



ACA News

The Newsletter of the Academy of Certified Archivists Issue 97 Summer 2017

You will notice that the lead column is not the usual “President’s Message.” This was not an accident. We believe changes to the recertification guidelines described below warrant the front page exposure we are here providing them, as they will affect all members in the near future. My own column will appear on page 4.
Louis E. Jones, CA, Ph.D.

New Recertification Petition Guidelines Finalized, Go into Effect for 2018

From the Regent for Certification Maintenance

Tara Laver, CA
The Nelson-Atkins Museum of Art
Kansas City, MO



The Recertification Petition Guidelines Review Task-force recently completed an almost 18-months-long process of reviewing and revising the requirements, definitions, and credits for the process of recertifying by petition and is pleased to share these new instructions and rules.

The fully revised guidelines are available at http://www.certifiedarchivists.org/wp-content/uploads/2017/07/Current_RecertificationPetitionGuidelines.pdf, as is a detailed overview of the changes at <http://www.certifiedarchivists.org/wp-content/uploads/2017/07/overview-of-revised-petition-guidelines.pdf>.

To allow members time to adjust their recertification activities and recordkeeping, CA’s due to recertify in 2018, 2019, and 2020 may opt to submit a petition under either the previous or new guidelines. Forms and guidelines for both options are available at <http://www.certifiedarchivists.org/members-area/certification-maintenance/option-b-recertification-by-petition/#Guidelines>. The next recertification cycle begins in January 2018.

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From the Regent for Certification

Maintenance *(Continued from Previous Page)*

Please take some time to review these, even if you recently recertified, to assist you in planning your activities and professional engagement in support of recertification.

Overall, the revisions represent an opening up of the criteria to take into account the changing nature of the profession and the variety of contexts in which certified archivists are practicing within the archival domains. In addition, the proposed changes endeavor to make credit values for analogous or related activities more consistent across sections, to adjust any perceived gaps between the effort an activity requires and the credit it confers, and to reflect evolving modes of professional participation and engagement. Selected changes from specific sections are highlighted here, but see the overview or revised guidelines linked above for full details.

Introduction and Section A. Employment

Focusing on the idea that the appropriateness of an activity's inclusion for recertification credit is based on its relationship to the archival domains defined in the ACA's "Role Delineation Statement" (acquisition and appraisal, arrangement and description, preservation, reference and access, outreach and advocacy, management of archival programs, and legal, ethical, and professional responsibilities), the taskforce added language to reflect that qualifying work may not always be performed in a traditional archives context. As a result, work, experience, and activities in allied professions (including but not limited to libraries, museums, records management, and oral history) that fall within the archival domains may be included for credit. Revisions were made in these sections to reflect this enlarged scope. Most notably, the confusing and contradictory specific instructions on records management were removed in favor of a more general policy that allows petitioners in posi-

tions that combine archives and allied professional work to claim full-time archival employment if 60% or more of overall professional duties fall under the archival domains (acquisition and appraisal, arrangement, description, preservation, reference, outreach, etc.) Petitioners in combined positions where less than 60% of their time is spent on work in the archival domains will continue to pro-rate and report the job in A.3, "Employment with partial archival responsibilities."

Section B. Education

Key changes in this section include increasing credits for taking a semester course from 20 to 25 points to reflect the effort involved, requiring graduate degrees be earned in or related to the archival domains (as opposed to previously counting any graduate degree), and creating a new category that allows for earning a certificate to confer five credits. The following caveats apply:

- Semester-length courses must be in or related to the archival domains, as opposed the previous requirement that they be in a domain.

This widening of what is accepted acknowledges that the changing nature of archival work may require coursework in outside disciplines. Petitioners must now provide an explanation of how the course supports archival functions and activities.

- Recognizing that that petitioners already earn credit for the courses that are part of a certificate program, the criteria require something above and beyond just completing the curriculum courses.

Certificates can be claimed when earning the certificate requires passing course exams or comprehensive exams that are not part of course requirements (as with SAA's DAS and A/D certificates), or the programs require completion of a capstone project or paper. Certificates may not be earned as part of graduate degrees for which you are also claiming credit.

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From the Regent for Certification

Maintenance *(Continued from Previous Page)*

Section C. Professional Participation and Outreach (now “Instruction, Professional Participation, and Engagement”)

Significant to note in this section are selected reductions in the credits awarded in certain areas. For example, teaching archival workshops was revised to better align with the length-based categories for those attending the workshops already established in Section B., and points were reassigned accordingly. Previous guidelines only defined two

C.2.a	Leadership for 3 or more days but less than 2 weeks.	15
C.2.b	Leadership for 2 days	10
C.2.c	Leadership for 1 day (at least 6 hours)	7
C.2.d	Leadership of less than 1 day (more than 2 and less than 6 hours)	4
C.2.e	Program of less than 2 hours but at least 1 hour	2

lengths of workshops taught: 5+ days for 15 points or fewer than five days for 10 points. New categories are as follows:

In addition, credits allowed for programs or presentations on topics related to but not in the archival domains to any audience outside of job duties were reduced from three (½ day or less) or six (over ½ day) to two and four respectively. Credits for teaching a semester-long course, however, increased from three to five points per credit hour. On a related note, further clarification was added about CA’s hosting credit-bearing internships and practica in their archives not providing teaching credit. Such arrangements that go above and beyond the scope of job responsibilities may be considered under D.3.d “Contributed Service” with a required explanation of the work’s significance.

Section D. Professional Service

Most significantly, formal mentoring was defined and added as a specific category in D.3 “Contributed Service,” and a basis for calculating it at two points per mentee per year was specified.

In addition, membership in allied organizations now may count towards recertification, with the caveat that no more than 12 of the 25 points allowable from memberships may come from allied organizations.

Section E. Writing, Publishing, Editing

Generally, revisions in this section make the subsections consistent in language and variety of publication types and include additional examples of editorial roles. A new section, E.4, serves as a catch-all for writing or editing not defined elsewhere, such as single blog entries or SAA’s short story contest.

Members of the taskforce included Claire Jenkins, CA; Tara Laver, CA (chair as Regent for Certification Maintenance); Stephanie Malmros, CA; Cheryl Oestreicher, CA; and Kristy Sorensen, CA. Mary Beth Herkert, CA participated in initial meetings. Thank you to the members for their committed and thoughtful service, as well as to the members of the Board and the petition review teams who provided support and feedback.

Election Results

The Nominations Committee wants to thank all 407 Certified Archivists who voted in this year’s election. That is a 33% participation rate. Those who you elected are:

President - Gregor Trinkaus-Randall
 Secretary - Emily Hughes Dominick
 Regent for Exam Administration - Daria Labinsky
 Regent for Certification Maintenance - Stephanie Malmros
 Nominations - Cheryl Oestreicher

Again, thanks to those who ran for office and voted in the election.

2017 Nominating Committee: Courtney Chartier, CA; Mott Linn, Regent for Nominations; John Slate, CA

President's Message

Louis E. Jones, CA, Ph.D.
Wayne State University
Walter P. Reuther Library
Detroit, Michigan



As I end my tenure as ACA's president, I can't help but to reflect on the talent and dedication that comprise the Academy's board and numerous other volunteers. They work hard to administer and develop the exam, monitor its finances, annually review hundreds of petitions for recertification, represent the Academy in international forums and other efforts and, in a new initiative, will be soliciting ads for our newsletter. They also provide updates and security to our web site, post messages on our Twitter and Facebook accounts, write articles for and edit its quarterly newsletter, and market the importance of certification to employers, archival educators, and, of course, directly to prospective members.

I thank each board member and volunteer, but even as I do so, I want to specifically thank Mott Linn, CA, who had served as the Academy's Treasurer, President and, more recently, as Regent for Nominations. My thanks also go out to Tara Laver, CA and Marcus Robyns, CA who served as Regents for Certification Maintenance and Exam Administration respectively. These board members deserve our collective thanks, as they end their tenure in the above capacities. While they are leaving the board, their work on behalf of the Academy will continue to reverberate in positive ways. I know they will assist incoming officers transition into their new positions.

Don't be surprised, though, should these outgoing board members return in other leadership positions subsequently or share their insights in a more informal way, as they have a great deal more to offer.

I extend my thanks, too, to the Academy's Secretariat, Abby Curro, who took over from Steve

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ACA Officers

President (2016-17)	Louis E. Jones, CA, Ph.D. Wayne State University Walter P. Reuther Library Detroit, Michigan
Vice President/ President-Elect (2016-17)	Todd Welch, CA Cline Library Northern Arizona University Flagstaff, Arizona
Treasurer (2016-18)	Gerrienne Schaad, CA Florida Southern College Lakeland, FL
Secretary (2015-2017)	Emily Dominick, CA University of Washington Libraries Special Collections, Allen Library Seattle, Washington
Regent for Examination Administration (2015-2017)	Marcus Robyns, CA Northern Michigan University Marquette, Michigan
Regent for Examination Development (2016-18)	Rebecca Hankins, CA Texas A&M University Libraries College Station, TX
Regent for Certification Maintenance (2015-17)	Tara Laver, CA The Nelson-Atkins Museum of Art Kansas City, MO
Regent for Outreach (2016-18)	Elizabeth Scott, CA Project Archivist/ Consultant Easton, PA
Immediate Past President & Regent for Nominations (2015-16)	Mott R. Linn, DA, CA Clark University Worcester, Massachusetts

Contact information for the Officers and Regents is available on the ACA website:
www.certifiedarchivists.org/about-us/officers.html

Grandin who had served in that capacity for over 20 years. (Learn more about Abby in the profile found within these pages). The insights she has shared with me broadened my thoughts on how to strengthen the Academy. Always open to receive and provide advice and guidance in her first year in this position, she is becoming increasingly acclimated to the needs of the board and membership. It was with her recommendation, I should mention, that I decided, with Vice President Todd Welch's support, to have the Academy embark upon its first strategic planning process, which, I am confident, will have tremendous benefits for the Academy. (See more about the strategic plan in the adjacent column within this newsletter).

And then, of course, there is the Academy's membership to thank, some of whom are new to our ranks while others have remained loyal to the Academy through recertifying, often on multiple occasions. I am always heartened to hear of the multiple ways in which they remain engaged in the archival field through their professional and scholarly activities. The archival world benefits from what each of you contribute to it.

I cannot leave this column without thanking Todd Welch who will, as ACA president, be leading the Academy into its next year. In our weekly telephone conversations, he became as much a colleague and confidant as a friend whose encouragement, generosity of spirit and insight made for a much better year than it would have been without his support. Most importantly, I am confident that the Academy is in very capable hands with him as its next president. As I transition into the role of regent for nominations and remain involved in other areas, I look forward to supporting him, the board and membership in the Academy's next chapter.



The Academy Embarks Upon its First Strategic Planning Process

Louis Jones, CA, PhD

ACA President

By the time this issue of *ACA News* is sent to members of the Academy and made available on the its website, all 9 current board members in addition to the secretariat and 14 others, some of them incoming board members, will have met for a strategic planning retreat facilitated by Brian Buff of Capitol Hill Management (aka Caphill). As many of you know, Caphill is the management company that has managed the day-to-day operations of the Academy since 1995. Brian comes to this task having conducted numerous strategic planning processes with other organizations managed by Caphill, including NAGARA. As a result of that background, he comes to this process with a set of insights that will benefit the Academy during the retreat and subsequent implementation of the recommendations in the strategic planning report he will be preparing. By completing the membership surveys you recently received, many of you have already played an important part in this strategic planning process. The responses that many of you have shared anonymously through this survey will help provide a framework for making changes for the benefit of our members.

Brian tells us that there has been a higher rate of returns on these surveys than what he has experienced with most organizations undertaking strategic plans, an indication that the membership is engaged with the possibilities for the future. With these surveys, we will have a clearer sense as to how the membership views the Academy. I am guessing that the surveys will reveal areas in which the Academy has met or exceeded membership expectations, but I'm certain that the surveys will also show the extent to which members believe the Academy can improve. I am confident that the board will rise to this challenge and, in the process, strengthen the Academy, which will also strengthen the larger archival profession. Stay tuned for updates to this process and thanks again for your participation in this effort.

From the Treasurer

Gerrienne Schaad, CA
Florida Southern College
Lakeland, FL



This is a list of all of the Academy of Certified Archivists' financial assets as of June 30, 2017:

Operating Reserve: Pioneer Bank:

Checking and PayPal Acct	\$ 13,049.68
MM Savings	\$40,550.60
CDs: two, one-year CDs worth a total of	\$ 15,224.67
<u>Sub-total of assets held at Pioneer Bank:</u>	<u>\$ 68,823.78</u>

Investment Reserve:

T. Rowe Price	\$ 51,696.25
The Vanguard Group	\$ 39,365.16

Sub-total of assets invested in mutual funds: \$ 91,061.41

Total ACA Assets as of June 30, 2017: **\$159,886.36**

Sub-total of assets held at Pioneer Bank as of June 30, 2016: \$ 68,361.83

Sub-total of assets invested in mutual funds as of June 30, 2016: \$ 84,672.68

Total ACA Assets as of June 30, 2016: **\$153,034.51**

Excerpt from the Investment and Reserve Policy: "The balance of the Operating Reserve should equal or exceed the amount of that year's annual budget. Any additional funds may be placed in the Investment Reserve with the approval of the Board of Regents."

2016-2017 Fiscal Year: Actual as of June 30, 2017**Income:**

Membership dues	\$54,630.00
Exam Fees	\$ 6,275.00
Certification Fees	\$14,475.00
Income from reserves	\$ 1,230.26
Unrealized gains or losses from investment reserve	\$ 6,388.73
Other	\$ 4 3 4 3 . 0 0
Total	\$87,341.99

Expenses:

General overhead	\$49,674.75
Board expenses	\$17,755.08
Outreach	\$ 6,706.04
Exam Development	\$ 4,674.06
Exam Administration	\$ 1,106.30
Certification Maintenance	\$ 0.00
Awards	\$ 4 7 0 . 9 1
Total	\$80,387.14

Net Income \$ 6,954.85

From the Regent for Nominations

Mott R. Linn, DA, CA
Clark University
Worcester, Massachusetts

My three year term is now coming to an end. We have improved ACA's position a great deal over that time.

As of July 1st, we had a record number of members: 1,272. This increase of almost one hundred members over the last three years was due in part to the largest number of exam applicants ever that we had last year (this year we had the third-largest, so we hope that our growth will continue). This growth is due in part to our improved outreach efforts as well as the new early-bird deadline, which creates more exam sites that we can then use to attract more applicants.

I have always enjoyed my time on the Board of Regents because of the high-quality archivists that are on it. Although it requires a great amount of work, being on the Board is rewarding given that we are all working together towards the same goal: to improve the archives field by ensuring the quality of the professionals in it.



From the Regent for Examination Development

Rebecca Hankins, CA
Texas A&M University Libraries
College Station, TX



The Exam Development Committee held our annual Item-Writing Workshop at SAA in Portland OR. The participants submitted great questions, a total number of 30 were debated and reviewed. We had lively, probing, intense, and thoughtful conversations. The questions submitted will be reviewed in the Spring for further development, potential for our bank of questions, and possible use in future exams.

Participants on site were:

Jennifer Andreola-The History Factory

Maurice R Blackson-Central Washington State University

Anton R. DuPlessis-Texas A&M University

Grant Gerlich-Texas Tech University

Sharalyn Howcroft-LDS Church History Library

Mott Linn-Clark University

Patrizia Nava-University of Texas at Dallas

Aaron Speight-Western Governors University

Participant not on site but submitted questions was:

Tracy Robinson-National Society Daughters of the American Revolution

A sincere thank you for each participant who will receive 5 recertification points for their service to the Academy of Certified Archivists.



A large group of future CAs worked their way through the exam at the Portland, OR site this July.



Academy Profile

By Ruth E. Bryan, CA

Abby F. Curro, Secretariat for the Academy of Certified Archivists



Abby Curro is the new Secretariat for ACA, a contracted staff position through Capitol Hill Management Services, the association management firm that has been managing ACA for over 20 years. (See past ACA President Martin Levitt's endorsement of Capitol Hill.) Abby began training with former Secretariat, Steve Grandin, in August 2016, and has been working as Secretariat since Steve's retirement. Although ACA is not Abby's only client, she notes that "[i]t is my intention...to always provide full-time service." For example, when we conducted this interview, her current work load included the annual Board of Directors elections and processing the applications for the upcoming annual exam in July 2017. "As the exam gets closer, we will be planning the events at the SAA convention in Portland, OR, and preparing the packets for the exam proctors and sites at all the locations across the country."

The Secretariat's main responsibilities are to support "the Executive Board of Directors and all the Regents in their goals to cultivate and to educate archivists about the benefits and importance of becoming certified in their chosen field through membership and participation in the ACA. From the exam application to converting members to Emeritus status, the Secretariat acts as the 'office,' assisting with the exam application process, membership dues collection, maintaining the member database, marketing projects, and meeting planning; and serving as a liaison for the finance department and as the communication coordinator for the Members and Board of Directors."

What Abby enjoys most about being Secretariat is that ACA "members are so passionate about their field and about the ACA. I believe the organiza-

tion has a lot of potential for growth, and I hope to help in recognizing that growth in the membership as well as formulating short and long term goals for the association." Abby indicates that "[s]ome of [ACA's] processes are original. While they continue to work, I hope to utilize current association best practice methods to update those processes to increase efficiency in the association's administration and marketing capabilities." Thus, one of her long-term projects is "to bring updated procedures and communication practices to the administration. This will hopefully help the ACA attract and bring in more members, who in turn, will greatly benefit, both personally and professionally, from an ACA membership."

Abby believes that being a successful Secretariat requires "strong administrative and managerial experience. Having a communications background is beneficial for any organization, not just for attracting new members, but also to inform and educate the active membership." She does not have a records management background, but does have a "lifetime interest in history!" Since she started working with ACA, Abby says that she has "learned something new every day and have enjoyed getting to know the Board, the members and the candidates."

Abby lives in the Albany, NY, area with her husband and four children. She has more than 20 years of experience working with associations in sales, marketing and management.

Ruth E. Bryan, CA, is University Archivist at the University of Kentucky Special Collections Research Center.

Distinguished Service Award

Daphne DeLeon, CA

The Distinguished Service Award “acknowledges extraordinary services rendered to ACA by its members.” Daphne DeLeon is a deserving recipient.



Daphne has been an ACA member since 1998. In the last ten years, she has contributed continuously to the Academy. She served as a member of Exam Development Committee during 2007-2010 as well as a member of Role Delineation Statement Review Committee in 2008-2009.

Daphne became the first to spend seven consecutive years on the ACA Board of Regents. First, she was Regent for Exam Administration from 2009-2013. In this position she oversaw the development of ACA’s online exam application. This initiative saves time, money, and effort for both our applicants and ACA.

Next, Daphne was Vice President/President/Regent for Nominations from 2013-2016. In addition to her time and effort, she had contacts throughout the information field because she was the director of Nevada’s state library and archives and a former president of NAGARA. She used her wide array of contacts to greatly benefit ACA.

These are the most important reasons that ACA has given this year’s DSA to Daphne DeLeon.

Jodie Foley, CA

The ACA Regents’ Award is given irregularly and “recognizes a special contribution to ACA.” Jodie Foley is very deserving of this honor.



Jodie, who is the state archivist of Montana, is a very strong proponent of the certification of archivists. She encourages her staff and interns to become CAs. In fact, in 2015 she convinced so many of her staff to take the ACA exam that Helena became a pick-your-site location. In addition, Montana is the state with the highest percentage of archivists who are certified, and many of them work for Jodie.

Jodie is a strong proponent of certification despite the fact that she is not a Certified Archivist (because she never completed a master’s degree). Many others who cannot qualify to become certified hold it against ACA with an attitude along the lines of “if ACA does not think that I am a competent archivist, then I will oppose them.” Jodie so understands the importance of the certification of archivists that she supports ACA despite our rejection of her candidacy.

It is for her steadfast support of certification that ACA has given the Regents’ Award to Jodie Foley.

Please send any comments, ideas, or suggestions about *ACA News* to:

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