programs, awards, and scholarships by 20%.
- d. By January 2020 the development member(s) of the Membership Committee, in coordination with the Treasurer, will take steps towards ensuring that all named awards and/or scholarships are financially stable and sustainable.

4. Increase programming targeted toward mid-career and retiring members.

- a. By June 2017 the Inclusion and Diversity Coordinator (IDC) will host a brainstorming session to gauge interest in a series of programs on work/life balance. If interest is strong enough, a task force will be appointed to develop programming on this issue to be launched by September 2018.

STATUS: COMPLETE / ONGOING

- b. By ~~January 2018~~ ~~June 2018~~ **June 2019** the Education Committee will develop at least one education workshop for mid-career archivists on salary negotiation and career advancement.

STATUS: IN PROGRESS

- c. By ~~June 2018~~ ~~October 2018~~ **June 2019** the Membership Committee and/or a Task Force (if appropriate), will develop a policy and procedures for outreach to retired and lapsed members with invitations to stay involved as presenters, workshop leaders, and newsletter contributors.

STATUS: IN PROGRESS

4.4. Education

GOAL STATEMENT

Cultivating and providing lifelong learning opportunities for our membership throughout all stages of their careers.

STRATEGIES

1. **Allow membership in all geographic areas to more fully engage with NEA's educational offerings by increasing our suite of online options.**

- a. By ~~June 2017~~ ~~June 2018~~ **June 2019**, the Education Committee will identify and develop web-based resources, such as skillshares, for frequently requested educational topics that will allow the membership to gain basic, immediate knowledge of a subject or resource.

STATUS: IN PROGRESS

- b. By ~~June 2018~~ **June 2019**, the Education Committee will implement a system with clearly defined processes for hosting and successfully marketing webinars on a variety of topics, such as those offered by SAA, with the goal of mitigating issues of cost and distance and reaching a greater number of participants.

STATUS: IN PROGRESS

2. **Enhance NEA's ability to actively engage members at every stage of their career and to reach out both to potential new members and members in allied organization or related professions.**

- a. By ~~June 2017~~ ~~June 2018~~ **June 2019**, the Education Committee will develop a tiered workshop structure, with tiered pricing, that offers continuing education opportunities along three tiers (beginner, intermediate, and advanced) in order to better serve our entire membership.
- b. By ~~June 2018~~ **June 2019**, the Education Committee, in collaboration with the CEC, will create a mechanism for institutions to request low-cost basic archival training to their employees, volunteers, NEA members and other interested parties.

4.5. Inclusion and Diversity

GOAL STATEMENT

Building an organization welcoming to, and representative of, all of New England's archivists.

STRATEGIES

1. Enhance the visibility and promotion of inclusion and diversity resources available to NEA members.

- a. By March 2017 the Inclusion and Diversity Coordinator (IDC), in collaboration with the Communications Committee, will integrate promotion of resources to support access and accommodation at NEA events for individuals with particular physical, cognitive, or other accessibility needs into the production of all relevant organizational literature (brochures, emails, website updates).

STATUS: COMPLETE / ONGOING

- b. By ~~January 2018~~ **September 2018**, the IDC will develop a "best practices" stylesheet for language and selection of visuals to represent our diverse professional community in print and online communications in order to increase the visual and verbal representation of the diversity within NEA in print and online literature, press releases, and other forms of institutional communication.

STATUS: COMPLETE

- c. By March 2019 the IDC and/or a task force (if appropriate), will formalize and document a planning checklist for planners of NEA events to ensure baseline accessibility and procedures for requesting and accessing additional access and accommodation services for NEA events.

2. Identify and address changes in the landscape of the current archival workforce, including increased outreach to youth, with particular focus on young people in marginalized/minority communities.

- a. By January 2017 the IDC will complete the Contingent Employment Survey (CES) using a targeted online questionnaire and in-depth one-to-one interviews to assess the labor conditions and professional needs of contingently-employed archivists in the New England region. Submit final report and recommendations for the CES to the Board in January 2017 and submit an article version of the CES findings and recommendations to a relevant professional journal for consideration.

STATUS: COMPLETE

- b. By ~~June 2018~~ **October 2019**, the CEC, in conjunction with the IDC and/or a task force (if appropriate), will establish a working group to develop resources for archival outreach to K-12 students and teachers. The CEC will encourage participation of NEA members as judges for National History Day, the annual history competition for 6-12 graders, reach out to all state-level NHD organizations to find out how NEA members can volunteer to serve as judges, and aim to have at least one NEA member participating annually in each of the state competitions.

- c. By January 2019 the Executive Board, under the leadership of the IDC and the CEC, will establish a two-year working group and/or a task force (if appropriate), to develop an outreach plan for staff and volunteers in four underrepresented repository types: public library history rooms/archives, local historical societies, religious archives, and school (K-12) archives.

3. Increase accessibility and inclusion at NEA activities and spaces for lower-income, job-insecure archivists.

- a. By September 2016 the Representatives-at-Large, in collaboration with the IDC, will review application policies and procedures for conference scholarships with the goal of clarifying expectations and increasing participation.

STATUS: COMPLETE

- b. By ~~September 2016~~ ~~June 2017~~ ~~September 2017~~ **January 2018** the Communications Committee, in collaboration with the IDC, will establish a communication plan to increase awareness of conference scholarships.

STATUS: COMPLETE

- c. By ~~June 2017~~ ~~January 2018~~ ~~June 2018~~ **June 2019** the Executive Board, advised by the Conference and Education Platform Task Force (2015), will offer at least one low-cost, no-travel option for accessing in part or in full all NEA conferences, workshops, and business meetings through streaming, webinars, or similar means.
- d. By January 2020 the Executive Board, Communications Committee, and the IDC will increase application rates for scholarship funds by 50%.

The creation of the Strategic Plan 2016-2020 was a collaborative effort. Thank you to the membership for being engaged in the process and providing input along the way. Thank you to the Strategic Plan Task Force (SPTF) and the NEA Board for synthesizing ideas and writing the plan.

SPTF MEMBERS INCLUDED:

Caitlin Birch (Co-chair)

Jill Snyder (Co-chair)

Erica Boudreau

Stephanie Call

Johanna Carl

Elizabeth Caron

Anna Clutterbuck-Cook

Hanna Clutterbuck-Cook

Kathryn Donahue

Maureen Jennings

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