



Strategic Plan 2014 – 2018

DRAFT ACTIONS¹

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

MISSION: SAA promotes the value and diversity of archives and archivists. We are the preeminent source of professional resources and the principal communication hub for American archivists.

CORE ORGANIZATIONAL VALUES:

The Society of American Archivists is committed to:

- Advancing the public standing of archivists.
- Ensuring the diversity of its membership and leaders, the profession, and the archival record.
- Fostering a culture of creativity and experimentation across the association.
- Providing an open, inclusive, and collaborative environment.
- Providing excellent member service.
- Social responsibility and the public good.
- Transparency, accountability, integrity, and professionalism in conducting its activities.

The following Goals and Strategies represent areas of focus for the next three to five years. The Goals articulate the outcomes that SAA would like to achieve and answer the question, “What will constitute future success?” The Goals are not necessarily identified in priority order, but are numbered to enable easy reference.

¹ A Council subgroup (Roe [Goal 1], Mangiafico [Goal 2], Light [Goal 3], and Bell [Goal 4]) and Beaumont reviewed the draft actions to create this version.

GOAL 1: ADVOCATING FOR ARCHIVISTS AND ARCHIVES

Society values the vital role of archivists and archives.

Key Performance Indicators:

- SAA provides an increasing range of resources that are useful in articulating the vital role of archivists and archives.
- A cadre of influential advocates is available and eager to speak on behalf of archives as needed.
- SAA members indicate that they are confident in speaking with the media and advocating for archives.
- Archivists successfully advocate for increased resources.
- SAA measures and reports on the “state of American archives” (using metrics such as employment rates and salaries, funding, media citations).
- Public awareness of and appreciation for archives and archivists are documented and increase.
- SAA works effectively with partners on advocacy and public relations activities.
- SAA actively fosters activities that result in diversity of and access to the historical record.

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

1.1.1. Identify key audiences and craft compelling messages that are most likely to influence their opinions about the value of archives and archivists and/or move them to take action on behalf of archives/archivists.

Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Identify influential audiences and craft targeted messages.	PR Counsel PR Committee Staff National/Regional Orgs	2014-2016	Need to identify potential funding source(s) to support this work. Consider relationship with NARA’s Chief Communications Officer? National/regional orgs include, especially, CoSA and NAGARA.	
B. Compile and distribute stories demonstrating the practical value of archives.	PR Counsel PR Committee CAPP Component groups (IART)	2014	Information gathered in this action feeds into 1.1.1.A. Consider appointing ad hoc group to do initial review/editing/vetting of stories? Consider issuing a call to component groups that may want to participate.	

1.1.2. Identify key stakeholders and assess their understanding of archives to establish a baseline against which to measure progress.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Identify a range of options for measuring baseline understanding of archives among key audiences and evaluate feasibility for completion and for successfully capturing new and useful info.	Council Staff PR Counsel	2014	Consider: <ul style="list-style-type: none"> Consult with CoSA and NAGARA re data they may have. Consult with archival educators with data-gathering and –analysis experience. May be necessary to hire consultant? 	
B. Explore potential partners for funding to measure baseline understanding.	Council Staff PR Committee	2015		
C. Conduct or plan for baseline measurement.	PR Committee PR Counsel Staff	2015- 2016		
1.1.3. Implement an ongoing publicity and media plan and sponsor public awareness campaigns (including American Archives Month) that demonstrate the value of archives in individuals' everyday lives.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Seek member, public, and media feedback to continuously increase the effectiveness of and involvement with AAM activities.	PR Committee PR Counsel Staff	2014- 2015	Consider design by archival educators with data-gathering and –analysis experience?	
B. Create and distribute via SAA website resources to assist archivists in learning about and participating in public awareness campaigns.	PR Committee PR Counsel Staff	2014- 2018		
C. Increase visibility of archives within existing public awareness campaigns (eg, Preservation Week) through efforts at the national level and by supporting SAA component groups' activities.	PR Committee Staff	2014- 2018	Unclear what this means.	
D. Partner with other cultural heritage professionals who have significant interaction with the public to garner their support in developing and delivering key messages.	PR Committee Staff	2015- 2018	Related to 3.3.5. Must have our own message at least somewhat clear to connect with others. Must ID those other professionals and be clear on benefits (to both parties) of partnering.	
E. Work with allied organizations to create a “heritage advocacy” toolkit.	PR Committee Staff	2015- 2016	Related to 1.2.2.D. Must first have archival advocacy toolkit.	

F. Identify partners outside the cultural heritage sphere that might assist in crafting messages to make what archivists do accessible and meaningful to new audiences.	PR Committee Staff	2016- 2017	Related to audiences in 1.1.1.A. Must carefully identify and prioritize audiences to maximize effectiveness. Collaborate with CoSA to ID government community partners; collaborate with (who?) to identify university partners?	
G. Develop short PSAs each year and disseminate on social media sites, radio, and possibly TV.	PR Committee PR Counsel Staff	2017- 2018	How/what do we know about the impact this would have? We don't have a PR plan to guide work in this area generally. Financial implications? Where would funding come from, esp. for ongoing PSAs?	
1.2. Educate and influence decision makers about the importance of archives and archivists.				
1.2.1. In collaboration with CoSA, NAGARA, and other influential advocates for archives, develop a broad-based archival advocacy program directed at resource allocators, policymakers, and other "influencers."				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Convene or participate actively in meetings with coalition partners to determine priorities, develop ongoing communication plans, and evaluate progress.	Staff (Beaumont) Officers Council CAPP Chair PR Committee Chair	2014- 2015	Need to define who the other "influential advocates" are. Are they the same people as in 1.1.1.?	
B. Working with local, state, and regional archival organizations, put in place a diverse, nationwide grassroots network of archivists and supporters to expand the capacity of coalition partners to reach key audiences.	Staff (Beaumont) Officers Council CAPP Chair PR Committee Chair Regional Organization Leaders	2015- 2016	Need to confirm interest and commitment among regionals.	
1.2.2. Develop and maintain a wide variety of advocacy resources, including up-to-date issue briefs and talking points on a variety of topics that can be adapted easily by archivists, supporters, and the media.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Put in place an official SAA group to coordinate and enhance SAA's capacity to respond efficiently and effectively to advocacy opportunities.	Council	2013	Created Committee on Advocacy and Public Policy, 0913.	Done.

B. Develop via this group issue briefs covering topics outlined in SAA's Advocacy Agenda.	CAPP Component Groups (based on issue) Staff	2014-2018	Provide for update as needed? How do new issues get on the table? How frequently is Advocacy Agenda reviewed and updated?	
C. Query members about what resources and info they need to assist them in advocating in their own institutions.	Staff, CAPP IART?	2014		
D. Based on a variety of inputs, develop a broad array of practical resources (online testimonials, brochures, email-able squibs) in a variety of formats to help archivists make the case for archivists and archives passionately and convincingly.	Staff CAPP IART, PR Committee Other interested component groups?	2014-2015	Is this the Archives Advocacy Toolkit? Draw from the IART toolkit under development? Potentially a very substantial resource—need to provide for funding, but also for maintenance over time.	
1.2.3. Measure and report on the “state of America’s archives” (using metrics such as employment rates and salaries, funding for archives, media citations, etc).				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Determine what we know (via existing studies) and don't know about the current state of American archives.	TBD	2014	Considerable data out there in varied formats. Is there an archival educator who might take this on? Is this a Posner American Archives (writ large or more) overview? Maybe a mentor/protégé project? (have we ever used them in this way?) A project for SAA Fellows?	
B. Explore funding options and partnership opportunities for conduct of a baseline study.	Staff? Ad Hoc Group?	2015	Do we need a group that focuses on measurement and analysis (at macro level)?	
C. In the absence of a baseline study, gather existing data and publish a periodic compilation about the “state of America’s archives.”	TBD	2015	Suggestions from Archival Educators? Report card on the American Historical Record? Perhaps choose a few elements to assess, rate. Learn from Heritage Preservation experience?	

D. Disseminate a comprehensive report on the findings of the baseline study as broadly as possible, including a “quotable facts about America’s archives” summary.	Author(s) TBD Council Staff	2016-2018	Who is the audience for this?	
1.2.4. Determine methods for measuring the impact (return on investment) of archives as the basis for crafting compelling messages about the value of – and appropriate level of funding for – archives and archivists.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Determine whether methods for measuring impact exist within the archives or affiliate community(ies) and therefore may be accessible and affordable for SAA.	Consultant? Records Management RT?	2015	Consider Yakel and Pleva-Flynn as resources.	
B. If feasible, implement a study that provides measurable evidence of the value of archives and the impact of archives professionals.	TBD	2016-2018	Depends on methodology defined in 1.2.4.A. Amount needed and potential sources of funding to do this?	
1.3. Provide leadership in ensuring the completeness, diversity, and accessibility of the historical record.				
1.3.1. In concert with allied professionals, ensure that the historical record is as representative as possible.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Define for the public the meaning of “the completeness of the historical record” and the value that comes from a historical record that provides a better reflection of the past. [fix]	TBD	2014	Seek SAA Fellows with particular skill in explicating this (eg, Jimerson)? Who are the allied professionals? Do we have a commitment from them to participate?	
B. Develop tools to help archivists advocate for the completeness of the historical record as a way to protect these records from destruction. [fix]			How is this different from 1.2.2.D.?	
C. [Bullet re “diversity” and its importance in a more complete historical record.]	Diversity Committee?	FY15	Seek SAA Fellows or leaders in addressing diversity to develop this statement?	
1.3.2. Promote existing models and develop new methods to help archives and archivists diversify the documentary record and to promote archives to diverse communities.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Initiate and promote discussion within the archival	Diversity Committee	2014	Has begun with Case Study project. Include	

community re what it means to “diversify the archival record,” including discussion about successes, failures, and lessons learned.			discussion in 2014 Joint Annual Meeting forum?	
B. Solicit and disseminate a comprehensive selection of case studies on diversifying the archival record.	Diversity Committee (with Publications Board, AACRT, LAGAR, LACCHA, WAR) Staff	2013-2014	Underway.	
C. Develop materials targeted at community, citizen, and non-professional archivists to train them in how to care for their own historical records.	TBD	2015	Related to 4.3.2. How does this relate to Basics of Archives materials already developed by CoSA and AASLH?	
D. Develop messages and tools that archivists can use to promote archives in diverse communities.	Diversity Committee?		Related to 4.3.2.	
E. Develop resources and tools, such as case studies and model policies, to assist archivists in developing access policies for property from other cultures.	Cultural Heritage WG? Diversity Committee?	2015-2016	Redundant with 1.3.3.B.?	
1.3.3. In collaboration with appropriate communities, develop resources for managing cultural heritage materials to assist the broader archives community in managing cultural property issues.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Continue development of online resources (including a bibliography), gathered from multiple sources, about managing cultural heritage materials.	Cultural Heritage WG	2014-2018	Underway.	
B. Develop and implement a work plan for creation of resources and tools, such as case studies and model policies, that could assist archivists in collecting and developing access policies for property from other cultures.	Cultural Heritage WG	2015-2016	Redundant with 1.3.2.E.?	
C. Remain engaged with ALA’s Traditional Cultural Expressions initiative.	Cultural Heritage WG President		What is happening with this now?	
1.3.4. Advocate for and develop resources to make the historical record more accessible.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Define what it means to make records accessible in the archives profession.	TBD	2014	Commission someone to draft a definition/statement? Make this a paper for discussion at relevant	

			committee/RT/Section meetings at 2014 Annual Meeting?	
B. Support/endorse/adopt professional guidelines that define ethically appropriate levels of accessibility of historical records by the public.	TBD	2015-2017	Who is a champion on this issue in SAA? Will legal counsel be needed for this?	
C. Work with allied professionals to promote reasonable levels of access to all historical records.	TBD CAPP Staff	2016-2017	Work with CoSA? Open government groups? AHA/OAH? ALA? Journalists?	
1.4. Strengthen the ability of those who manage and use archival material to articulate the value of archives.				
1.4.1. Develop and provide resources and education, using a variety of delivery modes, to assist archivists in advocating for archives.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Solicit feedback from members about what resources and assistance they need most to help them advocate for archives.	CAPP Staff PR Committee	2014-2015	Related to (duplicates?) 1.2.2.D. Consider merging into that item.	
B. Develop resources and education programs designed to meet the advocacy needs identified by members, including a free “Basics of Advocating” guide.	CAPP Staff (Beaumont, De Sutter) Committee on Education	2014-2015	Collaborate with CoSA and NAGARA. Connect to Advocacy Toolkit and resources being developed. Refer to ALA Advocacy University and other professional groups’ resources, such as ACRL “Value of Academic Libraries.”	
C. Provide free “Advocating for Archives” preconference workshop at 2014 Joint Annual Meeting for up to 60 attendees.	Staff CAPP Instructors	2014-2015	Done with CoSA in 2010 (Roe and Carmicheal). Need to ensure quality and content. Consider funding for instructors. Consider whether/how we should be reaching outside our own professional group to do this.	
D. Develop and host a free, on-demand “Advocating for Archives” webinar.	Staff CAPP IART	FY 15	Collaborate with CoSA and NAGARA. Consider cost issues (including instructor honoraria) for doing webinar.	

GOAL 2: ENHANCING PROFESSIONAL GROWTH

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

Key Performance Indicators:

- Member participation in SAA education programs increases, and evaluations of the quality, relevance, and accessibility of those programs indicate continuous improvement.
- Sales of SAA’s publications increase, and evaluations of the quality, relevance, and accessibility of those publications indicate continuous improvement.
- Readership of *The American Archivist* and *The American Archivist Online* increases, and evaluations of the quality, relevance, and accessibility of the journal indicate continuous improvement.
- Participation in various aspects of SAA’s career development program (online career center, mentoring program, leadership development) increases among students, new professionals, mid-career archivists, and seasoned archivists.

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

2.1.1. Review, expand, and continuously improve SAA’s course and conference content to address both archival fundamentals and the latest thinking and best practices in the field.

Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Refine SAA’s entire education program based on the DAS model: Develop training plans for archivists, integrate courses across realms of archival knowledge, and continuously improve offerings and training materials based on attendee and instructor feedback.	Committee on Education De Sutter + other staff Archival Educators RT Program Committee	By 2017- 2018	Related to 4.1.3. Consider assigning to mid-size task force with representatives from COE, AERT, Program Committee, staff.	
B. Increase the speed at which SAA develops and offers education on “hot topics.”	Committee on Education De Sutter + other staff	2014- 2018	Related to 2.1.2.B. What is benchmark for “speed”? Who will determine “hot topics”?	
C. Explore collaborations with other communities to expand training for archivists in areas in which SAA does not have expertise or capacity.	Beaumont De Sutter External representatives Council	Begin decisions 2014- 2015	See 1.1.3. and 1.2.1. for other collaboration activities.	
D. Develop evaluation tools to enhance current feedback mechanisms.	Committee on Education De Sutter Black	Begin 2014	Related to 4.1.3.	

2.1.2. Review, expand, and continuously improve SAA’s published content to address both archival fundamentals and the latest thinking and best practices in the field.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Assess and enhance the Trends in Archives Practice series to ensure that it meets evolving member needs.	Publications Board Brinati + other staff	2014-2018		
B. Increase the speed at which SAA develops and publishes content—via books, the journal, and e-pubs—that addresses current professional needs.	Publications Board Journal Editorial Board Brinati + other staff	2014-2015	Related to 2.1.1.B. What is benchmark for “speed”? Who will determine “hot topics”?	
C. Lead the development of professional literature on digital curation that appeals to archivists and allied professionals.	Publications Board Brinati + other staff Metadata/Digital Objects RT?	2015-2016	Does SAA have the capacity to do this? If not: <ul style="list-style-type: none"> • Can it be dropped? • How might SAA gain capacity? 	
D. Explore the potential market for practical leaflets that teach the basics of one archival skill (eg, cleaning archival records, creating a checksum, disaster response, etc).	Publications Board Brinati + other staff	2015	Related to 2.1.1.B. (“hot topics”)	
E. Facilitate development and implementation of a virtual space for sharing case studies, project documentation, processing manuals, outreach materials, and other “gray literature” to help archivists and institutions launch new projects.	Brinati Black	2015-2016		
2.2. Deliver information and education via methods that are accessible, affordable, and keep pace with technological change.				
2.2.1. Develop a better understanding of members’ preferences for delivery of content and respond to them.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Ensure that <i>Archival Outlook</i> and <i>In The Loop</i> meet the needs of members in both content and delivery/accessibility.	Staff (Brinati, Hartman, Black, Beaumont) Council	2014	Related to 4.1.3.	
B. Confer regularly with component group leaders to assess members’ needs regarding delivery of content.	Staff Council Liaisons	2014-2015	Why component group <u>leaders</u> rather than component <u>group</u> members (ie, members at large)?	
C. Experiment with existing and new delivery modes (eg, podcasts, webcasts, e-pubs, and self-guided	Staff (De Sutter, Brinati, Black)	2014-2015	Related to 4.2.1.B.	

interactives) and assess their benefits.				
D. Explore the feasibility of implementing voluntary hands-on learning labs to supplement SAA courses.	Staff (De Sutter)	2015-2016	Related to 2.1.1.A.	
2.2.2. Continuously review and assess SAA's pricing models to ensure that they meet members' needs.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Conduct annual environmental scans to assess pricing strategies of other member associations.	Staff Finance Committee	2014-2018	Related to 4.2.1.B.	
B. Survey SAA members periodically to gather data on price sensitivities.	Staff	2014-2018	Related to 4.1.3.	
2.2.3. Continuously improve and streamline the internal processes associated with managing education offerings (from marketing communications, through registration and reporting, to onsite or online management and test administration) and journal submissions to enhance the customer experience and to maximize efficiency.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Conduct an annual process improvement analysis to ensure customer value and operational efficiency.	Staff (De Sutter, Brinati) Committee on Education Publications Board Editorial Board	Begin 2014		
B. Acquire software that streamlines the submission, peer review, and communication processes for publications, including <i>The American Archivist</i> .	Staff (Brinati, Black, Mueller) Journal Editor + Ed Board Publications Editor	2014-2015	Seek opportunity to combine with software to streamline Annual Meeting proposal submission/review process.	
2.3. Support the career development of members to assist them in achieving their goals.				
2.3.1. Provide comprehensive and practical career development information on archival education, career paths and options, professional development, job hunting, and interviewing for archivists at all stages of their careers.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Survey members to determine what career development resources would be most valuable to them.	Membership Committee Staff (Beaumont, Black, Salgado)	2014-2015	Related to 4.1.3.	
B. Organize career development resources into "tracks" (Introductory, Management, Leadership) and share via various mediums, including the SAA website and Annual Meeting Career Center.	Membership Committee Committee on Education Staff	2015-2016	Related to 2.1.1.A.	

2.3.2. Expand SAA’s Mentoring Program to ensure that members who want a professional mentor can find one through SAA.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Increase the rate of participation by Fellows and past leaders as mentors.	Membership Committee Staff (Beaumont, Salgado)	2014-2017		
B. Ensure that SAA has the technological capability to support a robust Mentoring Program, including a feedback mechanism.	Staff (Black, Salgado)	2016-2017	Related to 4.1.1., 4.1.3., 4.3.4.	
2.3.3. Expand our conception of what an archivist can be and what an archivist can do.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Work with component groups to develop an online guide for new archivists on possible career paths, including new areas in which archivists are making an impact.	Council Liaisons Component Group Leaders Staff	2014-2015	Related to 2.1.1.C., 2.3.1.B., 2.3.4., 3.3.1.A.	
B. Partner with allied organizations to provide a broad and wide-ranging view of career opportunities for individuals with archival training.	Council Staff External Representatives	2014-2015	Related to 2.1.1.C., 3.3.1.A.	
2.3.4. Expand the online “Career Center” to incorporate information for those who are interested in a career in archives (“So You Want To Be An Archivist?”)				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
As stated in objective.	Staff Committee on Education Membership Committee Archival Educators RT	2014-2015	Related to 2.3.3.	

GOAL 3: ADVANCING THE FIELD

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

Key Performance Indicators:

- Participation in the development of standards, guidelines, and best practices increases.
- SAA participates in national and international collaborations in which representation of the American perspective is considered vital.
- More archivists engage in research and disseminate their work.
- Collaborative projects and research initiatives increase among SAA members.
- An increasing number of allied professionals participate in SAA annual meetings and courses.

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

3.1.1. Conduct ongoing environmental scans to facilitate awareness of gaps and of relevant external standards.

Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Promote member awareness of the Standards Portal and processes for developing, reviewing, endorsing, or including new standards, guidelines, or best practices.	Standards Committee Staff	2014-2018		
B. Encourage component groups and members to identify needs and gaps for standards development and regularly contribute “related resources” to the Standards Portal.	Standards Committee Component Groups Staff	2014-2018		
C. Consulting broadly, determine areas in which standards, guidelines, and best practices are most needed by practicing archivists.	Standards Committee	2014-2018		

3.1.2. Collaborate with other standards-creating organizations to develop standards that SAA can endorse and disseminate.

Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Communicate regularly with component groups and external organizations to remain aware of standards development and collaborative opportunities in allied professions.	Standards Committee	2014-2018		
B. Endorse as appropriate relevant standards, guidelines, and best practices from allied professions.	Standards Committee Council	2014-2018		

C. Ensure that the Standards Portal documents the relationship(s) among archival standards and those of related professions.	Standards Committee	2014-2018		
3.2. Foster and disseminate research in and about the field.				
3.2.1. Develop creative ways to increase research by archivists.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Establish a task force or working group to investigate the infrastructure necessary to promote research in the archival profession (and possibly to manage the Research Forum).	Council	2014	New. Group might also be charged to manage Research Forum.	
B. Explore ways to highlight and recognize research by archivists.	Research Working Group? Staff	2015	Deleted “expand opportunities for information exchange” because reflected in multiple items under 3.2.2.	
C. Survey participants and attendees of past SAA Research Forums to learn more about the needs and challenges of archivists who have conducted research and how SAA might better support the research process.	Research Working Group? Staff	2015	New. Deleted “grant funding” because added to 3.2.1.B.	
D. Explore creation of a “how to” workshop, webinar, or other helpful guide to teach and/or encourage practicing archivists to conduct research and share results.	Committee on Education Research Working Group? Staff	2015-2016	New.	
E. Create an online resource that encourages information sharing and exchange (i.e., ideas about tools, grant opportunities, current projects, ideas, etc.) to support research, innovation, and publishing by practicing archivists and allied professionals.	Pending infrastructure recommended by the Research Working Group or the AA Editorial Board? Staff	2015-2016	Combined: 1) “Develop or compile and make available resources for practicing archivists to enable them to conduct research and create resources for the profession”; 2) “Develop a destination on the SAA website that compiles abstracts of research published throughout the archival literature and in areas that intersect with archives”; and 3) “Develop a communal portal for key research information from information professional and heritage partners.” See also 2.1.2.E.	

3.2.2. Consider ways in which to expand the conversation within the profession about published research (both practical and theoretical).				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Encourage member engagement with published research with hosted discussion groups both online and at the Annual Meeting.	AA Editorial Board Publications Board Staff	2014-2018		
B. Experiment with juried papers and published proceedings from the Research Forum and/or the Annual Meeting.	Program Committee Research WG? AA Editorial Board? Staff	2016	Moved from 3.2.1. SAA already publishes Research Forum proceedings?	
C. Increase participation by Annual Meeting presenters in posting their materials (abstracts, posters, slides, full papers) on the conference website.	Program Committee Staff	2014-2018		
D. Record and distribute via the website and other mediums those Annual Meeting presentations that are most likely to engage members in conversations about practical and theoretical research.	Program Committee Staff Recording or Virtual Conferencing Vendor	Begin 2015		
E. Explore ways in which to increase opportunities for information exchange and feedback on research projects.	Research Working Group?	2015	Moved from 3.2.1. Previous text deleted because too similar to 3.2.1.B.	
3.2.3. Seek funding to conduct the next iteration of Archival Census and Education Needs Survey in the United States (A*CENSUS II).				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Review and address IMLS comments on February 2012 grant proposal.	Executive Committee Staff	2014		
B. Evaluate merits of resubmitting to IMLS versus seeking other external funding, and submit a proposal in the next appropriate grant cycle.	Executive Committee Staff	2014		
C. Consider ways in which to begin work on the survey without external funding.	Council Staff	2014-2015	Related to 1.2.3.	
3.3. Participate actively in relevant partnerships and collaborations to enhance professional knowledge.				
3.3.1. Provide opportunities for joint meetings and information exchanges.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status

A. Work with grant agencies to sponsor gatherings/symposia that bring together potential collaborative partners (i.e., institutions or organizations that might not work together otherwise) and stimulate the development of new research and projects.	Staff Assigned Council members? Granting Agencies Component Groups	2017-2018		
Consider options for adding an “allied professionals” track at the SAA Annual Meeting.			Not a priority in AMTF recommendations; members do a good job of incorporating allied professionals on panels when relevant. This would happen if SAA co-sponsored with other conferences.	
B. Explore the feasibility of conducting joint annual meetings with organizations beyond CoSA and NAGARA.	Staff	2017-2018	Related to 3.3.2.B.	
C. Explore the feasibility of hosting regular topical online symposia.	Committee on Education Staff	2016	Related to 4.1.1., 4.1.2.	
3.3.2. Enhance SAA’s relationship with state and regional archival associations to increase our collective voice and to share resources and knowledge.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Offer state and regional archival associations the opportunity to hold annual regional summits at the Annual Meeting.	Staff	2014-2018		
B. Investigate the feasibility of holding joint meetings with regional organizations.	Staff Council	2017-2018	Related to 3.3.1.B.	
C. Investigate the feasibility of cooperative education and training programs with regional organizations.	Committee on Education Staff	2014-2015	Doesn’t this already happen? Delete?	
3.3.3. Forge new alliances with the information technology community nationally. Establish or strengthen alliances with allied professional fields. (NEW)				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Consult with component groups that are tied to allied professional fields about the needs, opportunities, and strategies for reaching and serving allied professionals.	Council Staff	2014-2015	New. Previous text removed. We shouldn’t look for a partnership for the sake of having one; this should be based on a clear, well-defined need.	
B. Promote SAA’s annual meeting, publications, and education offerings to allied professionals.	Staff Component Groups	2015-2018	New.	

C. Investigate the creation of a joint committee with an appropriate national IT association as a means of discussing and coordinating the convergence of disciplines.	Council		Possible collaborations in plan: 1.1.3.F. (advocacy) 1.3.4. (access to historical record) 2.1.1.C. (training) 2.1.2.C. (publishing) 2.3.3.B. (employment offerings) 3.1.2. (standards) 3.3.1. (joint meetings)	
D. Discuss with ARMA the value of reestablishing a joint committee to enhance communication between the organizations.	Staff	2014	Possible collaborations in plan: 1.3.1. (completeness of historical record) 2.1.1.C. (training) 2.3.3.B (employment offerings) 3.1.2. (standards) 3.3.1. (joint meetings)	
E. Strengthen the impact and influence of the Joint Committee on Archives, Libraries, and Museums.	Joint Committee on Archives, Libraries, and Museums	2014	Opportunities for action within the plan: 1.1.3.D. and E. (value of archives) 3.1.2. (standards)	
F. Discuss with the American Historical Association, the Organization of American Historians, and the National Council on Public History the value of creating a Joint Committee to enhance communication among the organizations.	Staff	2014	Opportunities for action within the plan: 1.1.3.D. and E. (value of archives) 1.2.3.B. (state of archives partnerships) 1.3.4. (access to historical record) 3.3.1. (joint meetings)	
G. Encourage information exchanges and collaborative efforts with allied organizations on cultural heritage and cultural property issues.	Council Component Groups Staff	2014- 2015	Specific examples are throughout the plan: 1.1.3.D. and E. (value of archives) 1.2.1.A. (advocacy) 1.2.3.B. (state of archives partnerships) 1.3.1. (representative historical record) 1.3.3. (ALA Traditional Cultural Expressions) 1.3.4. (access to historical record) 2.1.1.C. (training) 2.1.2.C. (publishing) 2.3.3.B. (employment offerings) 3.1.2. (standards) 3.3.1. (joint meetings)	
3.3.4.— Reestablish an alliance with the records management community nationally.				

3.3.5. — Strengthen alliances with the library and museum communities nationally.				
3.3.6. — Foster alliances with organizations representing professional historians.				

GOAL 4: MEETING MEMBERS' NEEDS

SAA is an agile association that delivers outstanding service and fosters a culture of inclusiveness and participation.

Key Performance Indicators:

- SAA has an effective and sustainable technology infrastructure that meets member and organizational needs.
- Adoption of revenue-neutral, low-barrier tools enables broader participation by members in SAA activities.
- Members indicate that their needs for formal (eg, section and roundtable) and informal networking are being met within the organization.
- SAA’s membership and leadership are increasingly diverse.
- Member surveys indicate that members feel valued and welcome within SAA.

4.1. Facilitate effective communication with and among members.

4.1.1. Implement a new association management software (AMS) system to better coordinate and conduct all aspects of membership services and operations.

Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. By early FY 2015, complete a comprehensive needs assessment—including input from members/users, component group leaders, and staff—to determine mid- and long-term needs and preferences for AMS functionality.	Staff	FY 2015	Consider existing quantitative and qualitative data (eg, 2012 Member Loyalty Study). Consider one survey research firm to do work across activities.	
B. By late FY 2015, complete development of an RFP to be issued to a wide range of AMS providers.	Staff (Black, All)	FY 2015		
C. By FY 2016, ensure that SAA’s reserves are sufficient to support purchase of a new, more robust AMS system.	Treasurer, Finance Committee Council Staff	FY 2016	Will our current practice of putting net gain into technology infrastructure be enough to do this by FY 2016?	
D. By FY 2017, complete acquisition, configuration, user testing, and migration to a new AMS system.	Staff	FY 2017		

4.1.2. Implement measures to enhance SAA’s communication – and particularly its web and social media presence – using tools that ensure high member satisfaction.

Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Implement an aggregator tool to provide one-stop access to all social media accounts used by SAA.		2014	Related to Communications TF Report, 0813-1-III-A.	

B. Continue to listen to and engage with archivists on social media channels, including <i>Off The Record</i> .	Officers, Council Staff	2014-2018		
C. Implement Council-approved recommendations of the Communications Task Force.	Beaumont, Black, Brinati, Hartman	2014-2016		
D. By FY 2014, create a mobile app version of the SAA website and the Annual Meeting program.	Black	2014		
E. By late 2014, complete a comprehensive needs assessment, with input from all interested parties, to determine mid- and long-term needs and preferences for website functionality.	Staff (Black, All)	2014	Related to 4.1.1. Consider existing quantitative and qualitative data/information from 2012 Member Loyalty Study, work of Communications TF.	
F. By FY 2015, complete user testing and launch a redesigned and more robust SAA website, including integration of component group microsites and, to the extent possible, “unofficial” communication tools.	Staff (Black, All)	2015	Related to 4.1.1 and 4.1.3. Can this be done before the complete AMS system is in place?	
4.1.3. Promote member input on an ongoing basis, and improve means for members to tell SAA what they think and what they need.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Implement a full suite of feedback mechanisms to accommodate members’ preferred communication methods.	Staff (Beaumont, Black, Brinati, Salgado)	2015?	Related to: 1.1.3., 1.4.1., 2.1.1., 2.2.1., 2.3.2., and 3.2.1. Consider data/information from Communications TF report and Member Affinity TF (once received).	
B. Conduct periodic “pop-up” surveys to take the pulse of members on various issues and to solicit their ideas.		2015	This is a subset of 4.1.3.A. (a mechanism to achieve it).	
C. Provide a place and schedule for Council members to meet with members (via forums and/or in informal settings) during the Annual Meeting.	Council Staff	2014-2018	This is a subset of 4.1.3.A. (a mechanism to achieve it. This needs to happen at more than the Annual Meeting. Consider technologies to support this outside of Annual Meeting.	

4.2. Create opportunities for members to participate fully in the association.				
4.2.1. Based on feedback from the 2012 Member Loyalty Study, the Council-adopted recommendations of the Communications and Annual Meeting task forces (2013), and periodic pop-up surveys of members:				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Adopt revenue-neutral, low-barrier social media tools to enable broader participation by members in SAA activities.	Staff	2014-2018	Related to 4.1.3.	
B. By 2015, develop a proposal for Council review for online access to Annual Meeting sessions, including technology requirements, cost impact, and pricing models.	Staff (Beaumont)	2015	Related to 2.2.1., 2.2.2., and 4.1.1.	
4.2.2. Remove barriers, perceived and actual, to broad participation by SAA members in the activities of the organization.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Collect information from members about what they view as barriers preventing them from being more active in the organization, and share this information with the broad membership for comment.	Staff	2015	Related to 4.1.1. and various other actions related to collecting data from members. Combine? Consider existing survey data (2012 Member Loyalty Survey). Consider contracting with survey research firm to conduct various surveys and provide analysis.	
B. For member-identified barriers that are structural: Explore how to remove them and remove as many as possible.	Council Staff	2015-2018	Could benefit from connection to 2.3.2.A.	
C. For member-identified barriers that are more perceived than structural: Implement regular communication to remove the perception of those barriers and to explore the cause of that perception.	Council Staff	2015-2018	Related to 2.3.2.A. How can members help with this, beyond asking for their advice?	
D. Regularly assess progress on members' perceptions of SAA as an organization that fosters participation.		2015-2018	Related to 4.1.3.	
E. Publish at least one post per quarter in <i>Off The Record</i> that highlights a component group project.	President Council Beaumont	2014-2018		

4.2.3. Assess the structure of component groups and develop nimble structures to meet member needs for affiliation.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Appoint a Task Force to Study Member Affinity Groups, with a final report date of August 2014.	Council	FY 2013- FY 2014	TF-MAG appointed August 2013.	
B. Initiate activities based on Council-approved recommendations of the Task Force.	Council Staff	2014- 2018		
4.3. Continue to enrich the association and the profession with greater diversity in membership and expanded leadership opportunities.				
4.3.1. Use existing programs and networks to create both models and metrics for scholarships, internship opportunities, sustained mentoring relationships, and leadership development programs directed to achieving diversity in the profession and the association.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Implement the IMLS-funded Mosaic Program grant in partnership with the Association of Research Libraries.	Staff	2013- 2014		
B. Survey past recipients of the SAA Mosaic Scholarship to establish metrics and gather qualitative data about the effectiveness of the scholarship in advancing their careers and/or establishing long-term relationships with SAA.	Staff	2014		
C. Work with the Archives and Archivists of Color and Native American Archives RTs to establish metrics for, gather qualitative data about, and evaluate the effectiveness of awards and scholarship programs related to diversity.	Diversity Committee AACRT NAAR Council Liaisons Staff	2014- 2015	Consult with ARL or ALA re: availability of comparative data (eg, Spectrum). Review data from Pinkett Award winners' Annual Meeting session(s).	
D. Work with the administrators of the past and current Archives Leadership Institutes to determine the extent to which diversity of attendees has been achieved, how diversity might be increased, and what successes have come from the participation of a diverse body of participants.	Diversity Committee Staff	2014- 2015		

4.3.2. Identify underrepresented populations and develop recruitment efforts for the profession that include focused marketing and communication resources.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Examine recruitment policies and practices in graduate archival education programs and evaluate their effectiveness in reaching underrepresented groups.	Council Archival Educators RT New Task Force? Staff	2015	Go beyond graduate educators into schools themselves? How much recruiting do teaching faculty do? Consider contacting other heritage orgs for information re programs they may have put in place to encourage diversity? (1.1.3). Include all of the communities mentioned in 3.3.?	
B. Work with the Archival Educators RT to improve the effectiveness of graduate archival education programs in recruiting and retaining students from underrepresented populations.	Council Diversity Committee New Task Force? Staff	2015	How achievable is this? Consider the Council's 0114 "Mega Issue" discussion.	
C. Explore methods for sharing information about the archives profession with a variety of groups, focusing on diversity (K-12, HBCUs), to broaden potential interest in the archives profession.	Council Diversity Committee AACRT LACCHA NAAR Staff	2015- 2016	Related to 1.3.2 and 1.1.3.F. Consider what "diversity" means in this context. Profession is becoming more white and female. Should we be recruiting men?	
D. Develop focused marketing and communication resources and implement a strategy for delivering them to underrepresented populations.	Diversity Committee Staff	2017- 2018	Related to 1.3.2.	
E. Assess the effectiveness of SAA's efforts to promote membership to underrepresented groups.	Council Staff	2018	Related to 1.1.3.F. and 1.3.2. Consider moving to 4.3.3.	
4.3.3. Develop a plan for building on SAA's progress in achieving greater diversity in membership and in leadership positions.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Charge the Diversity Committee to draft a plan for increasing diversity in SAA's membership and leadership positions.	Council Diversity Committee	2014	Related to 2.3.1.	
B. Identify new sources of funding to assist a diverse range of members in attending SAA meetings and education offerings.	Diversity Committee Staff	2015		
C. Formulate achievable next-step goals and activities, beyond scholarship aid, that would attract and keep	Diversity Committee Staff	2015	Related to 2.3.1.	

members of underrepresented groups as participating members of SAA.				
4.3.4. Develop resources and tools that encourage and expand leadership opportunities throughout SAA.				
Specific Action	Assigned To	Timeline	Notes/Issues/Relationships	Status
A. Build on the annual Leadership Forum to share information about how to effectively lead a component group.	First-Year Council Members Staff	2014-2018	Tap into good ideas from members who are already leaders or who have spoken at the Forum.	
B. Develop guides and resources for component group chairs that help them encourage dialogue among and participation of members.	Council Staff	2014-2015	Could this be assigned to second-year members as follow-up to running the Leadership Forum in their first year?	
C. Continue to monitor the SAA appointments process to ensure that at least 40% of appointees are first-time appointees.	Vice President Appointments Committee Council Staff	2014-2018	What happens if we don't get enough people to meet this particular quota? This feels problematic.	
D. Encourage former elected leaders of SAA and Archives Leadership Institute alumni to serve as leadership mentors.	Council Staff	2014-2018	Related to 2.3.2. Should specify Fellows and connect to 2.3.2.A.	