



Strategic Plan 2015 – 2018








2015-2016 WORKPLAN UPDATE, MAY 2016 [STAFF DRAFT]





GOAL 1: ADVOCATING FOR ARCHIVES AND ARCHIVISTS

Society values the vital role of archives and archivists.

| 1.1. Promote the value of archives and archivists to institutions, communities, and society. | | | |
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| 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 Actions | Status | | Notes |
| A. For key audience of SAA members: Implement campaign to educate and motivate members to speak/write about “the value of archives.” <ul style="list-style-type: none"> Develop video of members speaking about the value of archives. Compile and distribute stories re the practical value of archives. | ● | | <ul style="list-style-type: none"> See COPA work plan, reviewed by the Council in 1114. Includes Roe’s “Year of Living Dangerously for Archives” monthly initiative. “Archives Change Lives” video launched at <i>ARCHIVES 2015</i>; prominently placed on SAA website; picked up on History Relevance Campaign website. (PR Counsel fees included in FY16 budget, Program 107.) Stories may be used on website to motivate and give examples to members and/or may be used in media relations/external audience initiatives. “Advocacy” now highlighted on main navigation bar to make it more apparent to members. Includes Public Policy, Public Awareness, and “Within Your Institution.” |
| B. For key audience of general public: Work with PR Counsel to gain media attention via 3-4 feature releases, using archivist spokespersons, that highlight the value of archives/archivists. | ● | | <ul style="list-style-type: none"> See COPA work plan, reviewed by the Council in 1114. Not accomplished in FY16 (although PR counsel fees were included in the budget) due to challenges in deciding on a sufficiently “hot” topic for which we could also locate archivist spokespersons. |






| | | | - PR Counsel fees deleted from Proposed FY17 budget, Program 107. | |
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| C. Retool website to provide “destination” for media and general public; develop array of practical resources to help archivists make a compelling case for archives and archivists. | ● | | - With website launch, focus has been on developing content at “About Archives” to appeal to public and media. - Website resources undergoing review by COPA members and staff. | |
| D. Seek member, public, media feedback to continuously improve the effectiveness of and involvement in American Archives Month. | ● | | | |
| E. Implement Year 2 of #AskAnArchivist Day on October 1, 2016. | ● | | - Done. Plans in place to implement again in October 2016, tied to American Archives Month. | |
| 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.” | | | | |
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| Specific Actions | Status | | Notes | |
| A. Convene or participate actively in meetings with coalition partners to determine priorities, develop ongoing communication plans, and evaluate progress. | ● | | - Beaumont, Lawrimore (COPA), and Zanish-Belcher (CAPP) have participated in monthly conference calls of Joint Working Group on Issues and Awareness. Council adopted in March 2016 the JWG’s “Joint Statement on Access to State and Local Records.” - Funds included in FY16 and Proposed FY17 budgets (Program 107) for member travel to one meeting of coalition partners (eg, Issues and Awareness Joint Working Group). Group has progressed slowly; expect more activity in FY17. | |
| B. ID opportunities to collaborate on advocacy with RAAC, NCPH, AASLH, ALCTS, RBMS, AMIA (groups that also have a stake in archives). | ● | | - Collaborated with RAAC on messaging regarding LA Port Authority records. - Council considering endorsement of History Relevance Campaign . | |
| 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. | | | | |
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| Specific Actions | Status | | Notes | |
| A. Develop issue briefs covering topics outlined in SAA’s Public Policy Agenda. | ● | | - Eight issue briefs now available: Presidential Records Act, FOIA, Access to State and Local Records, HIPAA, Strengthening of Federal Records Authority, Copyright Act Section 108, Orphan Works, Funding of Government Archives and Archival Programs. | |







| B. Query members about what resources they need to help them advocate in their own institutions. |  | | |
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| C. Based on variety of inputs, develop and disseminate practical resources to aid archivists in advocating for archives and archivists. |  | | <ul style="list-style-type: none"> - Website redesign has created more logical placement of advocacy-related information. - Work continues on consolidation of existing and creation of new resources. |
| 1.2.3. Strengthen the ability of SAA members to articulate the value of archives to resource allocators, policymakers, and other “influencers.” | | | |
| Specific Actions | Status | | Notes |
| A. Develop resources/education programs designed to meet the advocacy needs identified by members, including free “Basics of Advocating” guide. |  | | <ul style="list-style-type: none"> - Review existing “toolkits” to determine whether SAA will adopt and publicize or move in different direction. |
| B. Provide free “Advocating for Archives” workshop at 2015 Joint Annual Meeting for up to 60 attendees. |  | | <ul style="list-style-type: none"> - Presenters not available for 2015 live offering. |
| C. Develop and host a free, on-demand “Advocating for Archives” webinar. |  | | <ul style="list-style-type: none"> - Two half-hour “Advocating for Archives” webinars (live and on-demand) to be offered free via SAA website. Instructor: Roe. Release date: August 2016. - Include Study Guide to help facilitate further discussion among participants. |
| 1.2.4. Develop evidence-based value proposition for archives and archivists. | | | |
| Specific Actions | Status | | Notes |
| A. Apply for IMLS National Leadership Grant to fund “Toward a More Data-Informed Archives Profession.” |  | | <ul style="list-style-type: none"> - Initial proposal submitted February 1, 2015. - Invited to submit “second phase” proposal by June 1; not done due to illness of PI. - New initial proposal submitted September 29, 2016; notified on November 24 of IMLS decision not to invite a full grant proposal. - Next steps to be discussed. |
| B. Publish a periodic compilation of data re the “state of America’s archives” using metrics such as employment rates, salaries, funding for archives, media citations, etc. |  | | <ul style="list-style-type: none"> - Pending outcome of grant proposal. |

| 1.3. Provide leadership in ensuring the completeness, diversity, and accessibility of the historical record. | | | |
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| 1.3.1. Promote existing models and develop new methods to help archives and archivists diversify the documentary record and promote archives to diverse communities. | | | |
| Specific Actions | Status | | Notes |
| A. Promote discussion within the archives community re what it means to “diversify the archival record,” including discussion of successes, failures, lessons learned. |  | | <ul style="list-style-type: none"> - Diversity Committee forums at 2015 and 2016 Annual Meetings. - Council Working Group on Diversity and Inclusion to provide coordination across groups (Diversity Committee, Cultural Heritage Working Group, appropriate component groups), develop plan for 2016 and 2017 Annual Meetings. (See 0516-V-F-WGDiversity.) |
| B. Publish five case studies on diversifying the archival record. |  | | <ul style="list-style-type: none"> - Call for Case Studies issued by Diversity Committee in 8/13; several case studies under review by Committee and Publications Board. - One case study published online in January 2016 (“Preservation Workshops with Restricted Resources: Preserving Cham Manuscripts in Vietnam”). |
| C. Increase the “cultural competence” of SAA members via education and training. <ul style="list-style-type: none"> • Draft cultural competence principles. • Provide webinar on cultural competence by mid-FY16. • Explore creation of Diversity webinar track. • Prepare blog post, AO article, session at 2015 Annual Meeting. • Solicit and publish case studies. |  | | <ul style="list-style-type: none"> - Discussions of cultural competence led by Helen Wong Smith at 0515 and 1115 Council meetings. - Council Working Group on Diversity and Inclusion to develop plan for 2016 and 2017 Annual Meetings and other activities throughout the year(s) (see 0516-V-F-WGDiversity); coordinate with the work of the Diversity Committee, Cultural Heritage Working Group, and appropriate component groups to leverage their contributions into broader cultural competency for the Council, staff, and SAA members. - 2016 Annual Meeting keynote address by Chris Taylor, Director of Inclusion and Community Engagement, Minnesota Historical Society. |
| 1.3.2. In collaboration with appropriate communities, develop resources for managing cultural heritage materials to assist the broader archives community in managing cultural property issues. | | | |
| Specific Actions | Status | | Notes |
| A. Continue development of online resources (e.g., bibliography), gathered from multiple sources, about managing cultural heritage materials. |  | | <ul style="list-style-type: none"> - Ongoing by Cultural Heritage Working Group. See “Definitions and Resources” at http://www2.archivists.org/groups/cultural-heritage-working-group. |

Goal 2: ENHANCING PROFESSIONAL GROWTH

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

| 2.1. Provide content, via education, publications, and the SAA website, that reflects the latest thinking and best practices in the field. | | | |
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| 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 Actions | Status | | Notes |
| <p>A. Refine SAA's education program based on 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.</p> <ul style="list-style-type: none"> • Implement Phase I of A&D curriculum. • Increase number of DAS courses in Tools and Services and Transformational tiers. • Update/revise DAS course exams. |  | | <ul style="list-style-type: none"> - A&D Curriculum and Certificate Program approved by the Council in August 2015. (See 0815-1-III-A-A&DCertificate.) - Fourteen A&D courses scheduled between late April and August 2016. - A&D: Four new courses developed; five existing courses revised and exams added; two new courses under development. - DAS: Two new courses under development in Tools and Services; four courses under revision and three courses under development in other tiers. - DAS course exams under continuous review. |
| B. Explore collaborations with other communities to expand training for archivists in areas in which SAA does not have expertise or capacity. |  | | <ul style="list-style-type: none"> - CoE members audited Lyris online courses and POWRR face-to-face courses to evaluate potential for collaboration. |
| C. Develop evaluation tools to enhance current feedback mechanisms. |  | | |
| D. Develop webinars that use SAA publications as basis for content. |  | | <ul style="list-style-type: none"> - Produced "Introduction to Processing Digital Records and Manuscripts" using Trends Module 2 as an enhancement to the offering. |
| 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 Actions | Status | | Notes |
| A. Assess/enhance Trends in Archives Practice series to ensure that it meets evolving needs of members. |  | | <ul style="list-style-type: none"> - See http://www2.archivists.org/publications/book-publishing/trends-in-archives-practice#.Vx6LOlYrKUK. |





| B. Ensure timely preparation and production of Archival Fundamentals Series III. |  | | - See https://offtherecord.archivists.org/2014/10/16/looking-forward-to-the-archival-fundamentals-series-iii/ . | |
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| C. Reevaluate business model for book publishing program. |  | | - Discussed at February 2016 Publications Board meeting. | |
| D. Initiate "how-to" video series on 10 basic practices (eg, how to describe a photo, how to document a new acquisition, how to do metadata, etc). |  | | | |
| 2.2. Deliver information and education via methods that are accessible, affordable, and keep pace with technological change. | | | | |
| 2.2.1. 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. | | | | |
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| Specific Actions | Status | | Notes | |
| A. Implement strategies to support, strengthen, and enhance the Education program via some combination of software, tech support, consultants, temp assistance. |  | | - Funding included in FY 2016 and Proposed FY 2017 budgets (Program 105). | |
| B. Implement Allen Press solution for production of <i>The American Archivist</i> , from manuscript tracking to multi-platform publication and distribution. |  | | - Phase I implemented in late April 2015. | |
| C. Acquire software that allows collaborative editing and online publishing of <i>Dictionary of Archives Terminology</i> . |  | | - Software purchased in March 2016, training scheduled for April 2016. (Funding included in FY16 budget, Program 104.) | |
| 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. | | | | |
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| Specific Actions | Status | Notes |
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| A. Survey members to determine what career development resources would be most valuable to them. | ● | Hold for 2016-2017. |
| B. Work with component groups to develop an online guide for new archivists on career paths, including new areas in which archivists are making an impact. | ● | Hold for 2016-2017. |
| C. Expand Online Career Center to include information for those who are interested in a career in archives. | ● | - Some progress made with redesign of website and creation of new content. See http://www2.archivists.org/careers/beanarchivist#.Vx6MyVYrKUk for information available at website launch. |
| D. Increase Education Directory listings to make this guide more comprehensive. | ● | |
| 2.3.2. Examine and respond to archival employment issues. | | |
| Specific Actions | Status | Notes |
| A. Conduct periodic pop-up surveys to determine trends in archival employment. | ● | - One pop-up survey conducted in January 2015. A total of 3,976 individuals responded to the 23-question survey. |
| A. Publicize “Best Practices for Internships as a Component of Graduate Archival Education.” | ● | - Brought forward recently via Call for Internship Directory Listings , a staff effort to update a directory originally created by members in 2005. |
| B. Publicize “Best Practices for Volunteers.” | ● | |

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. | | | |
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| 3.1.1. Conduct ongoing environmental scans to facilitate awareness of gaps and of relevant external standards. | | | |
| Specific Actions | Status | | Notes |
| A. Promote member awareness of the Standards Portal and processes for developing, reviewing, endorsing, or including new standards, guidelines, or best practices. | | | <ul style="list-style-type: none"> - Existing Standards infrastructure may not support this. Consider resources before moving forward. - Consider revised structure for maintenance of standards (to be proposed by Standards Committee, 0815). UPDATE? |
| B. Encourage component groups and members to identify needs and gaps for standards development and to contribute “related resources” to the Standards Portal. | ● | | |
| C. Consulting broadly, determine areas in which standards, guidelines, and best practices are most needed by practicing archivists. | ● | | |
| D. Ensure that the Standards Portal documents the relationship(s) among archival standards and those of related professions. | ● | | |
| 3.2. Foster and disseminate research in and about the field. | | | |
| 3.2.1. Consider ways in which to expand the conversation within the profession about research (both practical and theoretical). | | | |
| Specific Actions | Status | | Notes |
| A. Encourage member engagement with published research with hosted discussion groups both online and at the Annual Meeting. | ● | | <ul style="list-style-type: none"> - <i>The American Archivist</i> discussion groups at Annual Meeting are now standard. |
| B. Continue to increase participation by AM presenters in posting their materials (abstracts, posters, slides, full papers) on the website. | ● | | <ul style="list-style-type: none"> - Participation increased significantly from 2014 to 2015 as individuals have become more familiar with the Sched platform. |

| C. Lead a series of Twitter chats based on research presented at the Annual Meeting or published in <i>The American Archivist</i> . |  | | |
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| 3.2.2. Provide opportunities for joint meetings and information exchanges with other organizations and disciplines. | | | |
| A. Seek out, and be responsive to, opportunities to collaborate with other organizations. <ul style="list-style-type: none"> Apply "Principles and Priorities for Planning Joint Meetings with Other Professional Organizations" to all discussions. |  | <ul style="list-style-type: none"> Made a successful proposal to CoSA for the 2016 Joint Annual Meeting. Proposal to co-host Joint Meeting with the International Council on Archives in 2018 or 2020 is pending a decision by the ICA Executive Board. | |
| B. Coordinate relevant activities with the Regional Archival Associations Consortium (RAAC). |  | <ul style="list-style-type: none"> Coordination on some advocacy issues. SAA provides meeting space and microsite. | |
| 3.2.3. Establish or strengthen alliances with allied professional fields. | | | |
| Specific Actions | Status | Notes | |
| A. Actively work to strengthen involvement and/or alliances with RBMS; the Coalition to Advance Learning in Archives, Libraries and Museums (CALALM); and others as appropriate and feasible. |  | <ul style="list-style-type: none"> Working with RBMS on three joint task forces: Holdings Metrics, User Metrics, and Primary Source Literacy. Working with CALALM (and offshoots) on a variety of IMLS grant-funded projects regarding professional development/continuing education across LAMs. | |


GOAL 4: MEETING MEMBERS' NEEDS
SAA is an agile association that delivers outstanding service and fosters a culture of inclusiveness and participation.

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 Actions | Status | Notes |
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| A. By late FY 2015, complete an assessment of functional requirements by key stakeholders (staff, Council, group leaders) to determine mid- and long-term needs and preferences for AMS functionality. |  | - Although funding was included in FY 2016 budget (Program 100), website redesign took precedence. Funding included in Proposed FY 2017 budget (Program 100). |
| B. By early FY 2016, develop staff development plan to address augmenting staff capacity to specify and analyze SAA business requirements for AMS RFP. |  | - Although funding was included in FY 2016 budget (Program 100), website redesign took precedence. Funding included in Proposed FY 2017 budget (Program 100). |
| C. By early FY 2016, complete development of process diagrams, use cases, and RFP to be issued to a targeted though broad cross-section of AMS vendors. |  | - Although funding was included in FY 2016 budget (Program 100), website redesign took precedence. Funding included in Proposed FY 2017 budget (Program 100). |






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 Actions | Status | Notes |
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| A. Integrate social media and sharing tools with the SAA website to make it easier for users to engage with all of SAA's communication channels. Provide one-stop access to all social media accounts used by SAA. |  | - Accomplished with website redesign in March 2016. |



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| B. Reorganize website navigation to optimize ease of use and highlight organizational priorities. | ● | - | Completed spring 2014. Launched with new website in March 2016. |
| C. Redesign website to incorporate contemporary design principles and a home page that features the breadth of SAA's work. | ● | - | Completed fall 2014 with outside designer. Launched with new website in March 2016. |
| D. Implement new navigation structure and branding in Drupal for staging site. | ● | | |
| E. Conduct user testing with staff and members. | ● | | |
| F. By early FY16, launch redesigned website. | ● | - | Launched March 2016. |
| 4.1.3. Promote member input on an ongoing basis, and improve means for members to tell SAA what they think and need. | | | |
| Specific Actions | Status | | Notes |
| A. Implement feedback mechanisms to accommodate members' preferred communication methods. <ul style="list-style-type: none"> Periodic "pop-up" surveys to take pulse of members on various issues. Provide place and schedule for Council members to meet with members (via forums and/or in informal settings) during Annual Meeting. | ● | - | Have provided Council "office hours" in the Expo Hall as well as Town Hall meeting with the President at 2014 and 2015 conferences; same scheduled for 2016. |
| 4.1.4. Expand SAA's Mentoring Program to ensure that members who want a professional mentor can find one through SAA. | | | |
| Specific Actions | Status | | Notes |
| A. Implement a campaign to increase the rate of participation by Fellows and past leaders as mentors. | ● | - | Several calls to the Fellows list have resulted in 10-15 individuals signing up to be mentors. |
| B. Ensure that SAA has the technological capability to support a robust Mentoring Program matching system, including a feedback mechanism. | ● | | |

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

4.2.1. Address barriers, perceived and actual, to broad participation by SAA members in the activities of the organization.

| Specific Actions | Status | Notes |
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| 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. |  | - Although this issue is <u>extremely</u> important and is dealt with on a case-by-case basis as it arises, the activities as outlined represent a significant “campaign” that staff are unable to address due to other priorities. We welcome ideas from the Council re how these activities might be accomplished without significant staff resources. |
| B. For member-identified barriers that are structural: Explore how to remove them and remove as many as possible. |  | - On hold. |
| 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. |  | - On hold. |
| D. Regularly assess progress on members’ perceptions of SAA as an organization that fosters participation. |  | - On hold. |
| E. Publish at least one post per quarter in <i>Off The Record</i> that highlights a component group project. |  | - Two (possibly three) Council Exemplary Service Awards in 2016 highlight the work of SAA component groups. |

4.2.2. Assess the structure of component groups and develop nimble structures to meet member needs for affiliation.

| Specific Actions | Status | Notes |
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| A. Council Working Group on Member Affinity Groups to address recommendations of Task Force on Member Affinity Groups, propose structural revisions as needed. |  | - Discussed at May 2015 Council meeting. - Call for comments issued to members before 2015 Annual Meeting. - Discussed at November 2015 Council meeting. - See May 2016 Council agenda item (0516-V-B-MembAffGroups). |
| B. Implement Council-approved revisions of the component group structure. |  | |

| 4.2.3. Develop resources and tools that encourage and expand leadership opportunities throughout SAA. | | | | |
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| Specific Actions | Status | | Notes | |
| A. Continue to monitor the SAA appointments process to ensure that at least 40% of appointees are first-time appointees. | ● | | | |
| B. Encourage former elected leaders, Fellows, ALI alumni to serve as leadership mentors. | ● | | | |
| 4.3. Continue to enrich the association and the profession with greater diversity in membership and leadership. | | | | |
| 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 Actions | Status | | Notes | |
| A. Implement the IMLS-funded Mosaic Program grant in partnership with the Association of Research Libraries. | ● | | <ul style="list-style-type: none"> - Current grant implemented through August 2016. - Mosaic II grant proposal submitted; grant awarded for June 2016 – May 2019. - New component of Mosaic II is DAS education, with customized program based on fellows' needs. | |
| B. Consider ways in which the Program can be sustained after the current grant period. | ● | | <ul style="list-style-type: none"> - Being discussed by SAA Foundation Board. | |
| C. 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. | ● | | | |
| D. Work with AACRT and NAAR to establish metrics for, gather qualitative data about, and evaluate effectiveness of awards and scholarship programs related to diversity. | ● | | | |
| 4.3.2. Identify underrepresented populations and develop recruitment efforts for the profession that include focused marketing and communication resources. [PARKING LOT PENDING DISCUSSION AND RESOURCE ALLOCATION] | | | | |