

# Society of American Archivists Strategic Plan Dashboard, FY 2023 – FY 2025

## DRAFT For Member Comment, January 2022

The SAA Council seeks member comment on a new draft of the SAA Strategic Plan Dashboard for fiscal years 2023–2025. The Council began review of the dashboard in fall 2021, per the established regular strategic planning cycle. This proposed draft consolidates significant updates from the current FY 2020-2022 dashboard as well as incorporating new actions and activities, most notably from the recent SAA Work Plan on DEIA.

The Council uses a Strategic Plan Dashboard to develop and track specific projects, initiatives, and activities to accomplish the goals of the SAA Strategic Plan. This living document is frequently referenced and reviewed by the Council, growing and adapting to the evolving needs of SAA and profession.

Learn more and submit comments or feedback by **Friday, February 4**, at: <https://www2.archivists.org/news/2022/call-for-member-comments-saa-strategic-plan-dashboard-2023-2025>.

### Notes:

- Levels of staff support are designated as follows: Staff1 = ≥ 400 hours/year; Staff2 = 100-400 hours/year; Staff3 = ≤ 100 hours/year.

### **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.

<b>FY23</b>	A. Develop service-oriented competency training (for archivists) that focuses on the need for archivists to cultivate non-custodial, reciprocal relationships with their community. [DEIA Work Plan 1.6, 3.1 and 4.2]		Committee on Education / Diversity Committee / RAO Section / Council / Staff2
<b>FY23</b>	B. Provide media training for cohort 1 of 5-7 members; create media opportunities.		COPA / PR Counsel / Staff2

<b>FY24</b>	C. Provide media training for cohort 2 of 5-7 members; create media opportunities.		COPA / PR Counsel / Staff3
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**1.2. Educate and influence decision makers in any setting about the importance of archives and archivists.**

<b>FY22</b>	A. Draft legislation for national funding initiative; seek sponsors. [Specifically charge COPP with starting this work in FY21.]		COPP / Joint Working Group / NCH
<b>FY22</b>	B. Develop letters/editorials on two key public policy issues for members' use. [Consider providing training to members on how to write an op-ed.]		COPP / Staff3
<b>FY22</b>	C. Develop "Facts and Figures" data-based webpage.	Ongoing.	CORDA / Staff3
<b>FY23</b>	D. Seek co-sponsors for federal funding initiative; hold member fly-in to advocate.		COPP / Joint Working Group / NCH
<b>FY23</b>	E. Use early A*CENSUS II data to craft messages re: funding for archives/archivists for several uses, including with policy makers, HR and other administrators, and funding agencies.		COPP / ACTF / Arch Mgmt Section/Staff3
<b>FY23</b>	F. Develop graphics, interactive map to track district visits; participation "count down" to all 50 states.		Staff3 / COPP

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

<b>FY23</b>	A. Exhibit at future ATALM conferences; establish scholarship program for NAAS members. [DEIA Work Plan]	Ongoing.	NAAS / Publications Board / Staff3
<b>FY 23</b>	B. Webcasts on <i>Protocols and Guidelines for Accessibility</i> . [DEIA Work Plan]	Ongoing.	NAAS (SAAF Grant) / Comm on Education / Staff3
?	C. Complete "IP Guide" to Native American <i>Protocols</i> . [DEIA Work Plan]		IPWG
<b>FY23</b>	D. Publish Archival and Special Collections Facilities.	Ongoing.	TS-AFG / Publications Board / Staff2

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

<b>FY22</b>	A. Rally SAA members to conduct district visits.	Ongoing.	COPP / Joint Working Group / Staff3
<b>FY23</b>	B. Based on “Facts and Figures” web page information, provide outreach to managers and users of archival material.		CORDA / COPP / COPA / Staff3
	C. Specifically address archivists reaching out to users (e.g., AHA, ASALAH, genealogists, etc.) and their immediate communities. [Look for mention of non-custodial relationships.] <a href="#">[DEIA Work Plan 1.6]</a>		Assignment TBD

**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.**

<b>FY22</b>	A. A. Develop a comprehensive Management Track.	Ongoing.	Committee on Education / Staff1
<b>FY23</b>	B. C. Consider how to strengthen Mentoring Program/opportunities; implement.	Ongoing.	Membership Committee / Staff3
<b>FY23</b>	C. E. Initiate development of research, data, and assessment workshops and training program. [New 0321]		CORDA / Staff3
<b>FY22</b>	D. F. Implement remaining Management Track programs.		Committee on Education / Staff1
<b>FY23</b>	E. Salary reporting and inclusive job description. <a href="#">[DEIA Work Plan - 1.1]</a>	[NEW]	Compensation TF, Arch Mgmt Section
<b>FY24-25</b>	F. Contingent labor and pathways to a secure career for BIPOC, LGBTQIA+, and disabled archival workers <a href="#">[DEIA Work Plan - 1.2]</a>	[NEW]	Compensation TF, A&D Section, DSGS Section, AAC Section, Diversity Comm

<b>FY24-25</b>	G. Recruit diverse students into the profession [DEIA Work Plan - 1.5]	<b>[NEW]</b>	Archival Educators, Council, Diversity Comm, GAE Subcomm, Membership Comm, RAAC
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**2.2. Provide content via education and publications that reflects the latest thinking and best practices in the field.**

<b>FY23</b>	A. Retool/refresh DAS and other professional development offerings as needed to remain current.	Ongoing.	Committee on Education - DAS Subcomm / Staff1
<b>FY23</b>	B. Publish <i>Appraising and Acquiring Archives and Manuscripts (AFS III)</i> .	Ongoing.	Publications Board / Staff1
<b>FY23</b>	C. Scope and plan advanced DAS track for “recertificate.”		Committee on Education - DAS Subcomm / Staff2
<b>FY23</b>	D. Publish <i>Introducing Archives and Manuscripts (AFS III)</i> .	Ongoing.	Publications Board / Staff1
<b>FY23</b>	E. Implement Task Force on Publishing Ethics.	Ongoing.	Editorial Board / Publications Board / Dictionary WG / CEPC / Staff3
<b>FY24</b>	F. Implement advanced DAS track for “recertificate.”	Not done (staff capacity)	Committee on Education / Staff1
<b>FY22-23</b>	G. Publish titles that address DEIA, component group needs, and leadership perspectives. [DEIA Work Plan 2.3]	Ongoing.	Publications Board / Staff2
<b>FY22</b>	H. Review SAA’s educational offerings, and ensure that courses and certificates cover issues of diversity, equity, inclusion, accessibility, community building, anti-racism, and trauma-informed archival practice [DEIA Work Plan - 3.1]	<b>[NEW]</b>	Comm Education, Diversity Comm,
<b>FY23</b>	I. Support post-custodialism, radical empathy, communication, and ethics in collecting. [DEIA Work Plan - 4.3]	<b>[NEW]</b>	Standards Comm, Education, Publications, AA Board, AAA Section, Archives Mgmt Section, RAO Section

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

FY24	A. Regional rotation of “boot camps” with more advance notice.	Not done (COVID).	Education Staff
FY23	B. Journal accessibility: Implement hidden content project recommendations and consider reducing journal embargo.	Ongoing.	Editorial Board / Staff2
FY24	C. Explore possibility of regional in-person “boot camps.”	[COVID]	Education Staff3
FY24	D. Host limited number of regional in-person “boot camps.”	[COVID]	Education Staff1
	E. Provide more local and regional opportunities for participation [DEIA Work Plan - 2.6]	[NEW]	[Operational] Council, RAAC, Membership Comm, SNAP Section, Program and Host Comms,
	F. Ensure physical and digital spaces and services are inclusive and accessible, considering learning styles and abilities, physical/sensory and cognitive abilities, and lived experiences [DEIA Work Plan - 2.7]	[NEW]	A&D Section, Diversity Comm, CoE, Publications, Staff

### 2.4. Foster communities for professional interaction.

FY22	A. Hold Council-led, all-member forums.	Ongoing.	Council / Component Group Leaders / Staff3
FY23	B. Initiate component group cross-interactions and programming.	Ongoing.	Council / Component Group Leaders / Staff3
	C. Continue to implement component group cross-interactions. [New 0321]		Council / Component Group Leaders / Staff3
	D. Provide archives workers and archival organizations resources for community building (affinity groups for employees, related to retention) [DEIA Work Plan - 1.6]	[NEW]	Council, RAO Section, Archives Mgmt Section, Compensation TF,
	E. Build and sustain relationships with BIPOC communities to better support community archives. [DEIA Work Plan - 4.2]	[NEW]	Diversity Comm, LACCHA, NAAS, RAO, AAC Sections

### 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.

FY22	A. Continuously update the SAA Standards Portal. [Remove in future years, as this is operational and ongoing work of committee.]	Ongoing.	Standards Committee
FY22	B. Identify need for new standards and prepare development work plan roadmap.		Standards Committee
FY22	C. Implement standards development roadmap.		Standards Committee
FY22	D. Ensure physical and digital spaces and services are inclusive and accessible, considering learning styles and abilities, physical/sensory and cognitive abilities, and lived experiences [DEIA Work Plan - 2.7]	[NEW]	A&D Section, Diversity Comm, CoE, Publications, Staff
FY22	E. Develop and provide easy access to existing resources for archivists on anti-racism and DEIA topics [DEIA Work Plan - 3.2]	[NEW]	CoE, Diversity Comm, (many sections), Staff
FY22	F. Support critical reexaminations of descriptive practices and language used for description, narratives, and exhibits. Promote inclusive language. [DEIA Work Plan - 4.1]	[NEW]	Diversity Comm, Standards Comm
FY22	G. Support post-custodialism, radical empathy, communication, and ethics in collecting. [DEIA Work Plan - 4.3]	[NEW]	Standards Comm, Publications, AA Board, AAA Section, Archives Mgmt Section, RAO Section,
FY23	H. Address the shortcomings of archival description and the presence of bias. [DEIA Work Plan - 4.4]	[NEW]	Diversity Comm, Standards Comm, Description Section
FY23	I. Address the shortcomings of archival collecting and the presence of bias. [DEIA Work Plan - 4.5]	[NEW]	Diversity Comm, Standards Comm, Collection Mgmt Section
FY22	J. Create guidance on inclusive reference/reading room practices. [DEIA Work Plan - 4.6]	[NEW]	Diversity Comm, Standards, RAO Section

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

<b>FY22</b>	A. Begin implementation of A*CENSUS II. [Edited to reflect that while implementation begins in FY21, most will take place in FY22.]	Ongoing.	A*CENSUS II Working Group / Ithaka S+R / Staff1
<b>FY22</b>	B. Begin to populate data repository.	Ongoing.	CORDA
<b>FY23</b>	C. Seek effective means to elevate information presented at Research Forum.		Research Forum Organizers / CORDA / Staff3
<b>FY23</b>	D. Identify and implement ways to raise awareness of SAA members about research and data-related efforts, training, presentations, and publications.	Ongoing.	CORDA / Research Forum Organizers / Staff3
<b>FY22</b>	E. Implement A*CENSUS II.	Ongoing.	A*CENSUS II Working Group / Ithaka / Staff1
<b>FY23</b>	F. Promote availability of data via SAA Dataverse, encourage member engagement with it.		CORDA / Staff3
<b>FY22</b>	G. Draft Research Roadmap for Council review and approval.		CORDA / Council
<b>FY23</b>	H. Publish full A*CENSUS II results and special reports.		A*CENSUS II Working Group / Ithaka S+R / CORDA / Staff1
<b>FY23</b>	I. Conduct A*CENSUS on a regular schedule [DEIA Work Plan - 1.3]	[NEW]	Council, Staff, CORDA, A*CENSUS II WG

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

<b>FY22</b>	A. Consider strategic advantages of partnering with other organizations; initiate conversations as appropriate. [Operational, remove in future years.]	Ongoing.	Council / Staff3
<b>FY22</b>	B. Advocate for DEIA informed curriculum at graduate archival programs [DEIA Work Plan - 3.4]	[NEW]	Council, GAE Subcomm, Arch Educators Section
<b>FY22</b>	C. Build and sustain relationships with BIPOC communities to better support community archives. [DEIA Work Plan - 4.2]	[NEW]	Diversity Comm, LACCHA, NAAS, RAO Section, AAC Section,

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

	A. See 2.1.A. (develop comprehensive Management Track) and 2.1.B. (publish Leading and Managing Archives and Manuscript Repositories).	Ongoing.	Staff
FY22	B. Consider how to stimulate interest in developing leadership skills, becoming an SAA leader. [DEIA Work Plan]		Council / Staff
FY22	C. Provide periodic online engagements with members to address questions, foster interest in leadership development.		Council / Section Leaders
FY22	D. Build on successes to continue engagement with members in developing their leadership skills.		Council / Staff2

**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.**

FY22	A. Conduct periodic (eg, quarterly) pulse surveys to check in re member needs, preferences, interests.	Ongoing.	Membership Committee / Staff2
FY23	B. Pilot and/or create guidance for creating affinity or employee resource groups that bring together archives workers that share cultural commonalities [DEIA Work Plan - 1.6]	[NEW]	Council, RAO Section, Archives Mgmt Section, Compensation TF,

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

FY22	A. Implement Year 1 of DEIA work plan.	Ongoing/ upcoming.	Council / Consultant / All Component Groups / Staff1
FY23	B. Create three-year Member Recruitment/Retention Plan, including 1) initiative to welcome new member participation and 2) crafting and testing value proposition messages. [DEIA Work Plan]		Marketing Consultant / Membership Committee / Staff2



**4.3. Foster an inclusive association and profession through educational and leadership opportunities.**

<b>FY22</b>	A. Ensure that management and leadership training opportunities explicitly address inclusion in the workplace and the profession at all levels.	Ongoing.	Committee on Education / Staff
<b>FY22</b>	B. Diversify the instructor base for SAA education programs.	Ongoing.	Committee on Education / Staff
<b>FY23</b>	C. Develop and promote training for members to transform practice and move beyond representative diversity to create inclusive workplace cultures.	Ongoing.	Committee on Education / Diversity Committee / Staff2
<b>FY22</b>	D. Develop training and educational opportunities on navigating workplace culture for archivists who are of color, who identify as LGBTQ+, and/or who have disabilities.		Council, Staff, CoE, Diversity Committee, Disability Section, and Diverse Sexual Identity (LGBTQ+)
<b>FY23</b>	E. Based on A*CENSUS II results, work with partner organizations to strategize on recruitment and retention of a diverse workforce.		Diversity Committee, Council, Staff, A*CENSUS Working Group, and Partner Organizations

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

<b>FY22</b>	A. Refine “town hall” meetings concept as appropriate. [DEIA Work Plan - 2.6]	Ongoing.	Council / Staff
<b>FY23</b>	B. Research and implement models (related to diversifying leadership) in use in other organizations [DEIA Work Plan - 2.2]	[NEW]	Council, Staff, Diversity Comm, Nominatng Comm, Appointments Comm
<b>FY23</b>	C. Implement a more inclusive strategic planning process, engaging membership in strategic planning , rather than just leadership and council [DEIA Work Plan - 2.5]	[NEW]	Council, Staff, Membership Comm
<b>FY23</b>	D. DEIA Foundations training for SAA staff and leadership [DEIA Work Plan – 3.3]	[NEW]	Council, Staff