I would like to focus my remarks this afternoon on our culture as a professional society and to consider ways in which we might like that culture to change and grow. We have laudable professional values that, together, offer us a solid grounding in who we are and what we are about. And, I hope it is apparent from previous communications that I believe in SAA’s strategic plan, a plan that focuses our activities in what I think are very useful directions—advocating for archives, enhancing our growth as professionals, advancing our knowledge base, and meeting our members’ needs.

But, it has always seemed to me that, before you go out and do something, you need to be something. So, at this moment in our evolution, what are some of those things that we need to be that perhaps we have not yet become? In what directions do we need to move our culture? Let me suggest three that are top-of-mind for me: first, and most important, we need to become a more inclusive profession; second, we need to become a profession of advocates; and third, we need to become a profession of givers.

Becoming a More Inclusive Profession

SAA has cared about diversity for a long time. In her 2007 presidential address, Elizabeth Adkins noted that we had been working to address our diversity concerns for more than thirty-five years. In examining that history, Adkins settled on three areas where we needed to extend and intensify our actions: diversifying the archival record, diversifying the profession, and then diversifying SAA itself. From that day forward, those three diversification objectives have dominated the thinking of SAA leaders. Those three goals have been ever-present in our values and in our strategic goals, but our progress, I would argue, has been incremental at best. As Adkins pointed out in her address, “while it’s easy to embrace the value of diversity, it’s difficult to change the demographic makeup of a profession.”

All of this is very difficult work—perhaps the most difficult that we face as an association and a profession. It is at best cold comfort to note that we are not alone. Libraries, museums, and other cultural institutions are wrestling
with the same problems and are feeling the same inertial weight. But I have to think that we might speed up our progress if we were to stop focusing on achieving *diversity* itself and focus instead on practicing *inclusion*. We ought to be focusing our efforts on becoming an association, and a profession, that truly values inclusivity.

So, we might ask, what is wrong with concentrating on diversity? Well, in truth, we can never define diversity clearly in all its myriad aspects. Diversity quite naturally tends to fracture into more and more discrete identity groups. This makes it almost impossible for us to set a meaningful diversity agenda. We find ourselves focusing on a few things to the exclusion of many other things. It is bound to work out that way, given how diversity works. The varieties of diversity that characterize our world just keep growing. But if we were instead to focus on the *behavior* of inclusion, rather than on the *fact* of diversity, we might over time prevail and actually achieve a profession, association, and historical record that more truly embrace the diversity of our society. And behaving in an inclusive manner is something that we can all learn to do, and something that we can always learn to do better.

Diversity is indeed a fact. But, as I am always reminded by my colleague Chris Taylor, from whom you heard earlier this week, inclusion is a choice we make, both as individuals and as an association, a choice that increases our appreciation of diversity, as well as our energy to embrace it. To fixate our attention on diversity leaves us questioning our direction and strategies. Which identity groups do we focus on? They are legion. What types of difference are the right priorities to embrace?

But to focus on inclusion, instead, opens up some sensible paths forward and the hope of real progress because inclusion represents the set of tools that we can use to achieve the goals that are related to diversity.

Diversity, by itself, does not lead to improved outcomes. Sometimes it leads to worse outcomes, if it is not married to inclusive outlooks and practices. We can pull a dizzying range of diversity into SAA, or into our repositories, and yet see nothing emerge from it beyond frustration. We may find it very difficult, as happens in many workplaces, to retain employees from marginalized communities who, despite being brought into the organization, never get to the point of feeling safe, respected, valued, or encouraged to be authentic.

Bringing in diversity is no magic bullet. Because having access to diversity does *nothing* to create in us the responses that place value on that diversity, that make use of that diversity, that *welcome* that diversity into our professional lives. Essentially, inclusion is a way of working *with* diversity to ensure that those outcomes are achieved. Inclusion only exists when the simultaneous needs that individuals have for belonging and uniqueness can both be satisfied.
The shift from diversity to inclusion needs to happen at several levels. It certainly achieves its greatest impact at the marketplace or societal level. And to get to that level it needs to be practiced first at the workplace and organizational level. But the work will gain no traction at either of those higher stages if it is not first understood, and then practiced, at an individual, personal level.

To have any hope of effectiveness, the practice of inclusion must begin with us as individuals. And, therefore, I sincerely believe that it is at this level—the individual level—where SAA needs to begin focusing its work. Before we attempt to diversify SAA or the archival record, we need to rotate the lens and work on ourselves as SAA members. The way to begin doing this is through increasing our cultural competence as the first step in making us more inclusive individuals.

Cultural Competence

What, then, is cultural competence? Janet M. Bennett, the executive director and cofounder of the Intercultural Communication Institute, the source of a great deal of good learning on the topic, described it as the “set of cognitive, affective, and behavioral skills and characteristics that support appropriate and effective interaction in a variety of cultural contexts.” If we concentrate our strategic efforts on inclusion, then we start from a perspective in which we see all of us as contributing valuable life experiences and perspectives to our profession and we start to approach each other with a spirit of curiosity and a willingness to engage. Getting to that point of comfort, curiosity, and engagement with our many differences is what cultural competence means. It is a measure of how we respond to the experience of difference.

Surprisingly, it does not appear that members of outsider groups or people who have experienced overt discrimination are necessarily more culturally competent than anyone else. We conducted an extensive baseline survey at the Minnesota Historical Society some time back and discovered that staff members representing a wide range of diversity were distributed quite evenly over a continuum of competence. In fact, research on inherent bias suggests quite strongly that we are all subject to deeply ingrained biases that can affect our reasoning, our behavior, our performance—and therefore our cultural competence.

So, recognizing that we are—all of us, every one of us—fellow travelers on a path to improvement, how can we begin to increase our competence? The first step is recognizing that the continuum of competence can be divided into several somewhat discrete stages, leading from lesser to greater competence.

- At the beginning stage, we see a denial of difference, in which differences are perceived to be superficial and irrelevant.
• This is followed by a defense against difference: Individuals at this stage recognize difference, but adopt a confrontational stance—the “us versus them” mindset.

• The next stage is minimizing difference: in which we see a broad-brush belief that we are all the same. There is a failure to appreciate the effects of privilege and power imbalances.

• In the following stage, people demonstrate an acceptance of difference: Here there is, for the first time, a recognition and an appreciation of cultural differences, along with a curiosity that is nonevaluative and seeks to understand.

• The next stage after simple acceptance is an adaptation to difference: People at this stage begin to demonstrate a successful interaction across cultures and the beginnings of real empathy.

• And the final stage represents the integration of difference: wherein individuals manifest a true multicultural perspective.

The fact is that we all occupy some location along this continuum of cultural competence. And there should be no shame associated with the particular address that we happen to occupy right now. To be sure, our position is dynamic and tends to shift throughout our lives as we gain experience, learn, and grow. But we can all move forward, and that is the important point. Moving forward, for each of us, and then for SAA as an organization, is what we need to do.

We need to get ourselves moving along this path, and then we bring our workplaces, SAA, and our profession along with us. Look at me. I am a sixty-five-year-old white guy who has been fortunate enough to think and act from a position of relative privilege all my life. I have benefited from some ability and a great deal of luck. And I have had so many opportunities in my life that I could afford to squander half of them and still come out alright. But I have had recent opportunity to understand my own cultural competence and to gain some awareness of how I need to move forward—a combination of study and reaching out more to others—and to really appreciate the importance of that forward movement. We can all do this, and we must all do this to move our profession toward a more inclusive future.

So, then, knowing that we fall somewhere along this continuum, how do we start making progress toward our goal of competence? I believe that our efforts need to follow a certain critical path:

1. The SAA Council needs to adopt a business case and a strategy for inclusion. Why do we want and need to do it, and then how do we do it? We are already taking steps down this path, so we should be able to realize this objective in a short time.

2. We need to assess where we are as an association. Thoughtful member surveys, key informant interviews, and focus groups can equip us
with a baseline understanding of how SAA members are distributed in terms of awareness, motivation, and learning needs.

3. We need to assemble a suite of learning opportunities, the sorts of practical educational tools that can help us along are widely available in the marketplace. At the Minnesota Historical Society, we have taken advantage of excellent trainers, counselors, and tools provided by the Minneapolis YWCA, which has made inclusion training one of its core programs.

4. We must use this inclusion priority to start building a continuous quality loop into our operations. Specifically, we will need to establish some performance targets for our inclusion efforts and periodically reevaluate our position with follow-up surveys and focus groups.

I want to return to the crucial area of learning opportunities. The first step is for each of us, as individuals, to learn about cultural competence, to understand where we fall on the continuum, and to begin the process of moving forward as individuals. This is a place where SAA can play a definite and important role and, in fact, has begun to take some tentative steps. Through the good efforts of Council member Helen Wong Smith, Council members have participated in some introductory learning about cultural competence, have embraced the concept, and agree on the importance of carrying it forward.

The next step—and it is not a small one—will be to roll out learning opportunities to as many SAA members as possible. How can we do this? As I noted, the sort of learning opportunities that can bear practical fruit, like training in cultural competence, are widely available. One good starting point is the Intercultural Development Inventory, a generally two-pronged tool that analyzes a person’s intercultural competence and then follows with a roadmap for personal growth.

But even though learning tools are widely available, I also think that SAA’s Continuing Education program may play a significant role in providing learning opportunities that are more targeted and relevant for the community of archivists. There might well be a useful blend of licensed content married to home-brewed resources. Such a curriculum should address several pedagogical needs:

- A curriculum that offers scaffolded learning: a combination of Web-based information and training modules; in person, workshop-style sessions; as well as lecture offerings, and so forth will be necessary.
- There should be cognitive learning: cultural knowledge, concepts of diversity and inclusion, the business case for diversity and inclusion; and then deeper learning about micro-aggressions, unconscious bias, white privilege, and cultural appropriation, to name a few.
- There must be affective learning: we need to address empathy, values, increasing our curiosity, and cultural flexibility in meaningful ways.
- And there must be behavioral learning: developing practical skills in conflict resolution, cross-cultural communication, group dynamics,
and team effectiveness. These abilities are essentials in building an inclusive workplace environment.

In short, we need to provide some new learning opportunities that greatly extend what we traditionally think of as the archival skill set. Needless to say, I would anticipate a large and very important role for the community of archival educators in helping us think through the requirements, the approach, and the mechanics of new learning aimed at our cultural competence as individuals and our inclusiveness as a profession. If our thinking and our behavior about inclusion are not woven into the fabric of SAA—in education, publications, outreach, advocacy, and governance—then we will make inadequate progress toward this crucial goal.

In this regard, I envision a rich SAA microsite devoted to providing learning and assessment tools designed to equip SAA members with at least a portion of the knowledge, resources, and skills to move them along on their own journeys, and then to take those new attitudes and abilities into their workplaces.

So, we begin our inclusion journey with learning. Then what? We need to move from awareness to behavior, from ourselves to our workplaces and the marketplace, from individual behavior to policy and procedure. There are some obvious starting places in our repositories.

We can begin with our hiring practices. Our recruitment strategies, our position descriptions, our application processes, and our interview protocols are all areas where long-standing traditions and policies may hide roadblocks to achieving a diverse archival workforce. We should challenge past assumptions about job requirements and the mechanics of the selection process, and do everything we can to be more inclusive in our hiring.

And our retention strategies—or lack thereof—may also be harming us. We probably lack appropriate and effective onboarding practices, employee resource groups, performance management processes, and the sort of respectful workplace policies that can make a difference in our collective ability to retain a diverse workforce.

As we begin to enjoy successes in our workplaces—growing and then retaining a more diverse workforce—SAA and the archival profession become the direct beneficiaries. SAA cannot create an inclusive profession by itself, but it can surely help its members to carry out that critical work in the places where they have real agency.

Then we also need to keep doing all the things that we are currently doing—Mosaic scholarships, diversity-focused internships, the work of the Diversity Committee—because we are beginning to get some traction through all of these related efforts.

One final thought on this topic. An upward journey toward greater inclusion will require us to work together with the understanding that we all bring
different baggage on the journey: different life experiences, different levels of cultural competence, different perspectives, different senses of urgency. Progress will require constant dialogue; but we need to keep that conversation free of bitterness and harsh invective. We are all beginning from different starting points, so we need to be patient with each other and help each other along. We cannot change our pasts, but we can definitely shape our future. Let’s learn, lead, and grow together.

**Becoming a Profession of Advocates**

Another thing that we really need to be—to become—is an association of advocates for archives. And I want to make it clear that I mean advocacy in its broadest possible sense. I do not simply mean improving our ability to argue for improved funding and beneficial legislation. Those skills and activities are, without a doubt, hugely important. But I guess I am talking about going beyond those practical and specific activities and becoming true advocates for our shared mission and values as archivists, and being those advocates on a routine, daily basis with our consumers, our stakeholders, and with each other.

In his 2008 presidential address, Mark Greene held up a set of ten broad principles that he believed should be mutually embraced as a set of core values for archivists. An adjusted version was adopted by SAA Council as comprising that essential set of values that we can all believe in: access and use, accountability, advocacy itself, diversity, history and memory, preservation, professionalism, responsible custody, selection, service, and social responsibility.

I believe that the first, and perhaps the most important, step in advocacy is to understand and own those values. Each one of us! That conviction in the importance of the archival mission, and its supporting values, is essential to advocating the importance of the profession and its work to any outside constituency. If we do not own it, we cannot sell it. We cannot possibly persuade any external audience that archives have value.

As I argued in talking about inclusion, I do contend that our first step must be to work on ourselves, to educate ourselves about the value of archives and the value that we create as archival professionals. The important outcomes will surely be realized higher up the advocacy chain, but before any of that can happen, we must first develop ourselves into competent advocates.

I think that advocacy comprises a few essential things, among them conviction, evidence, communication, and persuasion. Conviction encompasses our belief in the value of what we do, as I have just discussed. Evidence comprises the information resources that we can present to support that conviction. Communication involves everything we do to present that evidence to
our stakeholders. And persuasion is, ultimately, our ability to be effective in everything that we communicate.

Kathleen Roe, a tireless champion of archival advocacy, made clear in her presidential address last year that we archivists are very good at explaining what we do and how we do it. But we are much less skilled at explaining why we do it. I would suggest this indicates that we have work to do in all four areas: the strength of our convictions, the evidence at our disposal, our ability to communicate the most important evidence, and our knowledge about how to persuade.

So, how do we move this endeavor forward and become effective advocates? There are several things that we need to do, and they break down into three areas:

- The compelling stories that we can tell,
- The evidence that supports those stories,
- And an infrastructure of tools and resources that enable SAA members to make full use of both.

Much of the advocacy groundwork that we have accomplished to date has focused on establishing a theoretical basis for the value of archives—their contribution to preserving legal and political rights, providing evidence to support truthful historical narratives, and so forth—and then providing compelling stories that illustrate, sometimes very dramatically, the power that archives have demonstrated to changes lives. This lattermost was a powerful theme in last year’s annual meeting, and Roe’s address did an admirable job of expressing the value of these storytelling activities.

To support this work in a sustainable way, we have created two standing committees that can keep pressing this work forward—the Committee on Public Policy, which keeps us focused on federal and state legislation and policy, and the Committee on Public Awareness, which develops and executes an agenda for advocating in nongovernmental arenas. These are important steps. But the next step needs to concentrate on gathering, evaluating, and presenting the real quantitative and qualitative evidence that supports all the compelling narratives and theoretical arguments about the value of archives.

We need this evidence because we have struggled for many years with the challenge of demonstrating the “value” of archives via anything resembling objective measures.

We know too little about whom we serve, how much they gain from interaction with our holdings, and the real, practical impact of our work to make an effective case about resource needs, return on investment, or “value.” Our previous attempts at data gathering, while distinctly valuable in many ways, have nevertheless been too self-referential to answer these questions. And our previous strategies for making the case for resources—basing our arguments
primarily on who we are, how many collections we hold, or how many tasks we perform—have not been effective.

Instead, I believe we must develop an understanding, supported by meaningful data, of who our users are, what services they value, how they want to use our collections, and which potential users we are not serving. We must understand the real economic impact of archives and archivists on their communities—on things like employment, local spending, educational contributions, volunteer opportunities, and even tourism. Our goal in this regard is to provide access to compelling data about American archives and their users that speak to the value of archives for society and that also help us improve our services to our consumers.

This is big work; so how do we take it on? I have been chewing on this problem for a year now and have come to believe that our best way forward is to create another standing committee, this one focused, at least in part, on gathering, analyzing, and presenting data that can measure and explain the value created by the archival enterprise.

However, I think that such a committee could perform much more for SAA than this single function. We can imagine its mission more broadly as a center for a wide variety of research, data gathering and analysis, project development and management, and knowledge dissemination that can serve SAA members in many different ways. Just for a start let’s call it the Committee on Research and Evaluation, acronym: CORE.

It would function as a center for conducting and evaluating research that is practical, meaningful, and useful. CORE would gather quantitative and qualitative information of strategic value for our efforts relating to advocacy, public awareness, improved audience service, and community engagement. CORE would evaluate this information and surface it to members via dashboards, reports, and constructed data sets that members can use to better understand and act upon their own environments.

Allied professional associations have already embarked on this sort of effort. The American Library Association has its Office for Research and Statistics, whose mission is to “provide leadership and expert advice to ALA staff, members and public on all matters related to research and statistics about libraries, librarians and other library staff.”¹² Similarly, the Alliance of American Museums has its central Research Program, whose goal is to “provide sound and current data to support the Alliance, its members and the museum field.” They both conduct and commission original research about America’s libraries and museums, collect and synthesize benchmarking data, monitor external research, and collaborate with other organizations on research projects of interest to their members and their professions.¹³
By creating standing research arms within their operating structures, these associations have positioned themselves to commission, gather, and evaluate information critical for their members in serving their audiences better, in demonstrating their value to society, and in expanding their professional knowledge base.

SAA’s position as a professional association that serves members employed by the great majority of U.S. archival repositories gives us a gateway to an immense amount of captured and uncaptured data, and it affords us a unique opportunity to survey, test, and evaluate a comprehensive population of archivists. This committee could become a very useful skunkworks within SAA to serve the larger archives profession. We would share the results of our studies so others can learn from them, and so that our profession can remain strong and vibrant.

CORE’s work would be guided by a few essential values:

- Objective research
- Strategic importance
- Collaborative approaches
- Shared knowledge

CORE might function by organizing itself dynamically into ad hoc and long-term research teams that would study particular strategic problems of broad interest and relevance to SAA members. These teams would be collaborative and drawn from across the membership. The teams would work in partnership, sharing data, methods, insights, and personnel. Teams could form and disband as required by the dictates of their projects.

Some CORE teams might be very academic in terms of their objectives, approaches, and personnel. They would work on problems and methods that demand scholastic rigor. Others might be very pragmatic and businesslike efforts intended to move quickly toward a practical solution or understanding on some more immediate and discrete issue. At least some CORE teams could expect to receive modest funding to facilitate their work from SAA operating funds, from the SAA Foundation, or from external grants.

At its heart, a Committee on Research and Evaluation would provide our members with a common foundation of information to understand and act on issues that affect them. It would be an initial step in creating a real business intelligence capability for the association, as well as developing an appreciation for data analysis and evaluation among archivists. It could offer up a number of extremely valuable services that are presently lacking:

- Repository and analytical tools for sharing and evaluating useful data about archivists, repositories, audiences, and the environments in which archives function;
• A training site for archivists in the area of business intelligence;
• A mechanism that can proactively commission necessary and strategic research, rather than passively waiting for it to occur on its own;
• A persistent team of SAA members that is positioned to look strategically at the organization’s information needs;

Another SAA member has suggested that we might begin this effort with a convening of program officers from large grant makers like IMLS, NEH, NHPRC, and Mellon, funded by the SAA Foundation and aimed at advising SAA on how to pursue this business intelligence initiative effectively.

Regardless of how we get it off the ground, I believe that doing so is within our reach, and I believe that the resulting work will repay SAA richly for its investments.

Becoming a Profession of Givers

The things I have outlined so far obviously require resources, and probably new resources. So I want to close by talking about how all of our aspirations depend upon an essential infrastructure of people, technology, and money. Money will not buy us either happiness or goodness, but it certainly offsets the costs of everything else that we care about.

A professor of public administration at the University of Minnesota is fond of reminding nonprofits that “there is no mission without a margin,” meaning that while SAA as a professional association is driven by its mission to serve the rather wide-ranging professional needs of American archivists, it cannot possibly realize that mission without getting into the business of making money. No margin; no mission.

SAA’s resource infrastructure has traditionally depended upon four sources of revenue. They are membership dues, annual meeting income, workshop fees, and publication sales. We do a pretty good job monitoring these revenue streams and then seeking opportunities to enhance them and to drive them a little harder.

But I would argue that we have neglected a fifth revenue stream that must grow in significance if we are to ensure ourselves the most solid resource base possible. That revenue stream depends upon philanthropy and, specifically, upon SAA members as givers. Every successful nonprofit can boast of having a strong donor base, and in SAA’s case that donor base is primarily its members. We have been very successful thus far in creating a membership of takers—and I mean that in a very good way: members who consume SAA’s products and services on a sort of pay-as-you-go basis.

But what we need to become is an association of givers, that is, members who go beyond paying for what they consume directly: donating in excess of
that as a way to create a stronger, more resilient organization that can realize its mission in more powerful ways.

The emerging SAA Foundation is the mechanism that lets us accomplish this. The foundation is moving beyond its infancy into its training pants stage, which, of course, is a big step forward but still requires a great deal of attention.

It is already doing good work for us. It funds the Mosaic Scholarship program, which has benefited a cohort of emerging archivists and which helps move our diversity agenda forward. It funds the Pinkett Minority Student Award, which recognizes student achievements that serve as models for all of us. It also funds a fledgling grant-making program. It provided research and development funds that resulted in the DAS curriculum and certificate program, as well as R&D funding for several book publishing projects.

But the foundation is capable of doing a great deal more than it is able to do right now. It can help fund the sort of cultural competence training and other initiatives aimed at growing our inclusivity. It can certainly help support innovative research and experiments that would come out of a Committee on Research and Evaluation. The unbudgeted funds in the foundation are available to try out any number of good ideas. They can help us to be more nimble and quick to respond to opportunities, as well as to crises. We cannot do those things now, but we can do them as the funds within the foundation grow. The foundation’s growth is in our hands, and it is within our abilities as members to make that growth happen.

Philanthropic giving is an American value. In 2015, Americans contributed more than $373 billion, 80 percent of which came from the annual gifts and bequests of individuals. By the same token, giving, for the purpose of strengthening the archival profession, needs to become a value owned by SAA members—all of us.

In holding up this value, I am very cognizant of the fact that it might ring hollow with many new or younger members, especially, who live with financial stress and who would be hard pressed to contribute beyond their annual dues. But I also know that our circumstances change over the years and that giving to the institutions that have sustained us and made positive contributions to our lives eventually becomes an important value.

Conclusion

So this becomes another thing that we ought to be as SAA members. To bring this thinking to a close, I will reemphasize that our strategic directions are, in my estimation, good ones. They are carrying us forward.

But we should always make an opportunity to step back and think about what we want to be before we keep surging ahead with the all things we want to do. So, in my mind, the three things that I have talked about this afternoon are the bare necessities that we should add to the basket of things we aspire
to. Above everything else, we should be moving our diversity strategy forward by using every resource at our disposal to become a more inclusive association and profession. Second, we should invest more of our individual and team efforts, and our associational resources, into business intelligence efforts and mechanisms that support our advocacy initiatives, as well as other important work. And, finally, we need to help ourselves become more impactful SAA members by embracing the value of giving to support the association—both for its practical outcomes and because it is a very good thing to do.

I hope that we will all find it in our hearts and minds to own these values and to use them as a platform for refreshing our strategic agenda and moving it forward to help SAA be the best organization that it can be, for all of us.

Notes

3 In 2014, ALA’s nonwhite membership was about 9.2 percent.
9 Bennett, “Intercultural Competence,” 166–70.
12 For further information, see its landing page on the ALA website: http://www.ala.org/offices/ors.
13 For further information, see its landing page on the AAM website: http://www.aam-us.org/about-museums/research.
14 Giving USA 2016, Giving USA Foundation.

About the Author

Dennis Meissner is the recently retired Deputy Director for Programs at the Minnesota Historical, a Fellow of the Society of American Archivists, and the SAA’s immediate past president. Most of his 43-year career at MNHS focused on the arrangement, description, and use of archival materials, and he has participated in a number of national and international efforts to develop standards and practices in those areas. In 2003-2004 he collaborated with Mark Greene on the NHPRC-funded “More Product, Less Process” research project, which has seen broad adoption within American archives and special collections, as well as international attention.