

**Society of American Archivists
Council Conference Call
January 20, 2016
2:00 – 4:00 pm EST**

**Coalition to Advance Learning in Archives, Libraries and
Museums (CALALM): Annual Report
(Prepared by SAA Lead Representative Donna E. McCrea)**

This report summarizes CALALM activities from April to December 2015, with emphasis on the activities of SAAs representatives. It will also serve as the report of the in-person meeting of CALALM on November 18, 2015.

BACKGROUND

The Coalition to Advance Learning in Archives, Libraries and Museums (CALALM, aka “the Coalition”) was established in 2013. “The purpose of the Coalition is to work in deliberate coordination across organizational boundaries to devise and strengthen sustainable continuing education and professional programs that will transform the archives, library, and museum workforces in ways that lead to measureable impact on our nation’s communities.”¹ Appendix A of the [Council’s November 2014 minutes](#) provides background information about SAA’s involvement in CALALM. Additional information is provided in my May 2015 report to the Council (0515-VII-J-CALALM).

Coalition participants represent 21 different museum, archives, library, and related associations and organizations. A [roster of current participants](#) is available on the [Coalition’s website](#). The Coalition was originally supported by grants from the Institute of Museum and Library Services and the Bill & Melinda Gates Foundation, with administration provided by OCLC. In the summer of 2015 IMLS awarded the Coalition a supplemental grant which extends funding for the Coalition through December 2016. The Coalition has had paid facilitators since inception; in the fall of 2015 OCLC selected Educopia to facilitate through December 2016.

I serve as SAA’s lead representative to CALALM. SAA’s other two representatives are Danna Bell and Helen Wong Smith. As lead representative I attend virtual and in-person meetings of CALALM and maintain regular communication with the other two representatives, with SAA leadership (Dennis Meissner), and with SAA staff (Nancy Beaumont and Solveig De Sutter.)

¹ “About Us.” Coalition to Advance Learning in Archives, Libraries and Museums. Accessed December 14, 2015. <http://www.coalitiontoadvancelearning.org/about-us/>

DISCUSSION

At the time of our appointment, SAA's CALALM representatives were assigned to one of the three existing Coalition work groups: Developing a Prototype (Bell), Assessing the Field (Wong Smith), and Governance (McCrea). Following the Coalition's in-person meeting in March 2015, the Governance and Prototype work groups essentially dissolved. Bell assisted with the RFP for the development of a revised Coalition website. McCrea participated in an exploration of a Foundations 101 webinar series; IMLS had expressed a need for widely available, cross-disciplinary basic training. (The Foundations 101 idea was set aside when no Coalition participant was able to dedicate the necessary time and cost-share required to serve as lead principal investigator.)

Wong Smith continued on the Assessing the Field work group and now represents SAA on the IMLS-funded grant awarded to Educopia for a project entitled "Mapping the Landscape." Members of the Mapping the Landscape team held a focus group around Continuing Education / Professional Development (CE/PD) interests at the SAA Annual Meeting in August 2015; a draft summary of that focus group has been shared with De Sutter. Two public documents have come out of "Mapping the Landscape" thus far. A white paper, "[Spanning Our Field Boundaries: Mindfully Managing LAM Collaborations](#)," aims to document "challenges and complexities that impact our ability to collaborate." The report "[LAM Education Needs Assessments: Bridging the Gaps](#)" outlines "guiding principles and practices for CE/PD needs assessments."

[Note: Mapping the Landscape is directly affiliated with the Coalition and has 38 partner organizations. In 2014 Educopia also received an IMLS grant for NEXUS II, a project focused on leadership training across LAMs. NEXUS is not directly affiliated with the Coalition, although there is a significant overlap in Coalition membership and NEXUS advisory board membership. SAA was originally represented on the NEXUS II advisory board by Jennifer Pelose, chair of the Committee on Education, and Solveig De Sutter. I took over for Pelose in November 2015.]

The Coalition held its fourth in-person "convening" in New Orleans on November 18, 2015, immediately following the IMLS Focus conference. The diversity of the Coalition continues to be both an opportunity and a challenge. As just one example, a portion of Coalition participants want the Coalition to design and deliver (or at least vet) CE/PD, but others believe this should not be the purview of the Coalition and may compete with some participants' sustainability models and disincentivize their participation. The focus of this November meeting was to identify areas for a National Agenda framework around which Coalition participants can align independent and shared CE/PD activities. The draft framework, released by the Coalition facilitators in December, has the following four broad goals:

1. Increase and strengthen collaborations between LAM CE/PD providers
2. Increase institution- or organization-level support for CE/PD within LAMs
3. Better leverage existing CE/PD offerings from across the LAM sectors
4. Improve the quality of LAM CE/PD provision.

In Tuckman's Stages of Development (forming-storming-norming-performing) I believe the Coalition is still somewhere in the storming-norming area, but this articulation of goals and related action areas may represent a solid step toward "performing."

I make the following recommendations at this time and follow each with a support statement. I don't believe any of these require an official motion at this time.

1. SAA should continue its participation in the Coalition at least through December 2016, the end of the IMLS grant funding. A decision to continue participation past December 2016 should be based on solid alignment between the goals of the Coalition and the strategic priorities of SAA.

Support: Participation on the Coalition allows SAA to be represented in a conversation about CE/PD among national-level archives, library, and museum associations. This collaboration may also strengthen our ability to collaborate in other areas of interest.

2. Bell wishes to step down from CALALM at this time. She should not be replaced.

Support: Bell is not working on a specific project or with a specific work group at this time, so there is no need for another representative to replace her. (SAA is currently the only CALALM participant with more than one representative.)

3. The terms for McCrea and Wong Smith currently end August 6, 2016. These terms should be extended to August 2017.

Support: Wong Smith and McCrea have spent the last two years becoming familiar with the Coalition. The Coalition is funded through December 2016, including one more in person meeting which the lead representative will attend. Extending their terms to a third year seems practical.

4. If the Coalition does continue past 2016, and if SAA chooses to continue to be involved, SAA leadership should appoint just one official representative to CALALM. It may be ideal for that one representative to also be an official or *ex officio* member of the Committee on Education (CoE).

Support: At this point in the Coalition's evolution, there is overlap between the focus of SAA's CoE and the focus of the Coalition. It would be useful for the CALALM representative to be aware of the current interests, needs, and focus areas of the CoE.

Impact on Strategic Priorities: Our participation in the Coalition is in alignment with several strategies in Goal 1 of our Strategic Plan: Advocating for Archives and Archivists. If the Coalition is successful, our participation will also advance several strategies in Goal 2: Enhancing Professional Growth. Finally, our participation aligns with Goal 3, Strategy 3.3: Participate actively in relevant partnerships and collaborations to enhance professional knowledge.

Fiscal Impact: It seems likely that after December 2016 some funds will be required for participation in the Coalition, either through dues or in-kind contributions, as a sustainability model has not yet been developed.