

**Society of American Archivists
Council Meeting
August 1, 2019
Austin, TX**

Staff Report: Education

(Prepared by Rana Hutchinson Salzman, Director of Education)

Education FY19 Update (July 1, 2018 – June 30, 2019)

- 67 courses in total: 27 A&D, 40 DAS
 - Budgeted 80 for year.
 - Canceled, postponed, rescheduled: 9
 - Courses presented as closed professional development workshops for staff of host organizations:
 - *Archivists Guide to Balancing Legal Issues in Photographic Collections @ Yale*
 - *Advocacy, Awareness, and Archives @ Emory* (rescheduled to FY20)
- Delivered in-person education to a total of 1512 attendees
 - Budgeted for 1600 for year
- Approx. 1500 webcasts sold
 - 175 views of free *Cultural Diversity Competency* webcast
- Bootcamps were held in five locations, each with solid attendance.
 - A&D Bootcamp | Syracuse, NY | October 1-5, 2018
 - DACS: 24
 - Arrangement and Description of AV Materials: 26
 - A&D Fundamentals: 25
 - Privacy and Confidentiality of Digital Archives: 22
 - DAS Bootcamp | Salt Lake City, UT | October 2-5, 2018
 - Preserving Digital Archives: 36
 - Appraisal of Digital Records: 37
 - Digital Forensics Fundamentals: 37
 - DAS and A&D Bootcamp | Irvine, CA | November 5-9, 2018
 - Appraisal of Digital Records: 27
 - A&D Fundamentals: 26
 - Managing Digital Records in Archives: 27
 - DACS: 24
 - DAS Bootcamp | Atlanta, GA | March 18-21, 2019
 - Command Line Interface: 30
 - Tool Integration: 29

- Digital Forensics: 30
 - Privacy and Confidentiality of Digital Archives: 31
 - A&D Bootcamp | Salt Lake City, UT |April 10-12, 2019
 - Appraisal of Digital Records: 35
 - Implementing More Product, Less Process: 32
 - Copyright Issues in Digital Archives: 37
 - A&D Bootcamp | Columbia, SC |May 13-16, 2019
 - A&D Fundamentals: 26
 - Copyright Issues in Digital Archives: 23
 - DACS: 20
- It is important to note that SAA Education product pricing has remained consistent since FY18—for the third consecutive fiscal year. For FY20 we made one change, removing the “group pricing” option that allowed purchase of a la carte exams at a lower price point. Going forward, each individual who desires credit for a webcast must purchase the full webcast + exam product. We no longer sell a la carte exams.

Certificate Programs

- 105 individuals fulfilled all the requirements and were awarded the DAS certificate in FY19. In addition, 33 individuals completed the requirements to renew their DAS certificate.
 - The DAS Comprehensive Exam was administered as follows in FY19: August (47), November (23), May (35). Going forward, the DAS Exam will be offered in January, May, and September of each year.
 - 19 failed the DAS Comprehensive exam over the three exam periods in FY19 (13, 3, 3).
 - Two DAS Exam Question Managers now assist the DAS Subcommittee and SAA Education staff with management of the comprehensive exam. We are now back on an annual renewal schedule for exam questions, with the new exam version and related Practice Exam product to come online for the next testing window in September 2019. The DAS Subcommittee also put into place a procedure for addressing complaints about exam questions, results, and quality. For more detail, see Martin Gengenbach’s DAS Subcommittee report (Appendix).
- Nine individuals fulfilled all requirements and were awarded the A&D Certificate in FY19.

New Courses for FY19

- *Appraisal for A&D*; Huggard and Bryan; webcast (A&D)
- *Introduction to PREMIS*; Lori Lindberg; in-person in Austin (DAS, A&D)
- *Email Archiving*; Chris Prom & Tricia Patterson; in-person in Austin (DAS)
- *Advocating for Archives in State and Local Policy-Making*; Various members of the SAA Committee on Public Policy; in-person in Austin; special pricing.

Significant Curriculum Revisions Completed in FY19

- *Arrangement and Description of Digital Records Part 1 & 2* (redeveloped as a 2-day course, reached max enrollment in Austin)
- *Association Archives*
- *Managing Physical and Digital Architecture, Design, and Construction Records*

Development for FY20

- *Using ePADD for Email Archiving* (Schneider & Chan, DAS)
- *Introduction to XML Analysis and Manipulation* (Heberlein, A&D/DAS)
- *Linked Archival Open Data* (RFP in search of instructor, webcast for A&D)
- Management Track
 - Archives Managers Unconference (Austin; I am hopeful that the lineup of lightning talk speakers will provide fresh content that we might repurpose into webcasts in FY20)
 - Project Management for Archivists (convert to online, Pleva Flynn)
 - Grant Writing (convert to online, Minks)
 - Upcoming possibilities with outside experts: Financial Conversations for Archivists, IT Management, Career Development.

Additional Activities

- **New instructor recruitment strategies:** In order to insure the continued success of SAA Education and maintain the quality of our courses, we need to perpetually recruit and develop the next generation of instructors to teach established core courses and help us bring new courses into fruition. Ideally, this means reaching beyond the “usual suspects” and cultivating instructors who represent the diversity of SAA membership. To achieve this goal, SAA Education and CoE are jointly sponsoring an Instructor Recruitment Fair at the 2019 Annual Meeting. In addition, DAS has begun to explore new models for instructor service, including recruiting and training individuals in specific remote/rural areas (Hawaii and Montana in particular) to teach more than one course and developing a baseline rubric of qualifications to facilitate recruitment. The Committee is actively brainstorming ways to increase the diversity of the instructor pool and I look forward to making more progress on this in the coming year.
- **Next steps for marketing:** Building on the Marketing study completed by John Chrastka, SAA Education will implement some of the consultant’s suggestions in the coming year, including:
 - Tagging member profiles in the database with persona and audience metadata to facilitate marketing and audience segmentation.
 - Engaging with a marketing firm to produce mailers, catalogs, and other collateral materials highlighting A&D, DAS, and Management programming, as well as

cross-promoting related SAA publications and calling attention to resources for new professionals.

- **Scouting the continuing education landscape:** In order to learn more about the CE offerings from other institutions, scope out potential instructors, and gauge where SAA might improve upon existing programs, we supported Peter Hirtle to enroll in the Museum Study course *Rights & Reproductions 1: Intro to IP and Licensing Best Practices* and Laura Davis to enroll in *Web Archiving* run by the University of Wisconsin. It is important for SAA Education to monitor the landscape of CE for archivists and I look forward to hearing more from the volunteers about their course experiences.
- **A continued focus on online course development:** The Strategic Plan includes a goal for the DAS Certificate to move completely online by FY21. Though this goal has yet to be fully discussed and vetted within the DAS Subcommittee and needs to be scoped for viability, it remains a central organizing principle for development. In order to serve members who continue to prefer online learning as it is more financially and logistically accessible, we need to move quickly to refashion as many face-to-face courses as possible into quality online products. Because the *Copyright in Digital Archives* and *Privacy and Confidentiality in Digital Archives* courses satisfy requirements in both A&D and DAS programs, these are on the top of the list for revision in FY20. In addition, the Management Track will be developed intentionally as an all-online program.
- **Upcoming courses of note:**
 - A&D Bootcamp @ Princeton (September 2019)
 - DAS Bootcamp @ Salt Lake City (January 2020)
 - DAS Bootcamp @ Northbrook, IL (March 2020)
 - Exploring possibility of hosting bootcamp in conjunction with the Western Archives meeting @ San Francisco (April 2020)
 - *Cultural Diversity Competency* @ Harvard (October 2019)

Reports from Education-Related Appointed Groups

The Committee on Education

See May 2019 Council Packet for most recent report.

The DAS Subcommittee

See appendix for report from Martin Gengenbach, chair

The GAE Subcommittee

See May 2019 Council Packet for most recent report.

Report: Digital Archives Specialist (DAS) Subcommittee (Prepared by Martin Gengenbach, July 2019)

The DAS Subcommittee made significant progress toward four established goals this year:

1. Stabilize comprehensive exam and practice exam;
2. Identify and propose alternatives to comprehensive exam;
3. Maintain existing DAS course catalog, develop new courses in desired areas, and identify potential courses for retirement; and
4. Engage ARL/SAA Mosaic Fellowship participants.

This report provides additional detail into ongoing and completed activities related to each of the goals above, and closes with a thank-you to departing members.

Goal 1: Stabilize comprehensive exam and practice exam

Activities:

- Update and revise comprehensive exam reading list (and individual course readings) (complete)
- Deduplicate and revise practice exam questions (in progress)
- Revise final exam (in progress)
- establish process for contested exam questions (complete)

The DAS Subcommittee recommended the hiring of two part-time resources, Sarah Shipley and Tomaro Taylor, to handle review and revision of existing exam questions across both the practice exam and comprehensive exam offerings. They have identified exam questions that should be revised or excluded from future offerings, and have provided valuable feedback on exam question development that will be of great benefit to future DAS test question writers.

The Subcommittee has also developed a process for test-takers to contest exam questions that they identify as unclear. This process allows test takers to request review of specific exam questions by a small subset of the DAS Subcommittee, who may elect to remove or revise the identified question. In some cases, test takers may also be given the opportunity to retake the exam at no cost. This process has provided clarity and transparency in response to an unanticipated impact of offering the comprehensive exam online, and has been used multiple times to identify questions that are in need of revision or review.

Goal 2: Identify and propose alternatives to comprehensive exam

Activities:

- Research alternatives in other industries (complete)
- Work with DAS Intern Pam McClanahan to conduct survey for DAS program evaluation and participant views on comprehensive exam (complete)

- Develop and submit to council a proposal on next steps related to comprehensive exam (in progress)

The DAS Subcommittee dedicated much of its on-site meeting in October 2018 to discussions around the comprehensive exam. This work continued into 2019, resulting in the [draft proposal for the comprehensive exam found here](#). We continue to develop and finalize a recommendation for the future of the comprehensive exam.

The Subcommittee also sought to understand how previous DAS course participants and certificate holders see the DAS program and comprehensive exam through a participant survey. The survey was developed and executed by the DAS Intern, Pam McClanahan, who included targeted questions on the quality of courses offered through DAS, and the benefits of the DAS Certificate for those who have earned it. This survey received over 500 responses and provided valuable feedback for the DAS Subcommittee.

Goal 3: Maintain existing DAS course catalog, develop new courses in desired areas and identify potential courses for retirement

Activities:

- Ensure timely audit, review, and revision of existing courses (in progress)
- Develop courses in email management, XML editing, and other high-interest areas
- Support development of Management track where appropriate (in progress)

Courses developed in FY2019

- Introduction to PREMIS; Lori Lindberg; in-person in Austin (DAS, A&D)
- Email Archiving; Chris Prom & Tricia Patterson; in-person in Austin (DAS)

Courses in development for FY2020

- Using ePADD for Email Archiving (Schneider & Chan, DAS)
- Introduction to XML Analysis and Manipulation (Heberlein, A&D/DAS)

105 individuals fulfilled all the requirements and were awarded the DAS certificate in FY19. In addition, 33 individuals completed the requirements to renew their DAS certificate

Goal 4: Engage ARL/SAA Mosaic Fellowship participants

Activities:

- Clarify policies regarding use of Mosaic Fellowship funding (complete)

The existing arrangement between SAA and ARL provided funding that Fellows could put toward DAS courses during the time of their Fellowship. However, analysis of course participation and feedback from Mosaic Fellows revealed that many Mosaic Scholars were unable to complete their DAS certification during the time of their scholarship, due to a combination of DAS course scheduling and the Fellows' own existing educational and occupational commitments. The new funding agreement between ARL and SAA provides

funding for all current and past Mosaic Fellows through the end of the grant period - currently 2021.

- Encourage regular communication with Mosaic scholars and ARL mentors to increase participation in program (complete)

In addition to clarifying policies related to the use of Mosaic Fellowship scholarship funds, the DAS Subcommittee has re-engaged with Mosaic program alumni to ensure that all Fellows are aware of this extended benefit, and have opened communications between ARL mentors, Mosaic Fellows, and DAS Subcommittee members. The result has been a notable uptick in Mosaic Fellow participation in DAS course offerings. We hope to build on this success through the end of dedicated funding to the program in 2021.

Farewell to departing Subcommittee members!

Finally, the DAS Subcommittee wishes to thank outgoing and departing subcommittee members, with particular gratitude to **Glen McAninch** for his eight (plus?) years on the DAS Subcommittee. His experience and wisdom will be missed!

Thanks to all of our outgoing/departed subcommittee members for all of their efforts!:

- Glen McAninch
- Jeni Spamer
- Ashley Taylor
- Pam McClanahan, Intern