

Overview of Revised Petition Review Guidelines

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In response to the recommendation of the former Regent for Certification Maintenance and issues that arose during the course of 2016 petition review, at its March 2016 meeting the Board created the Recertification Petition Guidelines Review Taskforce to review the requirements, definitions, and credits for the process of recertifying by petition.

Members were appointed in summer 2016 and included the following: Claire Jenkins, Tara Laver (chair, Regent for Certification Maintenance), Stephanie Malmros, Cheryl Oestreicher, and Kristy Sorensen. Mary Beth Herkert participated in initial meetings.

The committee met by conference call 11 times between October 2016 and March 2017.

This document highlights the areas of most change or revision, but see also the attached full document of revised guidelines.

I. Overview of Revisions

Overall, the revisions may be seen as 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 categories and 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.

II. Introduction and Section A. Employment

The introduction to the criteria and Section A. Employment are two areas in which the opening up of criteria is evident. 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 falls within the archival domains** may be included for credit. Revisions were made in these sections to reflect this. Most notably, the confusing and contradictory specific instructions on records management were removed in favor of a more general policy that allows petitioners in positions 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."

III. Section B. Education

- A. B.1. Increased credits for a **semester course** from 20 to 25 points to reflect the effort involved, especially as compared to the 15 points awarded for a short course/workshop of 3 days to two weeks. Courses may be in or related to the archival domains, as opposed to 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.
- B. B.2. Changed criteria so that **graduate degrees** must be earned in or related to any of the archival domains, as opposed to the previous “any discipline” provision. The taskforce found the wide open nature of the existing criteria inappropriate given the centrality of the archival domains in determining appropriateness in all other areas.
- C. B.2.a. Added a new category to allow for earning 5 credits for **certificates**. After reviewing the variety of certificate programs offered by academic institutions and professional organizations, the taskforce found that completion of certificate programs required a commitment and level of effort that warranted some recognition. Recognizing that petitioners already earn credit for the courses that are part of the certificate program, we drafted the criteria to require something above and beyond just completing the curriculum courses: “Certificates can be claimed when receipt of certificate requires passing course exams or curriculum-based exams that are not part of course requirements or the programs requires completion of a capstone project or paper...certificates may not be earned as part of graduate degrees for which you are also claiming credit.” SAA’s Digital Archives Specialist certificate figured prominently in our thinking, as did SAA’s Arrangement and Description certificate. CA’s who earn this certificate go to the extra effort to take the required post-workshop or comprehensive exams, and we believe that merits recognition. At the same time, we kept the points awarded to a relatively moderate level at five (5) considering petitioners also receive credit for courses.
- D. B.4. In determining the length of a meeting, **tours** may now be counted. The taskforce sees this exposure to how other repositories operate as valuable educational experiences. We reaffirmed the spirit of the part in existing B.4.e that acknowledged **local meetings** of allied organizations may have an archival educational component with more direct language in the chart. Attendance at national meetings of allied organizations are still excluded.

IV. Section C. Professional Participation and Outreach

- A. The name of the section was changed to “Instruction, Professional Participation, and Engagement” to better reflect the activities represented and to reduce the erroneous reporting here of job-related outreach activities.
- B. C.1. Roles in **program participation** were expanded to reflect the changing nature of programming at professional organizations and points values were adjusted accordingly. Because few sessions have actual commentators and the chair typically just introduces the participants, the points for those roles were reduced. As poster sessions become more substantial and prevalent at archival meetings, the points value for that activity was increased

from two to three.

- C. C.2. **Teaching archival workshops** was revised to align with the length-based categories for those attending the workshops already established in Section B; points were assigned accordingly. Existing guidelines only defined two lengths of workshops taught: 5+ days for 15 points) or fewer than five days for 10 points. New categories are as follows:

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

This change represents a **reduction in points** available for workshops of one day (6 hours) or less.

- D. C.3. Reflecting the effort and time commitment required to teach a **semester-long course**, credits increased from three to five points per credit hour (ex. 15 credits for teaching a typical semester course instead of nine).
Also added language making it clear that hosting **credit-bearing internships and practica** do not provide teaching credit and directing petitioners involved in such arrangements above and beyond the scope of their position to consider claiming credit in D.3.d “Contributed Service” and provide an explanation of its significance there.
- E. C.4. In consideration of the changes in C.2 described above, 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 3 (½ day or less) or 6 (over ½ day) to two and four respectively.

V. Section D. Professional Service

- A. D.1.b vs. D.1.d. Added language to avoid petitioners claiming membership on an SAA section or roundtable **steering committee** at the same level as membership of an organization’s highest level governing board.
- B. D.2. Revised to allow **membership in allied organizations** to count, with the caveat that no more than 12 of the 25 points allowable from memberships may come from allied organizations. Prior criteria nonsensically allowed membership in ARMA or ICRM but not regional records management organizations.
- C. D.3 Contributed Service. This section was revised to add **formal mentoring** as a defined category, as opposed to it being allowed under “other” and to define it at per mentee per year. Existing guidelines do not clearly define the basis for computing credits for mentoring.

VI. Section E. Writing, Publishing, Editing

- A. General revisions to make the categories between E.1 and E.2 consistent in language and the

variety of publication types.

- B. Added further examples of **editorial roles** and assigned them to appropriate existing categories.
- C. Added E.4 as a **catch-all** for other writing or editing in or related to the archival domains.
Examples we had in mind include blog entries, the SAA short story contest, etc.
- D. Clarified that credit for publications is counted at the **time of publication**, not at any other time during the writing, submission, or revision process. Existing wording allows for works to count if they were written or submitted during the period, opening up the possibility of it being counted again, after publication.