

**Society of American Archivists
Council Meeting
May 2026
Virtual Meeting
Operations Report
(Prepared by Cherie Newell)**

I. Executive Summary

In the third quarter of FY26 (**January - March**), SAA moved 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 Q3 Financial Statements are accessible via the SAA Council Listserv. ([SAA Preliminary Financial Statements as of 3.31.26 – via SAA Council Listserv](#))

Quarter	Period	Meeting Period
Q1	July – September	November
Q2	October – December	February
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, aligning with organizational goals.

Key Priorities

- **New Website Launch (Updated Timeline):**
Administrator and staff training, along with a 30–60-day testing period, is underway to ensure functionality, accessibility, and accuracy before launch. Following this phase, a select group of members and nonmember end users will participate in additional testing. The full launch is tentatively scheduled for July 15.

- **Community Management:**

We've officially kicked off implementation of the Higher Logic Thrive platform, with each component moving forward in parallel. Our team is holding weekly working sessions to maintain momentum across Thrive Marketing, Thrive Community, and related modules. We are also launching the Thrive workspace environment and beginning the migration of microsites from Drupal into Higher Logic, helping consolidate our digital ecosystem within the Thrive platform

AI-Enabled Efficiencies

- Some SAA staff have embarked on using the out-of-the-box AI tools to accelerate draft writing for routine communications, reducing turnaround time while keeping staff review as the final checkpoint.
- Leveraging AI to summarize long documents and meeting materials, helping staff identify action items and decisions more quickly.
- An internal team has been assigned and will lead in developing an AI and Data Governance Policy to ensure responsible use, protect sensitive information, and improve consistency across systems.

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, though at a measured pace, as the role continues to evolve in scope. In Q3, the position remains central to supporting cross-department efficiency; however, increasing demands related to content migration, platform implementation, and broader technology initiatives highlight the need for more dedicated IT-focused expertise. Strengthening capacity in this area will be important to ensure consistent help desk support, system reliability, and successful execution of upcoming digital projects.

V. Membership

Dues Model *Effective 01/01/2026*

The Membership Report is accessible via the SAA Council Listserv. ([3Q FY26 Membership Report – via SAA Council Listserv](#))

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

Q3 reflects solid progress in financial management, technology modernization, and membership support. *Key priorities moving forward include:*

- Maintaining fiscal responsibility, timely financial reporting, and audit readiness
- Executing key platform transitions (website launch, Higher Logic Thrive implementation, and microsite migration) while strengthening internal workflows
- Building capacity for scalable support (AI and data governance, reliable help desk coverage) and advancing member engagement and retention through data-informed strategies