

**Society of American Archivists
Council Meeting
November 2-3, 2018
Chicago, Illinois**

**Staff Report: Education
(Prepared by Rana Hutchinson Salzmann)**

FY19 Statistics to Date (As of 10/15/18)

- Scheduled 25 in-person courses between 7/1/18 and 10/31/18 (including pre-conferences)
 - Budgeted for 80 in FY19
 - Cancelled 2 in-person courses.
- Approximately 534 total in-person attendees in 23 courses to date.
- DAS Comprehensive Exam
 - August: 28 took the exam. 17 passed, 11 failed.
 - November: Testing window currently open with approx. 25 eligible for exam.
- It is exciting to report that the two Bootcamps scheduled for October (DAS in Salt Lake City and A&D in Syracuse) were very well subscribed, with most courses achieving maximum enrollment of 35 students. This model is promising, and I am now looking for Spring 2019 hosts, potentially in the Southeast region.

Staffing

Brianne Downing, Education Coordinator, left her position at SAA effective 9/23/2018. We have worked to hire an appropriate replacement that will help SAA Education meet our ambitious goals related to use of PathLMS and expansion of online learning options. Akila Ruffin joins the staff as of 10/23/18, with the title Education Program Specialist – LMS and Online Learning. Akila has a Master's degree in Performance Improvement from Roosevelt University and brings to SAA many years of experience in education program administration, most recently as the Clinical Placements Coordinator at Trinity Christian College. Due to this unforeseen staffing gap, we were forced to curtail certain department activities and prioritize others. With a full staff in place, I hope we can return to projects left untended during the transition.

A&D Certificate Status Discussion

I removed the Action item regarding A&D from your draft agenda for this meeting. As some may recall, at a previous meeting, I began to raise the issue about whether the A&D curriculum is viable as a certificate program, or if we should consider discontinuing the certificate and packaging A&D content in other ways. I have since witnessed a particular interest in A&D

courses as we have offered Bootcamps in different areas. I am not ready to suggest we discontinue A&D as a certificate program at this time, particularly as we should be able to harness the capabilities of the new AMS to administer and market the program more effectively. However, I expect that this conversation will continue in future meetings as we consider member needs and market potentials revealed by John Chrastka's work.

Report on Courses of Interest

Cultural Diversity Competency Pre-Conference at 2018 Joint Annual Meeting

We offered this pre-conference in Washington, DC at a special \$49 rate to encourage enrollment. 30 people attended the one-day session taught by Helen Wong Smith.

Courses in Development for FY19

- *Appraisal for A&D*; Huggard and Bryan; webcast (A&D)
- *Long-Term Digital Content Management*; JA Pryse; webcast (DAS)
- *Introduction to PREMIS*; Lori Lindberg; in-person (DAS, A&D)
- *Bootcamps for DAS and A&D*:
 - DAS in Salt Lake City, UT
 - A&D in Syracuse, NY
 - Combo DAS & A&D in Irvine, CA

"Pop-Up" Development

Topics outside the main curriculum for SAA Education, in various stages of development.

Due to staffing constraints, I have postponed development of the full webcast schedule reported on for the August 2018 Council meeting. The topics below remain priorities in the pipeline.

- Diversity, Equity, and Inclusion
 - *It's My Job: Managers and the Ethics of Inclusion* (Chartier, possible webcast in December, pending Committee on Education review)
- Management Track
 - With the assistance of Committee on Education members, I am trying to re-establish contact with Rosemary Pleva Flynn and Nancy Lenoil to push this priority forward and establish a timeframe for delivery of a Management 101 webcast in FY19. If necessary, we will approach other subject matter experts or an outside consultant to develop and design this offering in a timely manner.
- Advocacy
 - COPP expressed interest in developing an Advocacy related pre-conference for Austin.
 - SAA Education staff will consider re-recording and re-purposing the first Archives on the Hill webcast as a free online offering, as time permits.

Marketing Consultant Engagement

In your packet, AssociaDirect/John Chrastka provided a top-level summary of his findings and recommendations to date (see Appendix). The full report is anticipated at the end of November, at which time staff will review it and determine priorities for the coming months.

Current Challenges

- **Exam quality control.** Both the DAS Subcommittee and the Committee on Education have been asked to contribute to solving this challenge. Course liaisons now know that assisting with exams is an expected part of their work with instructors. Chairs Faulder and Gengenbach will assist me in ensuring exam quality throughout the A&D and DAS offerings.
- **A&D curriculum gaps.** The Committee on Education is helping me brainstorm to fill these gaps in Transformational and Tactical and Strategic content tiers.

Reports and Activity from Education-Related Appointed Groups

The Committee on Education continues its schedule of monthly phone meetings and will meet in Chicago on February 11-12, 2019. The Chair, Vice-Chair and I meet prior to each full meeting to set the agenda. We also spoke recently to Committee intern Carli Lowe to scope out a potential research and data analysis project focusing on management curriculum options.

The DAS Subcommittee met in Chicago on October 8-9, 2018. The Subcommittee has an ambitious agenda for the year. Projects include: creating a unified Course Development Workflow with CoE; managing the Comprehensive Exam while developing a report for CoE and the Council about possible alternatives to the exam; developing standardized metrics for reporting about the DAS program; and reinvigorating the DAS Subcommittee mentor relationship with the SAA/ARL Mosaic Fellows program.

The GAE Subcommittee begins meeting by phone in late October. Chair Alex Poole talked with me on 10/5/18 about goal-setting for the subcommittee. We will soon meet with Committee on Education Chair Erin Faulder and Vice-Chair Rachel Morris to make sure GAES and CoE activities and priorities are in sync for this year.

**AssociaDirect Report to the SAA Council on
Continuing Education and Certificate Program Evaluation
November 2018
(Prepared by John Chrastka)**

The Society of American Archivists has identified several key opportunities for growth and uptake of your Continuing Education and Certificate programs. Identified areas of interest include: improving your marketing and outreach to encourage uptake of existing offerings by members and the wider profession; evaluating your current educational offerings with an eye toward both sun setting low-relevance content as well as onboarding new content in its pipeline that anticipates and addresses professional needs; and better integrating continuing education and certificate programs into the fabric of membership, conference, and publishing to maximize uptake across the organization.

SAA retained AssociaDirect, a leading association management consulting firm, to evaluate your current approach to positioning your professional development offerings and to create and deliver a Marketing Plan for CE and Certificate Programs to staff. Beginning in April 2018, the evaluation process was informed by a series of staff interviews, member-leader interview, member focus groups, and an all-member survey. AssociaDirect was given full access to SAA's member, conference, and purchase data along with an extensive briefing on prior member survey work and evaluation. We are delivering our key findings here for the Council's review and consideration as a final step before developing the Marketing Plan.

MEMBER CE AND CERTIFICATE UPTAKE AND USE

As of June 2018, SAA's membership database contains a total of 12,442 records comprising 6,010 "active members" and 6,432 "inactive member" records. Since 2013, a total of 2,873 members (active and inactive) are "educational purchasers". Combined, nearly 23% of all active and inactive members are educational purchasers of at least one SAA offering. Of all records: 6,010 are "active members". Of those, 1,904 made an "educational purchase" in the last 5 years (31%). Of all these educational purchases, 95% were made by individual members (with 5% made by Institutions). Of purchases made by members in a "salaried" category, the three mid-tier blocks account for 53% of all. Fully 80% of all educational purchases were made by mid-career (6 to 14 year) members. It should be noted that a small but significant number of current SAA members (2.5%) have purchased professional development offerings from all three of your major channels: CE or Certificate programs; Annual Meeting attendance; and books.

Focus Group Findings

At SAA's 2018 Annual Meeting in Washington, D.C., AssociaDirect proctored seven in-person hour-long focus groups with an invited sample of attendees. Two panels were hiring managers,

two were student (SNAP) members, and three were working archivists (generally mid-career). Overall, participant perceptions of SAA's CE and Certificate programs were in the mid- to high-range. Likewise, SAA scored well in relation to other organizations which offer comparable professional development offerings, both as a trusted source and as a desirable brand. There was a moderate to high level of agreement with positive descriptive words like "influential," "knowledge-based," and "helpful," with a moderate to low level of agreement with more negative words like "ineffective," "dogmatic," and "inaccessible."

Overall, focus group participants reported looking to SAA for three types of professional development offerings: 1) skills-based best practices in the field; 2) deep-dive Certificate programs for specific skills; and 3) a robust body of professional literature that informs immediate needs. It should be noted that no one appears to either want or expect to find particularly "cutting edge" offerings from SAA. It is not seen as your core competence. That said, the focus group panel discussions revealed and highlighted a missing piece in the current professional development offerings of SAA and the rest of the professional training ecosystem. There was agreement on the part of both the hiring manager panels and the mid-career archivist panels that they would benefit (in distinct but interrelated ways) from a new series of professional development offerings from SAA on management-focused, rather than purely archives-focused, skills. Our final marketing plan will offer insights into the form and nature of these additional programmatic opportunities.

Member CE Survey Findings

Following the focus groups, AssociaDirect developed and fielded an all-member survey designed to solicit feedback and actionable insights into member perceptions of the quality, impact, and desirability of SAA CE and Certificate programs. The survey was in the field from September 10-18, 2018 and received 667 completed responses. It is significant to note that members report that they are "highly likely" to "somewhat likely" to look to SAA for five key archival CE subject areas: Selection, Appraisal, and Acquisition (72%), Arrangement and Description (73%), Reference Services and Access (64%), Preservation and Protection (81%), and General Archival Knowledge (66%). Likewise, when considering the management and interpersonal skills trainings needed to run archives, SAA was rated as the "highly likely" or "somewhat likely" source for related CE and PD as well: Outreach and Promotion (74%), Managing Archives Programs (79%), Ethical and Legal Responsibilities (80%), Project Management (70%), Advocacy and Funding (65%), Staff and Personnel Management (51%), Grant Writing (57%), and Finances and Budgeting (46%). Emotionally laden words like "trusted," "serious," "helpful," and "best practices" scored high while negative words like "ineffective," "inaccessible," and "dogmatic" scored low.

Members were also asked to identify if certain subject areas were seen as being particularly relevant to a future job or career. Topics like Financial Management, Fundraising and Donor Relations, and Personnel Management / Human Resources were scored the highest. It should be noted that these subject areas are being addressed in SAA's current offerings in several ways. These findings mirror and validate the 2017 "Barriers to Participation" survey results wherein mid-career and "new to job" archivists identified topics for professional development offerings in the areas of electronic records, digital preservation, born-digital materials, and digitization,

management training and development (including management of collections, management of people, training for new managers, developing management skills), and how to gain management experience. It is important for SAA to pursue new offerings in these areas. Our final marketing plan will highlight ways to frame your current offerings to relevant and interested audiences while providing pathways to identify new offerings.

Barriers to Participation and Uptake

In the 2017 “Barriers to Participation” member survey, the issue of cost was noted in several ways. A key recommendation in that report was for “SAA staff [to] consider cost-control strategies for non-Annual Meeting educational opportunities.” It should be noted that in the DC focus group sessions, panelists reaffirmed that both “cost” and “proximity” were significant barriers to utilizing your synchronous professional development offerings. However, focus group panelists also reported that the cost of SAA membership dues is often paid by themselves, rather than by their institutions. While our final marketing plan will explore actionable recommendations for “co-hosting workshops with other archival organizations or library consortia” that were noted in the 2017 report, we disagree that SAA should “[develop] funding sources that provide scholarships for attending in-person workshops, [and explore] a workshop registration fee model scaled to a member’s level of income or professional development support (such as how annual dues are categorized).” While meritorious, we shy away from recommending universal or blanket discounts because, as reported in that survey, the majority of members’ institutions provide annual or occasional support for PD. If the focus group indicator that membership dues are not supported by many institutions carries forward, then tying discounts for a supported purchase to a non-supported member status can lead to an unintentional loss for SAA.

MARKETING RECOMMENDATIONS

Website

In both the DC focus groups and the 2017 “Barriers...” survey, members report that the SAA website is one of three primary information sources they rely on to make purchase and use decisions from SAA. With SAA’s upcoming migration to the Nimble AMS, our full-length marketing plan will include recommendations on discoverability, breadcrumbs, and navigation—both within trees and within narratives—to ensure that CE and certificate programs gain more visibility online.

SAA should plan to advertise its own CE and Certificate offerings on its own website and through its digital channels. Our full marketing plan will recommend developing a series of “House Ads” covering your CE and Certificate offerings for use online. We also recommend that you depreciate “outside ads” on CE and Certificate pages in favor of House Ads that reinforce purchase decisions or cross-market publications and conferences. While we acknowledge that there is a revenue issue if outside ads are depreciated on some site pages, the resulting increase in member and professional awareness and use of SAA courses should offset any relative page placement losses.

It should be noted that in our review and evaluation of SAA's online "pathways to purchase," the differences between "online" and "in-person" CE offerings were often opaque at times. For example, "point of need" customers can only utilize online offerings, but the online Course Catalog comingles delivery methods without glossing them. Customers at "point of want or interest" likewise may be confused between the dual nature of some in-person courses that are available as one-off CE items while also being available as a component of the Certificate program. The final marketing plan will make recommendations for how to develop and deploy a controlled vocabulary across offering types.

Outbound Email

SAA members self-report a high level of interest and engagement in your direct email communications, especially in digest formats. While CE and Certificate programs are currently featured in SAA's outbound emails, these posts tend to be transactional (i.e. dates and calls-to-register) rather than focused on orientating people to your offerings, or testimony about its impacts. It is important for SAA to continue to systematically include information about the professional impacts of its CE and Certification programs. However, we are encouraging you to also tell stories about the impacts that SAA CE and Certificate programs have on the professional lives of your members. We recommend developing a series of short "before and after" stories that highlight first-person member narratives in order to validate SAA as a primary source for professional development resources. While we acknowledge that adding new editorial content to your current approach to regular outbound emails will require some hard choices about what is or is not included in an issue, our full marketing plan will provide some pathways for evaluating when and how to integrate and place this new content.

Journals and Publications

SAA should create and deploy "House Ads" about your CE and Certificate offerings for *In the Loop*, *Archival Outlook*, and *The American Archivist*. Recent issues have featured CE and Certification offerings from other organizations and associations (as display ads) while SAA's own offerings are noticeably absent. We are not recommending a significant change in your advertising policy. While these should be "in addition" House Ads, there should be a consistent approach to using these ads in every issue. That being said, your ad: editorial ratio may be affected, and there is a potential revenue impact across internal departments because of changes to page count.

Direct Mail

Choosing to begin a Certificate Program is a significant personal and professional commitment. It takes time to personally evaluate and consider not only specific course options, but also one's own time budget and the relative costs of completing the course. In addition, as reported in your 2017 "Barriers to Participation" member survey, fully 66% of members report receiving annual professional development support from their employers. Another 25% receive support in some years, but not annually. SAA may have engendered an unintentional barrier to consideration by not having a print (by mail) brochure or course catalog available for evaluation and consideration. Likewise, it appears to us that there is no convenient way to signal one's interest

in learning more about a course or offering short of fully committing to a course or class. While there is currently an option on the Certificate page to email education@archivists.org for more information, the full marketing plan will offer ways within Nimble to automate a contact point which adds metadata to the member record as well as allowing for programmatic follow-up and direct mail engagement over time.

CONTENT RECOMENDATIONS

“Editor-Driven” Rather than “Instructor-Driven” Content

SAA’s approach to an “instructor-driven” model for developing CE and Certificate program content is both a true strength and a critical weakness for your future professional development offerings. It is a strength, in that member-contributors are able to move the profession forward by leavening course offerings with new, innovative, and proven learnings. This mirrors the way that your conference programs are solicited and created. However, the weakness of this approach is that opportunities from outside the profession, and best practices in the nature and style of professional development, may not bubble to the surface. A more appropriate analog for developing CE and Certificate content should be taken from your publishing division. This would be an “editor-led” acquisition strategy. Given the price, composition, delivery costs, and impact of your offerings, CE and Certificate programs are more analogous to publications and their front list, mid-list, and backlist management considerations as well.

MMCARP Audiences

As a component of this project, AssociaDirect was asked to evaluate and comment on the 2018 report “From Massachusetts to National Municipal Clerks Archival Records Project” (MMCARP) Final Report, a feasibility study concerning the development and deployment of a new professional development series covering archival best practices for municipal clerks. The study is comprehensive and provides a clear pathway that SAA could follow to design and institute a robust new program. However, our recommendation at this time is to refrain from pursuing MMCARP until the core of the SAA educational marketing plan is underway. Our cautions are threefold: 1) because the recommended content is almost entirely new and beyond the scope-of-needs identified by your current members, SAA will need to develop clerk-facing content that is unscalable for other uses; 2) the audience for this content is largely unaware of SAA beyond the basics of your brand and, as noted in the report, relies on other organizations as their primary professional development provider; and 3) it is unlikely that an MMCARP audience of municipal clerks will become full members of SAA or regular conference attendees. We can see a scenario where a stand-nearly-alone business unit could make sense, but the upfront investment in both curriculum development and marketing is a heavy lift given current SAA resources and clear pathways to increase use, uptake, and relevance of your core CE and Certificate program audience.