Society of American Archivists
Council Meeting
November 18/19, 2024
Chicago, IL – Hybrid

Annual Report: Committee on Education
(Prepared by Courtney Bailey, Chair)

ACTIVITIES

The activities of the Committee on Education (CoE) were shaped by the FY 2023-2025 Strategic Plan dashboard.

1. Completed

Reviewed feedback from SAA Council and revised the proposal for additional Records and Information Management courses: The CoE submitted to SAA Council in 2022 a proposal for the creation of a new records and information management (RIM) certificate program. Council requested more information about the intended audience and other training options available through other organizations; they indicated with current levels of SAA Education staffing; it would be difficult to launch another tier-based certificate program. SAA Education advised waiting until there are more staff to increase capacity for creating a new program; instead, revising existing courses was advised as an interim step. This project was picked back up in 2023-2024, with a working group fleshing out the business plan for a new education program and developing a revised set of competencies so that this program could be organized more like the approved Management Track program, which requires less staff oversight. The council expressed appreciation for the new submission but indicated fiscal and infrastructure issues would continue to delay implementation of a new program. SAA Education proposed developing 1-2 new courses in the interim to begin building out the RIM course portfolio.

2. Ongoing

The committee supported SAA Education's courses and instructors and advised future programming. Committee members served as liaisons for courses.

Revise the course evaluation form to incorporate feedback on DEIA: The Diversity, Equity, Inclusion, and Accessibility (DEIA) Working Group created a new course evaluation form to be used by Committee on Education liaisons. The working group incorporated feedback from both the larger CoE as well as the DAS subcommittee. The latest version of the form is available here. In addition to incorporating feedback on DEIA, the working group also transitioned the form to a Google form so both qualitative and quantitative data can be more consistently captured.

Revise the Archival Continuing Education guidelines: Thinking that we received a green light from the Standards Committee in September 2023, a working group began working to revise the 2017 guidelines. Many months later, they discovered a more formal permission process would be

necessary to complete this work, but the feedback they collected from a survey and other measures will be useful in completing this necessary work in 2024-2025.

Develop new courses: The Committee's leadership has been meeting with other component groups who've been assigned in the Strategic Plan responsibility for developing educational content. After reflecting on these meetings, CoE leadership developed a process moving forward whereby interested component groups can submit a summary of content they want to cover in a webinar, their learning objectives, the proposed length of the event, and some experts who can participate in the presentation. SAA Education and the CoE will provide feedback on the proposal, and the Committee will provide a liaison to help review and prepare the session. Webinars that elicit a large amount of interest may at some point get enlarged into full-blown courses.

3. New

Our 2024-2025 goals follow up on the ongoing and completed work of 2023-2024.

- Finalize the liaison course evaluation form and develop a new participant course feedback form
- Partner with other SAA groups to develop new educational content

STRATEGIC PLAN
Goal 1: Advocating for Archives and Archivists
The CoE advocates for archives and archivists by continuing to support SAA Education in providing relevant and timely instruction. Work on a revised course audit form will increase focus on how well existing and future education programs mesh with DEIA goals.

Goal 2: Enhancing Professional Growth
CoE and SAA Education exist to support the professional growth of SAA members and other archivists by providing opportunities for continuing education.

Goal 3: Advancing the Field
CoE works to advance the field by supporting SAA Education in providing timely and relevant instruction. CoE began the process of updating the Archival Continuing Education guidelines. CoE opened up lines of communication with other component groups to begin collaboration on new educational content.

Goal 4: Meeting Members' Needs
CoE continues to meet member needs by being responsive to requests and issues raised by SAA members. This is evidenced in our continuing work to make all SAA courses more accessible and inclusive, advancing the management track, and continuing to amplify requests for RIM training.

ANNUAL MEETING
Number of Attendees: 24
Summary of Meeting Activities: CoE provided highlights of our work from the 2023-2024 year and an overview of goals for the coming year. The Graduate Archival Education Subcommittee (GAES) and Digital Archives Specialist (DAS) Subcommittee each provided summaries of their work.

QUESTIONS FOR COUNCIL

None

The Committee on Education wishes to thank Rana Hutchinson-Salzmann, Director of Training and Organizational Development, Michael Santiago, Education and Annual Meeting Specialist, Akila Ruffin, Assistant Director for Online Learning and Exam Administration, and our Council liaison Jasmine Jones for their continued support and knowledge-sharing. We would also like to acknowledge our outgoing members, Donna Baker and Leanna Barcelona, and our outgoing immediate past chair, Jenifer Wachtel, for their exemplary service to SAA.

Report of the 2023-2024 Digital Archives Specialist Subcommittee
to SAA Committee on Education
Submitted by Katherine Fisher, September 2024

This report documents the DAS Subcommittee's activities, including ongoing and completed goals, from September 2023 through August 2024. This year the committee welcomed two new members, Brandon Jackson and Angela Fritz (a previous member returning to fill a vacated seat for a partial term). An early focus was facilitating a smooth transition from the previous subcommittee and leadership team and laying the groundwork for the year's work, while in subsequent months we focused on regular program business as well as priority projects.

Activities of the leadership team for the subcommittee included the following:
- Hosting an onboarding session for new members in August to introduce subcommittee responsibilities, procedures, and resources.
- Assigning working groups, based on programmatic needs for the year and members' interests, to undertake projects or oversee specialized functions. These teams remained the same as the previous year: Course Development, Comprehensive Exam, and Documentation.
- Holding a virtual retreat in October.
- Training members in course liaison and audit duties.
- Conducting monthly meetings of 90 minutes to allow time for reports from SAA Education staff, discussions of course audits, planning for program updates, and team breakouts and reports.
- Contributing to CoE's revision of the audit form and harmonization with the DAS version.

Subsequent sections of this report summarize further activities that warrant more detailed reporting.

Working Group Goals

The subcommittee's working groups made significant progress toward the goals each established during the October 2023 retreat:

Course Development Team
- Completed audits of prerecorded DAS webcasts still in active use.
- Developed preliminary action plan for updating and re-recording webcasts.
- Prepared survey about DAS program and curriculum to distribute to SAA members and other stakeholders.
- Proposed subcommittee focus areas and DAS program revisions based on survey results (proposed actions: overhaul webcasts and explore new course offerings, review accessibility feedback, update web presence, evaluate program structure).

Documentation Team
- Reviewed and revised DAS handbook to reflect current responsibilities.
- Inventoried documents and forms used by subcommittee to confirm accessibility.

- Began process of transitioning Documentation to ad hoc team to support periodic handbook updates and documentation needs of other working groups.

Comprehensive Exam Team
- Documented exam-related responsibilities, including subcommittee's relationship with psychometricians, and worked with Documentation team to add to DAS handbook.
- Updated comprehensive exam reading list.

DAS Courses

The frequency of post-pandemic in-person courses increased again, while interest in virtual courses remained strong. Course enrollment overall was up compared to the previous year. The subcommittee continues to evaluate the relevance of course content and the efficacy of formats, with a particular interest in adopting new online modes (such as self-paced modules or synchronous class meetings divided into two-hour segments over several days or weeks).

The subcommittee worked with instructors to add two new courses to the DAS program:
- A required OAIS prerequisite (delayed due to revisions of the OAIS standard and an instructor change, but slated to launch in early 2025)
- Project Management: Fundamentals and Advanced (revised with more digital archives content and made available for DAS credit)

Several existing DAS courses were updated or prioritized for revision soon:
- Accessioning and Ingest of Digital Records (revised)
- Appraisal of Digital Records (revised)
- Introduction to PREMIS (revised)
- Foundational tier webcasts (first batch up for revision in the coming year)
- Introduction to XML Analysis and Manipulation (to be revised during next review cycle)

Comprehensive Exam Creation

Working with the psychometric consulting firm SAA engaged in 2023, we created a new comprehensive exam. After authoring, reviewing, and revising exam items last summer, the 2023-2024 subcommittee underwent training on standard setting in September. We then tested and assessed the difficulty of new and existing items in the bank. After the standard-setting sprint, we spent the fall in continued discussions with the psychometricians about problematic questions requiring revision or exclusion, an appropriate passing score calculated based on the questions selected and their degree of difficulty, and details of the new exam form, all with an eye toward ensuring an accurate, fair, and defensible comprehensive exam. The new exam launched in January.

A total of 92 people passed the comprehensive exam and received the DAS certificate over the course of the year (36 in September 2023 using the old exam form, 31 in January 2024 with the new exam form, and 25 in May 2024), slightly fewer than the 102 new certifications granted in the previous year.

Renewal by Petition

In November 2023, Council approved the DAS Subcommittee's revised recertification proposal designed to provide certificate holders a way to renew after exhausting the available courses. The

revamped renewal process provides an alternative pathway: petitioning to substitute certain other courses or professional service for two of the four DAS courses normally required for renewal. The council recommended that we 1) maintain a list of approved substitution activities to minimize time involved in reviewing petitions and 2) launch the option initially as a pilot to evaluate workload and ensure sustainability. With this feedback in mind, the subcommittee developed guidelines, a rubric, and a petition form; beta tested them with two former members due for renewal and eligible to use the new pathway; revised the procedures based on subcommittee input; and planned a two-year pilot to be advertised to DAS certificate holders and launched in fall 2024.

Stakeholder Survey
A highlight of the year was the invaluable survey the Course Development team designed to obtain actionable feedback about the DAS curriculum and program. They launched the survey in February, then analyzed the results and presented detailed findings along with astute recommendations to the subcommittee in May.

The survey elicited 380 responses (compared to ~100 responses to similar surveys conducted in 2014 and 2016). Analysis of the results revealed positive views of the program overall but also recurring criticisms accompanied by strong interest in helping to drive improvements. Findings and feedback that should inform the subcommittee's future work include the following:
- Courses are not offered frequently enough.
- Course content is not varied enough or revised frequently enough.
- Cost is a barrier, especially for in-person courses.
- Courses and exams have accessibility issues.
- Preferences for online vs. in-person and synchronous vs. asynchronous courses vary.
- There is significant interest in and an unmet need for tool-specific courses, as well as content related to AI, information security, technology and project management, and vendor procurement/management.
- The comprehensive exam is a source of particular dissatisfaction. Responses indicated opportunities for improvement, such as a clear policy for accommodations and more exam prep resources.
- Negative experiences with the program or the bureaucracy around it have additional consequences. (One respondent wrote that because of their frustration with the program and the exam process, they not only "gave up on earning the certificate" despite having completed the coursework, but they also discontinued their SAA membership.)

In addition to considering ways to overcome these challenges, the subcommittee might in the future examine options for clarifying program scope, managing participants' expectations, and sharing more information about program mechanics, progress tracking, and support options.

Challenges and Opportunities
Despite minimal turnover, several initiatives carried over from the previous year, and shared understanding of core functions, members have repeatedly expressed a lack of clarity and confidence about the subcommittee's relationship to CoE, division of responsibilities with SAA Education staff, and degree of independence and level of authority in managing the DAS curriculum and program structure. I recommend DAS Subcommittee leaders, CoE leaders, our SAA Council liaison, and SAA Education staff continue to attend to these concerns through

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transparent communication and consultation, increased participation in each other's meetings, and consideration of governance changes if warranted.

Another topic of concern and frequent discussion was the scope and purpose of the DAS program itself, which warrants careful consideration and possible reimagining to ensure it informs relevant, meaningful subcommittee functions that make the best possible use of members' expertise and shapes a robust, up-to-date curriculum that serves the profession effectively.

Although the subcommittee's size increased in 2020 in response to an expanding catalog of courses and individual volunteers' limited capacity, there is still room to improve our organization and management of liaison work and course audits. This could involve assigning a team or individual member as audit coordinator, implementing a more formal liaison training process and checklist, making audit management an official responsibility of the vice chair or immediate past chair, or another solution not yet considered. In any case, frequent, robust audits and timely revision of course content are crucial for the program's effectiveness, professionalism, and reputation and should be a top priority for all members even as special projects come and go.

The incoming chair's priorities for the next year will include curriculum enhancement, organizational efficiency, and communication. Work in these focus areas might include an RFP and detailed plan for Foundational tier webcast revisions, a redefined team structure to reflect current needs and lessons learned in previous years, outreach to and collaboration with component groups, more frequent web page updates, improved communication channels , updates to standing rules, active recruitment of volunteers during the next cycle, and revisiting feedback obtained through the curriculum survey and during the subcommittee's annual meeting in July.

Acknowledgments
I wish to thank Rana Salzmann, Akila Ruffin, and Michael Santiago of SAA, Courtney Bailey of CoE, and Jasmine Jones of SAA Council for their support of the DAS program and the DAS Subcommittee. Thank you also to the subcommittee members who have given so much of their time, energy, and expertise to sustaining and improving the program. I am especially grateful to Krista Oldham and Pamela Campbell, the new chair and vice chair of the DAS Subcommittee, for their thoughtful planning and incisive vision and to the following outgoing members for their dedicated service:
- Lauren Burroughs
- Sally Benny
- Larissa Krayer

Annual Report: Graduate Archival Education Subcommittee (GAES)

(Prepared by: Weatherly Stephan, Chair)

The membership of the Graduate Archival Education Subcommittee for 2023-2024 included Karen Gracy (vice chair), Jesse Johnston, Sarah Meidl, Colin Post, and Weatherly Stephan (chair). Jill Tominosky served on GAES from September through December of 2024; Tomonisky's vacancy was filled by Heather Soyka in March 2024. The committee met ten times (monthly from September 2023 through June 2024) to work on the following projects:

Regular Updates to the SAA Directory of Archival Education

- After completing a large-scale update of all program and contact information in the Directory of Archival Education last year, GAES created and launched a Google Form that allows program contacts to submit updates to their listing directly to the subcommittee. The form is linked on the Directory landing page, along with contact information for SAA Education, at https://www2.archivists.org/dae.

GAES Microsite Updates

- GAES began building our microsite this year, as we needed a centralized page for links to our standards as well as special projects. Previously the site only held our charge. The microsite updates are now live at https://www2.archivists.org/groups/graduate-archival-education-gae-subcommittee.

DEIA Curriculum Resource Kit

- Building on our work to support SAA Strategic Initiatives and the DEIA work plan, GAES launched a survey to solicit additions to the 2023 DEIA Curriculum Kit. We received seven responses to our survey that garnered 25 additional resources, including books, articles, lesson plans, resource guides, manuals, videos, teaching toolkits, and course listings.
- To accommodate additions to the resource kit and improve navigability, we arranged the resources according to core archival knowledge competencies detailed in the current Guidelines for a Graduate Programs for Archival Studies, then by resource type (article, lesson plan, video, etc.), along with attribution to the submitting party, when their name was provided.
- The expanded curriculum kit, along with a page describing the kit's history and development, is now linked on the GAES microsite: https://www2.archivists.org/groups/graduate-archival-education-gae-subcommittee/deia-informed-curriculum-for-archival-education.
- GAES received feedback during the circulation of the survey about the inclusion of archivists from underrepresented communities and experts on incorporating DEIA concepts into curriculum. Based on this feedback, we submitted a discussion item for Council's February 2024 meeting. We have paused further work on the DEIA curriculum kit pending guidance from SAA about DEIA Work Plan assignments.

Revision to *Best Practices for Internships as a Component of Graduate Archival Education*

- GAES began revisions of the *Best Practices for Internships* based on survey results from our July 2023 business meeting, which received responses from educators, employers, working archivists, and current students. GAES also incorporated feedback gathered by previous memberships of the subcommittee.
- In March 2024, GAES circulated a proposed draft revision of the *Best Practices for Internships* to 13 SAA committees and sections, as well as the Archival Workers Collective, which is not affiliated with SAA. Feedback from these groups was incorporated into the draft revision in the summer of 2024.
- In July 2024, GAES submitted a request to the SAA Standards Committee to seek Council approval to revise the standard. We recognize this request should have come much earlier in our process but were unaware of this step. The Standards Committee has been in touch with GAES leadership confirming receipt of the revision request, which will be reviewed by Standards once reconvened for the 2024-2025 fiscal year.

In the coming year, Karen Gracy will begin her term as chair and Colin Post has been appointed as vice-chair/chair elect. Weatherly Stephan and Sarah Meidl will complete their terms on GAES in August 2024. Anthony Morgano has been appointed to join GAES, and Katie Kerekes will serve as an early-career member. We wish to thank SAA Director of Training and Organizational Development Rana Hutchinson Salzmann, SAA Education Manager Akila Ruffin, SAA Education and Annual Meeting Specialist Mike Santiago, and Council Liaison Jasmine Jones for their support over this year.