

Strategic Plan Actions and Timelines, FY 2020 – FY 2022 As Approved by the SAA Council, June 2019

Updated per Council Discussions, November 2020 – February 2021

In all things, SAA strives to provide a welcoming environment. Please note that activities that point specifically to this initiative are labeled “[WE].”

This version of the Strategic Plan dashboard captures Council deliberations between November 2020 and February 2021. Council members were encouraged to: Strike through activities that may no longer be necessary due to changing environment, lack of resources, or need to focus on more important or urgent priorities; move activities that were not accomplished in FY20 but that are urgent or important for FY21 or FY22; modify FY21 or FY22 activities in light of new realities; and/or add activities to FY21 or FY22 that are urgently needed or critically important. Refer to <https://docs.google.com/document/d/1cYDda6ClWC8K-Ywy6oMO09n2tlpD7Oo1/edit> to track Council members’ comments.

Notes:

- ~~Strikethrough~~ = deletions.
- Purple type = additions.
- Levels of staff support are designated as follows: Staff1 = ≥ 400 hours/year; Staff2 = 100-400 hours/year; Staff3 = ≤ 100 hours/year.
- FY23 and FY24 = activities that are deferred for Council re-consideration as it revises the Strategic Plan for FY23 – FY25.

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> .	Done.	Publications Board
	B. Provide media training for 5-7 members; create media opportunities.	Move to FY22.	COPA / PR Counsel / Staff
FY21	C. Promote <i>Creating Family Archives</i> broadly, including to consumers.	Ongoing.	Staff3 / Marketing Counsel

	D. Provide media training to second cohort; create media opportunities.	Move to FY23.	COPA / PR Counsel / Staff2
	Conduct listening session to provide perspectives on 1.1.E.	New	Council / Staff3
FY22	E. Develop service-oriented competency training that recognizes a continuum of advocacy and focuses on the need for archivists to cultivate non-custodial, reciprocal relationships <i>with their community</i> .		Committee on Education / Diversity Committee / RAO Section / Council / Staff2
	Provide media training for cohort 1 of 5-7 members; create media opportunities.	From 1.1.B.	COPA / PR Counsel / Staff2
FY23	Provide media training for cohort 2 of 5-7 members; create media opportunities.	From 1.1.D.	COPA / PR Counsel / Staff3

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

FY20	A. Update and enhance online Advocacy Guide and webcasts.	Ongoing.	COPP / Staff 3
	B. Craft compelling messages to target audience(s) for SAA and member use.	Ongoing.	COPP / COPA / Staff3
	C. Develop letters/editorials on two key public policy issues for members' use.	Move to FY21.	COPA COPP
FY21	D. Draft legislation for national funding initiative; seek sponsors. [Specifically charge COPP with starting this work in FY21.]		COPP / Joint Working Group / NCH
	E. Develop graphics, interactive map to track district visits; participation "count down" to all 50 states.	Move to FY22.	Staff / COPP
	Develop letters/editorials on two key public policy issues for members' use. [Consider providing training to members on how to write an op-ed.]	From 1.2.C.	COPA COPP / Staff3
	Develop "Facts and Figures" data-based webpage.	New	COPA / Staff3
FY22	F. Seek co-sponsors for federal funding initiative; hold member fly-in to advocate.		COPP / Joint Working Group / NCH
	G. Begin to use Use early A*CENSUS II data to craft messages re: funding for archives/archivists.		COPA / COPP / Staff3
	H. Produce guides, toolkits, and education to assist archivists in advocating for support from public and private funders.		Task Force to be determined
	Develop graphics, interactive map to track district visits; participation "count down" to all 50 states.	From 1.2.E.	Staff3 / 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]	Done.	NAAS / Publications Board / Staff3
	B. Complete “IP Guide” to Native American Protocols. [WE]	Move to FY21.	IPWG
	C. Revise/distribute <i>Guidelines for Accessibility in Archives</i> . [WE]	Done.	Accessibility TF / Council
FY21	D. Additional case studies on <i>Native American Protocols</i> ; ATALM exhibit. [WE]	Ongoing.	NAAS / Publications Board / Staff3
	E. Webcasts on <i>Protocols</i> and <i>Guidelines for Accessibility</i> . [WE]	Ongoing.	NAAS (SAAF Grant) / Comm on Education / Staff3
	F. Publish <i>Archival and Special Collections Facilities</i>.	Move to FY22.	TS-AFG / Publications Board
	Complete “IP Guide” to Native American Protocols. [WE]	From 1.3.B.	IPWG [Council liaison/staff to prompt group.]
FY22	G. Webcast series on working effectively with community archives. [WE]	MOVE TO FY23 OR DELETE?	Committee on Education / Staff2
	H. Podcast series for community/public on keeping/donating materials.		COPA / Podcast Team
	<i>Publish Archival and Special Collections Facilities.</i>	From 1.3.F.	Publications Board / Staff2

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

FY20	A. Publish <i>Advocacy and Awareness for Archivists</i> (AFS III).	Done.	Publications Board / Staff1
	B. Rally SAA members to conduct district visits.	Ongoing.	COPP / Joint Working Group / Staff3
	C. Pre-con course on conducting advocacy at state/district level.	Not done. Move to FY21.	COPP / Education Staff3
	D. Enable Council/leaders to model district advocacy; publicize their activities.	Not done. Move to FY21.	Council

FY21	E. Continue to build cohorts of media-trained archivists/spokespersons; create media opportunities for them.	See 1.1.B., 1.1.D.	COPA / PR Counsel / Staff3
	Pre-con course Webcast on conducting advocacy at state/district level.	From 1.4.C. Done.	COPP / Staff3
	Enable Council/leaders to model district advocacy; publicize their activities.	From 1.4.D.	COPP / Council / Staff
FY22	F. Continue to build cohorts of media-trained archivists/spokespersons; create media opportunities for them.	See 1.1.D., FY23	COPA / PR Counsel / Staff3
FY23	Based on “Facts and Figures” web page information, provide outreach to managers and users of archival material.		CORDA / COPP / COPA / Staff3
FY23	Specifically address archivists reaching out to users (e.g., AHA, ASALAH, genealogists, etc.) and their immediate communities. [Look for mention of non-custodial relationships.]		[Assignment?]

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.	Ongoing.	Committee on Education / Staff1
	B. Publish <i>Leading & Managing Archives & Manuscript Repositories</i> (AFS III).	Done.	Publications Board / Staff1
	C. Consider how to strengthen Mentoring Program/opportunities; implement.	Ongoing.	Membership Committee / Staff3
	Offer pilot workshop on “Demystifying Data Analysis.”	Done.	CORDA / Staff3
FY21	D. Implement 50% of Management Track programs.	Ongoing.	Committee on Education / Staff1
	E. Explore feasibility of train-the-trainer program (Instructor Academy) to build teaching expertise among current and prospective instructors.	Move to FY23.	Consultant / Staff2

	Initiate development of research, data, and assessment workshops and training program.	New	CORDA / Committee on Education / Staff3
FY22	F. Implement remaining Management Track programs.		Committee on Education / Staff1
	G. If feasible, implement train-the-trainer program.	Move to FY24.	Consultant / Staff2
	H. Based on A*CENSUS II results: Work with O-Net, BLS, others to upgrade descriptions of archivist positions. [See 3.2.]	Move to FY23.	CORDA / Compensation TF / Staff2
FY23	Explore feasibility of train-the-trainer program (Instructor Academy) to build teaching expertise among current and prospective instructors.	From 2.1.E.	Consultant / Staff2
	Based on A*CENSUS II results: Work with O-Net, BLS, others to upgrade descriptions of archivist positions. [See also 3.2.]	From 2.1.H.	CORDA / Compensation TF / Staff
FY24	If feasible, implement train-the-trainer program.	From 2.1.G.	Consultant / Staff2

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

FY20	A. Publish <i>Arranging and Describing Archives and Manuscripts</i> (AFS III).	Done.	Publications Board / Staff1
	B. Retool/refresh DAS offerings as needed to remain current.	Done.	Committee on Education / Staff2
	C. Capture annual meeting audio + synched slides to enhance education value.	Done.	Staff2
FY21	D. Publish <i>Advancing Preservation and Providing Reference and Access Services</i> (AFS III).	Done.	Publications Board / Staff1
	E. Retool/refresh DAS and other professional development offerings as needed to remain current.	Ongoing.	Committee on Education / Staff1
	F. Convene group to consider leveraging Section-developed educational content for broader distribution to members.	DELETE?	Council / Staff2
FY22	G. Publish <i>Appraising and Acquiring Archives and Manuscripts</i> (AFS III).		Publications Board / Staff1
	H. Implement <i>Scope and plan</i> advanced DAS track for “recertification.”		Committee on Education / Staff2
	I. Create sandbox for Sections to develop/vet content for broader distribution.	DELETE?	Council / Staff2

	Publish <i>Introducing Archives and Manuscripts</i> (AFS III).		Publications Board / Staff1
	Implement Task Force on Publishing Ethics.		Editorial Board / Publications Board / Dictionary WG / CEPC / Staff3
FY23	Implement advanced DAS track for “recertification.”		Committee on Education / Staff1
	Publish titles that address DEIA, component group needs, and leadership perspectives.		Publications Board / Staff2

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).	Done.	Staff
	B. Webcasts on key topics in archives management.	Done.	Committee on Education / Staff
FY21	C. Enhance book distribution options (via Amazon). make journal hidden content more accessible; consider reducing journal embargos.	Ongoing.	Publications Board / Editorial Board / Staff2
	D. Regional rotation of “boot camps” with more advance notice.	Not done (COVID).	Education Staff
FY22	E. Ensure that members may complete DAS certificate 100% online.		Committee on Education / Staff2
	Journal accessibility: Implement hidden content project recommendations and consider reducing journal embargo.	From 2.3.C.	Editorial Board / Staff2
	F. Explore possibility of regional in-person “boot camps.”		Education Staff3
FY23	Host limited number of regional in-person “boot camps.”		Education Staff1

2.4. Foster communities for professional interaction.

FY20	A. “WE” Initiative: Explore and implement advanced features in Higher Logic to increase member engagement.		Staff2
	B. Based on recommendations of Tragedy Response Initiative Task Force, develop implementation work plan.	Done.	Task Force / Council

FY21	C. Implement Tragedy Response work plan.	Ongoing.	Appointed Group / Council / Staff3
	Hold Council-led, all-member forums.	Ongoing.	Council / Component Group Leaders / Staff3
	Initiate component group cross-interactions and programming.	Ongoing.	Council / Component Group Leaders / Staff3
FY22	D. Continue to refine use of technologies to support member communities.	See 2.4.A.	Staff2
	Continue to implement component group cross-interactions.	New	Council / Component Group Leaders / Staff3

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 the SAA Standards Portal. [Remove in future years, as this is operational and ongoing work of committee.]	Ongoing.	Standards Committee
	B. Launch <i>Dictionary of Archives Terminology</i> .	Done.	Dictionary Working Group / Staff1
FY21	C. Identify need for new standards and prepare development work plan roadmap.	Move to FY22.	Standards Committee
	D. Survey external standards and recommend Council approval as appropriate. [Remove in future years, as also embedded in Committee's charge.]	See 3.1.A.	Standards Committee
FY22	E. Continuously update Standards Portal.	See 3.1.A.	Standards Committee
FY23	Implement standards development work plan roadmap.	See 3.1.C.	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.	Done.	A*CENSUS II Task Force / Research Firm / Staff
-------------	--	-------	--

	B. Draft Research Agenda for Council review/approval.	Not done. See FY22.	CORDA
	Select SAA data repository (SAA Dataverse).	Done.	CORDA / Staff3
FY21	C. Begin implementation of Implement A*CENSUS II. [Edited to reflect that while implementation begins in FY21, most will take place in FY22.]	Move to FY22.	A*CENSUS II Working Group / Research Consulting Firm Ithaka S+R / Staff
	D. Begin implementation of Research Agenda; seek out Establish data repository, MOU, and data policies.		CORDA / Staff3
	Begin to populate data repository.		CORDA
	E. Seek effective means to elevate information presented at Research Forum.		Research Forum Organizers / CORDA / Staff3
	Identify and implement ways to raise awareness of SAA members about research and data-related efforts, training, presentations, and publications.		CORDA / Research Forum Organizers / Staff3
FY22	F. Publish A*CENSUS II results and special reports.	Move to FY23.	A*CENSUS II Working Group / CORDA / Staff
	Implement A*CENSUS II.	From 3.2.C.	A*CENSUS II Working Group / Ithaka / Staff1
	G. Promote availability of data via SAA Dataverse, encourage member engagement with it.		CORDA / Staff3
	H. Continue implementation of Research Agenda.		CORDA
	I. Implement data repository. Draft Research Agenda for Council review and approval.		CORDA / Council
FY23	Publish full A*CENSUS II results and special reports.	From 3.2.F.	A*CENSUS II Working Group / Ithaka S+R / CORDA / Staff1

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. [Operational, remove in future years.]	Ongoing.	Council / Staff3
	B. Consider strategic advantages of partnering with other organizations; initiate conversations as appropriate. [Operational, remove in future years.]	Ongoing.	Council / Staff3

FY21	C. Pursue likely external sponsors/supporters to supplement SAAF's Strategic Growth Fund grants program [and AWEF program] .		Executive Committee / Foundation Board / Staff2
	Hire Foundation development consultant.		Foundation Board / Staff3
FY22	D. Hire Foundation development officer.		Foundation Board / Executive Director

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.A. (develop comprehensive Management Track) and 2.1.B. (publish Leading and Managing Archives and Manuscript Repositories) .	Ongoing.	
	B. "WE" Initiative: Consider how to stimulate interest in developing leadership skills, becoming an SAA leader.	Not done. MOVE?	Council / Staff
	C. Consider partnership with and/or alternatives to Archives Leadership Institute training.	Move to FY23.	Council / Staff
FY21	D. "WE" Initiative: Provide periodic online engagements with members to address questions, foster interest in leadership development.	MOVE to FY22?	Council / Section Leaders
	E. Implement partnership/other means to develop leadership training.	Move to FY23.	Council / Staff
	F. Sponsor a half day executive forum at the 2020 Joint Annual Meeting.	Move to FY23.	Council / Staff
FY22	G. "WE" Initiative: Build on successes to continue engagement with members in developing their leadership skills.		Council / Staff2
	H. Implement leadership education/training.	Move to FY23.	Committee on Education / Staff
FY23	Consider partnership with and/or alternatives to Archives Leadership Institute training.	From 3.4.C.	Council / Staff3
	Sponsor a half-day executive forum at the 2022 Annual Meeting.	From 3.4.F.	Council / Staff2
	Implement leadership education / training.	From 3.4.H.	Committee on Education / 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.

FY20	A. Implement NimbleUser, focusing on those features that streamline member interaction and create a vibrant user experience.	Done.	Staff
	B. Tag member database with "persona" information to increase understanding of member preferences, use that information to enhance customer experience.	Done.	Staff
FY21	C. Implement appropriate refinements in Higher Logic.	Ongoing.	Staff2
FY22	D. Conduct triennial member needs/preferences survey. Conduct periodic (eg, quarterly) pulse surveys to check in re member needs, preferences, interests.	Ongoing.	Membership Committee / Staff2

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

FY20	A. "WE" Initiative: Complete first round of staff development on DEI.	Done.	Staff
	B. Explore technologies that would enable greater participation via remote means (e.g., virtual section meetings, hosted discussions, etc.).	Done.	Staff
FY21	C. "WE" Initiative: Develop DEI work plan of initiatives to welcome member participation in SAA. [Superseded by DEIA work plan highlighted below.]		Council / Staff
	D. Create "Member Recruitment/Retention Plan 2020-2022," including 1) initiative to welcome member participation and 2) crafting and testing value proposition messages.	Not done (COVID). Move to FY22.	Marketing Consultant / Membership Committee / Staff
	E. "WE" Initiative: Implement Year 1 of work plan.		Council / Staff
	Develop a comprehensive, multi-year work plan for incorporating DEIA and cultural competency into all aspects of SAA's work.	See 4.2.C.	Council Internal Working Group on DEIA / Council / Staff2

FY22	Implement Year 1 of DEIA work plan.	See 4.2.C.	Council / Consultant / All Component Groups / Staff1
	Create three-year Member Recruitment/Retention Plan, including 1) initiative to welcome new member participation and 2) crafting and testing value proposition messages.	From 4.2.D.	Marketing Consultant / Membership Committee / Staff2

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

FY20	A. Review and recommit to Statement on Diversity and Inclusion.	Done.	Council / Diversity Committee / Staff
	B. Ensure that management and leadership training opportunities explicitly address inclusion in the workplace and the profession at all levels.	Ongoing.	Committee on Education / Staff
	C. Diversify the instructor base for SAA education programs.	Ongoing.	Committee on Education / Staff
FY21	D. 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
	E. Develop training and educational opportunities on navigating workplace culture for archivists who are of color, who identify as LGBTQ+, and/or who have disabilities.	Move to FY22.	Committee on Education / Diversity Committee / Staff2 / AACS / DSGS/ LACCHAS / ADS
FY22	F. Based on A*CENSUS II results, work with partner organizations to strategize on recruitment and retention of a diverse workforce.	Move to FY23.	Council / CORDA / ACTF / Staff
	G. Expand training and educational opportunities on navigating workplace cultures for archivists from other marginalized groups (i.e., those not mentioned in 4.3.E.).	Move to FY23.	Committee on Education / Diversity Committee / Staff2 / Others TBD
	Develop training and educational opportunities on navigating workplace culture for archivists who are of color, who identify as LGBTQ+, and/or who have disabilities. [Although this is an important effort, is SAA the right org to do this? Or should we support the work of others? See also FY23, from 4.3.G.]	From 4.3.E.	See 4.3.E.
FY23	Based on A*CENSUS II results, work with partner organizations to strategize on recruitment and retention of a diverse workforce.	From 4.3.F.	See 4.3.F.

	Expand training and educational opportunities on navigating workplace cultures for archivists from other marginalized groups (i.e., those not mentioned in 4.3.E.).	From 4.3.G.	See 4.3.G.
--	---	-------------	------------

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.	Done.	Council / Staff
FY21	B. Refine “town hall” meetings concept as appropriate.	Ongoing.	Council / Staff
FY22	C. Refine “town hall” meetings concept as appropriate. Continue “town hall” meetings.		Council / Staff