**Date: November 12, 2014**

**Name of Section:** Reference, Access, and Outreach

**Officers:**

2013-2014

Chair: Mary Manning

Vice-chair/Chair Elect: Lisa Sjoberg

Immediate Past Chair: Jill Severn

Steering Committee Members: Rachael Dreyer, Matt Herbison, Jean Green, Jodi Allison-Bunnell

Communications Liaison: Greg Kocken

Web Liaison: Shaun Hayes

**Report from annual meeting:**

* Number of attendees: approximately 130
* Election results:
  + Vice chair/chair elect: Rachael Dreyer,
  + Steering Committee members: Alison Stankrauff, Erin Lawrimore
* Summary of meeting activities:
  + Mary Manning, chair and Program Committee chair, called the meeting to order
  + Jill Severn, immediate past chair and chair of the RAO Nominations Committee, announced new steering committee members and vice chair/chair elect
  + Audience directed to the RAO summer newsletter for reports on all the committee and working groups and information about how to get involved in them
  + Lisa Sjoberg, vice chair and incoming chair, recognized current officers, steering committee, and committee chairs
  + Outgoing members thanked
  + New Access to Electronic Records Working Group shared their charge and made a call for membership
  + Marketplace portion of the meeting introduced; it was an hour long and contained the following six booths, which were 20 minutes apiece, so each participant could choose three to attend.
    - Scaling the Ivory Tower: Faculty Outreach at Colleges and Universities
  + Broad Collaboration, Narrow Focus: Strategies for Effective Social Media Outreach
  + Oral History Core: Ensuring Access to Personal Narrative (Through Metadata)
  + Let's Get Digital: Providing Access to Born-Digital Records
  + How I Saved History (and Am Milking It for All It's Worth): Making Historic State Law Free Online
  + The Numbers Game: Tools for Tracking Reference Statistics
* The Marketplace also included a virtual “Ideas Bar” via Twitter and a “Seed Swap,” which allowed participants to put their name into envelopes labeled with topics that they were interested in learning more about.
* Meeting participants were informed that a survey about the Marketplace would be distributed after the meeting. The survey was distributed via the RAO listserv and social media.
* Facilitated Plus/delta activity

*Plus*

* + - Good number of vendors
    - Good variety of topics
    - Narrowness of topics helped people focus on their interest areas
    - Handouts/take-aways were helpful
    - Networking/discussion time was better than just a business meeting
    - Assessment of Marketplace was good
    - Strong presenters
    - Flexibility to come and go was appreciated

*Delta*

* + Would like food and beverages
  + Make the subject matter/topics more obvious through signage or handouts
  + Have a directional handout available
  + Make sure there are enough chairs
  + Limit presenters to 5 minute intros and then open discussion
  + Space

**Completed projects/activities:**

The Access to Electronic Records group was founded in the spring, and administrative sections for all committees, working groups, and task forces were added to the RAO microsite to provide a place to track our activities and share documents.

As most of RAO’s projects/activities are completed through the work of our committees, liaisons, task forces, and working groups, the reports included below outline the work of our section and detail completed projects and activities.

* **The Program Committee Report, submitted by Mary Manning, chair**

The program committee met throughout the spring and summer, calls for proposals for the Marketplace were coordinated through the Communications Liaison, proposals were collected and presenters selected by committee members. The meeting was very successful with approximately 60 more participants than last year (close to double). Unfortunately, we did not expect such a large crowd. Subsequently, although we ordered approximately 25 more chairs than last year, seating was inadequate. A report on the meeting is included in the “Report from the annual meeting” section of this annual report (above).Selected results from survey distributed in October 2014. The full results can be accessed on the RAO Program Committee Admin page on the RAO microsite and are available upon request.

* The survey was completed by 14 people. 8 attended the Marketplace and 6 didn't.
  + Those who didn't attend cited the following reasons: were unable to attend SAA (4), schedule conflicts (1), the Marketplace topics did not appeal to me (1).
    - Those who knew about the Marketplace in advance found out about it through the following sources: RAO newsletter (2), RAO listserv (3), upon arrival at the RAO Section Meeting (2), SAA Annual Meeting program description in onsite program (1).
    - Asked to rate the program format “informative, effective, and dynamic” (on a scale of 1 to 5 with 5 being the highest rating), 5 participants rated the Marketplace with a 4, 2 participants ranted the Marketplace with a 3, and 1 participant rated it with a 2.
    - Responses to “What aspects of the program worked well:”
    - Good diversity of topics, but there were not enough chairs to satisfy demand.
    - The topics were good.
    - That these were - by design - very interactive. The discussions were super.
    - Ability to join the meeting partway through because of the format.
    - I really loved the opportunity to break into small groups and discuss a specific topic.I liked the energy of the forums and the interest of those who came in discussing the different topics.
* Responses to “What parts of the program could the Program Committee improve?”
  + - * The space was much better than previous years, but there were not enough chairs.
      * An additional format worth considering is a "Hot Topics" Pecha Kucha. This way everyone gets a chance to hear from all the presenters, but the presentations are short and concise so as not to lose an audience. You could also build it so the presenter has 5 or 6 minutes to present and the audience has maybe 10 minutes to react (or if there is no reaction we move on).
      * A little better organization in the beginning and not asking people to change rooms. 5 more minutes in each booth would have made a difference.
      * Not enough time allowed at each booth to have a complete discussion.
      * I think it was confusing where to go and when. Particularly as the acoustics in the room were not conducive to hearing each other - within a group - let alone outside the group - well.
      * I am not sure. This was my first group meeting and I really got a lot out of it.
      * I thought that there was just a bit too much going on this year. I've participated in the marketplace before, both as a speaker and a participant. I feel like RAO is growing so much that maybe we could do an informal panel or something to capture the thoughts of the entire group instead of smaller discussions.
* **Nominations Committee Report, submitted by Jill Severn, chair**

The nominations and elections committee began meeting in January 2014 to plan the RAO election for 2014. We set a timetable for the process and distributed the work tasks among ourselves. We advertised through the RAO listserv, the winter newsletter, and the RAO Facebook page for nominations for positions on the steering committee (two positions) and for Vice-chair/Chair-elect.

We received many nominations, and from this pool and verified nominees’ membership in SAA and RAO and confirmed that nominees were willing to run. We had two candidates for vice-chair/chair-elect: Rachael Dreyer and Greg Kocken. We had seven candidates for steering committee: Lori Birrell, Rebecca Bizonet, Rebecca Petersen, Erin Lawrimore, Alison Stankrauff, Elizabeth Wilkinson, and Jennifer Mitchell.

The committee solicited bios, photos, and statements for all candidates and prepared an article for the summer RAO newsletter featuring this info and details about the voting process. I submitted the slate of candidates to SAA Information Systems Administrator Matt Black on June 13th and RAO Web Liaison Shaun Hayes mounted the supporting info on the RAO micro site. The election opened the first week in July and at that juncture, we sent a note to the RAO listserv encouraging rampant voting. Following the conclusion of the election, I report the results to the RAO chair and vice chair. Election results:

* Vice chair/chair elect: Rachel Dreyer,
* Steering Committee members: Alison Stankrauff, Erin Lawrimore
* **Web Liaison Report, submitted by Shaun Hayes, liaison**

My main efforts over the past year have been updating the RAO microsite with recent committee reports, creating a candidates for those seeking a position on the Steering Committee and developing administrative pages for the various committees and working groups that RAO consists of. On a more general note, I have spent time more thoroughly familiarizing myself with the various intricacies such as Drupal and adding content to the RAO microsite.

Right now, I am in the process of determining the best way to give RAO's various committees and working groups the highest degree of administrative control over their committee pages. I will also be educating the various chairs on how to add content to their pages and other administrative tasks. This process will take time to complete, so I suspect it's something I will be working on for at least part of the next year.

It's difficult to tell what I will be doing with this position in the future, as it is largely a reactive job, by which I mean often times I only have things to do when people give me new things to post, etc. However, as I continue to familiarize myself with Drupal, I am hopeful that I will find new ways to improve the overall layout and navigational prowess of the RAO microsite and continue to provide quick and efficient responses to the section's needs as they arise.

* **Communications Liaison Report, submitted Greg Kocken, liaison**

The RAO communications liaison is charged with communicating important RAO news and information with the section’s membership. To accomplish this, RAO maintains a blog, listserv, Facebook account and publishes an online newsletter twice each year.

The RAO communications liaison position is constantly evolving. Currently, many social media tools such as Facebook and the blog are managed by multiple individuals. Social media is an increasingly more effective and important tool for RAO.

*Accomplishments*

Shared news and other announcements regarding RAO activities via social media and listserv. Prepared and published the winter 2014 RAO newsletter in early 2014. Prepared the summer 2014 newsletter for publication in early July 2014.

*Recommendations*

In accordance with “Communications Strategy Recommendations for Sections and Roundtables” issued by the SAA Communications Task Force in August 2013, the following recommendations are presented:

First, we should be placing our meeting minutes onto our microsite page. This can be accomplished by coordinating with the RAO web liaison.

Second, we should evaluate our social media and listserv presence on a regular basis. As social media changes we need to remain certain that we are reaching our audiences through the channels they prefer. This will be accomplished by the communications liaison.

Third, I recommend we re-instate the RAO internship program. For RAO to strengthen and build its membership we need to increase our presence within social media. Maintaining an active social media presence requires regular contributions and regular contributors. A communications intern would help us to accomplish this goal. Support from the steering committee is necessary for this to be successful.

*Goals and Objectives for 2014-2015*

First, continue to monitor changes in the social media and communications landscape. Second, increase our presence on social media through a new social media campaign.

* **National History Day Report, submitted by Shaun Hayes, chair**

Over the last year, the NHD has finished extensive edits to the text and layout of our Toolkit. We have also welcomed in new members to the committee. In addition, we have made plans to merge our content with the official NHD website in order to improve its visibility and general appearance.

As of now, we are waiting until the final stage of the NHD competition is over to begin working on moving the content of the Toolkit to the NHD page. This is something we are hopeful will be completed by the end of the year. We are also hoping to create webinars/screencasts to distribute to the state NHD coordinators in order to take additional steps to improve awareness of the information the NHD committee has assembled over the years. The Committee is planning on hosting one live webinar and distributing the screencast before the end of the year in order to take advantage of the time between NHD contests. However, to a certain degree, the timetable for these endeavors will depend on how quickly we can get the content merged on to the NHD website.

Our future plans include continuing to look for dynamic opportunities to promote National History Day, the archiving profession and the content we have created.

* **Teaching with and about Primary Resources Report, submitted by Jill Severn and Lisa Sjoberg, co-chairs**

The RAO TPS committee is on fire with activity! The committee has organized itself around three major activities: establishing governance and leadership guidelines, participating in proposing and developing new standards for SAA, and establishing a blueprint for its future initiatives around the key findings of the major RAO survey and report of 2012/13.

The current co-chairs are Jill Severn and Lisa Sjoberg. Lisa has been collaborating with a small committee of TPS members to propose guidelines for membership and leadership roles in RAO. A preliminary draft is nearly complete, and our goal is to solidify this document by August 2014. In addition, Lisa has been working with Anne Bahde and Heather Smedberg of the Rare Books and Manuscripts Section of ACRL to propose the creation of Primary Source Literacy Guidelines. A revised draft was be submitted to SAA's Standards Committee June 23, 2014. The goal of these guidelines is to develop a framework for archivists and special collections librarians to utilize in teaching with and about primary sources.

Jill has been coordinating the efforts to construct a blueprint for future TPS work. She sought volunteers for each of the four initiative areas from current TPS members and then invited RAO members who joined the TPS seed packet affinity group on TPS to also join the fun. From each of the four groups, she solicited a volunteer to coordinate and facilitate communication and work on the committee and provided a template for developing an initial proposal report. Four noble souls volunteered, and they and their teams dove into the work. Reports from each of the four groups were due by the first week in June. All reports have been received, and Jill will compile the reports and develop some questions to guide TPS members' feedback.

To make great progress and to allow for the serendipity of face-to-face interactions, Jill contacted SAA staff who very kindly arranged a meeting space for the four teams to gather and thresh the proposals with a goal of coming away with a rough but workable integrated plan that allows for collaboration, cooperation, and innovation among all four projects and their teams. This meeting took place at SAA on Wednesday, August 13th from 1-3pm.

* **Access to Electronic Records Working Group Report, submitted by Rachael Dreyer and Amy Schindler, co-chairs**

Guiding principles for the working group, related to the governance and purpose of the group were drafted by founding group member Greg Kocken and approved by the RAO Steering Committee. The proposal has been reviewed and revised by the RAO Steering Committee. The working group held a virtual meeting after the revised version of the proposal was approved to start working on objectives and ways to move the group forward. We reached out to other SAA Roundtables and Sections to gain buy-in from interested parties and to see if they wished to appoint a member to the task force. Membership was solicited through announcements to the listserv and the annual meeting and through the “seed swap packets” at the Marketplace.

* **Navigating Minimal Processing and Public Services Report, submitted by Gregory Kocken, chair**

*Group Objective & Responsibility*

To gather and share information on customized levels of processing with particular emphasis on public services. Responsibilities include:

* + Compile bibliography or literature review relevant customized levels of processing proposed by Greene and Meissner.
  + Solicit repositories for processing manuals and other relevant policies from institutions using these processing techniques.
  + Survey archivists regarding repositories' processing and public services practices as appropriate.
  + Summarize and synthesize survey results, processing manuals, literature, and other appropriate resources and information.
  + Propose assessment measures and models to judge the impact of customized levels of processing on users and public service archivists.
  + Offer models, workflows, or other means for public service archivists and other repository staff to benefit collections and users.
  + Ensure ongoing communication within the working group and the larger archival community while work is underway via appropriate means that allows and encourages communication, collaboration, and feedback.
  + Maintain a wiki, blog, Ning group, or other appropriate tool to document the working group’s results and progress and encourage collaboration from outside of the working group. Actively participate in reviews of the group’s progress and purpose and make recommendations for appropriate further actions.

*Working Group’s Role*

The working group serves an advisory role with its products intended to benefit the larger archival community and users of repositories.

*Anticipated Date of Resolution*

At the summer 2013 annual meeting of the RAO steering committee this working group was placed into a state of semi-active dormancy. The liaison is responsible for reporting changes to the steering committee and making sure that all of the group’s products remain viable.

*History*

Originally named the Reference/Processing Collaboration Group, the group began work in 2007 as the MPLP Task Force, a small committee of three members of the Reference, Access, and Outreach (RAO) section. The task force surveyed RAO members and found that there was great demand from members for more guidance regarding best practices in regards to minimal processing and public services. Since 2008, the group has slowly moved towards completing the objectives outlined in the group’s charge. In 2010 the group’s name was changed to “the Working Group for Data-Driven Decision Making in Archives.” Following a period of inactivity, the group was reorganized in the spring of 2012 and adopted the working title of “Navigating Minimal Processing and Public Services.” In August 2013 the group was placed into a state of dormancy, with a liaison assigned to monitor and update web resources accordingly.

*Accomplishments*

Over the past year the group has remained dormant. A list of new resources is compiled by the liaison and will be periodically submitted to the web resources site.

*Recommendations*

Continue in the current, dormant state.

* **23 Things Report, submitted by Rebecca Bizonet, chair**

Since August 2013, our group has completed the following tasks:

* + One new "Thing" was created and posted by team members, a Thing for Pinterest. A few other Things were updated.
  + We've confirmed team members' interest and availability in continuing on and have had monthly email discussions on "the State of the Things." There is continuing interest but limited availability.
  + We decided to start a new phase that will focus on promotion of 23 Things: the first and main part of this promotional activity will be a "Thing of the Month" campaign.

Currently, we are in discussions about planning and launching "Thing of the Month," which will involve promoting 23 Things for Archivists and the existing "Things" on RAO's Facebook page (and Twitter, too, possibly). There are some concerns about the time and level of commitment involved, and we still have to work out the logistics, but we are on board to do this.

*Future plans:*

* + Launch Thing of the Month by August-September. To this end, we'll work with the communications liaison on planning and coordinating communications for this.
  + Review the site and make sure our links still work, especially for the Thing of the Month features.
  + By the end of the year, we want to have contacted the Archival Technologies Resources Portal and discussed with them the idea of coordinating or cross-promoting our efforts.
  + Continue to place an emphasis on promotion of the 23 Things for Archivists platform and the existing Things.
  + Solicit feedback on user experiences with the "Things" (the technology and tools the Things describe).
  + In promotion and outreach, focus on students, new archivists, and lone arrangers (those least likely to know about and most need this resource).
  + Keep adding new Things, but probably at a slower pace, since we'll be focusing on promotion.
  + Try to recruit new team members.

**Ongoing projects/activities:**

Many ongoing projects/activities are detailed in committee reports above.

Highlights include:

* The Program Committee will continue with its popular Marketplace of Ideas at its next annual meeting
* The Nomination Committee will continue to solicit a large number of candidates for officer and Steering Committee elections.
* The Web Liaison will continue to work with committee and working group chairs to add content to their administrative pages on the microsite.
* The Web Liaison will continue to find new ways to improve the overall layout and navigational prowess of the RAO microsite and continue to provide quick and efficient responses to the section's needs as they arise
* RAO officers, Steering Committee, and committee and working group chairs will continue to add content to their administrative pages to better document RAO’s work.
* The Teaching with/about Primary Sources Committee (TPS) will continue to work with the RBMS Section of ACRL on a Primary Source Literacy Guide.

**New projects/activities:**

Many new projects/activities are detailed in committee reports above.

Highlights include:

* The new Access to Electronic Records Working Group will announce how results of the subgroups will direct the future work of the working group.
* 23 Things group will concentrate on promoting their group, particularly to students, new archivists, and lone arrangers (those least likely to know about and most need this resource) through the “Thing of the Month” campaign.
* The RAO National History Day Committee (NHD) will add its Toolkit to the National History website and hopes to host one live webinar.
* The Teaching with/about Primary Sources Committee will hold an “unconference” before next year’s SAA annual meeting.

**Initiatives associated with the new 2013-2018 Strategic Plan:**

* ***GOAL 1:  ADVOCATING FOR ARCHIVES AND ARCHIVISTS******Society values the vital role of archives and archivists.***

*SAA will*

* + 1.1. Provide leadership in promoting the value of archives and archivists to institutions, communities, and society.
  + 1.2. Educate and influence decision makers about the importance of archives and archivists.
  + 1.3. Provide leadership in ensuring the completeness, diversity, and accessibility of the historical record.
  + 1.4. Strengthen the ability of those who manage and use archival material to articulate the value of archives.

***RAO initiatives that supported SAA Goal 1:***

* + - Engaged with our membership, the archival profession as a whole, and society via our communications platforms to advocate for the value of archives.
    - The RAO Teaching with Primary Sources Standing Committee focused on addressing 4 key findings from its survey on teaching practices with primary sources:
      * Developing and/or identifying techniques for creating interactive instruction experiences.
      * Developing and/or identifying strategies for connecting with faculty/instructors and engaging them in the instruction planning process.
      * Advocating for instruction as a core component of archival work, given that the underlying barrier to successful instruction is lack of time, resources, and/or institutional support. While SAA cannot “wave a magic wand” and create more archivists, it can help archivists promote and demonstrate the value of instructional services to both internal and external constituents.
      * Developing best practices for assessment.
* ***GOAL 2: ENHANCING PROFESSIONAL GROWTH******Archivists have access to the professional resources they need to be successful and effective in their careers***

*SAA will*

* + 2.1. Provide content, via education and publications that reflects the latest thinking and best practices in the field.
  + 2.2. Deliver information and education via methods that are accessible, affordable, and keep pace with technological change.
  + 2.3. Support the career development of members to assist them in achieving their goals.

***RAO initiatives that supported SAA Goal 2:***

* + - RAO TPS worked on four directives outlined above.
    - Expanded Marketplace for Ideas program format and the Idea Seed Swap as contexts for providing inclusive, effective venues for deliberation on the most relevant RAO-related issues of the day.
    - 23 Things Initiative supported this standard by adding new descriptions of new Web 2.0 tools.
    - Migrated content from external sources to RAO micro site to ensure longer-term sustainability and accessibility.
* ***GOAL 3:  ADVANCING THE FIELD******Professional knowledge expands to keep pace with an increasingly diverse archival record***

*SAA will*

* + *3.1. Identify the need for new standards, guidelines, and best practices and lead or participate in their development.*
  + *3.2. Foster and disseminate research in and about the field*
  + *3.3. Participate actively in relevant partnerships and collaborations to enhance professional knowledge.*

***RAO initiatives that supported SAA Goal 3:***

* + - RAO contributed to the SAA-ACRL/RBMS Joint Task Force on the Development.
    - RAO Marketplace of Ideas Program provided a venue for presenting and threshing new ideas and approaches in the field related to RAO work.
* ***GOAL 4:  MEETING MEMBERS’ NEEDS******SAA is an agile association that delivers outstanding service and fosters a culture of participation***

*SAA will*

* + *4.1. Facilitate effective communication with and among members.*
  + *4.2. Create opportunities for members to participate fully in the association.*
  + *4.3. Continue to enrich the association and the profession with greater diversity in membership and expanded leadership opportunities.*

***RAO Initiatives that support SAA Goal 4:***

* + - * Marketplace of Ideas format for the program at the Section meeting depends on RAO member volunteers to propose and lead dialogue and deliberation or demonstration “booths,” encourages small group deliberation and dialogue, and assesses participant feedback through an evaluation survey
      * Use of the RAO listserv and Facebook for formal and informal input on professional and organizational matters as they arise.
      * Added administrative pages to RAO microsite to internally document RAO processes for succession planning.
      * Offered networking opportunities during the RAO Section Meeting to encourage career growth as well as involvement in RAO and SAA more broadly.
      * Provided opportunities for RAO members to participate actively in defined, professional projects through RAO committees and working groups.
      * Distributed widely the call for nominations for RAO leadership positions and committee/working group memberships to encourage involvement.

**Questions/concerns for Council attention:** none