

**Society of American Archivists  
Council Meeting  
February 17 & 19, 2026**

**Virtual Meeting  
Staff: 2<sup>nd</sup> Quarter Operations Report  
(Prepared by Cherie Newell)**

### **I. Executive Summary**

In the second quarter of FY26 (October–December), SAA advanced key financial, technology, and operational initiatives with a continued focus on compliance, infrastructure modernization, and process efficiency. These efforts support improved resource management, enhanced collaboration, and long-term organizational stability.

### **II. Finance**

SAA's fiscal year budget cycle aligns financial reporting with scheduled Finance Committee and Council meetings. The FY26 Q2 Finance Staff Report and Financial Statements are accessible via the SAA Council Listserv. ([0226-V-C-4-Fin](#))

<b>Quarter</b>	<b>Period</b>	<b>Meeting Period</b>
Q1	July – September	November
<b>Q2</b>	<b>October – December</b>	<b>February</b>
Q3	January – March	May
Q4	April – June	July/August

### **III. Information Technology Infrastructure and Operational (Information Systems)**

SAA continues to strengthen its technology systems to improve workflow, collaboration, and security in alignment with organizational goals.

#### **Key Priorities**

- **Website Launch (Updated Timeline):**  
The new website, originally scheduled for Q2, was delivered in Q3. Staff training and a 60–90-day testing period are underway to ensure functionality, accessibility, and accuracy before full launch.
- **Collaboration Tools:**  
SharePoint site development has been integrated into the broader technology

roadmap to support long-term coordination and scalability.

- **Ongoing Training:**

Development of the Data Governance Policy remains a central focus.

- **Co-pilot Training:**

Co-pilot training is deferred until after the Drupal and Higher Logic Thrive updates, with data governance work remaining at the immediate priority.

These activities support more efficient workflows, improved data security, and a technology foundation positioned as a strategic enabler for the organization.

#### **IV. Service Center Transition**

The transition from Service Center Manager to Operations Manager is progressing well and strengthening alignment between daily operations and organizational priorities. In Q3–Q4, the role will expand to include responsibility for information systems, ecosystems management, and logistics to support cross-department efficiency.

#### **V. Membership**

##### **Dues Model Change Effective 01/1/2025.**

The Membership Report is accessible via the SAA Council Listserv. ([0226-V-C-4-Memb](#))

- SAA has onboarded **Matthew Novotny**, Membership Marketing & Data Manager, who will lead value-proposition development, explore new member benefits, and support recruitment and retention analytics.

#### **VI. Conclusion**

Q2 reflects strong progress in financial management, technology infrastructure, and membership support. Key priorities moving forward include:

- Maintaining fiscal responsibility and audit readiness
- Strengthening internal systems and operational workflows
- Enhancing member engagement and retention strategies