

2016-2020

Society of Georgia Archivists Strategic Plan

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Executive Summary

In 2014, then-president Courtney Chartier initiated a strategic planning process for the Society of Georgia Archivists (SGA). She appointed a Strategic Planning Task Force (SPTF) to conduct the work, consisting of members Brittany Parris (then Secretary), Sarah Quigley (then Vice President), Ryan Rutkowski (then Mentoring Program Assistant Manager), and Lynette Stoudt (then Past President). The SPTF conducted a SWOT Analysis to identify SGA's strengths and weaknesses and then conducted a survey to gauge membership satisfaction with current programmatic offerings and identify areas for potential growth (Appendices A and B). The SWOT Analysis revealed that SGA offers a strong return on investment for members, with robust educational offerings, opportunities for leadership and service within the organization, and administrative transparency. Our weaknesses include poor internal records management, a sense that the organization is leadership heavy and could encourage the participation of members more often, and that our recruitment procedures have not lead to a fully representational and diverse administrative body.

The membership survey confirmed the results of the SWOT Analysis. It also revealed that our members are strong boosters for the organization, frequently recruiting new members and encouraging them to become more involved. We learned that our members value the opportunities we provide for networking and continuing education, but they are also eager to see SGA expand those opportunities through virtual or peer-to-peer educational programs. Members also indicated that they would like to see growth for SGA in the areas of diversity and digital initiatives. Of approximately 230 active members, 102, or approximately 44% of the membership, completed the survey.

Strategic planning efforts continued in 2015 under President Sarah Quigley. The composition of the SPTF remained the same. At the April 2015 board meeting, board members participated in a mission statement brainstorming activity. The board discussed and revised the draft mission statement at the July meeting and approved the final statement at the October meeting. Also in October, the SPTF met for a day long writing retreat to compose a vision statement, core organizational values, and outline strategic priorities for the organization. The vision statement and core organizational values statement were approved at the October board meeting.

We have identified six strategic priority areas for 2016-2020. They are outreach, education, fiscal sustainability, institutional knowledge management, diversity, and communication and publications. We have also identified three to six specific goals for each area with anticipated organizational impact and outcomes.

Mission Statement

The Society of Georgia Archivists fosters and supports the archival community by advocating for professionals, collections, and repositories; encouraging diversity in the field; promoting education and professional development; and advancing scholarly research and innovation through the publication of *Provenance*.

Vision Statement

Inspire our world to recognize the vital role and value of archives and archivists in creating a just and enlightened society.

Core Values

Community

- We are an engaged, passionate community of practice building bridges among archival collections, the profession, and the public.

Leadership

- We provide our members with opportunities to serve in roles that benefit the archival field. We are an organizational model for other professional archival groups.

Diversity

- We create inclusive environments by promoting unique perspectives and experiences so that the archival field is a reflection of the society it serves.

Lifelong learning

- We promote the continued pursuit of knowledge to achieve professional excellence and enrichment.

Sustainability

- We are committed to bringing value to the membership experience by providing high-quality, meaningful services and opportunities through the responsible stewardship of resources.

Strategic Priorities

Outreach

To increase public awareness of SGA's programs, to expand capacity for issue-based, short-term advocacy, and to develop a strategic, thoughtful, and ongoing mechanism for outreach to allied organizations, students, and archival professionals in Georgia and the United States.

Goals:

- Explore partnerships and collaborations with allied professional organizations such as the Georgia Humanities Council and National History Day.
- Continue to develop relationships with archival organizations across the national landscape (RAAC).
- Increase the visibility of the President's Award.
- Strengthen outreach to students in archival, library, and public history programs [revise existing method of contacting programs and identify areas where general membership can be more involved].
- Develop general policies for conducting ongoing and issue-based advocacy.

Budgetary impact: Minimal.

Human impact: Will require participation of Outreach Manager and Co-Manager, and the Membership Committee. May require establishment of temporary task forces as needed to develop policies or coordinate projects.

Education

To create more diverse and accessible educational offerings that serve a wider variety of our members.

Goals:

- Devise and promote new peer to peer learning and training opportunities.
- Formalize and promote virtual book club. Explore current service model [continue offering virtual real time meetings or create an asynchronous program].
- Explore innovative methods by which we could provide virtual access to workshops and meetings such as webinars or recorded sessions.
- Develop or adapt a basic, introductory archives workshop or other offerings and present them frequently throughout the state to non-archivists with responsibility for archival records in a variety of settings (public libraries, churches, etc.)

Budgetary impact: Every effort should be made to keep costs for new programs low and, when possible, to build in fee structures that will allow new programs to support themselves.

Human impact: The Education Committee may need additional members to develop and plan for new programs without siphoning capacity from the planning of regular workshops throughout the year.

Fiscal sustainability

To compensate for income loss due to fewer institutional subscriptions to *Provenance*, to ensure SGA can continue to support new scholarships such as The Taronda Spencer Award and the increased amount of the Gracy Award, to allow SGA to create new programs, and to create a secure foundation that will ensure the continued growth of the organization.

Goals:

- Increase total membership by 10%.
- Initiate drive to encourage existing members to renew at a higher level and/or donate to SGA.
- Revise and further develop long-term investment strategy.

Budgetary impact: Initiatives will not add costs, but will increase income.

Human impact: Treasurer may need to recruit a temporary task force to aid in research. Full board participation in membership drives is required.

Institutional knowledge management

To create a comprehensive, holistic, and sustainable archival management plan that includes both paper and digital material, and to establish workflows for transfer of information between officers and committee chairs from year to year.

Goals:

- Revise existing retention schedule to include both paper and digital records.
- Paper documents
 - Reassess and reappraise paper documents at the Georgia Archives.
 - Revise finding aid for collection.
- Digital archives
 - Reassess and reappraise existing digital records.
 - Develop digital preservation plan.
 - Develop access policy.
- Information/Knowledge management
 - Identify a tool for log-in and password management.
 - Create standard operating procedures for knowledge transfer.
 - Research new content management systems to replace Wild Apricot when current contract expires.

Budgetary impact: Minimal, with the possible exception of changes to the content management system (though the cost for Wild Apricot is expected to increase in two years).

Human impact: Archivist will need to recruit a temporary task force of members to assist in development of archival management plan. Collaboration with Website Editor will be key.

Diversity

To review and revise nominating and recruitment procedures to attract a wider range of candidates for board positions, committees, and general memberships; to create a culture in which leaders within the organization consider diversity as a critical element of all initiatives; and to ensure that SGA leadership reflects the variety of backgrounds of SGA membership.

Goals:

- Promote and increase awareness of the Taronda Spencer award.
- Increase involvement of members in all geographic areas of Georgia.
- Recruit potential leaders and new members with diverse backgrounds.
- Explore existing models for increasing diversity within the organization.

Budgetary impact: None.

Human impact: The Nominating Committee will lead this effort and may create special task forces as necessary.

Communication and publications

To create a recognizable brand for SGA that includes consistent quality of content and style across all publications and information products.

Goals:

- Revitalize and enhance content of resource library on website and establish a maintenance plan for same.
- Develop a social media strategy.
- Redesign layout and content of newsletter, including development of a style guide and editorial policies.
- Rebrand website with cohesive look and feel, including development of a style guide.
- Explore other methods of soliciting member feedback such as focus groups at the annual meeting.
- Identify innovative and creative ways SGA can support *Provenance*.

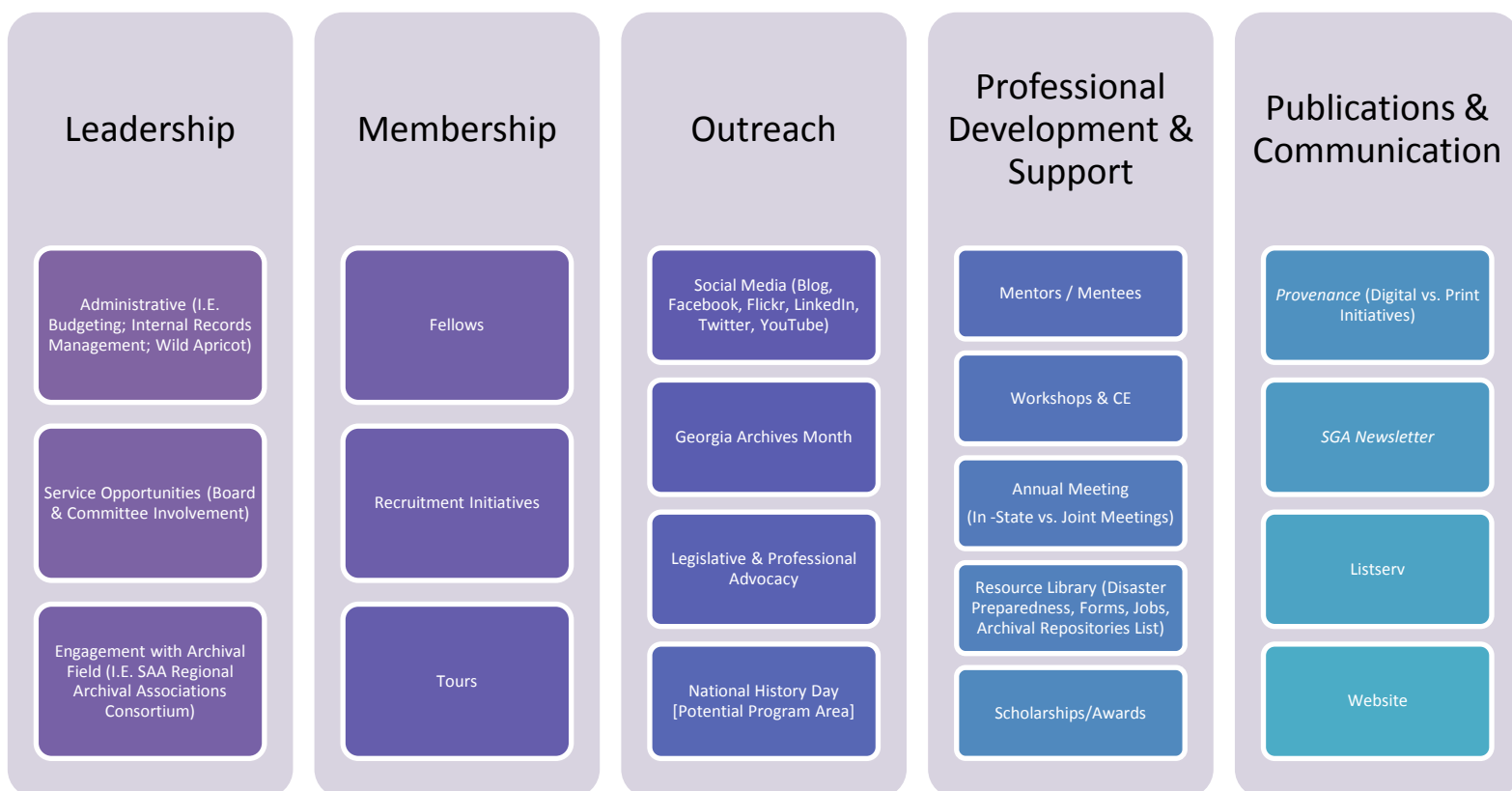
Budgetary impact: There will be one-time costs associated with the redesign of the newsletter template.

Human impact: Newsletter Editor/Assistant Editor, Website Manager/Assistant Manager, and Outreach Manager/Co-Manager will be responsible for leading new endeavors in this area. Members may be recruited to assist with editorial projects.

Appendix A: SWOT Analysis

Society of Georgia Archivists Strategic Planning Task Force

Preliminary Organizational Assessment



Strengths:

- Organizational transparency and transparency of leadership (ease of finding information regarding by-laws, administrative handbook, minutes, budget, etc.)
- Efforts to document organization's own history
- Many service (leadership) opportunities for members
- Robust database for handling membership and other details (Wild Apricot as a good investment)
- Offer a variety of membership benefits—tours, workshops, networking opportunities, scholarships, resource library, etc. (Very diversified compared to some organizations.) ***SGA offers a good "return on value" when comparing its benefits to its cost of membership.***
- Social media presence increases our relevancy
- Very strong "suite" of professional development activities (mentor program, workshops, annual meeting, resource library, etc.)
- Established and robust communication venues...*Provenance* recognized across the profession as a quality scholarly publication. Digital *Provenance* initiatives are a strength, as well.
- Established Annual Meeting (well organized, recognized as successful as evidenced by other organizations' willingness to collaborate with us.)
- SGA's efforts at legislative and professional advocacy are essential and indicate a certain level of "environmental awareness" in our current economy and political landscape

Weaknesses:

- Internal records management (particularly born-digital records)
- Recruitment initiatives possibly lack a focus on increasing diversity within the profession (starting to be addressed, however...i.e. Taronda Spencer Award is a great start.)
- We recognize established members of the profession (i.e. Fellows,) but we could maybe offer more recognition for those breaking into the field? (i.e. Rookie of the Year?)
- While we do actively participate with archival field at large, we need to solidify our relationship with RAAC by deciding how a representative from SGA is selected
- Social Media participation might spread us too thin unless we develop strategies for how we use each tool (frequency of updates, type of content, etc.) How do we maximize audience engagement?
- Need to “flesh out” vision and mission statements...
- Are we “leadership heavy?” Can we encourage more member contributions? More member presence on the website?
- Resource Library on website would probably be expanded and/or needs to be monitored occasionally to keep it updated
- Can we better utilize SGA’s calendar (or create a calendar) to broadcast events at archives *across* the state? Is this a communication gap?
- Scholarship/Award sustainability “plans” need to be better articulated

Questions:

- Would National History Day fit into the Outreach Category as its own initiative?
- Aspects of GAM are both strengths and weaknesses—while it is a great advocacy initiative, what are the statistics with regards to organizational participation? Public participation? Does GAM capture metrics necessary to gauge success or lack of success?
- In a world of social media (blogs, etc.), is the *SGA Newsletter* still relevant? (Not saying it isn’t! Just wondering if we have any readership metrics to gauge its value.)
- What are SGA’s plans for its “savings?” Money market account, etc...?

Appendix B: Membership Survey

SGA Strategic Planning 2014

How many years have you worked in the archival profession?

Answer Options	Response Count
	93
<i>answered question</i>	93
<i>skipped question</i>	9

Number	Response Date	Response Text	Categories
1	Nov 18, 2014 9:44 PM	18	
2	Nov 18, 2014 5:06 PM	7	
3	Nov 14, 2014 7:30 PM	10	
4	Nov 14, 2014 5:57 PM	7	
5	Nov 14, 2014 4:03 PM	22	
6	Nov 13, 2014 7:58 PM	3	
7	Nov 13, 2014 7:35 PM	30	
8	Nov 13, 2014 7:24 PM	4	
9	Nov 13, 2014 6:43 PM	8	
10	Nov 13, 2014 6:37 PM	20	
11	Nov 13, 2014 6:23 PM	25	
12	Nov 13, 2014 6:21 PM	7	
13	Nov 13, 2014 6:10 PM	10	
14	Nov 13, 2014 5:43 PM	2	
15	Nov 13, 2014 5:35 PM	3	
16	Nov 13, 2014 5:30 PM	6	
17	Oct 7, 2014 5:25 PM	24	
18	Sep 18, 2014 3:30 PM	12	
19	Sep 16, 2014 12:21 PM	10 years	
20	Sep 15, 2014 7:40 PM	20	
21	Sep 15, 2014 6:58 PM	1	
22	Sep 15, 2014 6:46 PM	21 years	

23	Sep 15, 2014 6:25 PM	3
24	Sep 15, 2014 3:51 PM	14
25	Sep 15, 2014 2:53 PM	None - Technically digital asset management 6 years
26	Sep 15, 2014 2:47 PM	4
27	Sep 15, 2014 2:39 PM	3
28	Sep 15, 2014 1:48 PM	15
29	Sep 15, 2014 1:47 PM	10
30	Sep 15, 2014 1:39 PM	3
31	Sep 15, 2014 1:26 PM	6
32	Sep 15, 2014 1:19 PM	1.5 years
33	Sep 15, 2014 1:13 PM	30
34	Sep 15, 2014 1:05 PM	30
35	Sep 15, 2014 1:04 PM	4
36	Aug 22, 2014 5:09 PM	20
37	Aug 20, 2014 3:46 PM	12 years
38	Aug 20, 2014 1:07 PM	2
39	Aug 19, 2014 8:15 PM	14
40	Aug 18, 2014 9:41 PM	4
41	Aug 18, 2014 9:24 PM	6
42	Aug 18, 2014 4:56 PM	20
43	Aug 18, 2014 1:25 PM	10
44	Aug 18, 2014 12:06 PM	30
45	Aug 18, 2014 12:16 AM	17
46	Aug 12, 2014 6:07 PM	15
47	Aug 8, 2014 8:17 PM	25* before retirement
48	Aug 8, 2014 4:16 PM	2
49	Aug 7, 2014 5:39 PM	0
50	Aug 6, 2014 9:39 PM	15
51	Aug 6, 2014 8:29 PM	30
52	Aug 6, 2014 6:23 PM	8 years
53	Aug 6, 2014 3:49 PM	I am a volunteer with local historical society for 35 + years
54	Aug 6, 2014 3:21 PM	6
55	Aug 6, 2014 2:15 PM	10
56	Aug 6, 2014 1:53 PM	13
57	Aug 5, 2014 8:40 PM	33

58	Aug 5, 2014 8:29 PM	25
59	Aug 5, 2014 7:41 PM	16
60	Aug 5, 2014 7:13 PM	15
61	Aug 5, 2014 3:48 PM	20
62	Aug 5, 2014 3:08 PM	33
63	Aug 5, 2014 3:03 PM	17
64	Aug 5, 2014 2:22 PM	5 years
65	Aug 5, 2014 2:17 PM	6
66	Aug 5, 2014 2:15 PM	17
67	Aug 5, 2014 1:43 PM	Approx. 7 years
68	Aug 5, 2014 1:29 PM	12
69	Aug 5, 2014 1:28 PM	7
70	Aug 5, 2014 1:27 PM	13
71	Aug 5, 2014 1:22 PM	16 years
72	Aug 5, 2014 1:21 PM	3
73	Aug 5, 2014 1:14 PM	5
74	Aug 5, 2014 1:12 PM	6
	Aug 5, 2014 12:59 PM	3
75	Aug 5, 2014 12:52 PM	18
76	Aug 5, 2014 12:40 PM	45
77	Aug 5, 2014 12:21 PM	8
78	Aug 5, 2014 12:10 PM	10
79	Aug 5, 2014 12:04 PM	12
80	Aug 5, 2014 11:57 AM	17
81	Aug 5, 2014 8:34 AM	18
82	Aug 5, 2014 2:24 AM	28
83	Aug 5, 2014 1:51 AM	24
84	Aug 5, 2014 12:04 AM	1.5
85	Aug 5, 2014 12:02 AM	18 years
86	Aug 4, 2014 11:55 PM	32
87	Aug 4, 2014 11:50 PM	7
88	Aug 4, 2014 11:50 PM	4 years
89	Jul 21, 2014 8:27 PM	20
90	Jul 17, 2014 9:22 PM	8
91	Jul 14, 2014 2:08 PM	7 years
92	Jul 14, 2014 11:18 AM	8
93	AM	

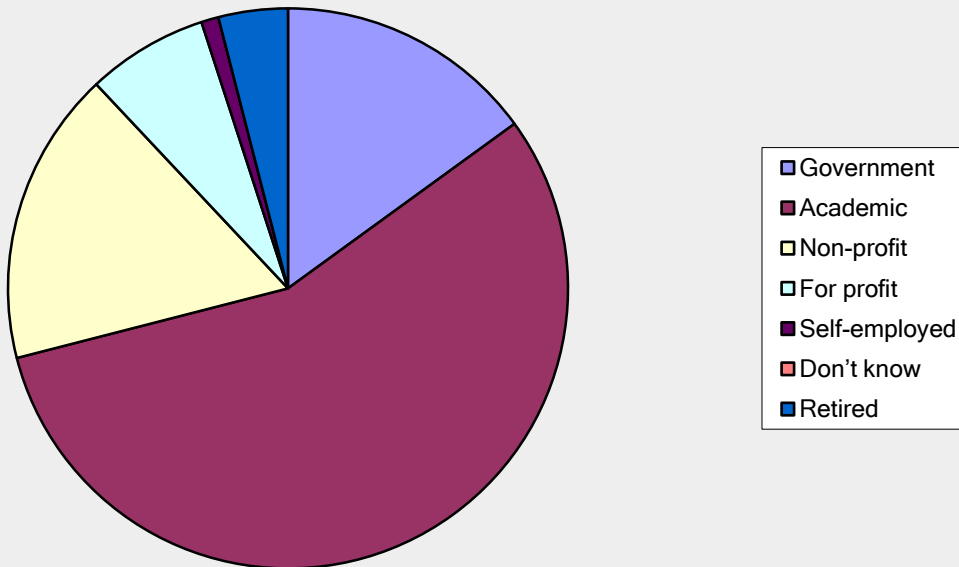
SGA Strategic Planning 2014

Which of the following best describes your current employer?

Answer Options	Response Percent	Response Count
Government	15.0%	15
Academic	56.0%	56
Non-profit	17.0%	17
For profit	7.0%	7
Self-employed	1.0%	1
Don't know	0.0%	0
Retired	4.0%	4
Other (please specify)		3
<i>answered question</i>		100
<i>skipped question</i>		2

Number	Response Date	Other (please specify)	Categories
1	Aug 18, 2014 12:16 AM	public library	
2	Aug 8, 2014 4:16 PM	public library	
3	Aug 5, 2014 8:40 PM	Education	

Which of the following best describes your current employer?

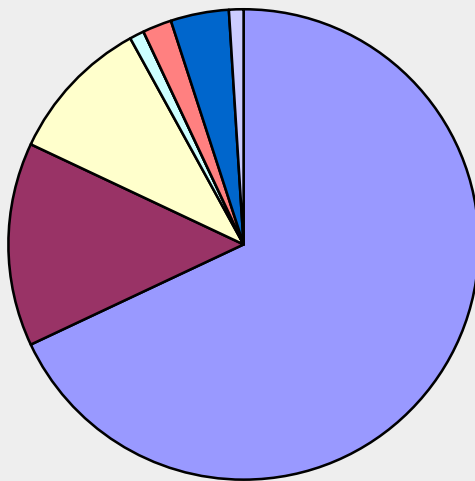


SGA Strategic Planning 2014

Which of the following categories best describes your employment status?

Answer Options	Response Percent	Response Count
Employed as a professional, working 40 or more hours per week	68.0%	68
Employed as a professional, working 1-39 hours per week	14.0%	14
Employed as a para-professional, working 40 or more hours per week	10.0%	10
Employed as a para-professional, working 1-39 hours per week	1.0%	1
Not employed, looking for work	0.0%	0
Not employed, NOT looking for work	2.0%	2
Retired	4.0%	4
Student	1.0%	1
answered question		100
skipped question		2

Which of the following categories best describes your

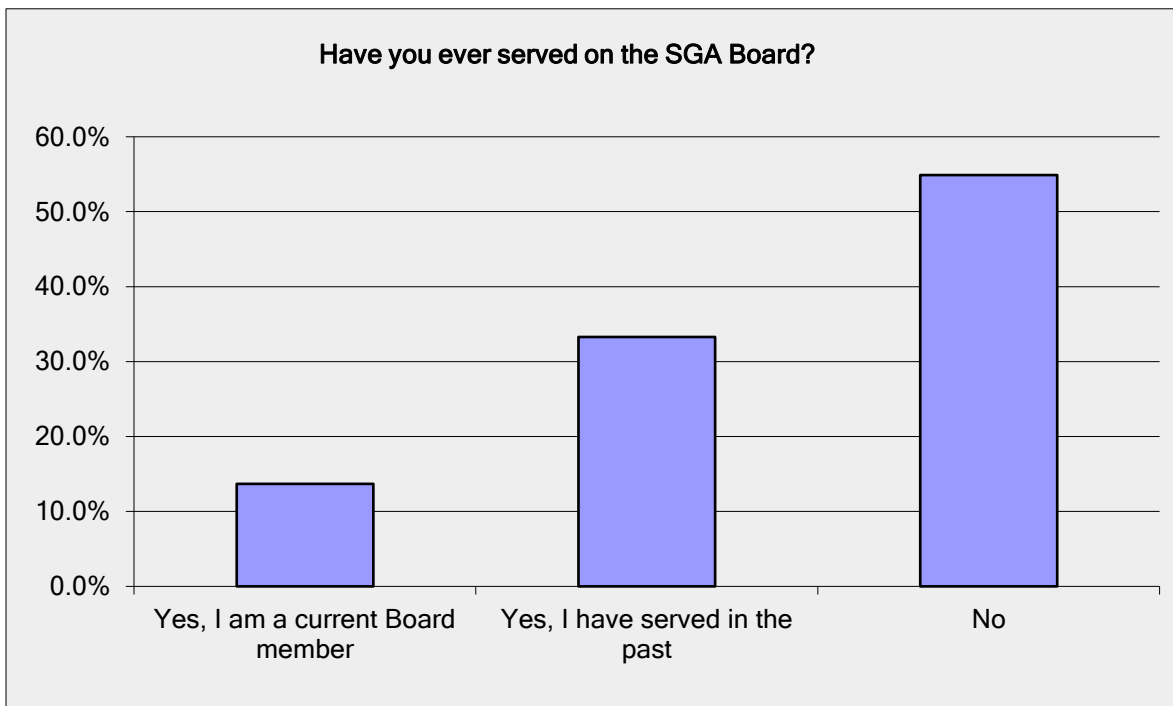


- Employed as a professional, working 40 or more hours per week
- Employed as a professional, working 1-39 hours per week
- Employed as a para-professional, working 40 or more hours per week
- Employed as a para-professional, working 1-39 hours per week
- Not employed, looking for work
- Not employed, NOT looking for work
- Retired
- Student

SGA Strategic Planning 2014

Have you ever served on the SGA Board?

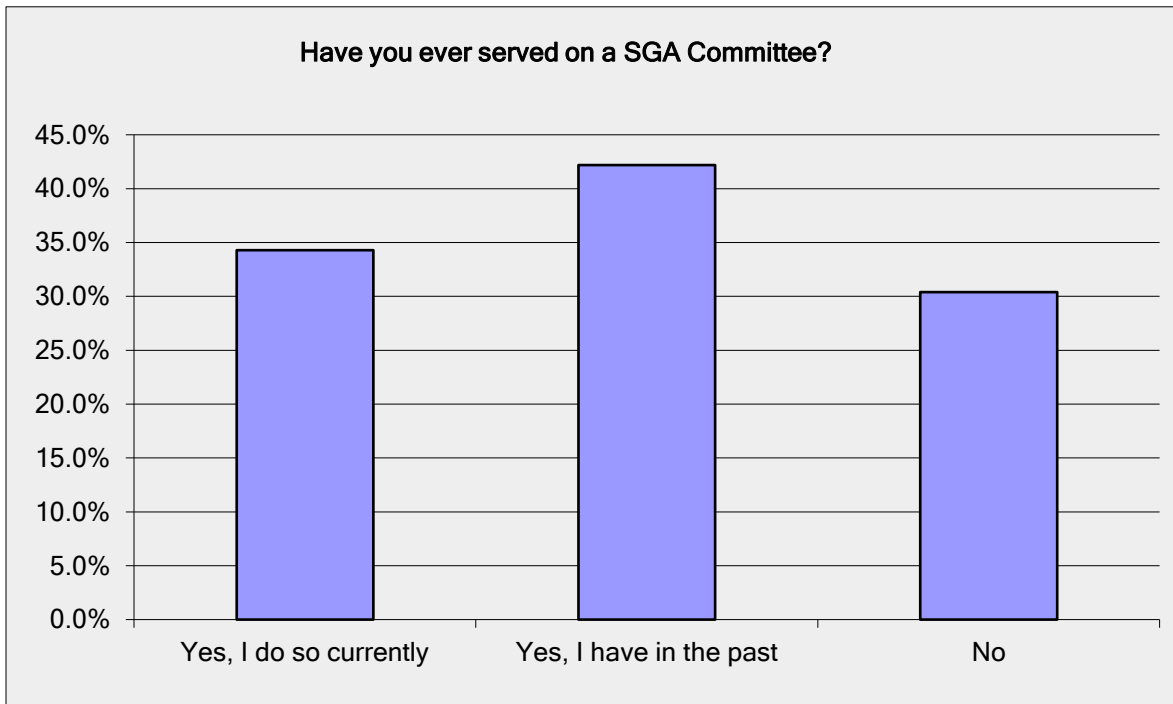
Answer Options	Response Percent	Response Count
Yes, I am a current Board member	13.7%	14
Yes, I have served in the past	33.3%	34
No	54.9%	56
<i>answered question</i>		102
<i>skipped question</i>		0



SGA Strategic Planning 2014

Have you ever served on a SGA Committee?

Answer Options	Response Percent	Response Count
Yes, I do so currently	34.3%	35
Yes, I have in the past	42.2%	43
No	30.4%	31
<i>answered question</i>		102
<i>skipped question</i>		0



SGA Strategic Planning 2014

Please describe the reason you decided to join a SGA Committee or become a Board Officer.

Answer Options	Response Count
	71
<i>answered question</i>	71
<i>skipped question</i>	31

Number	Response Date	Response Text	Categories
1	Nov 18, 2014 9:44 PM	SGA is a great, nurturing organization.	
2	Nov 14, 2014 7:30 PM	To become more involved and get to know more people	
3	Nov 14, 2014 5:57 PM	For professional development and service to the profession.	
4	Nov 14, 2014 4:03 PM	Pam Hackbart-Dean convinced me to take on a two year term as features editor of the SGA Newsletter.	
5	Nov 13, 2014 8:30 PM	To get more involved, to be active in a great organization and to learn more.	
6	Nov 13, 2014 7:35 PM	to meet SGA members I do not know. To learn what is going on in the Atlanta-area archival world.	
7	Nov 13, 2014 7:24 PM	There is a lot to be said for mentorship. I was encouraged by Cheryl Oestreicher to get involved with SGA, so I sent an email to Lynette with a ranked list of committee positions I was interested in, and was selected as assistant outreach manager. If it wasn't for having someone pushing me to become more involved, I fear I would have remained complacent in not participating.	
8	Nov 13, 2014 6:43 PM	to network with other local professionals	
9	Nov 13, 2014 6:37 PM	I conduct research is developing tools to support Digital Archives and Records management. I need the advise of those I wish to serve as to what they need and their collaboration in developing such tools.	
10	Nov 13, 2014 6:23 PM	Very active professionally at the time, well acquainted with my co-board members	
11	Nov 13, 2014 6:10 PM	Networking, both for greater success in the job market, and for greater access to information and cooperation in doing the job.	
12	Oct 7, 2014 5:25 PM	Was invited to participate and accepted because I knew I could contribute.	
13	Sep 18, 2014 3:30 PM	I decided to join a committee so I could be a part of the inner structure of the organization and offer my expertise and experiences. Also because it is such a good organization with great people.	
14	Sep 16, 2014 12:21 PM	I wanted to be an active member of SGA.	
15	Sep 15, 2014 8:46 PM	.	
16	Sep 15, 2014 7:40 PM	I wanted to help the organization	
17	Sep 15, 2014 7:29 PM	Enjoyed meeting and serving SGA members	
18	Sep 15, 2014 2:53 PM	To gain experience and network	
19	Sep 15, 2014 2:39 PM	To learn about opportunities for continuing archival education.	

20	Sep 15, 2014 2:33 PM	N/A
21	Sep 15, 2014 1:48 PM	Networking and contributing back to the profession
22	Sep 15, 2014 1:47 PM	Felt my interest in the topics of my committee would be of benefit to the SGA
23	Sep 15, 2014 1:19 PM	I just started my MLIS and am employed as an archivist; I wanted to expand my professional network and gain experience with another side of my profession to round out my education.
24	Sep 15, 2014 1:13 PM	To contribute to the profession; because my employer encouraged and supported such forms of service; because professional service contributed to advancement in rank/status at my institution.
25	Sep 15, 2014 1:05 PM	service
26	Aug 20, 2014 3:46 PM	I joined a SGA Committee because it was important to me share and develop my leadership skills and it was a great way for me to provide my knowledge and commitment to the profession.
27	Aug 19, 2014 8:15 PM	As someone new to Georgia, I wanted to become more involved with and meet archivists from around the state.
28	Aug 18, 2014 9:41 PM	I had learned of SGA's excellent reputation as one of the strongest regional archival associations even before I moved to Georgia. I wanted to get involved and do my part to ensure the continued strength of the organization, and to form relationships with other archivists working in the state.
29	Aug 18, 2014 9:24 PM	I joined SGA at the urging of my colleagues because I felt it would provide me with the best continuing education and interaction with fellow archivists.
30	Aug 18, 2014 2:50 PM	networking
31	Aug 18, 2014 1:25 PM	To increase my awareness of the profession in the state
32	Aug 18, 2014 12:06 PM	opportunity for service to the profession.
33	Aug 18, 2014 12:16 AM	To
34	Aug 17, 2014 10:38 PM	To encourage growth in our scholarship programs.
35	Aug 12, 2014 6:07 PM	Service to the professional community is important to me, and SGA is an excellent organization.
36	Aug 8, 2014 8:17 PM	Important to me, to SGA TO serve: as board member / director, on by-laws revision comm., newsletter editor, mng ed journal
37	Aug 8, 2014 4:16 PM	Meet colleagues, have a resource for questions, to gain experience, to hopefully serve in a leadership position at some point.
38	Aug 7, 2014 5:39 PM	To more actively participate in the Society.
39	Aug 6, 2014 9:39 PM	To become more involved and needed it for faculty promotion.
40	Aug 6, 2014 8:29 PM	to be involved with fellow archival professionals in the state
41	Aug 6, 2014 3:49 PM	Had the time and interest
42	Aug 6, 2014 3:21 PM	Professional service, a desire to contribute, and an opportunity to learn more about other archival institutions in the state.

43	Aug 5, 2014 7:13 PM	To serve the profession, obtain organizational experience, and make connections with colleagues.
44	Aug 5, 2014 3:48 PM	To become more involved in the Archival community.
45	Aug 5, 2014 3:08 PM	To contribute to the profession, grow in knowledge, and connect with others in the area.
46	Aug 5, 2014 3:03 PM	To be more involved in organization, meet other archivists, other co-workers were involved
47	Aug 5, 2014 2:22 PM	Experience, networking.
48	Aug 5, 2014 2:17 PM	To become more involved in the profession.
49	Aug 5, 2014 2:15 PM	Provenance Editorial Board. I was asked and it's an important way to advance the profession (easy to do with electronic media, too).
50	Aug 5, 2014 1:57 PM	to forward career
51	Aug 5, 2014 1:43 PM	SGA's leadership is very approachable and opportunities to serve are abundant. I feel that I can participate in the profession easily through SGA.
52	Aug 5, 2014 1:29 PM	Experience, networking
53	Aug 5, 2014 1:27 PM	Professional development opportunity; chance to network with colleagues; help organization operate smoothly
54	Aug 5, 2014 1:22 PM	I wanted to be more involved in SGA and serve my profession. It's hard to be active though from so far away.
55	Aug 5, 2014 1:14 PM	To help out and see how things work behind the scenes.
56	Aug 5, 2014 1:12 PM	I wanted to help out with an organization that I enjoy being a part of. Also, being involved with SGA committees helps with promotions, etc.
57	Aug 5, 2014 12:52 PM	Contribute to profession. Build resume and experience. Get to know colleagues.
58	Aug 5, 2014 12:40 PM	Desire to serve the archival community
59	Aug 5, 2014 12:21 PM	to network with other local professionals
60	Aug 5, 2014 12:10 PM	Aid a good organization, also work expectations
61	Aug 5, 2014 11:57 AM	Contribute to the profession; professional development; networking
62	Aug 5, 2014 8:34 AM	I wanted to be involved at the local level.
63	Aug 5, 2014 2:24 AM	I believe that professional engagement is important.
64	Aug 5, 2014 1:51 AM	As a conservator and a preservation manager, I wanted to represent my profession and the Georgia Archives.
65	Aug 5, 2014 12:04 AM	Involvement with professional organizations is vital to continuing education and career development. At the coaxing of my mentor, I dove right in to committee work.
66	Aug 5, 2014 12:02 AM	Give back to the organization
67	Aug 4, 2014 11:55 PM	Networking with other professionals and desire to give back to the profession through service
68	Aug 4, 2014 11:50 PM	I joined an SGA committee to get involved and network with other archivists.
69	Jul 21, 2014 8:27 PM	Desire to contribute to and help sustain our state's professional organization; meet and work alongside colleagues from around the state/networking; broaden my knowledge and understanding of Georgia's archival collections and repositories

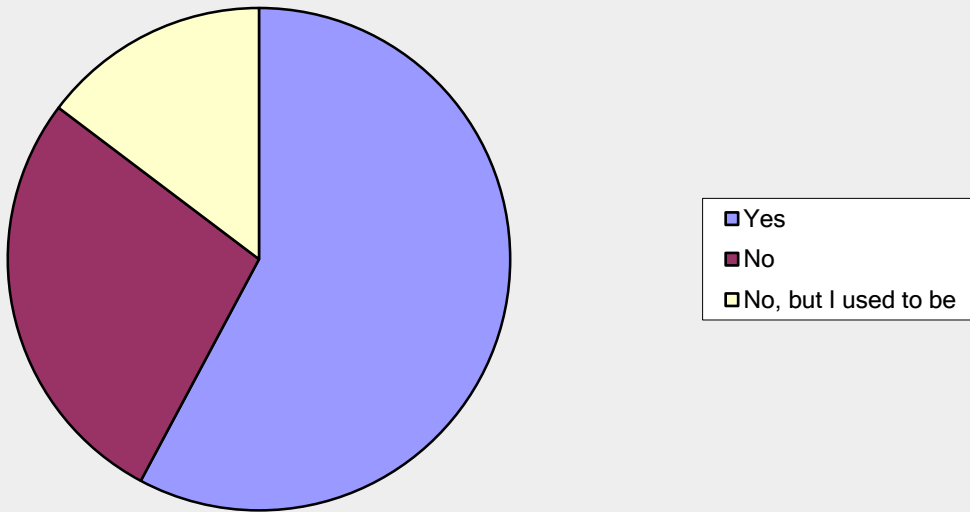
- 70 Jul 17, 2014 9:22 PM I wanted to serve the local archival community, and also get to know more of my colleagues in Georgia.
- 71 Jul 14, 2014 2:08 PM SGA offers "easy access" to participating in professional development and leadership opportunities.

SGA Strategic Planning 2014

Are you also a member of SAA?

Answer Options	Response Percent	Response Count
Yes	57.8%	59
No	27.5%	28
No, but I used to be	14.7%	15
<i>answered question</i>		102
<i>skipped question</i>		0

Are you also a member of SAA?



SGA Strategic Planning 2014

If you discontinued your membership in SAA, please share why.

Answer Options	Response Count
	21
<i>answered question</i>	21
<i>skipped question</i>	81

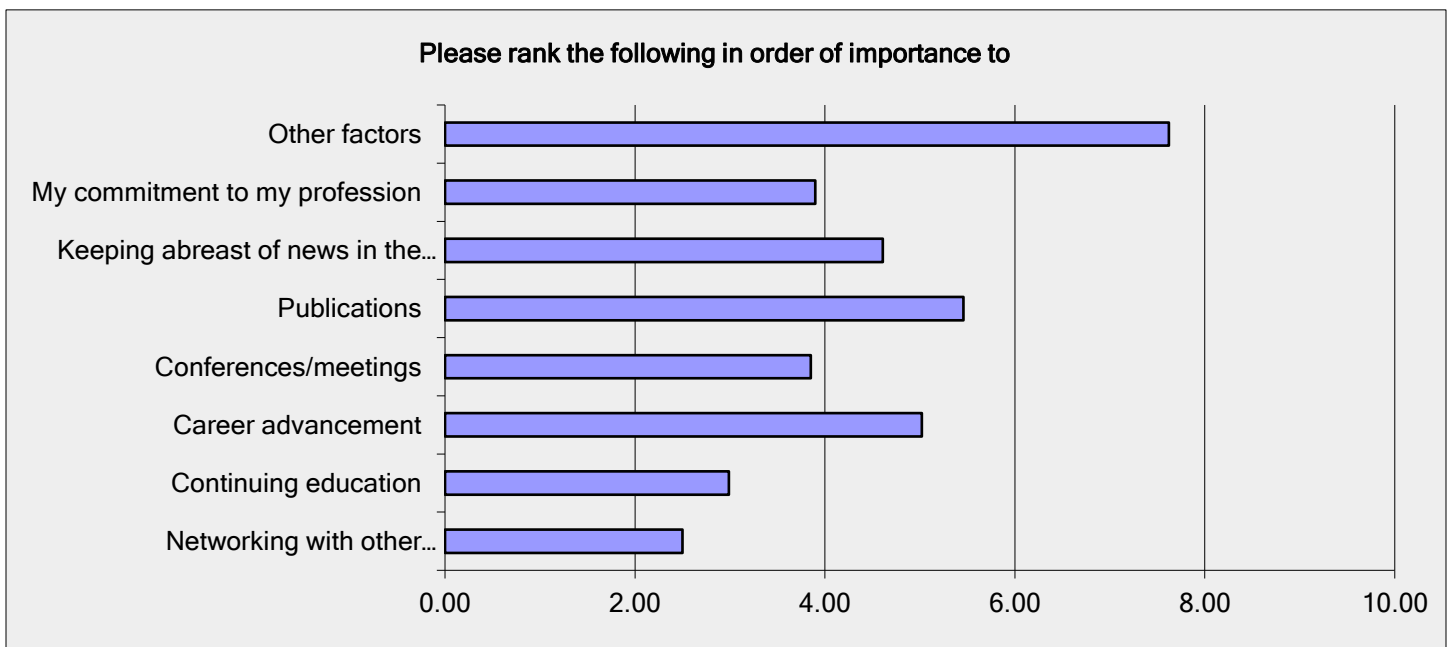
Number	Response Date	Response Text	Categories
1	Nov 14, 2014 4:03 PM	Currently a member of SAA, but cost could be a reason to discontinue membership.	
2	Nov 13, 2014 6:23 PM	When I retired they did not have a retired membership rate; I became more active with organizations	
3	Nov 13, 2014 6:10 PM	Expense	
4	Oct 7, 2014 5:25 PM	I'm not an archivist, just work closely with them	
5	Sep 18, 2014 3:30 PM	I could no longer afford the annual fees	
6	Sep 15, 2014 7:40 PM	No time to be involved and benefits don't seem very tangential	
7	Sep 15, 2014 6:46 PM	Expense	
8	Sep 15, 2014 2:33 PM	N/A	
9	Aug 20, 2014 3:46 PM	The membership fees are too expensive.	
10	Aug 18, 2014 1:25 PM	not a millionaire	
11	Aug 18, 2014 12:16 AM	Library where I worked was institutional member and I retired	
12	Aug 8, 2014 8:17 PM	When I retired they had no provision for retired mbrsp or mtg reg., too expensive. Needs changed.	
13	Aug 6, 2014 2:15 PM	The cost of membership compared to the benefits.	
14	Aug 5, 2014 8:29 PM	too expensive and little return on membership costs	
15	Aug 5, 2014 7:41 PM	Lack of budget	
16	Aug 5, 2014 7:13 PM	The cost, and I generally don't attend the annual conference. My institution is a member so we get the publications.	
17	Aug 5, 2014 3:03 PM	I am currently, but resisted until 2 years ago. So approximately 15 years as professional archivist without being an SAA member. Hadn't joined because of the high expense for very little to no return. Finally felt I needed to join for rank advancement.	
18	Aug 5, 2014 1:22 PM	It's hard for me to get to SAA but about once every ten or 12 years when it's within driving distance because I have to get surgery to fly (very weird ears) so it's cheaper just to attend as a non member.	
19	Aug 5, 2014 12:52 PM	My institution is a member, so I don't feel the need to belong individually.	

20	Aug 5, 2014 11:57 AM	Have not but considered it - sometimes SAA gets distracted with sociological navel gazing rather the improving practice
21	Jul 14, 2014 11:18 AM	Not as involved, cost.

SGA Strategic Planning 2014

Please rank the following in order of importance to your decision to join SGA. (1= most important 8 = least important)
Please note you may only assign one rank per item. *Make your choices by numbering or dragging and dropping your selections. As you assign ranks the list will automatically reorder itself.

Answer Options	1	2	3	4	5	6	7	8	Rating Average	Response Count
Networking with other professionals	35	22	22	14	3	4	1	1	2.50	102
Continuing education	25	19	22	16	10	4	5	0	2.99	101
Career advancement	4	12	10	9	20	19	20	8	5.02	102
Conferences/meetings	8	18	17	18	27	7	7	0	3.85	102
Publications	2	4	7	12	14	35	26	2	5.46	102
Keeping abreast of news in the field	7	12	13	19	8	18	24	1	4.61	102
My commitment to my profession	19	15	10	12	19	13	14	0	3.90	102
Other factors	2	0	1	2	1	2	5	89	7.62	102
<i>answered question</i>										102
<i>skipped question</i>										0



SGA Strategic Planning 2014

If you ranked "other factors" highly, please list these factors.

Answer Options	Response Count
	4
<i>answered question</i>	4
<i>skipped question</i>	98

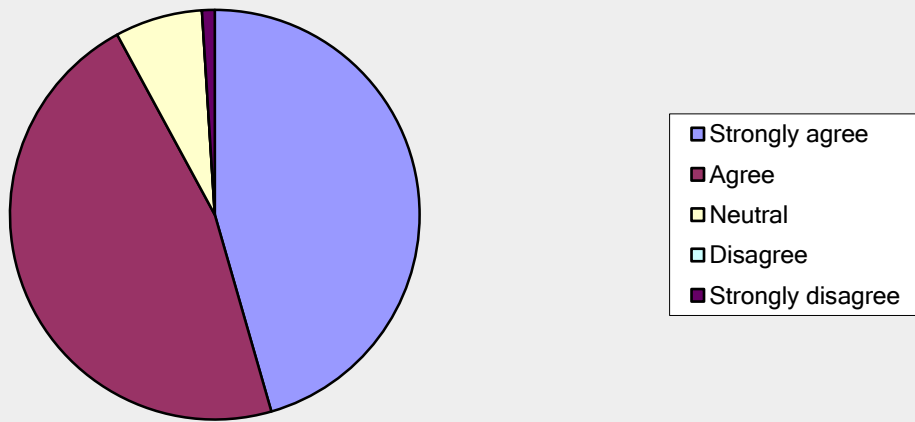
Number	Response Date	Response Text	Categories
1	Sep 15, 2014 8:46 PM	volunteer responsibilities to the Goodwin History Society and The Pythagoras Masonic Lodge No 41.	
2	Sep 15, 2014 3:51 PM	I joined SGA because of Provenance. While I enjoy reading the newsletter and e-mail list, the sole reason for my membership is to receive Provenance. (I don't live or work in Georgia). The rest of the factors listed don't really apply and could not be ranked	
3	Aug 18, 2014 9:41 PM	I didn't rank it highly, but I would say that SGA's strong reputation was important in my decision to join.	
4	Jul 14, 2014 2:08 PM	#9, #13, #14 wouldn't allow me to rank...	

SGA Strategic Planning 2014

Please rate how well you think SGA fulfills it's statement of purpose (below) as listed in the bylaws. "The Society of Georgia Archivists provides an effective means of communication and cooperation among all individuals employed in archives and manuscript repositories in the State; promotes the preservation and use of the manuscript and 'archival resources of the state; increases the knowledge of archival theories and practices; and cooperates with professionals in related disciplines"

Answer Options	Response Percent	Response Count
Strongly agree	45.5%	46
Agree	46.5%	47
Neutral	6.9%	7
Disagree	0.0%	0
Strongly disagree	1.0%	1
<i>answered question</i>		101
<i>skipped question</i>		1

Please rate how well you think SGA fulfills it's statement of purpose (below) as listed in the bylaws. "The Society of Georgia Archivists provides an effective means of communication and cooperation among all individuals employed in ar



SGA Strategic Planning 2014

If you do not think that SGA is fulfilling its statement of purpose, please explain why and list any areas where you think we can improve.

Answer Options	Response Count
	13
<i>answered question</i>	13
<i>skipped question</i>	89

Number	Response Date	Response Text	Categories
1	Sep 15, 2014 2:33 PM	N/A	
2	Sep 15, 2014 1:48 PM	I think SGA does a great job in education. Exciting to see Provenance publication online this year. I'd like more communication via the Listserv about SGA activities and archival issues, service & advocacy projects going on around the State.	
3	Aug 22, 2014 5:09 PM	Not enough communication; I am not aware of what it does to promote preservation and use; it probably does a good job of increasing knowledge; I am unaware of its cooperation with professionals	
4	Aug 18, 2014 9:41 PM	I do strongly think that SGA is fulfilling its statement of purpose. But the distinction between archives and manuscript repositories strikes me as perhaps outdated? I think it would be strategic for SGA to increase its partnerships with professional in related disciplines, particularly in records management and digital curation--for the purposes of outreach and advocacy (good allies = more bargaining power) and also because it seems like the archival profession is moving closer to these allied fields/groups.	
5	Aug 18, 2014 12:16 AM	I think we can do more to share our expertise with not-for -profits and do more collaboration with related organizations like Ga. Genealogical Society, Ga. Historical Society, Ga Trust for Historic Pres and local societies	
6	Aug 8, 2014 4:16 PM	I would really love to see a robust archive of free past webinars to help fulfill the "increases knowledge of archival theories and practices" portion of the statement of purpose.	

- 7 **Aug 5, 2014 8:40 PM** The SGA list is really quiet. It would be very interesting if a group of people got together to generate really good discussion of archival issues without the angst of the A&A List. (And if it's a good list for members only, it might just drive membership!) Needs good guidelines and a bit of moderation (nudging people who post off topic, even to the point of unsubscribing them if they go way off the reservation.) I'm less enthusiastic about social media (FB, Twitter) over email.
- Would like to see the annual meeting longer to justify the investment in travel time. Two full days, returning home on Saturday a.m.
- 8 **Aug 5, 2014 7:13 PM** I think SGA fulfills its purpose very well.
- 9 **Aug 5, 2014 1:22 PM** Maybe a little state wide guidance on Archives Space. We need to move together on this.
- 10 **Aug 5, 2014 1:21 PM** I'd like to see more educational workshops offered.
- 11 **Aug 5, 2014 12:59 PM** Emphasis implies large, well-staffed and well-funded facilities. Does not fully indicate that archives are important on a smaller scale and local level.
- 12 **Aug 5, 2014 12:21 PM** I have had major problems getting my email address added to the SGA listserv. I have contacted people whose information is included on the website but have received no response. The Treasurer has helped me before with this problem, and thought we thought the problem was fixed, it actually is still occurring. PLEASE someone get back to me so I can get added to the listserv; I am missing key information, including early bird registration for the November conference. It is very frustrating. Also, there is no footer at the bottom of listserv messages that directs you who to contact for listserv issues, so I am caught in a loop of not knowing how to get this resolved.

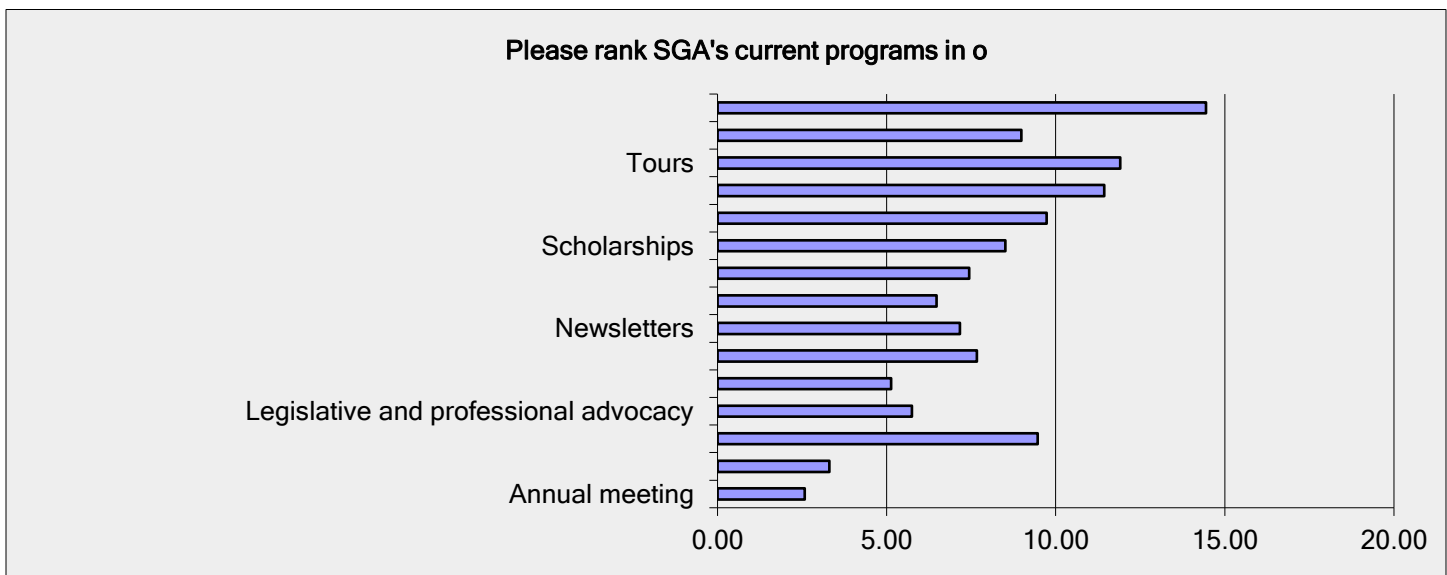
13 Aug 5, 2014 12:04 AM

I think SGA does a good job of communicating with CURRENT members...but I haven't personally seen much by way of recruitment/outreach to archivists who are not yet members. I was brought in by word-of-mouth, mentorship, and research related to my MLIS program. It may also be beneficial for current members to update and flesh out their member bios on the SoGA site; I haven't met many members yet, but a stronger online presence would help me feel more connected.

SGA Strategic Planning 2014

Please rank SGA's current programs in order of importance to you. (1= most important 14 = least important) Please note you may only assign one rank per item. *Make your choices by numbering or dragging and dropping your selections. As you assign ranks the list will automatically reorder itself.

Answer Options	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Rating Average	Response Count
Annual meeting	49	25	7	4	5	3	3	2	2	0	0	0	0	1	1	2.58	102
Educational workshops	19	28	22	9	7	6	4	3	2	2	0	0	0	0	0	3.31	102
Fellows program	0	2	4	9	9	4	5	6	7	12	7	5	12	14	6	9.47	102
Legislative and professional advocacy	5	14	12	10	16	9	7	7	10	2	1	3	4	0	2	5.75	102
Listserv	7	14	19	11	8	10	11	8	5	5	1	1	1	0	1	5.13	102
Mentoring program	0	3	7	8	7	11	11	12	15	9	9	7	1	2	0	7.67	102
Newsletters	3	3	5	12	11	9	12	13	9	8	11	1	3	1	1	7.17	102
Provenance	9	4	7	11	7	13	7	13	10	13	5	2	0	1	0	6.48	102
Resource Library (Disaster Preparedness, Forms Forum, Job Board, Archival Repositories List)	5	2	4	8	10	7	12	10	13	16	11	1	2	1	0	7.44	102
Scholarships	2	1	3	8	8	6	10	8	8	14	14	15	4	0	1	8.51	102
Service opportunities	0	1	3	2	6	9	3	7	6	7	25	19	12	1	1	9.73	102
Social media	0	1	3	0	1	2	3	5	1	4	10	34	24	12	2	11.43	102
Tours	0	0	2	2	1	3	3	3	4	6	4	8	30	33	3	11.91	102
Website	2	4	4	7	6	9	11	5	10	3	4	6	5	26	0	8.98	102
Other programs	1	0	0	1	0	1	0	0	0	1	0	0	4	10	84	14.44	102
<i>answered question</i>																	102
<i>skipped question</i>																	0

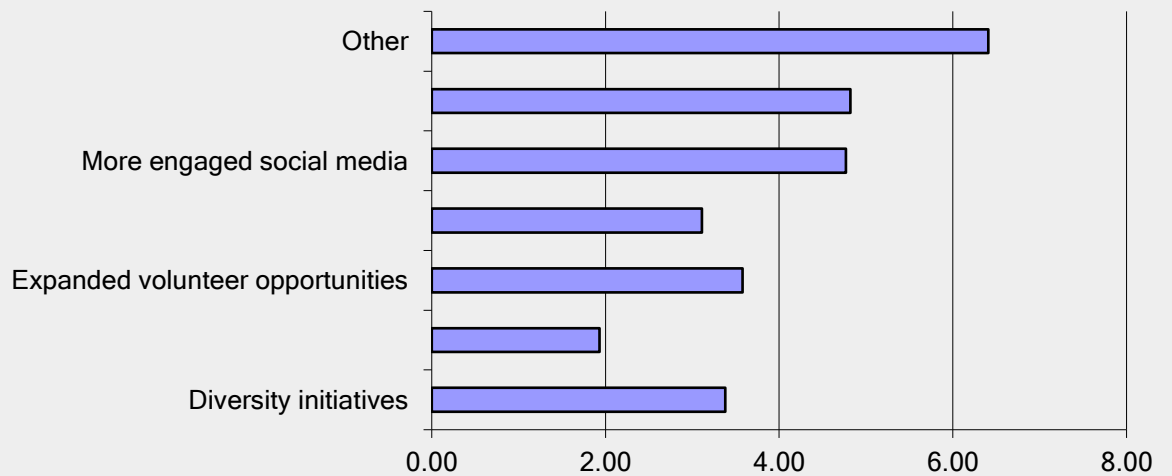


SGA Strategic Planning 2014

Please rank the following areas of potential organizational growth in order of importance to you. (1= most important 7 = least important) Please note you may only assign one rank per item.

Answer Options	1	2	3	4	5	6	7	Rating Average	Response Count
Diversity initiatives	15	29	12	17	7	14	6	3.38	100
Digital initiatives (i.e., leadership and support around the development of digital archives programs in GA)	54	21	12	6	6	0	1	1.93	100
Expanded volunteer opportunities	6	14	35	21	11	11	2	3.58	100
Improved communication about events and opportunities	15	21	19	29	15	1	0	3.11	100
More engaged social media	0	5	11	14	44	24	2	4.77	100
Recognition for newer archivists	4	7	11	13	15	46	4	4.82	100
Other	6	3	0	0	2	4	85	6.41	100
<i>answered question</i>									100
<i>skipped question</i>									2

Please rank the following areas of potential organizational growth in order of importance to you. (1= most important 7 = least important) Please note you may only assign one rank per item.



SGA Strategic Planning 2014

If you chose "Other", please explain.

Answer Options	Response Count
	10
<i>answered question</i>	10
<i>skipped question</i>	92

Number	Response Date	Response Text	Categories
1	Oct 7, 2014 5:25 PM	Improved communication of educational opportunities, not just workshops, but for ex., a list of people willing to take on a volunteer for a project or short term learning experience.	
2	Sep 15, 2014 8:46 PM	Getting the job done with the least complications.	
3	Sep 15, 2014 3:51 PM	For questions 13 and 14-- the ranking type question doesn't work for me. For Q13, I ranked (1 through 5) the items that I care (at least a little) about. Since I am out of state, I don't pay attention to the rest so forcing me to rank is throwing off your results. For Q14, I have no interest in ranking any of those things; they're not applicable to my interest in SGA.	
4	Sep 15, 2014 1:47 PM	Professional development opportunities online or via dicussion group	
5	Aug 18, 2014 9:41 PM	Maybe more opportunities for peer-to-peer learning? The educational workshops are top-notch, but perhaps peer-to-peer workshops or more casual social/educational opportunities would be useful?	
6	Aug 18, 2014 9:24 PM	Outreach toward other types of archives. SGA needs to think more outside the Academic Collections box. Much of the collective attention is focused on established institutions. We need to establish the message that archival collections can be found in many places and promote growth in the state for the care and staffing of those lost collections which are not being well served or even recognized.	
7	Aug 5, 2014 3:08 PM	Advocacy (advocating for archives both within our institutions and to the people outside our walls). SGA's grown a lot in this area over the past few years, but I think there's room for more growth.	

- 8** **Aug 5, 2014 2:22 PM**
- The focus of SGA conferences on one theme narrows the interest too much. A range of topics should be offered to generate options for the diverse repositories in the state. The corporate sector is often way overshadowed by the academic sector and advocacy issues. In regards to the tours, it is difficult to justify time off work to 'tour' another archive. Tours as part of the annual conference or in conjunction with workshops may work better. And honestly having the local Atlanta conference in Morrow is disappointing and depressing to say the least! Take advantage of downtown Atlanta and all it has to offer in terms of transportation, hotel, and food options. Why should a conference in Atlanta be treated any different than when the conference is outside of Atlanta? Note that SGA has little to offer visual materials archivists or moving image archivists and so they do not participate--this is something to consider.
- 9** **Aug 5, 2014 2:15 PM**
- "Market based" outreach into communities to develop long-term support for archival profession. "Market based" means listen to how we can serve our communities and let that guide us rather than listening to ourselves alone.
- 10** **Aug 5, 2014 1:57 PM**
- Professional advocacy for higher wages, improved working conditions, and recognition as a skilled profession.

Appendix C: Strategic Priorities: Timetables for Goal Completion

Outreach

To increase public awareness of SGA's programs, to expand capacity for issue-based, short-term advocacy, and to develop a strategic, thoughtful, and ongoing mechanism for outreach to allied organizations, students, and archival professionals in Georgia and the United States.

Goals:

- Explore partnerships and collaborations with allied professional organizations such as the Georgia Humanities Council and National History Day.
- Continue to develop relationships with archival organizations across the national landscape (RAAC).
- Increase the visibility of the President's Award.
- Strengthen outreach to students in archival, library, and public history programs [revise existing method of contacting programs and identify areas where general membership can be more involved].
- Develop general policies for conducting ongoing and issue-based advocacy.

Budgetary impact: Minimal.

Human impact: Will require participation of Outreach Manager and Co-Manager, and the Membership Committee. May require establishment of temporary task forces as needed to develop policies or coordinate projects.

Timetable

2016 Summer:

- [OUTREACH LEAD; MEMBERSHIP SUPPORT] Organize social media and listserv engagement campaigns with specific calls to action and incentives for participating. Social media and listserv engagement should increase the value of SGA membership (and thereby encourage members to renew). Possible ideas:
 - “This Is Archives” Twitter project from National Archives as a model
 - “Ask an Archivist Day” participation
 - Partner with social media managers from allied professional organizations and national archival organizations to plan joint outreach and engagement campaigns
 - Membership Committee can help with social media efforts by participating and encouraging other SGA members to participate
- [OUTREACH LEAD] Engage SGA members in listserv and social media activity in order to define “outreach” in the context of SGA and discover what types of outreach efforts SGA members would like to accomplish (internal outreach, community outreach, regional outreach...)
- [OUTREACH LEAD; MEMBERSHIP SUPPORT] Make initial contact with various history, library science, and archival studies programs to discuss potential avenues for promoting SGA within these programs
- [PRESIDENT] Call attention to the President’s Award in the *SGA Newsletter*

2016 Fall:

- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize bi-annual meetup in the Atlanta area (at least one each year that includes allied professional organizations)
- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Partner with the Mentoring Committee to identify ways the Membership Committee might be able to connect new members (particularly student members) with the Mentoring Committee. Work with RAAC to expand our mentoring scope to include mid-career mentees.
- [OUTREACH LEAD; MEMBERSHIP SUPPORT] Promote SGA among undergraduate and graduate students around the state to attract new members.
- [OUTREACH AND RAAC REPRESENTATIVE LEAD; MEMBERSHIP SUPPORT] Leverage the SAA annual meeting and Regional Archival Association Consortium (both in August) to develop stronger partnerships with other archival organizations.
- [OUTREACH LEAD] Make contacts with allied professional organizations such as National History Day in preparation for SGA involvement in 2017. Create sustainability and continuity for partnerships with allied organizations by formally identifying:
 - Which role (individual) on the SGA Board should be the liaison to each allied organization
 - Which role on the allied organization's board the SGA rep should reach out to
 - When and how the SGA rep should reach out to their contact in the allied organization

2016-2017:

- [RAAC REPRESENTATIVE LEAD; BOARD SUPPORT] SGA will commit to support RAAC's initiative to join the National Coalition for History as a member.

2017-2020:

- [PRESIDENT LEAD; OUTREACH SUPPORT] Advertise the President's Award more heavily across social media in addition to newsletter and listserv announcements.

2017:

- [OUTREACH LEAD] Articulate and document general policies for conducting ongoing and issue-based advocacy. Update Administrative Handbook entry as needed.

2017 Winter:

- [MEMBERSHIP LEAD] Explore the possible benefits of pursuing some sort of joint membership package, where individuals could join GLA and SGA (and other relevant orgs?) at the same time? Might encourage more people to join all organizations and solidify SGA's partnerships with allied organizations.
- [MEMBERSHIP LEAD] Identify members in each of the regions who can pull together committees who can organize casual spring meetups in major cities in Georgia from "on the ground."

2017 Spring:

- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize bi-annual meetup in the Atlanta area (at least one each year that includes allied professional organizations.)
 - Welcome new members in-person and invite prospective members to attend
- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Work with on-the ground volunteers to organize at least one annual casual meetup in other major city in Georgia.
 - Welcome new members in-person and invite prospective members to attend
- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Implement any new membership plan/model based on exploration conducted in Winter 2017
- [OUTREACH LEAD; MEMBERSHIP SUPPORT] Initiate “Lost Archives of Georgia.”

2017 Summer:

- [OUTREACH LEAD; MEMBERSHIP SUPPORT] Organize social media and listserv engagement campaigns with specific calls to action and incentives for participating.
- [OUTREACH LEAD] Identify advocacy issues impacting archival institutions both in and outside of Georgia. Make members aware of these issues, perhaps through a blog series.

2017 Fall:

- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize bi-annual meetup in the Atlanta area (at least one each year that includes allied professional organizations)

2018 Winter:

- [OUTREACH LEAD; MEMBERSHIP AND RAAC REPRESENTATIVE SUPPORT] Work in collaboration with membership committee and with RAAC to balance outreach efforts to various constituents, including current SGA members, students and young professionals who are potential members, as well as mid-career professionals who may not yet be members.

2018 Spring:

- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize bi-annual meetup in the Atlanta area (at least one each year that includes allied professional organizations)
 - Welcome new members in-person and invite prospective members to attend
- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize at least one annual casual meetup in other major city in Georgia.
 - Welcome new members in-person and invite prospective members to attend

2018 Summer:

- [OUTREACH LEAD; MEMBERSHIP SUPPORT] Organize social media and listserv engagement campaigns with specific calls to action and incentives for participating.

2018 Fall:

- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize bi-annual meetup in the Atlanta area (at least one each year that includes allied professional organizations)

2019 Spring:

- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize bi-annual meetup in the Atlanta area (at least one each year that includes allied professional organizations)
 - Welcome new members in-person and invite prospective members to attend
- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize at least one annual casual meetup in other major city in Georgia
 - Welcome new members in-person and invite prospective members to attend

2019 Summer:

- [OUTREACH LEAD; MEMBERSHIP SUPPORT] Organize social media and listserv engagement campaigns with specific calls to action and incentives for participating.

2019 Fall:

- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize bi-annual meetup in the Atlanta area (at least one each year that includes allied professional organizations)

2020 Spring:

- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize bi-annual meetup in the Atlanta area (at least one each year that includes allied professional organizations)
 - Welcome new members in-person and invite prospective members to attend
- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize at least one annual casual meetup in other major city in Georgia
 - Welcome new members in-person and invite prospective members to attend

2020 Summer:

- [OUTREACH LEAD; MEMBERSHIP SUPPORT] Organize social media and listserv engagement campaigns with specific calls to action and incentives for participating.

2020 Fall:

- [MEMBERSHIP LEAD; OUTREACH SUPPORT] Organize bi-annual meetup in the Atlanta area (at least one each year that includes allied professional organizations)

Education

To create more diverse and accessible educational offerings that serve a wider variety of our members.

Goals:

- Devise and promote new peer to peer learning and training opportunities.
- Formalize and promote virtual book club. Explore current service model [continue offering virtual real time meetings or create an asynchronous program].
- Explore innovative methods by which we could provide virtual access to workshops and meetings such as webinars or recorded sessions.
- Develop or adapt a basic, introductory archives workshop or other offerings and present them frequently throughout the state to non-archivists with responsibility for archival records in a variety of settings (public libraries, churches, etc.)

Budgetary impact: Every effort should be made to keep costs for new programs low and, when possible, to build in fee structures that will allow new programs to support themselves.

Human impact: The Education Committee may need additional members to develop and plan for new programs without siphoning capacity from the planning of regular workshops throughout the year.

Timetable

2016: Assign committee members specific, timetable-driven tasks to support carrying out existing workshop options and to focus on development of new initiatives.

2016: Identify annual meeting sessions that could be transformed into workshops or webinars. Revisit past SGA workshops to identify instructors interested in updating or re-developing them as webinars or other formats.

2016: Investigate how/if other peer organizations have incorporated partially or unstructured conferences into their member offerings. Survey membership if necessary.

2016-2017: Prior to implementation of the “basic archives training” initiative, the Education Committee Chair should meet with the Georgia Archives Institute board to discuss these plans due to potential overlap in missions. This is an opportunity to partner with what others are doing and/or promote what others are doing in conjunction with SGA’s own initiatives.

2016-2017: Formalize Virtual Book Club program, identify additional facilitators, and develop both synchronous and asynchronous ways for members to participate.

2016-2017: Work with Outreach Manager to develop plan for identifying individuals in need of basic archives training.

2016-2018: To move toward offering both live webinars as well as asynchronous content, investigate various platforms to determine what may work best in terms of budgetary restraints and infrastructure requirements.

2016-2020: Develop and maintain an “SGA Speakers Bureau,” a directory of SGA members interested in and willing to present workshops, webinars, short talks, etc.

2017: Collaborate with Program Committee to incorporate unstructured elements into the 2017 Annual Meeting. Evaluate membership response to new format and improve/change as needed.

2017-2018: Track member response and engagement with the Virtual Book Club to determine continued viability.

2017-2020: Identify 2-3 SGA members to develop or adapt a basic archives workshop or webinar that could be used going forward and present the workshop frequently throughout the state each year.

2018: Develop and plan a mid-year one- or two-day unconference (late spring/early summer). Cost to SGA would be minimized by partnering with an SGA member institution to host. Cost to members could be free or nominal, requiring only travel or lodging expenses.

2019-2020: If this format is received well by our members, keep it in the rotation to offer during the spring or as part of the Annual Meeting program.

Fiscal sustainability

To compensate for income loss due to fewer institutional subscriptions to Provenance, to ensure SGA can continue to support new scholarships such as The Taronda Spencer Award and the increased amount of the Gracy Award, to allow SGA to create new programs, and to create a secure foundation that will ensure the continued growth of the organization.

Goals:

- Increase total membership by 10%.
- Increase savings for scholarship funds, in particular the Taronda Spencer award which has no savings of its own.
- Initiate drive to encourage existing members to renew at a higher level and/or donate to SGA.
- Revise and further develop long-term investment strategy.

Budgetary impact: Initiatives will not add costs, but will increase income.

Human impact: Treasurer may need to recruit a temporary task force to aid in research. Scholarship Committee will be expected to experiment with and initiate new methods for fundraising. Full board participation in membership drives is required.

Timetable

2016 Spring-Summer: Scholarship Committee will have a brainstorming session meeting regarding how to increase savings for scholarship funds and will report these ideas back to the board. Select ideas will be rolled over into targeted fundraising and scholarship advertising initiatives over 2017-2020.

2016 Fall: Scholarship Chair, along with Committee's help, will return the Annual Meeting scholarship fundraising auction back to a live bidding format with the option still existing for some silent bidding, thus striving for more of a hybrid auction format than has been held in previous years. This action is based on member feedback regarding recent auctions.

2016: Treasurer will meet with SunTrust Representative to find out how SGA can make better use of its Money Market account. Treasurer will present findings and projections at the July 2016 board meeting and will pursue action on whatever the board decides.

2016: Membership Committee will partner with the Administrative Assistant to add language about the option of renewing at a higher level and/or donating to SGA to the renewal notices email template that comes from Wild Apricot. The board will also consider Treasurer recommendations for ways to encourage members to renew at higher levels.

2016-2020: Membership Committee will partner with the Administrative Assistant to publicize statistics about new members on a regular basis by sending a monthly announcement to the SGA list to welcome new members and mention how many renewals we had that month. Announcement can also include the following static text: *Do you know someone who would benefit from involvement in SGA? If so, they can find more information about how to join and the benefits of membership online at <http://soga.org/membership>*

2017: Board will discuss membership dues increase. Any decision to increase dues will be put to a vote for the membership.

2017: Treasurer will perform a cost analysis of how much money has been left with PayPal since SGA has been using that program because PayPal takes 85 cents of every individual membership and more monies on the higher levels of membership. Treasurer should consider other payment options for comparison and present findings to the board. If it is decided that an alternate payment method should be adopted, that initiative will be implemented in 2018 and the timetable updated accordingly.

2017: Membership Committee will equip all SGA members with the tools and information they need in order to recruit new members:

- Organize a challenge to ask all members to talk to at least one person a year about joining SGA, equip them with talking points, provide copies of membership brochure as needed, and design an incentive for participating in this challenge

2017: Membership Committee will equip interested repositories and educational programs in Georgia with copies of the SGA brochure and possibly a small sign or poster about SGA

2017 Spring: Scholarship Committee will identify ways to partner with HBCUs as part of an initiative to increase awareness of the Taronda Spencer Award. Increased advertising of award will also be paired with a call for donations to the award in order to build the award's savings. The goal is for the Taronda Spencer Award to become a permanent scholarship and listed as a line item in SGA's budget.

2017 Fall-2020 Fall: Scholarship Committee will incorporate feedback from the prior Annual Meeting and will apply that feedback to the 2017 auction and onward. Increased advertising of auction and call for member participation will take place prior to Annual Meetings.

2018: Membership Committee will evaluate recruitment efforts to date and continue or adjust initiatives as needed and will continue initiatives and commitments through 2018-2020. Update timetable at this time as needed.

2018: Membership Committee will target smaller organizations and historically underrepresented archivists and friends of archives for membership. Each year moving forward, identify a specific audience or group to reach out to in particular for membership and outreach--to identify opportunities for partnerships, volunteer collaborations, and growing SGA's membership.

2018: Scholarship Committee will evaluate initiatives to date and look critically at the number trends in scholarship funds. Adjustments to current strategies and revision of timetable will take place as needed.

2018: Membership Committee will explore the possible benefits of selling SGA merchandise and/or creating a popular giveaway item (e.g. idea inspired by <http://www.cafepress.com/marac>). Implement initiative by end of 2018 and continue through 2020.

2018-2020 Scholarship Committee will partner with Membership Committee regarding the creation of an SGA merchandise store, some of the proceeds of which will go to support scholarships.

Institutional knowledge management

To create a comprehensive, holistic, and sustainable archival management plan that includes both paper and digital material, and to establish workflows for transfer of information between officers and committee chairs from year to year.

Goals:

- Revise existing retention schedule to include both paper and digital records.
- Paper documents
 - Reassess and reappraise paper documents at the Georgia Archives.
 - Revise finding aid for collection.
- Digital archives
 - Reassess and reappraise existing digital records.
 - Develop digital preservation plan.
 - Develop access policy.
- Information/Knowledge management
 - Identify a tool for log-in and password management.
 - Create standard operating procedures for knowledge transfer.
 - Research new content management systems to replace Wild Apricot when current contract expires.

Budgetary impact: Minimal, with the possible exception of changes to the content management system (though the cost for Wild Apricot is expected to increase in two years).

Human impact: Archivist will need to recruit a temporary task force of members to assist in development of archival management plan. Collaboration with Website Editor will be key.

Timetable

2016 Summer: Archivist will collaborate with Kayla Barrett (Georgia Archives Liaison) to reassess acquisition process. This process needs to be formally documented in the Archivist portion of the Administrative Handbook.

2016 Fall: Retention schedule for paper records was recently revised in 2013. Archivist will review paper records retention schedule for possible revision. Disseminate new schedule to SGA board and replace old retention schedule on website with new version. Continue to review retention schedule 2017-2020 as needed.

2016 Fall: Website Manager and Assistant Manager will identify a tool for log-in and password management.

2016 Annual Meeting - 2017 January: Archivist will establish a Records Task Force (RTF) to assist with SGA's paper-based and digital records in various projects over 2017-2020. *It is understood that members will most likely need to rotate on and off of this task force. Recruitment of additional members should occur as needed.*

2017 Spring: Website Manager and Assistant Manager will create standard operating procedures for knowledge transfer.

2017 Spring: RTF will assess the arrangement of SGA materials at the Georgia Archives, including series, and will reappraise the documents themselves, as well. Update current inventory of paper records during the process. Depending on assessment, re-process and update series.

2017 Summer: Archivist and RTF will hold processing party and will update finding aid in conjunction with this activity. Make finding aid available to membership via the website.

2017 Fall: Website Manager and Assistant Manager will research new content management systems to replace Wild Apricot when current contract expires. Research on options will be presented to board for decision-making.

2017 Fall (Annual Meeting) - 2018 January: Archivist will recruit new RTF members with an interest in managing digital records as needed to supplement existing task force. Focus of RTF will shift to digital records for 2018-2020.

2018 Spring-Summer: Archivist and RTF will reassess and reappraise existing digital records:

- Identify types of digital records created by each appointed and nominated position.
- Identify types of digital records to preserve for SGA (consider, retention in digital format might not be necessary for all records created digitally.)
- Identify the various places SGA digital records currently exist.

2019: Archivist and RTF will develop digital preservation plan and access policy. These activities might include exploring options for an archival Content Management System.

2020: Archivist and RTF will implement digital preservation plan, access policy, and retention schedule.

Diversity

To review and revise nominating and recruitment procedures to attract a wider range of candidates for board positions, committees, and general memberships; to create a culture in which leaders within the organization consider diversity as a critical element of all initiatives; and to ensure that SGA leadership reflects the variety of backgrounds of SGA membership.

Goals:

- Promote and increase awareness of the Taronda Spencer award.
- Increase involvement of members in all geographic areas of Georgia.
- Recruit potential leaders and new members with diverse backgrounds.
- Explore existing models for increasing diversity within the organization.

Budgetary impact: None.

Human impact: The Nominating Committee will lead this effort and may create special task forces as necessary.

Timetable

2016 Summer: Create task force consisting of Nominating and Membership Committee members.

2016 Fall: Define what diversity means for SGA and investigate existing models for increasing diversity currently in use by similar organizations. Identify current demographic make-up of SGA and review existing administrative practices for recruiting members and leaders.

2017 Spring: Produce written statement of recruiting practices for Nominating Committee and identify new benchmarks for ensuring a diverse membership and demographically representative board. Submit report by April board meeting.

2017 Spring: Scholarship Committee will identify ways to partner with HBCUs as part of an initiative to increase awareness of the Taronda Spencer Award. Increased advertising of award will also be paired with a call for donations to the award in order to build the award's savings.

2017 Fall: With board approval, implement new guidelines and apply them during recruitment for 2018 SGA Board.

2017-2020: Collaborate with Membership Committee and Treasurer to ensure that diversity practices and metrics are followed during membership drives.

2018-2020: Scholarship Committee will continue to lead initiatives to increase awareness of the Taronda Spencer Award.

2018-2020: Explore and experiment with new programs encouraging involvement from members across Georgia.

Communication and publications

To create a recognizable brand for SGA that includes consistent quality of content and style across all publications and information products.

Goals:

- Revitalize and enhance content of resource library on website and establish a maintenance plan for same.
- Develop a social media strategy.
- Redesign layout and content of newsletter, including development of a style guide and editorial policies.
- Rebrand website with cohesive look and feel, including development of a style guide.
- Explore other methods of soliciting member feedback such as focus groups at the annual meeting.
- Identify innovative and creative ways SGA can support *Provenance*.

Budgetary impact: There will be one-time costs associated with the redesign of the newsletter template.

Human impact: Newsletter Editor/Assistant Editor, Website Manager/Assistant Manager, and Outreach Manager/Co-Manager will be responsible for leading new endeavors in this area. Members may be recruited to assist with editorial projects.

Timetable

2016: The Website Manager will rebrand website with cohesive look and feel, including development of a style guide.

2016-2017: Pending revision of Administrative Handbook, Outreach Manager (sharing responsibilities with the Membership Committee) will take actions to develop a social media strategy to be implemented and followed 2017 to 2020.

2016-2017 Winter: The *Provenance* Editorial Board will rebrand to match other SGA publications and will also explore dedicated ways to solicit member feedback and will incorporate *Provenance* announcements and initiatives in overall social media, and will better integrate with SGA education and advocacy.

2017: The Website Manager will review current site, solicit new entries, update and create timeline for routine revisions. This review should include extra attention paid to the revitalization and enhancement of content of resource library on website and the establishment of a maintenance plan for same.

2017-2020: The *Provenance* Editorial Board will explore dedicated ways to solicit member feedback and will incorporate *Provenance* announcements and initiatives in overall social media, and will better integrate with SGA education and advocacy.

2017: Pending revision of Administrative Handbook, the Membership Committee (with the assistance and support of the Outreach Manager as needed) will explore other methods of soliciting member feedback, such as focus groups at the annual meeting. These methods will be implemented and followed 2017-2020.

2017: Following the completed redesign of the layout and content of the newsletter, additional action steps include the development of a style guide and the exploration of e-newsletter delivery options, which might require additional layout and content redesign. Should be completed by end of 2017.

2018: Review success of actions taken to date and adjust timetable for any additional activities to undertake over 2018-2020 in support of these goals.