BACKGROUND

SAA launched a new website content management system (i.e., Drupal\(^1\)) on April 13, 2010. This project has been several years in the making, having first been contemplated during the migration to SAA’s association management system (AMS) in 2006. Since then, strategic planning discussions among various groups within the Society, including the Council, have repeatedly attested to the need for “increasingly effective use of current and emerging technology in order to enhance communication with internal and external audiences and stimulate collaboration among (SAA’s) constituents.”\(^2\)

STATUS UPDATE

The Drupal website, located at [http://www2.archivists.org](http://www2.archivists.org), should be viewed as an ongoing development effort, in terms both of technical features and editorial content. The system represents a critical cornerstone upon which to build communication solutions that will advance the Society’s strategic priorities and its value as a membership organization. Key components that help deliver this potential include:

- A sophisticated set of SOAP/XML routines that integrate with SAA’s association management system (i.e., member database), synchronize user login credentials, and grant restricted permissions to content based on leader roles designated in the AMS;
- Easy-to-use, Web-based editing tools that allow SAA staff and authenticated group leaders to increase productivity and manage content quickly and accurately;
- Posting of comments on individual articles by authenticated users, including members and nonmembers, which enhances the interactivity of the SAA website; and
- Configuration of 32 distinct “content types,” each with its own constituent fields and applicable logic, that facilitate specific content management needs. (See Appendix.)

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\(^1\) Drupal is an open-source content management framework. For more information, see [http://drupal.org](http://drupal.org).

\(^2\) Strategic Priority Outcomes and Activities, FY 2010 – FY 2013 ([http://www2.archivists.org/governance/strategic-priorities](http://www2.archivists.org/governance/strategic-priorities))
Ongoing Content Migration

Many pages remain posted on SAA’s old Web server (www.archivists.org) and are displayed in the old visual format. Content that has been migrated into Drupal includes:

1. The new and improved Directory of Archival Education;
2. The Thesaurus for Use in College and University Archives;
3. The Glossary of Archival and Records Terminology; and
4. The majority of primary pages referenced directly in the navigation menu.

Content migration will continue throughout 2010. This extended period is necessitated by the sheer volume of information posted to the SAA website and by the fact that much of it has not been systematically reviewed and edited in many years. Content such as the Council Handbook, the Directory of Archives Organizations, such public awareness and advocacy initiatives as American Archives Month and MayDay, and past Annual Meeting information, will be prioritized by staff and scheduled for review in the coming weeks and months. The so-called “SAA Intranet” (i.e., the database-driven home to the membership directory, group rosters, the SAA Bookstore, etc.) will also be re-themed to match Drupal and to maintain a unified navigation experience. This extended migration period will also provide component group leaders with time to learn the new system and move their content into Drupal.

Fiscal Impact

In February 2009, SAA received five Drupal development proposals with estimated project expenses ranging from $18,500 to $230,000. The median estimate was approximately $60,000. The selected vendor projected 275-350 project hours at $125/hr for a total of $34,375-$43,750.

Actual development expenses totaled $60,406, based on 483 hours billed for the project. An additional 581 hours of work was completed and not billed to SAA, including 147 project management hours, 101 hours to correct bugs identified during quality assurance testing, and 333 development hours. Thus the project to date has required a total of 1,067 hours.

These development expenses were capitalized over five years and supported by fund transfers of $49,105 from the Technology Fund (which is now depleted) and $11,301 from the Brack Fund.

NEXT STEPS

The nature of website development is such that necessary and/or desirable feature enhancements will be identified on an ongoing basis. Now that Drupal has been launched, the staff has compiled the following list of potential projects with input from various component group leaders. Fiscal impact analyses are based solely on staff estimates and are subject to change pending consultation with our vendor. I should emphasize that this list does not represent a single staff recommendation but, rather, an inventory of possible projects. Implementation of these projects is contingent upon SAA’s strategic and programmatic priorities, as well as the availability of resources.
Directory of Archival Education “Comparison Matrix”

The purpose of this directory is “to assist prospective students in making informed decisions about their graduate archival education.” The goal of the Guidelines for Graduate Programs in Archival Studies (GPAS) is “to improve the quality of archival studies graduate programs, specifically by raising the minimum expectations of students and universities.” Therefore, one of the features of the new directory is the ability for (premium) program listing administrators to list the courses offered in their program(s) and to apply metadata corresponding to the GPAS components.3

In order to achieve the goals of the directory, as well as GPAS, staff proposes to develop a “comparison matrix” feature that would allow users of the directory to select up to three program listings via a checkbox and click on a “Compare” button to generate a page displaying features of the selected programs in side-by-side columns. Rows would indicate such comparative information as types of degrees offered, number and types of faculty, and compliance with the curricular guidelines contained in GPAS.

Fiscal Impact: The FY 2011 Capital Budget specifies 40 hours of work for $5,000. This feature is also expected to have a positive impact on directory listing revenues.

Consultants Directory

The Consultants Directory will address a need among freelance archivists and consulting firms to market their services, and will also establish an information resource to which the staff may refer inquiries from the general public.

Fiscal Impact: The FY 2011 Capital Budget specifies 12 hours of work for $1,500. FY 2011 revenues are projected at $1,865, for a modest first-year net gain.

Mentoring Directory

This concept was first discussed several years ago by the Membership Development Task Force of the Membership Committee. It proposes the creation of an online resource that would allow mentors to create and edit searchable personal profiles so that applicants (protégés) could contact prospective mentors directly. Despite recent attempts by the Mentoring Program Subcommittee to refine administrative procedures, there is a growing consensus that the current model—i.e., the manual processing of applications and matching of mentors with protégés—is not sustainable.

Fiscal Impact: The FY 2011 Capital Budget specifies 20 hours of work for $2,500. Staff recommends supporting this development through the Brack Fund.

75th Anniversary Timeline

The 75th Anniversary Task Force has proposed creating a digital timeline as a kind of online exhibit of SAA’s history. The timeline would be based on an open-source project developed by

3 http://www2.archivists.org/category/types/gpas-component
MIT called Simile\textsuperscript{4} that has already been ported\textsuperscript{5} to Drupal. Based on discussions between staff and members of the task force, there is agreement that the timeline function would be unique to the 75th Anniversary project and would not be likely to serve content management needs by other component groups. Therefore, there are two options for deployment: 1) installing the Drupal module or 2) installing the timeline as a free-standing application on SAA’s Web server. Staff is investigating the options to determine the most cost-effective solution.

\textit{Fiscal Impact:} The FY 2011 Capital Budget specifies 20 hours of work for $2,500.

\textbf{Group Blogs}

The 75th Anniversary Task Force also has discussed enhancements to SAA’s wiki and/or blogging functions. These are generalizable features that would potentially serve content needs among many component groups.

As outlined in the Appendix, four content types have been configured for use by component groups: Group Pages, Group Reports, Group Minutes, and Group Newsletters. The first of these is a generic record type that can be used for a variety of informational needs. The other types allow for taxonomic categorization that can be leveraged to create automated indexes. All of these group content types relate to a fifth type representing the Group itself.

These content types are based on relatively traditional modes of written communication and may not, as of yet, address the expectations of users accustomed to today’s fast-paced social media sites (e.g., Facebook). For example, Group home pages are configured to display the group name and a static description. Group Newsletters may be best suited for editorial calendars in which editions are released on a monthly or quarterly basis. By comparison, blogs and microblogs (e.g., Twitter) produce content on a daily, hourly, or even minute-by-minute basis.

The concept of Group Blogs is to create a new content type, such as Group Blurb or Group Blog Entry, suitable for faster-paced content generation (i.e., like a Facebook status update), and to display these Blurbs in reverse chronological order on group home pages in the same manner in which SAA’s own home page functions. This would render Group pages much more dynamic and effective as communication tools.

\textbf{Global Blog}

The concept of the Global Blog is an association-wide feed, sorted in reverse chronological order, that would display the latest content produced by staff and/or by any component group. This would provide website visitors with a single location in which to find the latest news, information, and activities taking place within SAA. This type of aggregation is an example of how Drupal can be leveraged to change fundamentally the way in which content is disseminated within SAA.

\textit{Fiscal Impact:} The FY 2011 Capital Budget specifies 30 hours of work for $3,750 to develop Group Blogs and the Global Blog.

\textsuperscript{4} \url{http://www.simile-widgets.org}
\textsuperscript{5} \url{http://drupal.org/project/timeline}
Group Meetings

Group Reports and Group Minutes are two traditional content types that continue to serve an important function in recording evidence of activity within the Society. Other than their relationship to the parent Group itself (e.g., Council, Publications Board, etc.), these reports and meeting minutes are not currently configured to relate to a meeting event and/or other content generated by that event. Governance activities would be better facilitated by an enhanced content structure in which:

- Staff and/or group leaders could create a Group Meeting record and specify times, places, descriptive information, etc. The Group Meeting would facilitate online arrangement and retrieval of related content;
- Staff and/or group leaders could create a Group Meeting Agenda record, which would be related to the Group Meeting;
- Group Reports could (optionally) be related to a Group Meeting Agenda; and
- Group Meeting Minutes could be related a Group Meeting.

Fiscal Impact: The FY 2011 Capital Budget specifies 30 hours of work for $3,750 to enhance Group Meetings functionality.
APPENDIX: CONFIGURED DRUPAL “CONTENT TYPES”

Content types are systematically formalized record types that facilitate management and display of information in Drupal. Thirty-two content types have been configured and deployed thus far:

1. **Blurbs** (a.k.a. Stories) are short snippets of information posted to the home page.
2. **Pages** are a default, generic content type suitable for a wide range of uses.
3-4. **Books** and **Book Pages** are used for a series of interrelated pages.
5-7. **Annual Meetings**, **Annual Meeting Pages**, and **Annual Meeting Submenus** are used to manage conference content in Drupal.
8. **Associated Organizations** will be used to manage the *Directory of Archives Associations*.
9-10. **Courses** and **Course Faculty** will be used to manage the *Continuing Education Course Catalog*.
11-13. **Glossary Terms**, **Glossary Citations**, and **Glossary Citation Sources** are used to manage the *Glossary of Archival & Records Terminology*.
14-18. **Groups**, **Group Pages**, **Group Reports**, **Group Minutes**, and **Group Newsletters** work in conjunction with our custom SOAP/XML routines and Drupal’s Organic Groups module and are used by component groups to manage group content.
19-20. **Initiatives** and **Initiative Pages** will be used to manage content associated with such activities as American Archives Month, MayDay, and PAHR.
20-21. **News Articles** and **Position Statements & Resolutions** are variants of the Page content type configured in order to support automated indexes.
22-23. **Presidents** and **Presidential Addresses** will be used to manage multiple addresses presented by the SAA President at the Annual Meeting.
24-27. **Programs**, **Program Courses**, **Program Degrees**, and **Program Faculty** are used to manage content in the *Directory of Archival Education*.
28. **Promotional Items** are used to manage in-house ads displayed in page margins.
29-31. **Student Chapters**, **Student Chapter Pages**, and **Student Chapter Annual Reports** will be used to manage the *Directory of Student Chapters*.
32. **Thesaurus Terms** are used to manage the *Thesaurus for Use in College & University Archives*. 