

Strategic Plan Actions and Timelines, FY 2020 – FY 2022

At its November 2018 meeting, the SAA Council reviewed the Society’s [Strategic Plan 2014-2018](#) and discussed SAA’s evolving priorities, with a goal of revising the plan to reflect those priorities in the mid-term future. In a facilitated session, Council members identified three major areas of focus—Advocacy, Research, and Culture—as well as its highest priorities. The facilitator then mapped these to SAA’s four existing goals (Appendix).

Based on this work, the SAA staff drafted activities that staff members believe are 1) responsive to the Council’s priorities and 2) achievable given SAA’s resources. The activities were put forward in draft form for Council comment. The following reflects the comments received (in red) as well as ongoing refinements by the staff. With resolution of the comments in red, the staff recommends that the activities in this “dashboard” be approved, with an understanding that the Council and staff will monitor progress and adjust the activities as needed.

Note: Throughout the dashboard, “WE” designates our “Welcoming Environment” initiative, a reminder to all of us that SAA intends to provide an open, inclusive, and collaborative environment in which all members have the opportunity to participate fully.

RECOMMENDATION:

THAT the following activities and timelines for SAA’s Strategic Plan 2020-2022 be approved.

Goal 1: Advocating for Archives

Society values the vital role of archives and archivists.

1.1 Provide leadership in promoting the value of archives and archivists to institutions, communities, and society.

FY20	A. Publish <i>Creating Family Archives</i> .	Publications Board
	B. Provide media training for 5-7 members; create media opportunities.	COPA / PR Counsel
FY21	C. Promote <i>Creating Family Archives</i> broadly.	Staff / Marketing Counsel

	D. Provide media training for second cohort; create media opportunities.	COPA / PR Counsel
FY22	E. Develop civic literacy effort on how to source reliable information.	Already being done (EL). Up game with broadcast? (MG) Substitute?

1.2 Educate and influence decision makers about the importance of archives and archivists.

[COPP-proposed substitute: Provide leadership in demonstrating the value of archives in public policy.]

FY20	A. Update/enhance online Advocacy Guide and webcasts.	COPP
	B. Craft compelling messages to target audience(s) for SAA and member use.	COPP
	C. Develop letters/editorials on two key public policy issues for members' use.	COPA
FY21	D. Draft legislation for national funding initiative; seek sponsors.	COPP / Joint Working Group / NCH
	E. Develop graphics, interactive map to track district visits; participation "count down" to all 50 states.	Staff / COPP
FY22	F. Seek co-sponsors for federal funding initiative; hold member fly-in to advocate.	COPP / Joint Working Group / NCH
	G. Use A*CENSUS II data to craft messages re: funding for archives/archivists.	CORDA / COPP

1.3. Provide leadership in ensuring the completeness, diversity, and accessibility of the historical record.

FY20	A. Case study series on <i>Native American Protocols</i> ; ATALM exhibit. [WE]	NAAS / Publications Board
	B. Complete "IP Guide" to <i>Native American Protocols</i> . [WE]	IPWG
	C. Revise/distribute <i>Guidelines for Accessibility in Archives</i> . [WE]	Accessibility TF / Council
FY21	D. Additional case studies on <i>Native American Protocols</i> ; ATALM exhibit. [WE]	NAAS / Publications Board
	E. Webcasts on <i>Native American Protocols</i> and <i>Guidelines for Accessibility in Archives</i> . [WE]	Committee on Education / Staff
	F. Publish <i>Archival and Special Collections Facilities</i> .	TS-AFG / Publications Board
FY22	G. Webcast series on working effectively with community archives. [WE]	Committee on Education / Staff

H. Podcast series for community/public on keeping/donating materials.

COPA / Podcast Team

Launch sooner? Tie to consumer book? (SB)

1.4. Strengthen the ability of those who manage and use archival material to articulate the value of archives.

FY20

- A. Publish *Advocacy and Awareness for Archivists* (AFS III).
- B. Rally members to conduct district visits.
- C. Pre-con course on conducting advocacy at state/district level.
- D. Enable Council/leaders to model district advocacy; publicize their activities.
Good idea. Develop something more specific, like pilot? (AEY)

Publications Board
COPP / Joint Working Group
COPP / Education Staff
Council

FY21

- E. Continue to build cohort of media-trained archivist/spokespersons; create media opportunities for them.

COPA / PR Counsel

FY22

- F. Continue to build cohort of media-trained archivist/spokespersons; create media opportunities for them.

COPA / PR Counsel

Goal 2: Enhancing Professional Growth

***Archivists have access to the professional community and resources
they need to be successful and effective in their careers.***

2.1 Mentor and support the career development of members to assist them in achieving their goals.

FY20

- A. Develop a comprehensive Management Track.
- B. Publish *Leading and Managing Archives and Manuscript Repositories* (AFS III).
- C. Consider how to strengthen Mentoring Program/opportunities; implement.

Committee on Education / Staff
Publications Board / Staff
Membership Committee / Staff

FY21

- D. Implement 50% of Management Track programs.
- E. Explore feasibility of train-the-trainer program (Instructor Academy) to build teaching expertise among current and prospective instructors.

Committee on Education / Staff
Consultant / Staff

FY22	F. Implement remaining Management Track programs.	Committee on Education / Staff
	G. If feasible, implement train-the-trainer program.	Consultant / Staff
	H. Based on A*CENSUS II results: Work with O-Net, BLS, others to upgrade descriptions of archivist positions. (See 3.2.)	CORDA / Staff

2.2 Provide content, via education and publications, that reflects the latest thinking and best practices in the field.

FY20	A. Publish <i>Arranging & Describing Archives & Manuscripts</i> (AFS III).	Publications Board / Staff
	B. Retool/refresh DAS offerings as needed to remain current.	Committee on Education / Staff
	C. Capture annual meeting audio + synched slides to enhance education value.	Staff
FY21	D. Publish <i>Advancing Preservation and Providing Reference & Access Services</i> (AF III).	Publications Board / Staff
	E. Retool/refresh DAS and other professional development offerings as needed to remain current.	Committee on Education / Staff
	F. Convene group to consider leveraging Section-developed content for broader distribution to members.	Council
FY22	G. Publish <i>Appraising & Acquiring Archives and Manuscripts</i> (AFS III).	Publications Board / Staff
	H. Implement advanced DAS track for “recertification.”	Committee on Education / Staff
	I. Create sandbox for Sections to develop/vet content for broader distribution.	Council

2.3. Deliver information and education via methods that are accessible, affordable, and keep pace with technological change.

FY20	A. Audio-record Section meetings (no charge to attendees, small fee to non-attendees).	Staff
	Commit to streaming option here? (AEY)	Committee on Education / Staff
	B. Webcasts on key topics in archives management.	
FY21	C. Expand accessibility of content via Fulcrum; enhance distribution options (via Amazon); make hidden content more accessible; consider reducing embargos.	Publications Board / Staff
	D. Regional rotation of “boot camps” with more advance notice.	Education Staff
FY22	E. Ensure that members may complete DAS certificate 100% online.	Committee on Education / Staff

2.4. Foster communities for professional interaction.

FY20	A. "WE" Initiative: Explore and implement advanced features in Higher Logic to increase member engagement.	Staff
	B. Based on recommendations of Tragedy Response Initiative TF, develop implementation work plan.	Task Force / Council
FY21	C. Implement Tragedy Response work plan.	Appointed Group / Council / Staff
FY22	D. Continue to refine use of technologies to support member communities.	Staff

Goal 3: Advancing the Field

Professional knowledge expands to keep pace with an increasingly diverse archival record.

3.1. Identify the need for new standards, guidelines, and best practices and lead or participate in their development.

FY20	A. Continuously update Standards Portal.	Standards Committee
	B. Launch Dictionary of Archives Terminology.	Dictionary Working Group / Staff
FY21	C. Identify need for new standards and prepare development work plan.	Standards Committee
	D. Survey external standards and recommend Council approval as appropriate.	Standards Committee
FY22	E. Continuously update Standards Portal.	Standards Committee

3.2. Foster and disseminate research in and about the field.

FY20	A. Determine most effective means to field A*CENSUS II; apply for funding.	A*CENSUS II Task Force
	B. Draft Research Agenda for Council review/approval.	CORDA
FY21	C. Implement A*CENSUS II.	A*CENSUS II Implementation Group
	D. Begin implementation of Research Agenda; seek out data repository.	CORDA

	E. Seek effective means to elevate information presented at Research Forum.	CORDA
FY22	F. Publish A*CENSUS II results and special reports.	A*CENSUS II Implementation Group / CORDA / Journal Editorial Board
	G. Promote availability of data, encourage member engagement with it.	A*CENSUS II Implementation Group
	H. Continue implementation of Research Agenda.	CORDA
	I. Implement data repository.	CORDA

3.3. Participate actively in relevant partnerships and collaborations to enhance professional knowledge.

FY20	A. Continue discussions with RBMS re feasibility of joint annual meeting.	Council / Staff
	B. Consider strategic advantages of partnering with other organizations; initiate conversations as appropriate. Possible to have Council liaison to ALA's Committee on Accreditation? Because we don't accredit, can we have a voice in ALA's process? (MG)	Council / Staff
FY21	C. Pursue likely external sponsors/supporters to supplement SAAF's Strategic Growth Fund grants.	Executive Committee / Foundation Board
FY22	D. Hire Foundation development officer.	Foundation Board / Executive Committee

3.4. Support development of executive leadership skills and encourage participation in leadership opportunities by archivists at all stages of their careers.

FY20	A. See 2.1., FY20.	
	B. "WE" Initiative: Consider how to stimulate interest in developing leadership skills, becoming an SAA leader.	Council / Staff
	C. Consider partnership with and/or alternatives to Archives Leadership Institute training.	Council
FY21	D. "WE" Initiative: Provide periodic online engagements with members to address questions, foster interest in leadership development.	Council / Section Leaders
	E. Implement partnership/other means to develop leadership training.	Council / Staff

FY22	F. “WE” Initiative: Build on successes to continue engagement with members in developing their leadership skills.	Council / Staff
	G. Implement leadership education/training.	Committee on Education / Staff

Goal 4: Meeting Members’ Needs

SAA delivers outstanding service, fosters a culture of inclusiveness and participation, and is proactive and responsive to members’ needs.

4.1. Facilitate effective communication with and among members.

FY20	A. Implement NimbleUser, focusing on those features that streamline member interaction and create a vibrant user experience.	Staff
	B. Tag member database with “persona” information to increase understanding of member preferences, enhance customer experience. 😊 (AEY)	Staff
FY21	C. Implement appropriate refinements in Higher Logic.	Staff
	D. Consider need for/desirability of all-archivists discussion list.	Council / Staff
FY22	E. Conduct triennial member needs/preferences survey.	Marketing Consultant / Membership Committee / Staff

4.2. Create opportunities for members to participate fully in the association.

FY20	A. Create “Member Recruitment/Retention Plan 2020-2022,” including 1) initiatives to “welcome” member participation and 2) crafting and testing value proposition messages.	Marketing Consultant / Membership Committee / Staff
	B. “WE” Initiative: Complete first round of staff development on DEI.	Staff
	C. “WE” Initiative: Develop work plan of initiatives to “welcome” member participation in SAA.	
FY21	D. “WE” Initiative: Implement year 1 of work plan.	Council / Staff

	E. Explore technologies that would enable greater participation via remote means (eg, virtual section meetings, hosted discussions, etc).	Staff
FY22	F. “WE” Initiative: Implement year 2 of work plan.	Council / Staff

4.3. Foster an inclusive association and profession through greater diversity of membership and expanded leadership opportunities.

FY20	A. Leverage theme and programming at 2019 JAM to foster DEI discussions within SAA.	Council / Diversity Committee / Staff
	B. Begin development of suite of webcasts on DEI.	Diversity Committee / Committee on Education / Staff
FY21	C. Refine and expand DEI offerings as possible.	Diversity Committee / Committee on Education / Staff
FY22	D. Refresh and retool DEI offerings as possible.	Diversity Committee / Committee on Education / Staff

4.4. Ensure that leaders are accessible and that their work is transparent.

FY20	A. Conduct series of virtual “town hall” meetings at which members can interact with Council members, others.	Council / Staff
FY21	B. Refine “town hall” meetings concept as appropriate.	Council / Staff
FY22	C. Refine “town hall” meetings concept as appropriate.	Council / Staff

Society of American Archivists Council Strategic Plan Dashboard, 2019-2022



Society of American Archivists– Strategic Plan

Summary 2019-2022

Vision

The Society of American Archivists empowers archivists to achieve professional excellence and foster innovation to ensure the identification, preservation, understanding, and use of records of enduring value.

Mission

SAA is a vital community that promotes the value and diversity of archives and archivists and serves as the preeminent resource for the profession.

Values

SAA is committed to:

1. Advancing the public standing of archivists.
2. Ensuring the diversity of its membership and leaders, the profession, and the archival record.
3. Fostering an open and inclusive culture of creativity, collaboration, and experimentation across the association.
4. Providing excellent member service.
5. Ensuring transparency, accountability, integrity, professionalism, and social responsibility in conducting its activities.

Goals

**ADVOCATING FOR
ARCHIVES AND
ARCHIVISTS**

**ENHANCING
PROFESSIONAL
GROWTH**

**ADVANCING THE
FIELD**

**MEETING MEMBERS'
NEEDS**

Defined

**Society values the
vital role of archives
and archivists.**

**Archivists have
access to the
professional
community and
resources they need
to be successful in
their careers.**

**Professional
knowledge expands to
keep pace with an
increasingly diverse
archival record.**

**SAA delivers outstanding
service, fosters a culture of
inclusiveness and
participation, and is
proactive and responsive
to members' needs.**

2019-2020 Council Priorities

Advocacy

Empower archivists to advocate for their own career and advancement

Advocate for archivists and the profession

Research

Update A*CENSUS

Develop a research infrastructure

Consider strategic dissemination models

Culture

Foster engagement and ownership

Foster cultural competency

Foster and embrace ethical and professional conduct

GOAL 1: Advocating for Archives and Archivists

GOAL 2: Enhancing Professional Growth

GOAL 3: Advancing the Field

GOAL 4: Meeting Members' Needs