

Archives Working Across Remote Environments (AWARE): Connecting the Government Archives of the U.S. Territories, Hawaii, and Alaska

The Council of State Archivists (CoSA) requests \$149,736 for a 24-month NLG-L planning grant to investigate and articulate the needs of territorial and non-contiguous state archives, produce guidance documents, and develop a plan for their support. Using a series of data-gathering assessment methods, CoSA representatives and project partners will identify unique and shared agency needs and collaborative opportunities to address both individual and overarching challenges facing these institutions and the communities they serve.

This project supports CoSA's [strategic education and training and diversity and inclusion goals¹](#) (as per its 2022-26 strategic plan) and IMLS' Program Goal 2, Objective 2.3, though the scope lends itself to other program goals and outcomes related to emergency response and developing collaborative solutions. The planned activities will strengthen the relationships between institutions and the communities they serve, establish a network of support, create opportunities for mentoring and sharing within the CoSA membership, and identify next steps to address the identified challenges. Though focused on territorial and state government archives and the diverse communities they serve, the outputs could have potential application to other under-resourced cultural organizations nationwide; local, rural, and Indigenous communities; and peer membership organizations such as Chief Officers of State Library Agencies ([COSLA](#)).

Project Justification

CoSA regularly surveys its member institutions through annual, Board-conducted [Calls to the States](#), [biennial State of State Records surveys](#), and [occasional Digital Preservation Capability Maturity Model \(DPCMM\) self-assessment campaigns](#). Year over year, a range of needs are expressed by the territorial archivists, spanning lack of funding, failing physical infrastructure, attracting and retaining diverse talent, increasing costs, supply chain issues, and impending and realized environmental disaster due to climate crisis. In the last several years, these issues have been amplified by pandemic-related closures, inflation, social unrest, and increasing frequency in emergencies (for example, hardware failure, building deterioration, and storms). Similar challenges also face the non-contiguous states of Hawaii and Alaska, making them natural partners to serve both as beneficiaries of this project as well as mentors for their territorial peers. While the needs have been expressed, individualized and collaborative solutions remain to be coalesced and shared.

As a nonprofit membership organization of the state and territorial government archives in the 50 states, five territories, and the District of Columbia, CoSA provides leadership that strengthens and supports our members in their critical work to preserve and provide access to government records. Through [recent IMLS funding](#), CoSA facilitated a series of [Cultural Competency workshops](#) and working groups, led by consultant Helen Wong Smith, the lessons of which will inform the proposed exploratory work. CoSA has the capacity, support, and experience to manage this funding in order to develop responsive and replicable solutions.

¹ Hyperlinked resources and other citations are also included in Supporting Document 1.

Target audiences and beneficiaries

The primary beneficiaries of this proposed work are the staff members of the seven participating government archives, offering funding and support to listen to their needs, concerns, and strategic plans for the future. By strengthening the ties between these institutions and back to their peers within CoSA, they will be better prepared to meet the mission of their institutions and better able to serve the populations that depend on them for access to and preservation of the stories and records of local communities, governments, and locations.

By comparison to the other 48 states and when data is available, the populations of the territories, Hawaii, and Alaska represent diverse minority U.S. populations² and are more likely to live in precarious socio-economic conditions.³ A recent Washington Post article summarized 2020 U.S. Census population data for the territories, revealing an alarming rate of population decline.⁴ Territorial archives have shared their challenges attracting and retaining staff, reflective of trends that the recent census has enumerated. Investment in these institutions is a commitment to the people they serve, and a means to help stabilize and sustain their histories, governments, and future.

Though national in scope, the findings will be tailored to the specific situations of the seven participating institutions, their staff, and the populations they serve. Given the scope of the project and situational scenarios found in other under-resourced or rural cultural heritage organizations both nationally and globally, project results are expected to be adopted, adapted, and reused by other communities, increasing the potential impact.

Why the health of state and territorial archives matters

Archives collect the historical record, and government archives function specifically to collect and preserve records that protect the legal, financial, administrative, and historical foundation of the government and its citizens. State and territorial archives exist to preserve memory, making sure that historical and municipal records are accessible to citizens and properly maintained and, when necessary, migrated to new formats over time. In some instances, government archives may be the only organizations capable of the preservation of essential cultural and community information through public records.

Consistent funding and support of these institutions means more resources are available to help teach a student how to assess different viewpoints, to provide documentation for a veteran to access benefits, or to help a business owner recover after a disaster. Within the United States, government archives are the conduits that facilitate public transparency offering services that save tax dollars through increased government efficiency and empower private citizens to hold elected officials accountable.⁵

Conversations CoSA leaders have had with territorial archivists consistently reveal chronic underfunding and lack of resources. While the territories often participate in some way in CoSA's annual Calls to the States, a more casual data collecting activity, they are often unable to contribute to the more in-depth Archives and Records Management (ARM) Survey because of their own capacity limitations or extended vacancies in leadership roles.

² *List of U.S. state and territories by race/ethnicity*. (2023, February 5). Wikipedia. Retrieved 2023, March 10, from https://en.wikipedia.org/wiki/List_of_U.S._states_and_territories_by_race/ethnicity.

³ *List of U.S. states and territories by poverty rate*. (2022, September 29). Wikipedia. Retrieved 2023, March 10, from https://en.wikipedia.org/wiki/List_of_U.S._states_and_territories_by_poverty_rate.

⁴ Van Dam, Andrew. (2022, September 23). *People are fleeing Puerto Rico, Guam and every other U.S. territory. What gives?*. Washington Post. <https://www.washingtonpost.com/business/2022/09/23/american-territories-population-loss/>.

⁵ Council of State Archivists. (2013). *The Importance of State Archives*. <https://www.statearchivists.org/viewdocument/importance-of-state-archives>.

Limited resources, including staff time, amount to little availability of quantitative longitudinal data for these archives regarding their funding, capacity, and services to their communities.

Because of this paucity of data, comparisons are challenging; however, combining the numbers from Puerto Rico and Nevada from CoSA's 2021 State of State Records report with the U.S. 2020 census data does reveal disparities. Puerto Rico and Nevada reported similar population sizes (3,285,874⁶ and 3,104,614⁷, respectively), and yet their budgets specifically for archives are vastly different (\$250,000 and \$788,945, respectively). This means Puerto Rico is investing just \$0.08 per capita to support government archives for its citizens while Nevada is investing \$0.25 per capita.

Supplemental funding is also challenging to pursue for territorial archives. Territorial libraries regularly receive IMLS funding through the Grants to State Library Administrative Agencies program, but archival counterparts have no equivalent direct support. While many state archives report federal and other grant sources as consistent sources of supplemental funding, the territories report lack of capacity for competitive grant writing and the subsequent reporting requirements if funds are awarded.⁸ The function of territorial archives is no less critical than other states, and the health of these institutions is vital to supporting underserved American populations.

A collaborative approach to solutions

Since [CoSA's organization](#) stemming from the NHPRC's State Historical Records Advisory Boards (SHRAB) program, engagement with and support for the territories has been both a priority and a challenge. As remote participation options have increased, archival staff have had more opportunities to contribute through online communities and webinars; however, time zone differences often mean their contributions are out of synch with others, and staff turnover throughout CoSA membership means a regular need to build new relationships. Coordinating phone calls can often take months and may be further disrupted by instability of the internet infrastructure, emphasizing the value of conducting in-person meetings for the proposed project. The strategies of this project grew from decades of conversations within the CoSA community and are rooted in tactics suggested by the staff of the seven participating institutions.

Karen Gray and Adam Jansen, state archivists for Alaska and Hawaii, respectively, are eager to serve as mentors to their territorial peers. Their institutions have made great strides as new states, transitioning from territories and engaging in critical work with Indigenous communities. This subset of CoSA's membership recognizes the importance of community building (both between peer archival workers and between the archives and the communities they serve) and the healing that is necessary for them to best serve unique community needs and fulfill their missions in a space of trust. These archives also navigate their work within the larger government structure, which often comes with careful political negotiation and intentional advocacy.

In hiring consultants with expertise in government archives as well as the cultures of the Caribbean and Pacific Rim, CoSA intends to emphasize the importance of this work. Investing the time to travel to these locations demonstrates respect for the institutions and the communities they serve and draws attention to the importance of the project. Whereas an official or community elder may be reluctant to participate in a phone

⁶ *Puerto Rico*. (2021). United States Census Bureau. Retrieved 2023, March 16, from https://data.census.gov/profile/Puerto_Rico?g=040XX00US72.

⁷ *Nevada*. (2021). United States Census Bureau. Retrieved 2023, March 16, from <https://data.census.gov/profile/Nevada?g=040XX00US32>.

⁸ Council of State Archivists. (July 2021). *The State of State Records: A Statistical Report on State Archives and Records Management Programs in the United States*. <https://www.statearchivists.org/viewdocument/2021-the-state-of-state-records-a>.

call, archivists may use the consultants' visit as an invitation to external partners and advocates and as an opportunity to celebrate their mission and service to their communities. The work of the consultants is not to dictate external solutions but rather to listen to the project partners and articulate their needs and ideas to create a roadmap for implementation.

Project Work Plan

The project will be directed by Joy Banks, CoSA Executive Director, over a 24-month timeline, allowing for the vast geographic representation of participants, potential for disruptions, and various cultural considerations woven throughout the project. The CoSA Community Coordinator and project consultants, hired in the first quarter, will work in coordination with the participating archives and their communities to build authentic partnerships assuring greater success of the outcomes.

Quarter 1: Foundation (*August 2023 – January 2024*)

Project Team

CoSA will hire a part-time Community Coordinator to serve on staff and contribute oversight to this project as well as other community development efforts for the organization, particularly work with the State Electronic Records Initiative (SERI). The job posting will be shared through CoSA communication channels, mission aligned organizations (such as SAA), and other common job search networks, such as ArchivesGig and Idealist. While the work is archives-aligned, the focus will be on hiring someone with some experience in non-profits, associations, and remote community development. The Executive Director will lead the search process, in consultation with the CoSA Executive Committee, and serve as the immediate supervisor of the Community Coordinator.

Relying on established relationships in the geographic regions, CoSA plans to identify and hire at least two project consultants, or an equivalent team, with an understanding of and experience with archives in the Caribbean (Puerto Rico and the US Virgin Islands) and the Pacific Rim (Alaska, Hawaii, American Samoa, Northern Mariana Islands, and Guam). The following names have been submitted by the project partners and CoSA community as representative of possible hires:

- Jeannette Allis Bastian, U.S. Virgin Islands
- Sue Ann Lau, Santa Monica, California
- Selena Ortega-Chiolero, Nay'dini'aa Na' Kayax (Chickaloon Native Village)
- Derek Mosley, Auburn Avenue Research Library
- Helen Wong Smith, University of Hawai'i

A CFP will be released for the project through CoSA communication channels and directly to individuals identified by the territorial partners. Consultants will be expected to work within the structure of the awarded funds and timeline. The Executive Director will gather a small committee of at least one CoSA Board member and at least one representative of the participating archives to review submitted proposals and make the final selection.

Draft position description and consultant CFP are included in the Resume upload. Hiring for the Community Coordinator and consultants is expected to take no more than two months. The Executive Director, Community Coordinator, and consultants will serve as the *project team*.

Community building

Project partners will include one or more representatives from the participating archives (Alaska, Hawaii, American Samoa, Guam, Northern Mariana Islands, Puerto Rico, and U.S. Virgin Islands).

Concurrent to the hiring process, individuals from the project partners will be added to an online community by the CoSA IT coordinator to facilitate communication and collaboration. Once the Community Coordinator and consultants are hired, they will help generate conversations, suggest topics for discussion, and encourage sharing in the group. CoSA will host at least one synchronous, virtual introductory meeting to launch the project and establish relationships between CoSA members, the Community Coordinator, and the consultants.

Planning

In coordination with CoSA staff, the consultants will develop topic areas and questions to explore and determine the best methods for data collection for specific areas of discovery (e.g., surveys, focus groups, site visits, one-on-one interviews, etc.). This exploration will build on the most recent surveys conducted by CoSA (2023 Calls to the States and 2022 Archives and Records Management Survey) to reduce duplication of work and seek more comprehensive articulation of the challenges already identified by the project partners. The consultants will pursue collection of both qualitative and quantitative data, dividing inquiries for pre- and post-site visit data collection.

The consultants will work to schedule at least one site visit to each of the seven participating archives to tour archival facilities, meet staff, and discuss initial findings from pre-visit data collection. As deemed appropriate by the host archives, the consultants will collaborate with the project partners to invite elected officials, agency heads, and other community partners to participate in portions of the visit. In consideration of the cost and resources necessary for such travel, every effort will be made to combine trips when possible (for example, visiting Puerto Rico and the U.S. Virgin Islands consecutively) and book arrangements outside of high seasons.

Planning will also begin for the in-person 2024 CoSA Annual Meeting, which will include components specifically for the seven participating archives over several consecutive days. The Executive Director, Community Coordinator, and other members of the CoSA team will be responsible for the planning and coordination of this event.

Quarter 2-3: Formation (*February 2024 – January 2025*)

Project team

The project team will meet regularly through the end of the project to share updates, address concerns, make adjustments, and consult with the project partners. These meetings will also facilitate any required report writing, data assessment planning, data analysis, and other necessary administrative tasks.

Community building

The Community Coordinator and consultants will continue engaging the project partners through asynchronous conversations in the online community space. Partners can use this space to address particular concerns, glean resources from each other, and provide feedback on the progress of the project. Through the conversations and topics of concern that emerge in the virtual space, the Community Coordinator and consultants may develop additional virtual, synchronous activities or trainings deemed useful in discussion with the project partners. CoSA's IT Coordinator will help with the scheduling, hosting, and facilitation of any such virtual events. Other CoSA members or those with an interest in the project partners, such as members of the public or staff at other territorial cultural heritage organizations, may be invited to such events, depending on the topic.

Data Collection

Specific research questions will be finalized under the direction of the consultants and in coordination with the project partners. Expected topics for investigation include, but are not limited to:

- emergency preparedness and disaster planning;

- impact of climate change on archival records and facilities;
- infrastructure and technology needs;
- building institutional stability, maintenance, and growth potential;
- collection policies and challenges, especially related to electronic records;
- cultural and community needs unique to the regions;
- staffing levels, retention, and pool for future hiring;
- training and skills gaps; and
- growing community in state/territorial government agencies (e.g., relationships with CIOs) to identify opportunities to work collaboratively across and within their governments.

Using CoSA platforms and tools, the consultants will conduct virtual data collection as determined useful in the Foundation Phase. The CoSA Executive Director and Communications Coordinator will provide support as necessary. Focus groups, the virtual community, and other conversations will build a community of practice among individuals in the various institutions. Virtual data collection will be conducted both pre- and post-site visit. Pre-site visit data collected will help shape the itinerary for the visit, and post-site visit data collection will clarify any discovery and gather additional information with final outcomes in mind.

Site Visits

In-person site visits are a critical component of this project, providing a clear picture of how remote the project partners are and the unique challenges they face. Site visits also allow for in-depth tours of the facilities, observation of workflows that meet community needs, and opportunities to meet with and better understand the populations that the archives serve. The purpose of these visits is to listen and observe, gathering the stories of the project partners and their communities to inform future recommendations.

Visits will last between two to seven days, depending on flight schedules, availability for meetings, and coordinating cost- and resource-efficient itineraries. Funds are requested so that both consultants may travel to all seven program partners, though the group may determine a more appropriate combination of travelers, with the expectation that at least two individuals will travel concurrently to each location during this phase. The consultants will work with project partners to finalize itineraries and book travel.

When recommended and deemed beneficial by project partners, additional meetings may be planned during site visits to include other individuals or groups such as elected officials, related government employees (for example, those in IT or facilities), and community members. Extended invitations would be made to raise the profile of the archives and this federally funded project, further emphasizing the mission of the institutions and the critical services that they offer to their various populations. Inviting additional guests would also be an opportunity to gather stories of impact from a wider audience to guide the outcomes and recommendations of this project. *A sample itinerary for a 2-day site visit is included as Supporting Document 2.*

Annual Meeting

In alignment with CoSA's annual meeting (*tentatively Summer/Fall 2024*), representatives from the participating institutions will gather in-person for a symposium and listening session, further cultivating their community of practice. While CoSA often co-locates its meeting with another mission-aligned organization, organizational leadership is currently planning a CoSA-only event for 2024, allowing time to regroup and focus on the specific needs and concerns of its members. A smaller event will allow intentional focus on this project and its participants and engage the extended CoSA community in the opportunity to participate in listening sessions, focus groups, or other forms of feedback as outcomes are shaped.

CoSA expects to hold the 2024 meeting at a member archive to reduce costs. Several state archives have volunteered to host, including Louisiana, Hawaii, South Carolina, and Illinois. CoSA is strongly considering the

invitation extended by Hawaii to reduce the travel burden and expense for most of the project partners and equalize the travel experience for the remaining CoSA membership who are accustomed to conferences convenient to their geographic locations.

During the event, project partners will meet with consultants to discuss findings to date and plan for the remainder of the timeline. By the time of the meeting, several site visits should be completed, so consultants will also lead a discussion to generate ideas for emerging solutions. Project partners will also have the opportunity to engage in conversations with their CoSA peers during working sessions, share updates from their archives, and learn about current practices in the field to take back to their communities.

Quarter 4: Future Focus (*February 2025 – July 2025*)

Community Building

As the project timeline draws to a close, the Community Coordinator will assume primary responsibility of monitoring and encouraging conversations and disseminating resources for the project partners as the consultants turn their attention to final assessment and reporting outcomes. The online community space will continue to exist after the project ends so that collaboration, mentorship, and coordination of efforts continue.

Discussion time during this period will focus on identifying sustainable next steps, additional project partners, advocacy needs, and potential funders to implement the strategies articulated in the final phase. The Community Coordinator will liaise with the Executive Director as needed to share potential leads, topics, and issues that may need to be addressed through future member services such as webinars, reports, or white papers offered through CoSA. Post award, project participants will be encouraged to participate in the 2025 CoSA Annual Meeting, likely in coordination with another organization (such as ATALM or COSLA), or another mission-aligned conference (such as International Council on Archives) to share lessons learned and the outcomes of the project with a broader audience. Financial support may be available for this participation, depending on future CoSA funding and sponsorship.

Assessment

While assessment and evaluation is planned throughout the project, making lessons learned more iterative than linear, the consultants will concentrate efforts in the final quarter after data collection is complete. Consultants will review all of the qualitative and quantitative data gathered and transform what they learned into practical strategies, roadmaps, and actions for future implementation. Draft strategies will be reviewed by project partners and the Executive Director for refinement, connections with other active projects, and alignment with missions to serve the communities of the project partners.

Assessment activities will also include an evaluation of the next steps, additional project partners, and potential funders identified through the community building activities of this phase. The project team will work in collaboration with the project partners and the CoSA Board of Directors to shape the implementation phase of the project, including identification of the most sustainable activities and promising partnerships for funding. CoSA expects implementation to take place in multiple arenas: within the CoSA membership (e.g., mentorships, professional development, advocacy), locally for project partners (e.g., improved communication between archives, administrative agencies, and the general public), and nationally (e.g., additional funding for specific identified project needs).

Sharing

The data analysis and project recommendations will be shared through internal recommendations to the project partners, customizing reports as appropriate for specific scenarios. For example, findings may reveal a need for

additional documentation related to electronic records management at one territory, and templates developed through [CoSA's IMLS-funded BACKER project](#) could be adapted for use to start the policy development process and included as part of the provided custom report. When recommendations apply to multiple partners or have been addressed by other CoSA member institutions, the Community Coordinator and Executive Director will help facilitate collaborative work and broader mentorship to implement solutions.

Additional outputs may include, but are not limited to, blog posts from consultants and participants contributed under the supervision of CoSA's Communications Coordinator; a short white paper of high-level findings; a CoSA-hosted webinar; sound bites and interviews gathered by consent during community building activities and site visits; and advocacy pamphlets and templates to share with archivists, elected officials, community members, and potential funders. Resource development will target a variety of audiences and be shared appropriately through CoSA's communication channels, website, mission-aligned archival organizations (e.g., SAA, COSLA, NAGARA, ATALM), and community allies identified by project partners. The project team expects to present at least one conference presentation where outcomes and strategies may be most applicable, such as the Association of Rural and Small Libraries or the Associations of Tribal Archives, Libraries, and Museums (ATALM).

Diversity Plan (if applicable)

CoSA seeks to be a relevant, inclusive, and collaborative organization through responsive action on behalf of its members. Those employed within the member institutions of CoSA have built a community of trust and collegiality during the more than twenty-year history of the organization. The Board conducts regular conversations with the territories and non-contiguous states, and this regular communication informed the need for this planning grant and the shape of the activities included in this proposal.

As government agencies, state and territorial archives serve diverse populations of many races, religions, identities, abilities, and ages. In a typical year, they respond to online, in-person, mail, and phone reference requests from citizens, government officials, teachers, students, researchers, policy makers, and others. Yet, government agencies have traditionally done an uneven job of capturing the historical record involving marginalized populations and documenting their experiences through records collection, digitization, and enhanced access. Additionally, access to government records is an equity issue for most states and territories, especially those where broadband is weak or non-existent; where both government agencies and residents lack the technology to make records available and access them online; where archives facilities are located outside of urban centers, making them difficult to physically access by public transportation; and where populations are scattered over large distances making physical access to the archives difficult or impossible.

The residents of the territories and non-contiguous states reflect diverse voices of individuals and communities in the United States. Their archives have been historically underfunded, resulting in underrepresentation of their populations and their stories in our historical record. Assuring the continued support of these governmental archives is critical to preserve, sustain, and share the stories of these areas and empower these communities with the resources to hold governments accountable. Centering the project partners in this proposal and unifying their efforts through a community of practice amplifies their voices in the outcomes, increasing the likelihood of sustainable solutions that truly meet the needs of their institutions and the communities they serve.

Project Results

The intended results of this project are a stable community of practice between the seven project partners, articulated plans to address the primary concerns identified through data collection, and public facing reports and templates to share recommendations and replicable tools for implementation. The development of public facing resources will be done in close coordination with the project partners and center their voices and priorities.

The data collected throughout this project will be summarized in a series of seven focused reports delivered to each project partner. These reports will contain thorough analyses of several key domain areas essential to the administration of government archives, including:

- Recordkeeping governance (such as statutes, policies, and authorities)
- Physical infrastructure
- Digital infrastructure
- Technical expertise
- Security and disaster preparedness
- Access
- Cultural and community competency

CoSA's objective is to provide project partners with analysis of the current state of the archival services provided through the lens of the standards of practice state archives have developed over the past few decades of collaborative work. The consultants will synthesize the data collected through the various means (conversations, focus groups, surveys, and site visits) and provide customized reports to each archive, demonstrating the continued need for attention and resourcing. The reports will be designed for immediate advocacy and action, providing clear, concise, data-backed tools that territorial archivists and the entire CoSA community can use to elevate their services. These custom reports will be made public at the discretion of the project partners, with the possibility of aggregating data points for illustrative purposes.

To be sure project deliverables are usable by other government archives, cultural heritage organizations, and communities, a templated version of the reports and an overview of the data collection methodology will also be shared alongside the consultants' full overview of the project in a final white paper or report. Additional tools and templates will also be shared, reaching various audiences beyond the archival fields such as government agencies, the general public, and potential funders. The final report will also emphasize a clearly articulated plan to support the long-term stability, maintenance, and sustainability of the involve project partners and serve to introduce potential funders and new partners to the project. All public resources will be made freely available on CoSA's website and related platforms.

Possible outcomes of the dissemination of the project deliverables may include greater awareness and use of government archives by the public, an increase in more effective advocacy for the critical needs of archives and the communities they serve, and establishment of creative ongoing support such as new "Friends of the Archives" groups. Critically, the work will not end with a single project. The bridge built during the 24-months of work between the territories, their CoSA peers, and the diverse community of archival users must be maintained for the future, and outcomes will be designed for review, updating, and future re-distribution. By directing thoughtful attention to the territorial and non-contiguous state government archives, their learned experiences can inform their own future needs, provide support for other regional collecting organizations, and bring attention to remote communities throughout the United States.

Council of State Archivists

Digital Product Plan

Type

The digital products expected from this project include:

- Project partner reports detailing the observations from site-visits and incorporating other data collected pre- and post-visit.
 - Quantity: no more than seven
 - Digital file format: .pdf
- White paper or other report providing a summary of the project findings, lessons learned, and suggestions for implementation of key project findings.
 - Quantity: one
 - Digital file format: .pdf
- Marketing materials and other deliverables such as blogs, video clips, and templates.
 - Quantity: varying
 - Digital file format: .pdf, .docx, .mpg. Blogs will be posted on the CoSA website.
- Quantitative and qualitative research instruments for gathering data from the project partners and other stakeholders. These may include interview protocols, focus group protocols, and surveys.
 - Quantity: approximately twelve
 - Digital file format: .pdf, .docx, varying survey tools (e.g., SurveyMonkey, Google Forms)
- Research data, which may include interview transcripts, focus group notes, survey responses, and site visit notes.
 - Quantity: between 100-150 data points generated
 - Digital file format: .pdf, .docx, .xlsx
- Webinar video recordings and presentations, which may include a transcript, slides, and chat.
 - Quantity: approximately four
 - Digital file format: recordings will be made available on CoSA's YouTube channel or on its website as .mpg videos or another suitable file format for viewing in the territories.
- A semi-private online community forum for the project partners and assigned CoSA team members.
 - Quantity: one online community
 - Digital file format: the community forum will be hosted on CoSA's HigherLogic instance

Availability

All public facing outputs (public white paper/report, webinars and related slides, and marketing materials) will be shared on CoSA's website (statearchivists.org) and promoted widely through CoSA's newsletter, blog, social media accounts, community spaces, and mission-aligned listervs. Project partner reports will be publicly available at the discretion of the public partners, though CoSA anticipates making a template or other model available publicly for adaption or reuse.

Recordings of public webinars and video clips will be made available on CoSA's YouTube channel (<https://www.youtube.com/user/StateArchivists>). Other recordings may be made available in member-only HigherLogic communities with guidance from the project partners.

No data that would allow individuals to be individually identified will be included in the public outputs without proper consent.

Access

CoSA releases all public facing materials created with grant funding under [CC-BY licensing](#) for widest possible dissemination and attribution. Every consideration will be made to ensure that nothing is released with privacy concerns.

Sustainability

All public facing outputs will be uploaded through CoSA's HigherLogic instance and tagged for access and discovery in its Resource Center. Should CoSA migrate to an alternative platform in the future, the organization is committed to carrying forward grant-funded outputs to new iterations of the Resource Center for the length of their usefulness (usually no more than 10 years). Additional back-up files will be housed in a private, cloud-based drive only accessible by CoSA team members and project partners. Final grant products are also transferred to CoSA's organizational archives housed at the North Carolina State Archives according to a retention schedule for long-term preservation.

Council of State Archivists Organizational Profile, 2023

Mission: The [Council of State Archivists \(CoSA\)](#) provides leadership to strengthen and support state and territorial archives leaders and staff in their work to preserve and provide access to government records.

In December 2021, the CoSA Board of Directors [adopted a strategic plan](#) committing the organization to the following core values statements:

- **RELEVANT:** CoSA anticipates and responds to developing trends, emerging research, and advocacy issues to meet the evolving needs of state and territorial archives leaders and staff.
- **INCLUSIVE:** CoSA represents all state and territorial archives leaders and staff, encourages all agencies to provide equitable access to state records, and advocates for equity and inclusion within the government records workforce.
- **COLLABORATIVE:** CoSA acknowledges, amplifies, and facilitates the creative strength and extensive knowledge of diverse members, partners, and stakeholders working together.

To achieve the goals of the 2022-2026 Strategic Plan, CoSA prioritizes four areas of work:

- **Education and Training:** Using the strength of collaboration and partnership to leverage resources, share expertise, and solve problems, CoSA provides scalable, flexible, equitable and inclusive education and training that meet the diverse needs of state and territorial archives leaders and staff.
- **Research:** As the source of reliable information about state archives and records management programs, CoSA conducts relevant, current, and useful data collection and analysis appropriate for understanding the evolving field of state and territorial government archives and records management, and for informing professional and public policy development.
- **Advocacy:** CoSA represents member needs among policymakers, funders, allied organizations, and the media in a consistent and timely way, pursuing strategic partnerships relevant to its mission.
- **CoSA Sustainability and Excellence:** CoSA meets the evolving needs of state and territorial archives and their staff by being an inclusive, equitable, valuable, and agile resource of information and support, and a financially viable organization.

History and Service Area

In 1975 the National Historical Publications and Records Commission (NHPRC) enacted regulations requiring each state, territory, and the District of Columbia to establish a State Historical Records Advisory Board (SHRAB). Each SHRAB is chaired by a State Coordinator, who is usually the state or territorial archivist. In 1989 the state coordinators formally organized as the Council of State Historical Records Coordinators (COSHRC). COSHRC incorporated as a 501(c)(3) nonprofit membership organization in 2002, and officially changed its name to the Council of State Archivists (CoSA) several years later. Current membership includes the state and territorial government archives in the fifty states, five territories, and the District of Columbia.

CoSA is governed by a nine-member board and supported by numerous committees, with a current staff of one full-time executive director managing four on-going and three project-specific part-time contractors who carry out specific tasks and programming for CoSA.