

Note: This document is the earliest written record of conversations that led to creation of UMRA's Organizational Memory and Continuity Task Force.

Preserving UMRA's Organizational Documentation and Memory

Notes on a meeting of Jerry Rinehart and Chip Peterson, 7/8/19

A few issues we identified:

- A version of the UMRA Board has been meeting since 1976. We currently do not have an efficient means of identifying and/or accessing the Board's policy decisions. Related Issues:
 - Going backward:
 - How comprehensive [aggressive] should we be in trying to collect previous policy decisions and materials (e.g. from members' personal files/hard drives? from the U Archives?)
 - Going forward:
 - Where (in addition to monthly Board minutes) should policy decisions be kept? (What has happened to relevant technology since we retired? Are servers still used? Etc.)
 - In what format(s), and in what location(s), should we preserve electronic documents?
 - Who should have access to them?
 - If we develop a comprehensive digital storage system, should we still continue putting hard copies in the U Archives as well?
- Officers and Committee Chairs have institutional knowledge and memory that could be lost without some effort to efficiently capture this information. Related ideas:
 - Should we institute a system of "Understudies" for key positions?
 - For key positions should we develop "Crib sheets" containing key organizational issues, responsibility, deadlines, how-to tips, etc.?

A couple of bare-bones proposals:

- At the very least, UMRA should put policies on website, initially as simply another subsection within the UMRA Governance section; they could eventually be grouped into categories if numbers become unwieldy.
- We need some guidelines for developing documents (e.g., always include at date, authorship, at whom aimed).

Who should be on a task force to work through all of this?

Next step/decisions:

- Jerry will take a look at the UMRA section in the U Archives to see what's there and how it's organized.
- We will report on this meeting to Bill Donohue and suggest that he appoint a task force, or authorize us to do so, to dig more deeply into the issues and propose a plan.

Possible charge to a task force on maintaining continuity and organizational memory in UMRA:

An all-volunteer organization like UMRA faces particularly severe challenges concerning continuity and organizational memory. The proposed task force will deal with questions such as the following:

- How do we keep easily accessible records of policies passed by the UMRA board?
- Where, in what format, and dating back how far should digital records be kept?
- How can continuity be assured in key positions, particularly officers and committee chairs (e.g., through apprenticeships and/or more systematic written documentation)?