

**Society of American Archivists
Council Conference Call
October 14, 2019
3:00 – 5:00 pm EST**

**Tragedy Response Initiative Task Force:
Funding to Support a Meeting for
Tragedy Response Volunteer Force Planning
(Prepared by David Benjamin, Lisa Calahan, Kara McClurken,
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The Tragedy Response Initiative Task Force requests funding to support a Tragedy Response Volunteer Force Planning Follow-up Meeting.

BACKGROUND

In 2018, the Tragedy Response Initiative Task Force was established by the SAA Council. It was charged with 1) creating and/or compiling material for ready accessibility by archivists who are facing a sudden tragedy and 2) exploring the feasibility of creating a standing body within SAA that would update documentation as needed and serve as a volunteer tragedy response team. The Task Force members have worked diligently to make headway in completing “Collecting in Times of Crisis: A Resource Kit”¹ and working to make it easily accessible. At the 2019 SAA Annual Meeting, the Task Force, with the generous support of SAA, hosted a successful Think Tank Meeting event to discuss and brainstorm the sustainability of a national volunteer network.

In order to capitalize on the momentum of the Think Tank and the feedback and suggestions made by participants, we are requesting support for a follow-up in-person meeting on November 22 at SAA headquarters in Chicago.

DISCUSSION

The Tragedy Response Initiative Task Force, responsible for organizing the follow-up meeting, is composed of SAA members representing various perspectives and sharing their particular interests/expertise in responding to tragic events and the role of archival staff. Along with the Task Force members, the invited follow-up meeting presenters will include representatives from cultural heritage groups outside of SAA, including the American Association for State and Local History, National Council on Public History, National Heritage Responders, and LYRASIS.

¹ Available now at: <https://www2.archivists.org/advocacy/documenting-in-times-of-crisis-a-resource-kit>.

The follow-up meeting will bring cultural heritage stakeholders together to prioritize action items and outline a sustainability plan for a volunteer response network pulled from identified recommendations from the Think Tank. The Task Force will focus on three goals to address the sustainability of the network: 1) determine the structure of a permanent administrative group to oversee the network (i.e., a working group or advisory committee); 2) identify in-kind and collaborative partners; and 3) identify funding opportunities.

Perhaps most importantly, the proposed follow-up meeting will allow an extension of SAA in addressing the immediate needs of both its members and the larger society in which we all live. Beyond the work of the Task Force, little work has been done that recognizes the immediacy and the quantity of documentation happening within minutes of tragedies. Similarly, little work has been done on the place of cultural institutions in helping society heal, in promoting recognition of diverse viewpoints, and in understanding the resources needed to comprehensively collect the various types of documentation created in the aftermath of tragedies. The follow-up meeting will provide the opportunity for cultural heritage stewards to come together to collaborate by identifying priorities and obstacles in the creation of a volunteer network.

While the particular focus is new, the efforts to provide collaborative and sustainable support wisely builds on successful sustainable models in other areas of emergency preparedness, such as the National Heritage Responders network. The outcome of our meeting will be to strengthen partnerships with stakeholders from allied professions in building a continuing volunteer network for tragedy response. The critical involvement of these individuals and organizations who have not only responded to tragedies within their own communities, but also used that experience to help other communities struggling to respond to tragedies, will be formative in the creation of a sustainable and inclusive volunteer network that considers the needs of responders outside of “traditional” archival backgrounds.

The follow-up meeting also provides the Task Force an opportunity to solicit feedback on the work we have done so far regarding our documentation toolkit (part 1 of the Task Force’s charge), and will also allow us to collaborate with experts and practitioners across cultural heritage disciplines to determine the feasibility of a far-reaching and permanent volunteer framework to assist those experiencing tragedies in their communities and at their institutions (part 2 of the Task Force’s charge.) The follow-up meeting will benefit SAA by leading the cultural community in a collaborative sustainable approach to support for and response to those documenting communities in crisis. By reaching outside of our own organization and working with partners, we not only reduce the financial and personnel load placed upon the archival community, but we create a more inclusive network that can better support more communities.

Task Force members have made significant strides in building a collaborative network, which is evident through the success of the Think Tank event. The success and helpful ideas that were gathered as the outcome of the in-person Think Tank are a wonderful first

step to investigating a volunteer network. The ability to have an in-person conversation with stakeholders and SAA attendees was invaluable and cannot be easily replicated in other ways. The Task Force would like to capitalize on the investment of our collaborators with a secondary and more focused meeting time.

To fulfill the collaborative charge of this Task Force, this project would fund the travel of all participants. The Task Force has identified three guests to participate at the meeting with six Task Force members. The funding request below includes a request to cover travel costs in order to attend in person; virtual participation will be available through Zoom for Task Force and non-SAA participants who are unable to attend in person. The Task Force members discussed the option of holding the follow-up meeting virtually and agreed that virtual meetings would significantly hamper the productivity of the intended in-person meeting and would significantly delay the outcomes. We feel strongly that given the proximity to the Think Tank event, we should capitalize on the energy and commitment of our cultural partners to continue building those relationships in person.

The funding will also pay for a qualified facilitator to ensure that our time is used effectively. Fortunately Jessica Meyerson, who facilitated the Think Tank event, is available and willing to facilitate the follow-up meeting. Her ability to participate in this role will provide the consistent and seamless guidance the group will need to use our time effectively. The Task Force members planning this event are personally aware of the emotional and cultural implications of having these shared conversations, as community members, archivists, oral historians, and digital preservationists all bring different points of view and personal connections to tragedies that have occurred in their communities. Additionally, the participants will have different ideas of what a volunteer network should look like and collaborative project ideas (some of which are already in production). Having a professional facilitator to help the group find common themes in our experiences and projects will be critical to meeting our end goal of prioritizing activities for the creation of a volunteer network. The Task Force determined that planning the follow-up meeting in Chicago at SAA's headquarters would be a central location and ensure that more participants would be able to attend.

BUDGET

The follow-up meeting will be held in Chicago at SAA Headquarters. We considered other locations, including the potential of a Task Force member's institution hosting, but determined that both the central location of Chicago and use of SAA Headquarters would save money. The funding request is for 10 people: six task force members, three guests, and one facilitator.

- **Travel: \$10,350**
 - Hotel: \$4,500 [10 x \$225 x 2 nights]. Average hotel rate based on SAA Headquarters location.
 - Airfare/train: \$4,000 [10 x \$400]. Average based on regional airfare to O'Hare.
 - Per diem: \$1,350 [10 x \$45 per day]. Based on SAA standard per diem rate.
 - Transportation to/from airport: \$75 [10 x \$7.50]. Based on CTA fare to/from airport.

Morning coffee and lunch: \$350

10 people x \$35 based on per-person cost for meal, delivery, and tip for basic breakfast/sandwich options. Used ezcater.com for price estimates.

Facilitator: \$5,650 - \$7,525 (estimated, depending on number of hours required for asynchronous prep for the meeting)

Hourly rate for facilitation services = \$125 (x 9 hours for meeting set-up and attendance, 3 hours for planning calls, 15-30 hours for asynchronous prep for the meeting, and 15 hours for meeting synthesis/report/next steps).

Hourly rate for travel = \$50 (x 8 hours).

FUNDING REQUEST

The Tragedy Response Initiative Task Force requests that funding in the amount of \$17,800 be included in SAA's FY 2020 budget to support the Tragedy Response Initiative Task Force Follow-up Meeting this fall.

Support Statement: The funding request is to provide travel funding for Task Force Members and guests from key cultural heritage organizations to ensure that the broad spectrum of stakeholders in the preservation of cultural memory are able to participate and collaborate for the creation of a volunteer network to respond to tragedies affecting communities that are both human made and natural disasters. In order for our efforts to be effective and sustainable, they need to include critical conversations with allied professionals, whose work and opinions are not always present in archival conversations. The work of the Task Force directly impacts the cultural heritage profession by providing critical resources that mitigate financial and personnel resources for those involved in future documentation of disasters. For this work to be sustainable we must work with our cultural heritage colleagues rather than try and do it all within SAA. The request also includes funding to hire a skilled facilitator who is familiar with the goals of the task force to help the diverse group determine actionable next steps in the formation of the volunteer network.

Relation to SAA Strategic Plan: The Follow-up Meeting as proposed is aligned with three of the four goals in SAA's Strategic Plan. In terms of Goal One, advocating for archives and archivists, The Follow-up Meeting will be one step in ensuring that archivists' professional expertise speaks for itself among a group of diverse stakeholders. By taking a leadership role in bringing together professional and allied colleagues to plan this effort, we will be able also to expand archival thinking itself, thus meeting Goal Three, advancing the field. A one-time meeting, such as the Think Tank event in August, only touches the beginning of such efforts and continuing the Task Force's collaborative work is essential to the success of our charge. We will then be able to add to the

knowledge base of other archivists and allied professionals to assist in the Strategic Plan's Goal Four, meeting members' needs.

Fiscal Impact:

- Total direct expenses for travel, meals, and incidentals for 10 attendees = \$10,275
- Facilitator expenses facilitator = \$7,525.
- Staff time for assistance with event coordination = 1 SAA staff member @ 12 hours.
- Volunteer time for Task Force members to plan content and coordinate event = 240 hours.

“Exploring Feasibility and Readiness for a National Volunteer Tragedy Response Network”

SAA Tragedy Response Initiative Task Force
Think Tank Meeting | August 3, 2019
Final Report and Recommendations

Report prepared by: Jessica Meyerson

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Acknowledgements

Sincerest thanks to members of the SAA Tragedy Response Initiative Task Force for their important work. Special thanks to Lisa Calahan, Kara McClurken, and Susan Tucker for their expertise, guidance and collaboration.

Introduction

In 2018, the Tragedy Response Initiative Task Force was established by SAA leadership to address the increasing frequency of human-induced tragedy and environmental disasters. The Task Force was charged with 1) creating and/or compiling material for ready accessibility by archivists who are facing a sudden tragedy and 2) exploring the feasibility of creating a standing body within SAA that would update documentation as needed and serve as a volunteer tragedy response team. The Task Force initiated their work by researching best practices and reaching out to colleagues within and beyond the archival community that had experience in tragedy response. Research and synthesis of best practices for tragedy response resulted in the Task Force's publication of the [Tragedy Response toolkit drafts](#). These documents were left [open for comment](#) for two weeks in the summer preceding the 2019 SAA Annual Meeting.

Through their conversations with other cultural heritage professionals about tragedy response experiences, Task Force members determined that tragedy response should be an open discussion among a broader set of cultural stewardship stakeholders including oral history associations, museums, libraries and others. The Task Force expanded their original charge to explore the feasibility of a *national volunteer tragedy response network* including representatives from across cultural stewardship -- requesting support from SAA Council to host a Think Tank meeting with invited participants and members of the Task Force during the 2019 SAA Annual Meeting. Task Force members received funding from SAA Council to fund travel for invited participants and hire a consultant, Jessica Meyerson, to co-create the Think Tank meeting agenda, facilitate the meeting, and synthesize the outcomes. Together, they outlined a set of goals and objectives for a Think Tank meeting that would bring together cultural heritage professionals outside of archives with experience in tragedy response. Invited guests included representatives from The National Council on Public History, Oral History Association, FEMA Heritage Emergency National Task Force, and Documenting Ferguson.

A pre-meeting questionnaire¹ was sent to invited participants three weeks in advance of the Think Tank meeting with the goal of identifying shared goals, observed gaps in the landscape and

¹ Think Tank Pre-meeting Questionnaire:
https://docs.google.com/forms/d/1VdQIB1eI7fHWiQGaGBUclDWgy0Txxx_W3Dug2amVgcA/edit?usp=sharing

preliminary consensus on priorities for action. Organizers used responses² to refine the facilitator agenda and desired meeting outcomes. This baseline questionnaire could be used in the future with any potential new participants in order to capture their current thinking about this work. Think Tank members can use those responses as a way of evaluating initial alignment between invited participants' and the evolving scope and objectives of the Think Tank, enabling more targeted and explicit communications about needs, priorities and next steps.

The Think Tank meeting was initially an invitation-only meeting with 15 participants expected. However, the Think Tank meeting was listed on the SAA Annual Meeting program schedule as an open session, and forty-two conference attendees indicated an interest in attending. The open meeting allowed for greater transparency about the work of the Task Force, clear documentation of interest in tragedy response within SAA, and contributed to a broader range of perspectives to the feasibility discussion. However, because the agenda was designed for the list of invited participants, organizers encountered several challenges including ensuring that all attendees shared appropriate background information and context for the discussion; managing the additional input in a way that still allowed organizers to accomplish meeting objectives and desired outcomes; and facilitating discussion and engagement among attendees.

All transcribed notes and materials resulting from the Think Tank are located in a single folder³ that should be migrated to the Task Force workspace. This report outlines the structure and outcomes from the meeting as well as recommendations and next steps.

² Think Tank Pre-Meeting Questionnaire Responses:
<https://docs.google.com/spreadsheets/d/13rgTHVUQfGJrbogX1rVvoPHdLOT47b1EKLfPdXsvZ1c/edit?usp=sharing>

³ Documentation: SAA Tragedy Response Task Force | Think Tank 2019:
https://drive.google.com/drive/folders/1mGgBaDPx9-O5erpshu7hX5_PkxWuqIKL?usp=sharing

Think Tank Meeting Objectives, Structure and Outcomes⁴

Objectives of the Think Tank Meeting:

Explore research amassed by the SAA Task Force as well as that of allied groups such as SAA's own Disaster Planning and Recovery Subcommittee, AIC National Heritage Responders, and cooperative groups of museums, archives, and universities involved in earlier and current collecting efforts centered in repositories and communities across the United States.

This objective was addressed in part through an overview of the Task Force's documentation toolkit. However, due to time, there was no formal or specific feedback gathered from participants during the meeting. The meeting did not address research by other groups, except in conversation with Think Tank participants. [Recommendation #3](#) and [Recommendation #4](#) address this objective more thoroughly.

Establishing a shared understanding of the archival concerns during tragedy response.

While specific archival concerns during tragedy response are highlighted in the Task Force documentation toolkit, the meeting agenda did not address this objective directly. The agenda emphasized the perspectives and experiences of invited participants, as well as, attempts to move the discussion from general framing to actionable next steps.

Provide an opportunity for stewards to come together and examine challenges and resources inherent in a coordinated national effort for tragedy response in cultural stewardship

Participants accomplished this objective - most of the invited participants were able to attend and the meeting sessions were designed to help participants surface challenges and resources for a national volunteer tragedy response network.

Explore how stewards and the organizations they represent might best support each other in a volunteer response network

Throughout the meeting, participants talked about the network proposal in terms of their own experiences in tragedy response, reflecting on specific actions that worked and did not work. However, the work of determining exactly how stewardship professionals and organizations can best support each other in this network is the ongoing work of the Task Force and Think Tank participants - beginning with identification of resource allocators within participating organizations that have the authority to commit resources to the initiative.

Identify which stakeholders are missing from the current group discussion

⁴ Think Tank Meeting Facilitator Agenda:
<https://docs.google.com/document/d/1KSAg0hUWQCFTer-3gXYzdx7-b59HFneIPYmt0gNVPEM/edit?usp=sharing>

Participants accomplished this objective during the Stakeholder Mapping session. Now that the Stakeholder Mapping is documented, there is additional work to be done in order to identify the nature of the relationship between specific stakeholders and the network, and to locate individual contacts within stakeholder organizations.

Determine concrete next steps and identify community leaders to advance this work beyond the Think Tank meeting

Participants accomplished this objective. Through the Planning to Action and How We Work sessions, participants identified next steps for both specific functions of the proposed network (ie, tragedy response hotline and mentorship program) and more general formation next steps (ie, creating a mailing list and creating an advisory/planning committee). Identifying community leaders is addressed in [Recommendation #2](#)

Desired Think Tank Meeting Outcomes:

- Understanding how your experience and current work related to other participants' tragedy response work
- Understanding how a Tragedy Response Volunteer Network could help to advance all participants' goals
- Alignment of stakeholders from allied professions towards building a sustainable volunteer network for tragedy response
- Purpose & Possibility Statement
- Stakeholder Map
- Recommendations for next steps and clear objectives for Fall 2019 Follow-Up Meeting

Participants achieved all desired meeting outcomes to greater or lesser degrees. Understanding one another's work was a major outcome. Participants conveyed a strong desire to share anecdotes about their tragedy response experiences throughout the meeting. It is less clear if all the participants saw a volunteer national tragedy response network as a mechanism for advancing their goals.

The pre-meeting questionnaire responses⁵ revealed alignment among participants. In particular, when asked to list one to three major challenges facing effective tragedy response, every respondent listed something similar to "insufficient infrastructure" and "lack of an existing set of best practices." During the meeting, these challenges were reiterated by additional participants, however, there was some disagreement about the best actions to take to address these challenges.

All participants contributed Purpose & Possibility statements which will have to be analyzed for common themes and synthesized into a single statement for review by all Think Tank meeting participants. Participants also created an initial Stakeholder Mapping highlighting the unique positionality of cultural heritage in the tragedy response ecosystem - between first responders,

⁵ Think Tank Pre-Meeting Questionnaire Responses:
<https://docs.google.com/spreadsheets/d/13rgTHVUQfGJrbogX1rVvoPHdLOT47b1EKLfPdXsvZ1c/edit?usp=sharing>

community members, and service providers willing to host and store materials collected or captured about an event. This mix of stakeholders points to the temporal dimension of cultural stewards' role in tragedy response -- active both immediately after the event and over the long term (whether that means addressing negative impacts on existing collections due to an environmental disaster or the creation of new collections that document the stories of those impacted by environmental and human-induced tragedies).

Finally, the meeting successfully produced next steps and clear objectives for the Fall 2019 Follow-Up meeting. While creating the agenda for the Fall 2019 Follow-Up Meeting was out of scope for the Think Tank facilitation contract, many of the recommendations and next steps outlined in this report can feed directly into agenda creation for the fall meeting.

Think Tank Meeting Structure:

The meeting began with an overview of the goals and discussion of ground rules. The ground rules discussion brought to light a critical consideration when working in the context of tragedy response - the need to tailor the brainstorming and data gathering to protect the anonymity of the participants.

Introductions followed the overview and partners were asked to interview one another regarding their organizational affiliation, personal learning goals for the Think Tank meeting, and ideas for additional individuals and organizations that they felt should be present in any conversation regarding the development of a national volunteer tragedy response network. Participant learning objectives could be categorized into several common objectives including engaging with other colleagues doing tragedy response work; scoping the national volunteer response network appropriately; looking for strategies and best practices in tragedy response to bring back to their organization; and sustaining a national volunteer tragedy response network. By the end of the introductory exercise, the group had established shared metrics of success for the Think Tank meeting and created an initial Stakeholder Mapping of individuals and organizations considered essential to the success of a national volunteer tragedy response network.

Once participant learning objectives and initial stakeholders were identified, participants were given anonymized responses from the pre-meeting questionnaire as a writing prompt for a Purpose & Possibility statement. The objective of the Purpose & Possibility is to solicit statements from individual participants about what they believe the focus of the national volunteer tragedy response network should be and the activities they believe the network should undertake.⁶

Because there were many points in common across individual purpose and possibility statements, a subset of the results from the activity are organized below according to **Who?** the network consists of; **What?** types of activity the network undertakes; **Why?** the network exists and chooses to undertake a specific set of activities; **When?** the network is expected to be operational; and **How?** or in what manner, the network is expected to operate.

Who:

⁶https://docs.google.com/document/d/1uQ7ihy5vnRolOgQWzHqZIPK-r4tQUG5_1LasFGB0xMo/edit?usp=sharing, p.4-5

- A network
- team of cultural heritage specialists trained to respond to tragedy
- A network of community partnerships with a shared responsibility
- a multifaceted collaboration of institutions and individuals that is responsive and sensitive to a variety of tragedies that occur
- an interconnected web of professionals and institutions from the archival and related fields

What:

- Support institutions
- Support archivists
- Create something sustainable
- Create a toolkit
- supports the documentation of community tragedy.
- Immediate networked response FOR cultural heritage PROFESSIONALS across organizational types
- Developing tools and policies
- Attention to emotional health, sensitive materials
- Documenting the stories of what happened, who was involved, how the community responded and the significance of the documentation
- Develop language and strategies for archivists and others to use in order to convince their organizations' authorities that this work is vital and worthwhile
- Less about policies and more about support and different ways to respond (not necessarily collect)
- resource development and experience sharing

Why:

- to offer assistance to librarians, archivists and communities responding to a tragedy
- to ensure tragedies & victims are remembered in appropriate and sustainable ways
- To respond to a tragedy scenario
- be a support system for the next institution faced with collecting tragedy

When:

- during and after a tragedy

How:

- Rapid
- Flexibility
- Adaptable
- Dispersed
- Allowing communities to find their own way
- timely, sensitive manner respectful of impacted communities
- timely, ethical, trustworthy and sensitive manner
- a culturally humble approach

After reflecting on shared purpose and possibility for the national volunteer tragedy response network, participants were asked to return to the Stakeholder Mapping. Ultimately, participants identified several major constellations of tragedy response effort that would be critical partners for any coordinated cultural heritage response including technical experts⁷, service providers⁸, other Task Forces, funders, legal professionals, federal agencies, interfaith organizations, regional organizations and associations⁹, and national professional associations (within and beyond cultural heritage).

Once participants elaborated on the national volunteer tragedy response network Stakeholder Mapping, the discussion turned toward activities that need to be undertaken in order to fulfill the purposes and possibilities outlined earlier in the meeting. This discussion produced several major areas of activity that participants believed would be valuable for the volunteer network to undertake:

- Publicize resources that are already available through the SAA Tragedy Response Task Force
 - Create a Communication Plan
- Create additional advocacy tools to convince administration that cultural heritage organizations have to provide time and recognition/compensation for emergency and tragedy response
- Directory of responders
- Hotline
- Mentorship program
- Establishing a source of funding to form and sustain the national volunteer tragedy response network
 - With support from the same or different funding source, work with Brandon Butler, Peter Jaszi and Pat Aufderheide to develop a Code of Best Practices for Fair Use in Tragedy response
- Training for our own organizations
- Training for cultural heritage practitioners - there was agreement among participants that any directory of responders or mentorship program would require some standardized training

Once participants had an opportunity to think about specific functions of a network and the associated tasks, the focus shifted to *how* the network should work together to address the functions and associated tasks.

This discussion surfaced a shared philosophy for tragedy response work that emphasizes an “inside-out” approach, local communities, flexible best practices and clarity of communication.

⁷ One participant explained the importance of information technology professionals that can assist in developing tools and workflows for capturing specific documentary formats.

⁸ Participants provided [Reclaim Hosting](#) and [Archive-It](#) as service providers that have volunteered storage space and web hosting at low to no cost in the wake of tragedies. [Omeka](#) was named as content management content platform that has actually developed features in direct response to tragedy response and documentation needs.

⁹ This category includes first responders, public education, municipal government representatives, mental health professionals, local business owners, and social workers.

The “inside-out” approach begins with honest personal reflection, followed by attempts to address gaps in our own organizations’ policies regarding tragedy response, and finally externalizing valuable local resources in support of cultural heritage colleagues undergoing tragedy and its aftermath. There was also repeated emphasis on tailoring response to the specific needs of the community. Participants that had undergone a local tragedy reflected on instances in which organizations and media outlets that intended to help by requesting supplies or letters of support from the public unintentionally overwhelmed the already stretched resources of the community in need. Flexibility was another area of emphasis - more specifically, disabusing the notion that there are rigid rules and workflows that can be followed in any tragedy response content. In practice, cultural heritage practitioners need clear and expedient ways to locate resources, and be given the space to determine the best course of action.

The “How We Work” session helped the participants to clarify the population that the volunteer network is really hoping to reach. The group agreed that the designated population for the national volunteer tragedy response network is the professional community of cultural stewardship professionals. However, participants also emphasized the impact of any tragedy response work on the impacted community, and to bring that awareness to work in the volunteer national tragedy response network.

Several leadership functions emerged in response to the actions outlined for the volunteer network. These included fundraising & development; training & education leads; communication leads; hotline responders; and mentorship program directors. Each of these functions can be covered by one or more people depending on funding. The workshop had to conclude before participants were able to come to agreement on how decisions might be made among network participants, or how the network participants will meet and coordinate their work.

Recommendations

Recommendation #1: Determine immediate, available capacity

The SAA Tragedy Response Initiative Task Force has invested considerable time into creating the document toolkit as well as advocating to SAA Council for resources to support initial planning and hosting for the Think Tank meeting. However, the recommendations and next steps outlined in this report hinge on additional time from Task Force members over the next few months. Before implementing recommendations or following-up on next steps, the Task Force should take stock of available capacity among members and SAA Council prior to finalizing a plan of action.

Recommendation #2: Formalize a cross-professional, cultural heritage advisory and/or planning group on tragedy response

The SAA Tragedy Response Initiative Task Force has proposed the vision and led initial discussions regarding network formation. However, in order for network planning to move forward, a new advisory or planning group should be formed with representatives from across cultural heritage stewardship such as the individuals invited to attend the Think Tank meeting.

Invitees to participate in the advisory or planning should reflect range of criteria implicit in the goals and values articulated during the Think Tank meeting including:

- Representative of subfields across cultural heritage: museums, libraries, archives, historical societies, etc.
- Knowledgeable about the structure and design of distributed networks
- Experienced and knowledgeable about tragedy response - that are both sensitive to the trauma undergone by affected communities and therefore the limited capacity for action in the immediate response to the tragedy
- Experienced and successful in grant writing and other forms of fundraising
- Willing to take ownership over the planning and design phases of the network
- Willing to dedicate a certain percent of the time to the effort before initial funding is secured
- Representative of different positions within an organization - while “on-the-ground” practitioners are likely to have invaluable experience to offer and invest in the success of the network, if the network is aimed at assisting cultural heritage organizations and not just individual cultural heritage practitioners undergoing tragedy, the advisory or planning committee would benefit from administrative perspectives as well as departmental staff perspectives

Invitations to participate in the advisory or planning group should include a clear, time-bounded charge which emphasizes research, stakeholder alignment, fundraising. Once the advisory group is established:

- Make sure any new stakeholders asked to join the Think Tank group complete the questionnaire¹⁰
- Schedule regular calls
- Shared the working Purpose & Possibilities document to all members of the group for comment and refinement

Recommendation #3: Create a preliminary alignment map

During the Think Tank Stakeholder Mapping session, participants acknowledged cultural stewardship-specific tragedy response organizations including [National Heritage Responders](#), [Alliance for Response](#), and Documenting the Now. While a full environmental scan is beyond the scope of what can be accomplished without additional funding, a preliminary alignment map¹¹ is an activity that advisory group members can do together on calls or asynchronously with limited time investment. By creating a preliminary alignment map illustrating the ways that the network complements or overlaps with existing efforts, the advisory group can assert a coordinating role within the field at-large; create a shared understanding of the landscape among advisory group members; and identify potential partners and funding sources. An alignment map starts with a spreadsheet or other tabular data format. Advisory group members would add names from the Stakeholder Mapping produced at the Think Tank meeting, and then the group fills in additional information about those names (and others) such as:

- Mission
- Populations they serve
- Geographic reach
- Types of resources they produce
- Sources of funding

Recommendation #4: Secure funding

There were numerous acknowledgments of ongoing tragedy response efforts outside of cultural stewardship to which the network can turn to for potential partnership as well as models for how to organize tragedy response on a national scale including first responders, American Red Cross, Everytown, and Moms Demand Action. However, Formation¹² or start-up is the most resource

¹⁰ Think Tank Pre-meeting Questionnaire:

https://docs.google.com/forms/d/1VdQIB1eI7fHWiQGaGBUclDWgy0Txxx_W3Dug2amVgcA/edit?usp=sharing

¹¹ Copy of Software Preservation Network Alignment Map as example for Think Tank:

https://docs.google.com/spreadsheets/d/1t4FiKFkQOUM0DsXDVUw_yuUuSOguVda3s4e5pg1nfKM/edit?usp=sharing

¹² Educopia Community Cultivation Field Guide:

<https://educopia.org/wp-content/uploads/2018/11/CommunityCultivationFieldGuide.pdf>

intensive phase of community development and it will be difficult to move the idea of the network forward without a way to secure time from key individuals representing subdomains of cultural stewardship beyond archives. Advisory group members should prioritize the design and submission of a planning grant to provide resources to multiple professional organizations or organizations in order to substantively explore the feasibility of a national volunteer tragedy response network. This planning grant might include the following activities:

- **Conduct an environmental scan** that builds on the Think Tank stakeholder map and document all related initiatives, their funders, and their partners. The environmental scan should include a survey and/or interviews with representatives from these initiatives. Survey and/or interview questions should be crafted to help advisory members determine gaps in cultural heritage tragedy response resources, and subsequently, whether the network is adding a new layer of activity to an existing national initiative, or if the network should be established as a stand-alone effort. As a result of the environmental scan, advisory group members should also be able to answer the following:
 - Online resource openly available v. “contact us” model?
 - Short term “emergent” v. long-term, “advisory” > does the network only exist when needed, or does it exist on an ongoing basis?
 - Providing resources v. providing advice?
 - Overall set of policies v. support more regional-based responses?
- **Compile a comprehensive list of existing tragedy response resources across cultural stewardship.** As a secondary outcome of the environmental scan, advisory group members should produce a comprehensive list of resources already available across cultural stewardship.
- **Governance and community development training for the advisory group** that introduces community/initiative lifecycle phases (Ex. Formation, Validation, Acceleration, Transition), growth areas (Ex. Vision, Infrastructure, Engagement, Finance & HR, Governance), and models for organizing the work of the network moving forward¹³.

Another set of activity that reflects the “inside-out” approach emphasized by Think Tank participants is organizational training development. There is a growing body of work on “trauma-informed” approaches to organization and system-level change. Using The Missouri Model as a guide, the advisory and planning group might consider one of the broader goals of the network to be moving the field from trauma-aware to trauma-informed.¹⁴ If stakeholders agree on this goal, the planning group could use the model as a framework for additional phases of funding following the planning grant or in addition to/in parallel to the planning grant. For example:

Phase 1: Trauma-aware: organizations have become aware of how prevalent trauma is and have begun to consider that it might impact their staff and their patrons
Funded work could include:

¹³ Educopia Community Cultivation Field Guide:
<https://educopia.org/wp-content/uploads/2018/11/CommunityCultivationFieldGuide.pdf>

¹⁴ The Missouri Model:
<https://dmh.mo.gov/trauma/MO%20Model%20Working%20Document%20february%202015.pdf>

- Compiling and sharing a body of existing resources more broadly
- Develop and pilot tragedy response awareness training for organizational leadership in cultural stewardship

Phase 2: Trauma-sensitive: organizations have begun to explore the principles of trauma-informed care; build consensus around the principles; consider the implications of adopting the principles within the organization; and prepare for change.

Funded work could include:

- Develop an organizational self-assessment for identifying strengths, resources to support tragedy response locally, as well as barriers to providing support
- Develop and pilot tragedy response training for cultural stewardship staff

Phase 3: Trauma-responsive

Funded work could include:

- Develop a “Tragedy Response Toolkit for Cultural Stewardship” combining resources from across cultural stewardship, building on the outcomes of pilot training above as well as existing resources from professional organizations, including the Task Force

Phase 4: Trauma-informed

Funded work could include:

- Design and perform a broader assessment on a selection of cultural stewardship organizations (mix of archives, libraries, museums, historical societies) to determine the impact of tragedy response training on staff and community members.
- Based on the findings from the field-level assessment, determine concrete ways that the network can fill crucial gaps in organizational capacity for tragedy response

Next Steps

Immediate (1-2 months):

- Publish meeting materials (or a subset of meeting materials) as open documentation per documentation:
 - Attendee agenda
 - Facilitator agenda
 - Shared meeting notes document
 - Transcription of session
 - Working documents (see below)
- Send out the feedback form to attendees
- Create a mailing list
 - Start a new document with a list of questions to follow-up on
- Establish an advisory group with invited participants from the Think Tank meeting

Short-term (3-6 months):

- Finalize the following:
 - A draft of the Purpose & Possibility statement to share with advisory group members [[working document](#)]
 - Initial Stakeholder List (may involve identifying additional contacts for organizations represented by thin tank participants as well as organizations mentioned in the Stakeholder Mapping)
- Finalize agenda for November stakeholder meeting and conduct the meeting
 - Categorizing activities based on “current capacity”, “planning grant”, “follow-on grants”, and “hoped-for ongoing activities of the network” [[working document](#)]:
 - Activities that can be supported in the short term, with no additional funding, by the Task Force members and broader advisory group
 - Activities that need additional funding and resources before undertaking
 - Determine *how* the work will be completed and *by whom*
- Create a preliminary alignment map
- Develop a funding prospectus that outlines a phased approach to planning, design and implementation of a national volunteer cultural heritage network for tragedy response

Medium-term (6-12 months)

- Submit two - three separate funding requests
 - Planning grant
 - Organizational training on tragedy response