

DATE: August 27, 2024

TO: Jerry Rinehart, Organizational Continuity Committee Chair (OCC)

FROM: Jerry Rinehart, Cathy Gierke Co-Chairs

RE: Annual Report for OCC

- Charge to the Committee: Promote policies and processes that facilitate continuity from one cohort of leaders and members to another; ensure that web-based information and other key organizational documents are accurate and up-to-date; maintain archive of UMRA activities, leadership personnel, policies, and procedures; collect material about UMRA activities and provide them to University Archives.
- Committee members: Chair Jerry Rinehart; Webmaster Cathy Gierke; Archivist Julia Wallace; UMRA President; UMRA Secretary; UMRA President-elect; UMRA Membership and Communications Committee Chair.
- Meetings: The OCC meets as needed, but typically has one or two meetings in the fall to review annual reports and prepare a summary presentation for the UMRA Board in October; and one meeting in the spring to prepare for the call for annual reports and updates
- Activities: two Zoom meeting were held (September and October 2023) to develop a process for reviewing all annual report materials submitted and preparing for presentation to the UMRA Executive Committee and Board of Directors. The presentation summarized and highlighted elements of the FY23 Annual Reports and occurred at the meetings on Oct.16 and 23, respectively.
- Key outcomes/accomplishments of this committee this year:
 - Clarifying and formalizing the annual reporting and document/web updating process for all UMRA components [i.e, Committees, Special Interest Groups, Liaisons and Representatives etc.];
 - Developing an accessible database identifying all areas/ documents/websites needing updating and the individual(s) responsible for these updates;
 - Developing templates for Annual Reports and Toolkits that outline key content, and also follow the UMRA document formatting policy;
 - Clarifying processes for collecting and delivering Archival material for UM Library. (see “Policy Changes” below.)
- Policy changes over the year:

- Instituting the annual reporting process was an outcome of the UMRA Board adoption of a policy on annual reports.
 - The UMRA Archivist will submit a separate annual report on activities specific to this important area of organizational continuity. The UMRA Archivist (Julia Wallace) has also clarified issues related to “digital” versus “hard copy” storage of materials.¹
- Challenges or problems faced/solved? Innovations? See “Key Outcomes” above
 - Advice for future members and activities:
 - Obtaining annual reports, updates and archival materials requires multiple reminders and requests—without OCC members prompting and prodding those responsible, the process will likely be unsuccessful.
 - Board members and the UMRA Secretary need to be attuned to discussions involving **policies** and be attentive to capturing new or changed policies for inclusion in the web-based UMRA Policy Library.

¹ “At this point most of UMRA's collection in the University Archives is in paper. Materials can also be deposited in electronic format, either online or on DVD or USB drive, and we have a small number of these (especially some presidential papers). The assumption is that the University Archives will remain the prime source for research, since it is permanently housed in the University Libraries and is maintained by a professional staff. Our website is a much more convenient resource for relatively recent documents, and of course has the advantage of being accessible from anywhere. It depends on the hard work and skill of a volunteer web manager, and will remain a vital resource as long as volunteers are available. There is no reason to think that this is an "either/or" situation. Each resource has its uses. “(Julia Wallace email message 8/26/2024)