



COUNCIL OF STATE ARCHIVISTS

GUIDED BY OUR VALUES

RELEVANT | INCLUSIVE | COLLABORATIVE

ANNUAL REPORT 2023

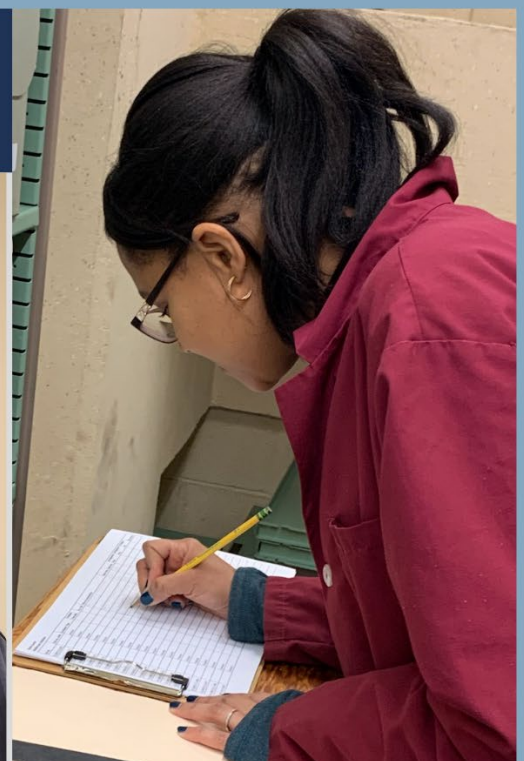


TABLE OF CONTENTS

Message from Executive Director Joy Banks

Our Mission

Guided by Our Values

- Relevant
- Inclusive
- Collaborative

2023 Award Recipients

Committees, Task Forces, and Affinity Communities

Corporate Sponsors, Program Partners, and Federal and Foundation Funders

Financial Highlights

Leave a Legacy

Board Members

CoSA Staff and Program Contractors

Contact Us

Front Cover Images: Left – Incoming CoSA President Jami Awalt (TN) with outgoing President Ken Williams (UT) at the 2023 Annual Meeting; Right – Governor's Records Archivist Rashida Felder of the State Archives of North Carolina



MESSAGE FROM EXECUTIVE DIRECTOR JOY BANKS

What luxury to pause and reflect on a year of work within the CoSA Community as we strive daily to fulfill our mission. Much of the work in 2023 was grounded in an effort by the CoSA Advocacy Committee to condense our popular “Importance of State Archives” booklet into an impactful “Government Archives are Essential” brochure. Just as CoSA remains keenly attuned to our values – Relevant, Inclusive, and Collaborative, which begin on page 5 of this report – we build our efforts to emphasize the critical role state and territorial government archives play in society of collecting, preserving, and providing access to government records.

The following pages are a reminder of all the CoSA community accomplished as we mark the mid-way point in our current Strategic Plan. We may only have 56 member institutions, but our outputs are impressive:

- Multiple opportunities each month for **education and training**, including webinars, a successful in-person meeting, a new virtual unconference, and regular networking calls;
- Publication of several **research** reports, including the highly anticipated 2023 *State of State Records Report*;
- Tireless **advocacy** efforts for the government archives profession, including the successful confirmation of the first female Archivist of the United States, a powerful Archives on the Hill day, and collaborative work on a number of archival issues; and
- Work towards establishing a **sustainable and excellent future for CoSA** through standardization of administrative practices, more efficient workflows, and a dues assessment process.

All of this could never be accomplished without the dedication of our Board of Directors and many committee members who contributed more than 1000 hours to our mission as well as our CoSA staff and project contractors who work to fulfill our members’ vision for the organization. We are particularly thrilled with the hiring of long-time contractor Rebecca Julson as our Community Coordinator and second staff person.

Now more than ever, CoSA needs to lead the way of supporting the non-partisan work of government archives. We have much in store for 2024, and we look forward to the path ahead alongside our members, partners, and friends.



OUR MISSION

The Council of State Archivists provides leadership to strengthen and support state and territorial archives leaders and staff in their work to preserve and provide access to government records.



GUIDED BY OUR VALUES

CoSA aspires to be a vibrant membership association of the state and territory archives community – one in which members identify and shape program directions, networks, and resources that are most needed and valued by them. To achieve that, CoSA uses its values to guide its work:

- **RELEVANT**
We anticipate and respond to developing trends, emerging research, and advocacy issues to meet the evolving needs of state and territorial archives leaders and staff.
- **INCLUSIVE**
We represent all state and territory archives leaders and staff, encourage all agencies to provide equitable access to state records, and advocate for equity and inclusion within the government records workforce.
- **COLLABORATIVE**
We acknowledge, amplify, and facilitate the creative strength and extensive knowledge of diverse members, partners, and stakeholders working together.

Relevant

We anticipate and respond to developing trends, emerging research, and advocacy issues to meet the evolving needs of state and territorial archives leaders and staff.

IMPACT

Programming

An overwhelming majority of webinar attendees ranked content good or excellent, stating that topics added to their understanding and helped them move forward.

"It is incredibly useful to see where you stand among your peers."

"Gives us confidence..."

Top 2 Reasons Why Members Attended the 2023 Annual Meeting:

- Be part of the Work Session + Business Meetings (70%)
- Networking (58%)

"I value the time with peers working on potential solutions and ideas."

Publications

- [*The State of State Records: A Statistical Report on State Archives and Records Management Programs in the United States*](#)

CoSA's education and training programs respond to member needs and focus on improving state and territorial archival programs, no matter their size or level of operation.

CoSA's education and advocacy programs rely on data about the state and territorial archives community to underpin funding proposals, awareness building, and advocacy. CoSA is seen as the source of reliable information about our members' archives and is sought out by others for it.

Education and networking on a wide variety of topics of interest to state and territory archives occur at annual meetings, in monthly member webinars, online community exchanges, monthly calls for state archivists and virtual meet-ups for state archives staff.

Here's a summary of these activities:

- **Webinars:** CoSA and SERI presented 18 webinars reaching 646 participants and more than 1,000 post-webinar recording views. Topics included advocacy for archives, member spotlights, replevin stories, AI and machine learning, approaches to electronic records transfers, and Story Maps as a tool for engagement and advocacy. Two new educational events – the [*Building Archives Virtual Symposium*](#) and the [*SERI STEER Unconference*](#) – drew a combined total of nearly 200 attendees. Most attendees reported that they anticipate folding concepts presented in these sessions into future strategic planning or in reframing current plans. CoSA and the National Archives collaborated on [*two webinars*](#) and four corporate sponsors presented [*ShopTalk programs*](#).
- **Annual Meeting:** The 2023 meeting was held in conjunction with the Society of American Archivists in Washington, DC. The meeting was preceded by a successful Archives on the Hill event. CoSA members from 39 states and the District of Columbia met with NARA colleagues and corporate sponsors for robust Work Session conversations and the Business Meeting. Our thanks to [*Ancestry*](#) and [*APPX*](#) for sponsoring significant portions of the meeting and to [*FamilySearch*](#) for supporting the annual Awards Program.
- **Electronic Records Day – 10.10.2023:** Messaging for this annual event reached more than 2,600 people on Facebook and had over 20,000 impressions on X. SERI committees produced a special webinar that attracted nearly 100 registrants and published the [*"Artificial Intelligence in the Archives"*](#) poster which is downloadable from the CoSA website. Thanks to a wide range of allied organizations and many state and territorial archives for supporting this important awareness effort!

- [2023 Electronic Records Day Poster](#)
- [Be Prepared: Managing & Preserving Email in State and Territorial Governments](#)

- All of CoSA's publications through SERI can be accessed through [the program's main page](#) and clicking the individual initiatives. CoSA also shares all of its [reports and surveys](#) for general use.
- CoSA's outreach and communications included the [News Brief](#), with more than 1,500 subscribers each month; and [11 blog posts](#) published.

Inclusive

We represent all state and territory archives leaders and staff, encourage all agencies to provide equitable access to state records, and advocate for equity and inclusion within the government records workforce.

IMPACT

"Serving on the CoSA Board has helped my staff and me stay current on relevant topics that affect all of us."

1,467 individuals were active in 30 CoSA committees, working groups, and communities of practice

Website (Jan 1-Nov 7, 2023)

Total views: 20,913

Users: 8,119

Most viewed: [Resource Center](#)

Social Media

[FB](#): 1,927 followers

[X](#) (formerly Twitter): 1,854 followers

Knowing that CoSA's members are challenged in recruiting and retaining qualified, diverse staff, we are committed to making space for archives leaders and staff to learn, share, and expand their potential. This includes developing and implementing programmatic initiatives that also speak to the broad public access of records.

Highlights include:

- **State Electronic Records Initiative (SERI):** Now in its twelfth year, [SERI](#) focuses on building organizational capacity around electronic records management, preservation, and access with ongoing digital capability assessment, topical webinars, guidance publications and reports, online communities of practice, and technical assistance.
 - The IMLS-funded [BACKER: Building Archival Capacity for Keeping Electronic Records](#) grant provides technical assistance, educational programming, and training to state and territorial government archives to strengthen their digital records preservation and accessibility capacities.
 - **Managing Cross-Cultural Differences:** As part of the BACKER project, consultant Helen Wong Smith is providing training and ongoing feedback to member agencies. An [expanded web page](#) featuring tools, templates, and a library of published resources is now available.
- **Networking:** an increasingly active set of [online communities](#), including a new State Archives Job Board open to anyone interested in the field. CoSA also hosts monthly calls with state and territorial archivists and periodic virtual chats with archives staff.

COLLABORATIVE

We acknowledge, amplify, and facilitate the creative strength and extensive knowledge of diverse members, partners, and stakeholders working together.

IMPACT

My participation in CoSA has helped me develop “...an appreciation for the professional commitment of state archives leaders and the positive impact that a small group of committed leaders can have on a profession.”

My CoSA involvement has led to “...collaborative partnerships/friendships/mentorships with many of my fellow state, territorial, and NARA archivists.”

“CoSA was the reason Archives on the Hill was such a success this year – you all really came through and volunteered to advocate.”

Advocacy

- Issue briefs/position statements: 1
- Webinars: 1

Awards Program Recipients: 13

- Walsh Leadership Award
- CoSA-Ancestry Leadership Award
- Advocacy for Archives Award
- Rising Star Award
- CoSA-NHPRC SHRAB Award
- Lifetime Achievement Award

Collaborations, partnerships, and corporate sponsorships allow CoSA to pursue critical issues, share information widely, and highlight the good work of colleagues in the field. CoSA uses the strength of collaboration and partnership to leverage resources, share expertise, and solve problems.

- **Advocacy:** CoSA advances the needs of its members to stakeholders and the public by acting as a clearinghouse for information, participating in policy and funding discussions, developing advocacy and awareness messages, and working in partnership with counterparts in allied organizations.

CoSA uses the strength of collaboration and partnership to leverage resources, share expertise, and to solve problems. CoSA works collaboratively with the Joint Working Group on Issues and Awareness, comprised of representatives from CoSA, SAA, the National Association of Government Archives and Records Administrators (NAGARA), and the Regional Archival Associations Consortiums (RAAC).

All position statements, issue briefs, and [CoSA's Advocacy agenda](#) are [available on our website](#).

Advocacy highlights in 2023:

- Development of *Government Archives Are Essential* advocacy materials
 - Continued support for Archivist of the United States' confirmation
 - National Coalition for History (NCH) policy board member
 - National Humanities Alliance (NHA) Advocacy Day participant
 - Joint Task Force on Issues and Awareness (CoSA, NAGARA, RAAC, SAA) founding member
 - Federal budget and state and territorial issues monitor, at the request of individual states
- **Awards:** [CoSA's annual Awards Program](#) acknowledges individuals, institutions, and programs that have enriched and strengthened our nation's state and territorial archives. The Awards Program rewards innovative efforts and provides encouragement for the development of new and remarkable projects. By recognizing exemplary achievements, the CoSA hopes to inspire others to make similar contributions to the field of government archives. [Read more about our 2023 award recipients.](#)

2023 AWARD RECIPIENTS

- Lifetime Achievement: Thomas J. Ruller Retired New York State Archivist and former CoSA Board President
- Victoria Irons Walsh Leadership Award: Ashley Selima (RI), Allen Ramsey (CT)
- Victoria Irons Walsh Emerging Leader: Joshua Hackel (IL), Amy Moran (LA), Ali Rahmaan (DC)
- CoSA-Ancestry Leadership Award: Grant Robertson (SC) and Bryan Collars (SC)
- Rising Stars: Matthew Storey (FL), Joseph Sullivan (DE)
- CoSA-NHPRC SHRAB Award: South Carolina State Historical Records Advisory Board and the Utah State Historical Records Advisory Board
- Advocacy for Archives: New York State Archives and the Archives Partnership Trust

2023 COMMITTEES, TASK FORCES, AND AFFINITY COMMUNITIES

Advocacy Committee: Jami Awalt (TN), Tim Baker (Retired, MD), John Dougan (MO), Karen Gray (AK), Aly Jabrocki (CO), Dave Joens (IL), Sarah Koonts (NC), Damon Munz (CT), Catherine Newsome (LA), Tom Ruller (Retired, NY), Barbara Teague (Retired, KY)

Awards Committee: Sara Davis (WY), Eric Emerson (SC), Jodie Foley (Retired, MT), James Himphill (AS), Heather Hultman (MT), Shawn Rounds (MN), Ken Williams (UT)

Development Committee: Conley Edwards (Retired, VA), Karen Gray (Chair, AK), Joshua Hackel (IL)

Education + Training Committee: Mark Harvey (MI), James Kichas (UT), Kristi Lear (IL), Lopez Matthews (DC), Abbie Norderhaug (WI), Cathy Popovitch (IL), Allen Ramsey (CT), Shawn Rounds (MN), Tom Ruller (Retired NY), David Ware (AR)

Finance Committee: Steve Murray (Chair, AL), Cynthia Laframboise (NV), John D. (Jack) Warner (MA)

Inclusion, Diversity, Equity, and Access (IDEA) Committee: Alan Arellano (VA), Elaine Rice Bachman (MD), Stephanie Clark (OR), Melissa Coy (UT), Dorothy Gidiere (AL), Rebecca Halbmaier (KY), Sarah Koonts (NC), Lizette Pelletier (CT), Elena Perez (NM), Cathy Popovitch (IL)

Nominating Committee: Jami Awalt (TN), John Dougan (MO), Ken Williams (UT)

SERI Committees:

Steering Committee: Gwen Amsbury, Kathryn Baringer, Nick Connizzo, Cathrine Giles, Josh Hackel, Josh Hager, Sarah Koonts, Lopez Matthews, Kate McBrien, Cathy Popovitch, Allen Ramsey

Advocacy + Outreach Subcommittee: Sara Casper, Cathrine Giles, Josh Hager, Patricia Mitchell, Christian Skipper, Jeannine Roe

Education + Programming Subcommittee: Gwen Amsbury, Barbara Austen, Kathryn Baringer, Danielle Marchetti, Elizabeth Perkes, Rachel Smith, Krista Sorenson, Bonnie Weddle

Tools + Resources Subcommittee: Alan Arellano, Michelle Arpey, Nick Connizzo, Joshua Hackel, Carol Kussmann, Natasha Margulis, Tara Maharjan, Elena Perez, Allen Ramsey, Suzanne Stasiulatis, James Watson

CORPORATE SPONSORS, PROGRAM PARTNERS, AND FEDERAL AND FOUNDATION FUNDERS

Platinum Sponsor - \$30,000 and above



Federal and Foundation Funders



SERI Sponsor



Sustainer - \$10,000 and above



Advocate - \$3,000



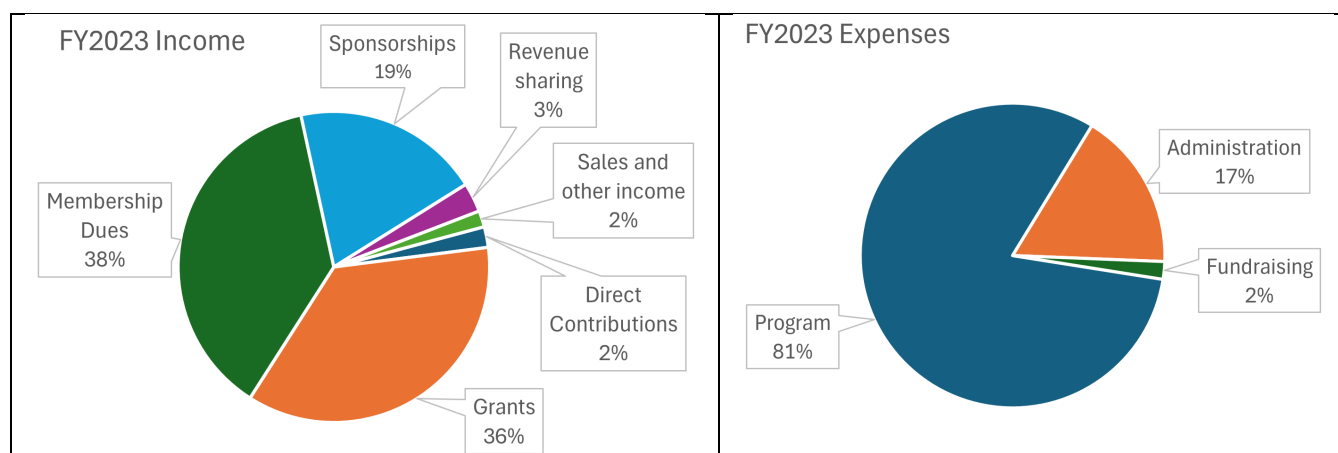
Supporter - \$1,500 and above



Lifeline Sponsors, supporting CoSA's Disaster Recovery Fund

- Backstage Library Works
- Conserv
- Hollinger Metal Edge
- Gaylord Archival
- NEDCC
- Polygon Group

FINANCIAL HIGHLIGHTS



As part of our efforts to achieve a sustainable future, CoSA underwent a significant change in our financial structure and practices during FY2023 to minimize necessary changes given future leadership changes. In addition to consolidating our various accounts for more robust remote access, we transferred our bookkeeping services to a national firm with a specific expertise in non-profit finances. This led to a full restructuring of our Chart of Accounts, which now aligns with generally accepted accounting practices and allows us more accurate tracking of our income/expenses alongside our budget and identified programs.

Several things to note regarding the associated charts:

- The numbers reflected on the charts are unaudited. CoSA will undergo two phases of account review: an internal process with our bookkeeping firm followed by our external independent audit. Audited financials are expected by Summer 2024 and will be shared with the membership according to the bylaws.
- In the past, CoSA has not tracked Fundraising activity; however, both the Executive Director and Communication and Development Coordinator spend a notable portion of their time engaged in securing funds from external sources for the organization. This work is intended to diversify our income sources and work towards a sustainable future.
- In July 2023, CoSA met jointly with the Society of American Archivists in Washington, DC. The negotiated revenue share is noted on our FY2023 Income. We are grateful for their generosity and fiscal acknowledgement for CoSA's contributions to the success of the July meeting. The SAA Council has since specified that they will no longer participate in revenue sharing activity at future annual meetings. In 2024, CoSA will be meeting independently in St. Louis, Missouri.

Special thanks are extended to Steve Murray, Treasurer (2022-2024), who assumed this role at the start of a complex time for CoSA's finances and has been a thoughtful advocate and leader for the Finance Committee, Board of Directors, and the CoSA community.



When you include the Council of State Archivists in your estate plan, your generosity advances our thriving community... a community where state and territorial archives leaders and staff find an inclusive network committed to education, training, and collective growth. Your legacy gift ensures that quality programming and advocacy for archives will continue well into the future.

You may create a legacy:

- by designating CoSA as beneficiary of your will or trust;
- by designating CoSA as a beneficiary of a life insurance policy;
- through the gift of a pension, IRA or other retirement plan proceeds;
- by remembering others through memorial gifts; and
- through the gift of securities.

Please consult your personal financial advisor, tax advisor, accountant and/or estate planning attorney to consider a giving strategy that works for you and your family.

BOARD MEMBERS

2023-2024

Jami Awalt (TN), President; Cathy Popovitch (IL), Vice President; Steve Murray (AL) Secretary-Treasurer; Stephanie Clark (OR), Karen Gray (AK), Cynthia Laframboise (NV), Lopez Matthews (DC), Allen Ramsey (CT), Ken Williams (UT), Immediate Past President

2022-2023

Ken Williams (UT), President; Jami Awalt (TN), Vice President; Steve Murray (AL) Secretary-Treasurer; Beth Golding (FL), Karen Gray (AK), Cynthia Laframboise (NV), Cathy Popovitch (IL), Allen Ramsey (CT), Eric Emerson (SC), Immediate Past President

COSA STAFF AND PROGRAM CONTRACTORS

Joy Banks, Executive Director

Anne W. Ackerson, Communications + Development Coordinator; Nick Connizzo, SERI Consultant; Lisa Johnston, Administrative Coordinator; Becky Julson, IT + Program Coordinator

CONTACT US

Council of State Archivists
6 Liberty Square, Suite 95366
Boston, MA 02109

Phone: 502.229.8222
Email: info@statearchivists.org
Web: www.statearchivists.org