



## Academy of Certified Archivists Recertification Petition Guidelines

Recertification by petition uses a credit system to reward professional experience, continuing education, and contributions to the profession such as attendance at archival meetings, participation in workshops, presentation of papers, and service on archival committees. These guidelines provide detailed instructions for claiming activities for credits through our online submission process.

Direct any questions to the Regent for Certification Maintenance at [certificationmaintenance@certifiedarchivists.org](mailto:certificationmaintenance@certifiedarchivists.org).

### Table of Contents

<b>Section A: Qualifying Professional Employment [Null]</b>	<b>2</b>
<b>Section B: Education</b>	<b>2</b>
<b>Section C: Instruction, Professional Participation, and Engagement</b>	<b>4</b>
<b>Section D: Professional Service</b>	<b>6</b>
<b>Section E: Writing, Publishing, Editing</b>	<b>8</b>

#### General notes and tips:

- A maximum number of credits is allowed in each of the five different sections; up to 165 credits can be earned during the five-year petition period, but only 60 credits are necessary for recertification.
- The governing principle used to determine the appropriateness of an activity’s inclusion for recertification credit is whether it reflects or falls into 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).

	Max Allowed
<b>Section B</b>	60
<b>Section C</b>	45
<b>Section D</b>	30
<b>Section E</b>	30

- ACA recognizes that more and more archives and records management positions require that the professional perform work in both fields. In addition, the lack of traditional archives positions in the current employment climate has resulted in archival professionals applying their skills and expertise in diverse contexts. Therefore, experience and activities in records management and other allied professions can be included for credit **if they clearly fall within the archival domains**. “Allied professions” include but are not limited to libraries, museums, records management, and oral history.
- All experiences and activities can only be counted in one category at a time. Generally, duties that fall within your job description or part of your employment cannot be submitted for credit. Report “extra-curricular” activities, such as attending conferences, service, or publications, in Sections B-D.
- A brief explanation or description of certain activities is required in some sections, as indicated within section instructions. Further, if the title of an activity does not make its relevance to the archival profession self-evident, include a couple of sentences describing why it is a qualifying archival activity.

## Section A: Qualifying Professional Employment

The Academy of Certified Archivists’ Board voted in 2021 to remove employment as a section of the recertification petition beginning with the 2022 submission cycle. Although this decision came out of the discussion surrounding possible COVID-19 related adjustments, it is a permanent change to the recertification petition process.

This change:

- ***Reduces the overall minimum credits required for recertification from 100 to 60.***
- Brings ACA certification in line with other similar professional certifications, focusing on professional development and service over the ability to find a traditional archivist position.
- Provides greater flexibility for CAs employed in allied professions, as well as those who are experiencing periods of un- or under-employment.
- Allows retired CAs who remain active in professional organizations to delay their move to Emeritus Status.
- Provides greater flexibility in the recertification process to accommodate the ever-changing archival field and be responsive to the needs of CAs.

ACA is maintaining the Section A-E arrangement of categories on this version of the recertification petition guidelines to avoid confusion during the change. The petition will be restructured at a later date.

## Section B: Education

		<b>Credits</b>
B.1	Course taken in or related to any of the archival domains (Equivalent to university semester [3 hr] or quarter [4 hr] courses. Includes intensive courses of 2 weeks or more)	<b>25</b>
B.2	Graduate degree (M.A., Ph.D.) earned in or related to any of the archival domains during the time period. [Credits earned are in addition to archival course credits in Section B.1.]	<b>10</b>
B.2.a	Certificate earned in any of the archival domains or related discipline	<b>5</b>

B.3	Attendance at archival seminars, workshops, institutes, and webinars as follows (in-person, online, or virtual):	
B.3.a	Program of 3 days or more (but less than two weeks)	<b>15</b>
B.3.b	Program of 2 days	<b>10</b>
B.3.c	Program of 1 day (more than 6 hours)	<b>5</b>
B.3.d	Program of less than 1 day (2-6 hours)	<b>2</b>
B.3.e	Program of 1-2 hours (includes webinars)	<b>1</b>
B.4	Attendance at professional archival meetings (per meeting; in-person, online, or virtual; excluding travel time)	
B.4.a	Attendance for 3 days or more (not including travel)	<b>9</b>
B.4.b	Attendance for 2 days (not including travel)	<b>6</b>
B.4.c	Attendance for 1 day (not including travel)	<b>3</b>
B.4.d	Attendance for less than 1 day but at least 4 hours (not including travel)	<b>2</b>
B.4.e	Attendance at monthly, semi-monthly, or quarterly meetings of local archival or allied groups that have a professional archival program component of approximately 1 hour [No more than 30 credits or 1/2 of the total credits allowed under Section B can be earned under Section B.4.e]	<b>1</b>
<b>Maximum Credits Allowed: 60</b>		

The governing principle used to determine the appropriateness of an activity’s inclusion for recertification credit is whether it reflects or falls into the archival domains defined in the ACA’s [“Role Delineation Statement”](#). Failure to provide complete details about an activity for which you are claiming credit, including date, location, and sponsoring organization, may result in discounting those credit.

#### B.1-2

Graduate degrees or individual courses (in-person or online), for which credits are claimed must be in or related to the domains of archival practice. Include a description/explanation of how the degree or course supports archival functions and activities.

#### B.2.a

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 program requires completion of a capstone project or paper. Programs should be offered by graduate academic institutions or professional organizations. To count for credit under B.2.a., certificates may not be earned as part of graduate degrees for which you are also claiming credit. Certificates may only be claimed during the certification period in which they are earned.

#### B.3

Archival seminars, workshops, institutes, and webinars attended must be in the domains of archival practice and can be sponsored by archival or allied organizations. Such educational events held as pre- or post-conference workshops are entered here; the days the workshops are held are not included in determining the associated meeting’s length (see also B.4). Participation in the ACA Item Writing Workshop is included in B.3.c. for 5 credits, in consideration of the prep work involved beforehand.

#### B.4

Attendance must be at an archival meeting or conference, or one directly related to the domains of archival practice. Petitioners must claim credits for only the educational portions of the meetings; time for travel is excluded, but repository tours are included. Also excluded is attendance at committee or board meetings, whether held in association with annual conferences or at separate times, as this attendance is part of service obligations

accounted for in section D: Professional Service. Pre- or post-conference workshops are also not figured in determining the number of days for a conference (and hence the applicable credits value). Workshops are entered separately under B.3. Attendance at **annual meetings or conferences** for records management or other allied organizations do not count for credit, as they are largely tailored to other disciplines and lack substantive archival content.

**B.4.e**  
Attendance at monthly, semi-monthly, or quarterly meetings (in-person or virtual) of local archival, records management, or other allied groups that have an archival instructional/educational component (i.e. within the archival domains) of approximately one hour will be credited. Committee meetings, board meetings, and social gatherings around a meal or other event without an instruction/educational component do not count for credit (See B.4). A local professional group is one whose members are drawn from a geographic area below the state level, such as a city, county, or region of a state.

*B.4 Special Exception: Attendance at Society of American Archivists Annual Meeting, 2020 and 2021*  
Given the increase of educational sessions available at the Society of American Archivists Annual Meetings in 2020 and 2021, petitioners may claim more credits for their virtual attendance.

For 2020 Annual Meeting educational sessions attended live or listened to on demand between August 2020-July 2021, petitioners will receive 1 credit per session with a maximum of 15 for the calendar year.

For 2021 Annual Meeting education sessions attended live or listened to on demand between August 2021-July 2022, petitioners will receive 1 credit per session with a maximum of 15 for the calendar year.

Individual ad hoc sessions attended outside of these date ranges, may be claimed under section B.3.e for 1 credit per session.

Definitions:

**Archival courses:** Formal classroom or online coursework relating to any of the domains of archival practice as defined by the [Role Delineation Statement](#): selection of documents; arrangement and description of documents; reference services and access to documents; preservation and protection of documents; outreach, advocacy, and promotion of documentary collections and archival repositories; managing archival programs; and professional ethical and legal responsibilities.

**Graduate degree:** A graduate degree conferred by an accredited institution of higher learning during the petition period.

**Archival seminars, workshops, institutes, webinars:** Short courses, ordinarily sponsored by organizations of professional archivists, colleges or universities, or archival institutions, relating to any of the areas or domains of archival practice defined by the role delineation statement, taken either in-person or online (see Archival courses above).

**Section C: Instruction, Professional Participation, and Engagement**

		<b>Credits</b>
C.1	Program participation must be on archival subjects (per program session)	
C.1.a	Professional paper or presentation	<b>10</b>
C.1.b	Panelist/chair/other session participant	<b>6</b>
C.1.c	Professional poster session at an archival conference or meeting	<b>3</b>

C.2	Institute, workshop, or seminar LEADER (per program) on ARCHIVAL THEORY, METHODS, or PRACTICE. If a workshop, etc. is co-taught, both leaders claim equal credit.	
C.2.a	Leadership for 5 or more days	<b>15</b>
C.2.b	Leadership for Less than 5 days	<b>10</b>
C.2.c	Leadership for 1 day (at least 6 hours)	<b>7</b>
C.2.d	Leadership of less than 1 day (more than 2 and less than 6 hours)	<b>4</b>
C.2.e	Leadership of less than 2 hours but at least 1 hour	<b>2</b>
C.3	Teaching a semester course in an accredited college or university on topics <b>in the archival domains</b> (5 credits per semester hour; pro-rate for quarter hour). Includes intensive courses of 2 weeks or more.	<b>5</b>
C.4	Programs or presentations on topics related to but not in the archival domains (history, biography, or other topics in which reference to archives or archival materials is primary) to any audience that are not part of official or assigned job duties (credits per program, presentation, or session)	
C.4.a	1/2 day or less	<b>2</b>
C.4.b	Over 1/2 day	<b>4</b>
<b>Maximum Credits Allowed: 45</b>		

The governing principle used to determine the appropriateness of an activity’s inclusion for recertification credit is whether it reflects or falls into the archival domains defined in the ACA’s [“Role Delineation Statement”](#).

Credits are accepted in some areas for archival work in non-archival settings, as long as credits are also claimed for activities within the archival profession. **Credit cannot be given for providing institutional promotional activities or user instruction when part of the petitioner’s official or assigned job duties.**

If the title of the workshop/seminar/institute/conference you attended, the name of the course you taught, the paper you presented, or the talk you gave fail to clearly show archival significance, please provide specific information that demonstrates the relevance of the class or seminar to the [archival domains](#).

Provide dates, locations, event name/sponsoring organization for conferences, meetings, workshops, and programs at which you present, instruct, or otherwise formally participate in the program. Failure to provide complete details about an activity for which you are claiming may result in discounting those credits.

C.1.a-c

Paper given, session participated in, or poster presented must be on archival theory, method, or practice as defined in the archival domains found in the [“Role Delineation Statement.”](#) See the definition for “Professional Paper” and “Panelist/other session participant/chair” below. Generally, if a CA has multiple roles at a session, such as serving as the chair *and* a presenter or panelist at the same session, that participation is only counted once and at the presenter or panelist rate. Multiple roles at different sessions at the same conference may be counted individually.

C.2.a-e

Workshops must be on archival theory, method, or practice as defined in the archival domains found in the [“Role Delineation Statement.”](#) See the definitions “Institute, workshop or seminar leaders” below and “Archival seminars, workshops, institutes” in Section B. If a workshop is co-taught, both/all instructors claim equal credit.

### C.3

Courses taught must be on archival theory, method, or practice as defined in the archival domains found in the [“Role Delineation Statement.”](#)

Serving as a field supervisor or onsite coordinator for internships, field experiences or practica that take place in and are of benefit to your workplace do not count as teaching experience, even if the student receives academic credit for the activity. In instances where such involvement is above and beyond the scope of a petitioner’s position, he or she may opt to claim credit in D.3.d “Contributed Service” and provide an explanation of its significance there.

### C.4

As noted above, credit cannot be given for providing institutional promotional activities or user instruction when it is part of the petitioner’s official or assigned job duties. If you have difficulty determining the appropriateness of entering an activity here, consider for example whether the presentation was given outside regular working hours or off the clock, at your workplace or off-site, or if it was optional or voluntary.

#### Definitions:

**Professional meetings:** Periodic meetings sponsored by international, national, regional, or local organizations of professional archivists or other meetings relating to the domains of archival practice. A local professional group is one whose members are drawn from a geographic area below the state level, such as a city, county, or region of a state.

**Professional paper:** Preparation and presentation of a professional paper relating to any aspect of archives administration as defined by the [“Role Delineation Statement”](#). The paper must be presented in an organized forum, such as a professional meeting or conference of archivists or allied professionals, and ordinarily must be presented from a written paper, notes, or outline. To qualify for this level of participation, generally the petitioner is one of two to four presenters.

**Panelist/chair/other session participant:** The format of sessions at professional meetings is increasingly diverse and characterized by more informal arrangements. These formats include but are not limited to lightning talks, pecha kucha, fishbowls, pop-up sessions, and the more traditional multi-participant panel. “Other session participants” have a designated role as a presenter or panelist at such an organized program session on any aspect of archives administration as defined by the [“Role Delineation Statement”](#). Chairing a session of any kind is also entered here.

**Institute, workshop or seminar leader:** Service as director, coordinator, or instructor of any archival seminar, workshop, or institute as defined above.

## Section D: Professional Service

		Credits
D.1	Leadership of archival organization, committee, or group (per year of activity)	
D.1.a	Executive Officer	<b>10</b>
D.1.b	Member of Council, Steering Committee, or Executive Board	<b>8</b>
D.1.c	Chair of committee, task force, section, or roundtable	<b>6</b>
D.1.d	Liaison, representative, or sub-group steering committee	<b>4</b>
D.1.e	Member of committee or task force	<b>3</b>

D.2	<p>Membership in professional archival organization(s) per year (1 credit per year)</p> <p>A maximum of five (5) credits per year may be claimed under D.2., for a maximum of 25 credits for the five-year petition. Further, no more than 10 of the 25 credits may come from allied organizations.</p> <p>Membership in ACA does not confer credit.</p>	
D.3	Contributed Service	
D.3.a	Pro-bono consulting (per project per year)	<b>4</b>
D.3.b	Advisory board services (per board per year)	<b>4</b>
D.3.c	Formal mentoring (per mentee, per year of service)	<b>2</b>
D.3.d	Other (please be specific, include length of service)	<b>2</b>
<b>Maximum Credits Allowed: 30</b>		

The governing principle used to determine the appropriateness of an activity’s inclusion for recertification credit is whether it reflects or falls into the archival domains defined in the ACA’s [“Role Delineation Statement”](#).

D.1

If your term of service does not follow the calendar year, pro-rate your credits accordingly. Organizations have different leadership titles – if it is unclear from your title which category applies, please include a brief description of your position.

D. 1.a

An executive officer is usually an elected position where the individual has primary responsibility for a major part of the work of the organization. Examples include President, Vice-President, Secretary, or Treasurer.

D.1.b

An elected member of a governing group where members share equal responsibility for guiding the organization’s work. Examples include governing boards, governing councils, and steering committees. Service on steering committees for SAA sections and roundtables is entered in D.1.d.

D.1.c

A chair of a committee, task force, section, or roundtable can be appointed or elected and is responsible for managing and guiding the work of a sub-group of an organization. These can be either permanent subgroups (for example, an SAA Section or a standing committee) or temporary sub-groups (such as a task force with a short-term project or goal).

D.1.d

A liaison or representative is generally an appointed position where the individual represents one organization to another. For example, a member of SAA may be appointed as the representative to ACRL. A steering committee member in this context is elected or appointed to a position of leadership in a subgroup of a larger organization, such as the steering committee of an SAA section or roundtable.

D.1.e

A committee or task force member is appointed or volunteers to work as part of a group, led by a chair, in order to complete the work of a standing committee or a topic-specific task force.

D.2.

Note: A local professional group is one whose members are drawn from a geographic area below the state level, such as a city, county, or region of a state.

D.3.a

Independent, pro-bono consulting activates providing advice to organizations or individuals by approved agreement (may or may not be a formal contract). Ordinarily consulting consists of activities such as advising organizations concerning archival management of historical materials or independently performing archival functions.

D.3.c

Formal mentoring is a structured program organized through a professional organization or academic program. Credit is given per mentee, per year. More organic or informal but significant arrangements may be considered under D.3.d with a description of the service.

D.3.d

You can include under the “other” category any service-related archival activities not covered by existing categories. For example, providing archival training outside the scope of your job duties; assuming responsibilities above and beyond your role as a member of an archival committee, task force, or roundtable; proctoring an ACA exam (2 credits) or staffing an ACA information table (1 credit per 2 hours); serving as a History Day judge, or any other contribution that falls under the aegis of Professional Service.

Definitions:

**Archival Leadership:** A variety of forms of participation in any organization of professional archivists, including the Academy of Certified Archivists, as set out in Section D.1.a - D.1.e.

**Membership:** Individual membership, per year, in any international, national, regional, or local archival organization of professional archivists or allied organization that relates to the domains of archival practice and has regular meetings or publications and formal membership roles.

**Contributed Service:** An aspect of professional service, contributed service consists of any form of uncompensated activity on behalf of the archival community or to promote the preservation of historical records elsewhere in society.

**Section E: Writing, Publishing, Editing**

		Credits
E.1	Peer Reviewed publications	
E.1.a	On topics in the <b>archival</b> domain:	
E.1.a.i	Book length publication	<b>30</b>
E.1.a.ii	Journal article or chapter in book	<b>15</b>
E.1.b	On topics <b>related to</b> but not in the archival domains (history, biography, or other topics in which reference to archives or archival papers is primary):	
E.1.b.i	Book length publication (e.g. a state or local history)	<b>6</b>
E.1.b.ii	Journal article or chapter in book	<b>3</b>
E.2	Publications without Peer Review	
E.2.a.	On topics in the <b>archival</b> domains:	



E.2.a.i	Book-length publication	<b>15</b>
E.2.a.ii	Journal article or book chapter	<b>10</b>
E.2.a.iii	Newsletter article (350 words or more)	<b>5</b>
E.2.a.iv	Primary author of a regularly updated blog or website	<b>5</b>
E.2.a.v	Published book/resource review	<b>3</b>
E.2.b	On topics <b>related to</b> but not in the archival domain (history, biography, or other topics in which reference to archives or archival papers is primary):	
E.2.b.i	Book-length publication	<b>5</b>
E.2.b.ii	Journal article or book chapter	<b>3</b>
E.2.b.iii	Newsletter article (350 words or more)	<b>2</b>
E.2.b.iv	Published book/resource review	<b>1</b>
E.3	Editorial activities	
E.3.a	General editor of professional archival journal or series (per year of activity)	<b>25</b>
E.3.b	Editor of book length archival publication or manual, or special issue journal (per publication)	<b>20</b>
E.3.c	Editor of ARCHIVAL newsletter (per year of activity)	<b>15</b>
E.3.d	Departmental editor (e.g., editor of Review section of journal) or member of editorial board (per year of activity)	<b>10</b>
E.3.e	Editor of a web page for an archives or archival organization (per website/per year)	<b>5</b>
E.3.f	Peer reviewer (per manuscript)	<b>2</b>
E.4	Other writing or editing on topics in or related to the archival domains (ex. blog posts)	<b>1</b>
<b>Maximum Credits Allowed: 30</b>		

*Co-authors or co-editors claim equal credits as single authors or editors. When possible, please provide links to publications.*

The governing principle used to determine the appropriateness of an activity’s inclusion for recertification credit is whether it reflects or falls into the archival domains defined in the ACA’s [“Role Delineation Statement”](#).

E.1. - E.3.

Co-authors and co-editors claim the same credits as single authors.

This section is divided into those books and articles which undergo peer review before being accepted for publication (most books and professional journals), and those which do not. If in doubt, call the editor or publisher.

There is also a division into publications on topics in the archival domains and those more general topics that are still related to archives or archival collections.

When claiming credit as the primary author of a publication that may be found online, regularly updated blog or web site, include the URL for the site(s) in your qualifying archival experiences document.

**Credit cannot be given for publishing, editing, or writing for a publication issued by the archivist’s employing institution or for a work published, edited, or written on behalf of your workplace.** Thus, editing or writing for an institutional website, blog, newsletter, journal, or promotional material or creating a finding aid to materials within the institutional holdings is not considered creditable under this section. Similarly, press releases submitted for inclusion in newsletters are not eligible for credit.

Credit for publications is given at the time of publication, not during the writing, submission, or revision process.

E.3.e and E.3.f

Peer review entered here must be outside any service on an editorial review board. Credit may not be claimed for peer review of manuscripts when such review is part of duties as a member of an editorial board. Such service is accounted for in E.3.e Section. Section E.3.f is meant to capture a petitioner’s irregular peer review of manuscripts independent of other service or editorial commitments

E.4

Publishing and editing that is archival in nature that is not accounted for in E.1-3. Provide details and links (where applicable). Examples include a blog entry not written on behalf of your employing organization, submissions to SAA writing contests, etc.

Definition:

**Archival writing, publishing, and editing:** Publications resulting from these activities must be on subjects relating to the domains of archival knowledge defined by the [role delineation statement](#).

**ACA Revision History**

<b>Date</b>	<b>Name</b>	<b>Description</b>
January 2016	Tara Z. Laver	Created/compiled from other existing sources.
July 2017	Tara Z. Laver	
June 2021	Stephanie Bayless	Updates for SAA Annual Meeting attendance 2020-2021; Formatting and related edits for use with online petition system
January 2022	Stephanie Bayless	Removed Section A from petition requirements/options