

**Society of American Archivists  
Council Meeting  
February 5 – 6, 2024  
Virtual Meeting, Chicago, IL**

**2<sup>nd</sup> Quarter Staff Report: Operations**  
(Prepared by: Cherie Newell, Chief of Operations)

**Executive Summary**

We are committed to investing in technology, bolstering cybersecurity, and exploring novel revenue streams. The SAA Operations team is pleased to present significant updates across four key strategic domains.

**I. Finance - Streamlined Reporting Mission**

*Financial Update*

The FYE 2023 financials are presently undergoing audit review, emphasizing our objective to simplify reporting for heightened transparency and accuracy. Concurrently, the budget is in the process of being mapped into the new accounting system.

*Accounting Policies & Procedures*

The implementation of the new accounting system is underway, encompassing standard operating procedures aligned with audit recommendations. These procedures cover bill-pay, expense tracking, and advanced reporting.

*Audit & Tax Compliance*

Successful completion of audits for consolidated financials in FY21 and FY22 has been achieved. FY23 details are currently under review for audit preparation, and FY24 audits are set to resume on schedule, utilizing data from the new accounting and bill pay systems.

*Budget Timeline*

The presentation of FY24 Financials is scheduled for March, introducing new tools and cost models for budget planning, including benefits-cost, cost-sharing, service delivery-cost, and effort allocation.

**II. Technology - Bridging the Gap Mission**

*New IT Partners*

A critical IT partner has been selected based on essential needs, prompting a redefinition of our technology roadmap with a significant emphasis on cybersecurity.

*Infrastructure/SharePoint*

The transition to cloud-based storage is ongoing, with a primary focus on data privacy and cybersecurity. SharePoint is being explored for volunteer document management, including establishing a new file directory.

**III. Service Center - Platform Experience Mission**

*Systems Assessment*

Approval for the technology systems assessment has been granted for this fiscal year, with scheduling planned for the fourth quarter.

*Community Management System*

Testing is underway to enhance collaboration features. Staff liaisons will receive training to facilitate the rollout to selected volunteer groups/leaders. The content management system upgrade project is in the planning phase, with migration likely post-annual meeting.

**IV. Staff Transition & Internal Operations - Process Improvement Mission**

*Internal Operations Team*

Critical gaps in accounting and analytical skills have been addressed, enabling goals to be managed using selected workflow and project management tools. Focus areas include routine processes, data management, and governance.

*Collaborative Efforts*

With a complete staff, we anticipate heightened collaborative efforts, leveraging our team's expertise in process improvement. Exciting prospects lie ahead as we work towards achieving our mission and goals.