

**Society of American Archivists  
Council Meeting  
July 24, 2017  
Oregon Convention Center  
Portland, Oregon**

**Review of Strategic Plan Actions and Timelines  
(Prepared by Nancy Beaumont and Felicia Owens)**

The attached document is provided as an update based on discussions at the May 2017 Council meeting following review of the Plan by a Council working group comprising Amy Cooper Cary, Pam Hackbart-Dean, Nance McGovern, and Tanya Zanish-Belcher. This “dashboard” will serve as a resource as the Council considers how it would like to approach development of SAA’s Strategic Plan for 2019 and beyond. A portion of the Council’s November 2017 meeting will be devoted to strategic planning and the next iteration of SAA’s Plan.

Key to markup of the current document:

- Strikethrough = Activity is completed or should be deleted.
- Text in **PURPLE** = Discussed by the Council in May 2017.
- Text in **RED** = Staff update.



## Strategic Plan 2015 – 2018

### WORKPLAN UPDATE, JULY 2017

**GOAL 1: ADVOCATING FOR ARCHIVES AND ARCHIVISTS**  
 Society values the vital role of archives and archivists.

<b>1.1. Promote the value of archives and archivists to institutions, communities, and society.</b>			
<b>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.</b>			
Specific Actions	Status		Progress Notes
<p>A. For key audience of SAA members: Implement campaign to educate and motivate members to speak/write about “the value of archives.”</p> <ul style="list-style-type: none"> <li>• Develop video of members speaking about the value of archives.</li> <li>• Compile and distribute stories re the practical value of archives.</li> </ul>	●		<ul style="list-style-type: none"> <li>- See COPA work plan, reviewed by the Council in 1114.</li> <li>- Includes Roe’s “Year of Living Dangerously for Archives” monthly initiative.</li> <li>- <del>“Archives Change Lives” video launched at ARCHIVES 2015; prominently placed on SAA website; picked up on History Relevance Campaign website. (PR Counsel fees included in FY16 budget, Program 107.)</del></li> <li>- Stories may be used on website to motivate and give examples to members and/or may be used in media relations/external audience initiatives.</li> <li>- “Advocacy” now highlighted on main navigation bar to make it more apparent to members. Includes Public Policy, Public Awareness, and “Within Your Institution.”</li> <li>- <a href="#">[Supplement “Archives Change Lives” with StoryCorps material from 2015 Annual Meeting, COPA’s Federal Funding Impact Stories, etc.]</a></li> <li>- <a href="#">COPA to meet in September 2017 to update work plan and discuss 1.1.1. A. and B.</a></li> </ul>

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"> <li>- See COPA work plan, reviewed by the Council in 1114.</li> <li>- <del>Not accomplished in FY16 due to challenges in deciding on a “hot” topic for which we could also locate archivist spokespersons.</del></li> <li>- <del>PR Counsel fees deleted from FY17 budget, Program 107.</del></li> </ul>
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.		<ul style="list-style-type: none"> <li>- With website launch, focus has been on developing content at “About Archives” to appeal to public and media.</li> <li>- Website resources undergoing review by COPA members and staff.</li> </ul>
D. Seek member, public, media feedback to continuously improve the effectiveness of and involvement in American Archives Month.		Ongoing.
E. <del>Implement Year 2 of #AskAnArchivist Day on October 1, 2016.</del>		Done. Implemented on October 5 to avoid weekend and religious holiday. Integrated with American Archives Month publicity. <a href="#">#AskAnArchivist Day is now a regularly scheduled activity as part of American Archives Month. COPA will review effectiveness and make recommendations in its new work plan.</a>

## 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.”

Specific Actions	Status	Progress Notes
A. Convene or participate actively in meetings with coalition partners to determine priorities, develop ongoing communication plans, and evaluate progress.		<ul style="list-style-type: none"> <li>- <del>Beaumont, Lawrimore/Burns (COPA), and Zanish-Belcher/Riley (COPP) 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.”</del> <a href="#">SAA representatives meet monthly via phone with JWG on Issues and Awareness representatives from CoSA and NAGARA.</a></li> <li>- Funds included in FY16-<del>FY18</del> and FY17 budgets (Program 107) for member travel to one meeting of coalition partners (eg, Issues and Awareness Joint Working Group). <del>Group has progressed slowly; expect more activity in FY17.</del></li> </ul>
B. ID opportunities to collaborate on advocacy with RAAC, NCPH, AASLH, ALCTS, RBMS, AMIA (groups that also have a stake in archives).		<ul style="list-style-type: none"> <li>- Collaborated with RAAC on messaging regarding LA Port Authority records.</li> <li>- Council endorsed <a href="#">History Relevance Campaign</a>.</li> </ul>

### 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.

Specific Actions	Status	Progress Notes
A. Develop issue briefs covering topics outlined in SAA's Public Policy Agenda.		<ul style="list-style-type: none"> <li>- Nine 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, Confidentiality of Private Information Held in Records Created by the Federal Government's Executive Agencies.</li> <li>- Information brief on "Archives and the Environment" approved in 0816.</li> <li>- <a href="#">Three issue briefs (Police Mobile Camera Footage as a Public Record, Declassification of Public Records, and Federal Grant Funding for Archives) on 0517 Council meeting agenda. Police Camera Footage brief returned to COPP to address member concerns. Will be submitted to Council after the 2017 Annual Meeting. COPP currently reviewing Public Policy agenda for recommendations to the Council in 1117.</a></li> </ul>
B. <del>Query members about what resources they need to help them advocate in their own institutions.</del>		<a href="#">[Per Council in 0517, incorporate in general information-gathering activities.]</a>
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"> <li>- Website redesign has created more logical placement of advocacy-related information. <a href="#">[But see progress note on 1.1.1.A. above.]</a></li> <li>- Work continues on consolidation of existing and creation of new resources.</li> </ul>
<b>1.2.3. Strengthen the ability of SAA members to articulate the value of archives to resource allocators, policymakers, and other "influencers."</b>		
Specific Actions	Status	Progress 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"> <li>- Review existing "toolkits" (eg, Issues and Advocacy Section, Business Archives Section, etc) to determine whether SAA will adopt and publicize or move in different direction.</li> <li>- <a href="#">Four-session Advocacy Café webinar series presented in 2016-2017 has had technical issues imposed by current web event provider; intend to re-do series with Roe and enhance it using new web event tools. Will be available on-demand.</a></li> <li>- <a href="#">Roe currently drafting Archival Fundamentals Series book on Advocacy.</a></li> </ul>
B. Provide free "Advocating for Archives" workshop at 2015 Joint Annual Meeting for up to 60 attendees.		<p><del>Presenters not available for 2015 live offering. Plans underway to schedule live offering in 2017.</del></p> <p><a href="#">Revamp for 2018 Annual Meeting in Washington, D.C. Discussions are underway to provide "Hill visit" training and an opportunity for members to participate in an "Archivists on the Hill" event at the 2018 Joint Annual Meeting.</a></p>

C. Develop and host a free, on-demand “Advocating for Archives” webinar.		<ul style="list-style-type: none"> <li>Five half hour “Advocating for Archives” webinars (live and on-demand) to be offered free via SAA website. Instructor: Roe. Release date: October 2016.</li> <li>Include Study Guide to help facilitate further discussion among participants.</li> </ul>
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#### 1.2.4. Develop evidence-based value proposition for archives and archivists.

Specific Actions	Status	Progress Notes
A. Apply for IMLS National Leadership Grant to fund “Toward a More Data-Informed Archives Profession.”		<ul style="list-style-type: none"> <li>Initial proposal submitted February 1, 2015.</li> <li>Invited to submit “second phase” proposal by June 1; not done due to illness of PI.</li> <li>New initial proposal submitted September 29, 2016; notified on November 24 of IMLS decision not to invite a full grant proposal.</li> <li>Council discussion of forming Committee on Research and Evaluation scheduled for November 2016 meeting. <a href="#">Council to consider charge for Task Force on CORE at 0517 meeting.</a></li> <li><a href="#">[Consider having CORE seek grants from various sources to support development of data for the profession.] Task Force on COR/DE created at 0517 Council meeting.</a></li> </ul>
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"> <li>Pending outcome of grant proposal(s) or decision to fund from operations.</li> <li><a href="#">[Review “Archival Metrics” by Yake/Tibbo/Duff as a starting point.]</a></li> </ul>

#### 1.3. Provide leadership in ensuring the completeness, diversity, and accessibility of the historical record.

##### 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	Progress 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"> <li>Diversity Committee forums at 2015, 2016, and 2017 Annual Meetings.</li> <li>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 and 1116-V-C update.)</li> <li>Summary of D/I initiatives to date included on new <a href="#">web page</a>.</li> </ul>
B. Publish five case studies on diversifying the archival record.		<ul style="list-style-type: none"> <li>Call for Case Studies issued by Diversity Committee in August 2013.</li> </ul>

		<ul style="list-style-type: none"> <li>- One case study published online in January 2016 ("<a href="#">Preservation Workshops with Restricted Resources: Preserving Cham Manuscripts in Vietnam</a>").</li> <li>- <a href="#">Given pace of progress, consider viability of this activity going forward.</a></li> </ul>
<p>C. Increase the "cultural competence" of SAA members via education and training.</p> <ul style="list-style-type: none"> <li>• Draft cultural competence principles.</li> <li>• Provide webinar on cultural competence by mid-FY16.</li> <li>• Explore creation of Diversity webinar track.</li> <li>• Prepare blog post, AO article, session at 2015 Annual Meeting.</li> <li>• Solicit and publish case studies.</li> </ul>	●	<ul style="list-style-type: none"> <li>- Discussions of cultural competence led by Helen Wong Smith at 0515 and 1115 Council meetings.</li> <li>- Council Working Group on Diversity and Inclusion has highlighted cultural competence in planning for 2016 and 2017 Annual Meetings (see 0516-V-F and 1116-V-C.); 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.</li> <li>- <a href="#">2016 Annual Meeting keynote address</a> by Chris Taylor, Director of Inclusion and Community Engagement, Minnesota Historical Society.</li> <li>- SAA President Nance McGovern launched #Try5SAA initiative in August 2016.</li> <li>- 1116 Council meeting featured four-hour facilitated session on diversity and inclusion led by DeEtta Jones.</li> <li>- <a href="#">Helen Wong Smith presented full-day course at MAC 2016 that SAA will retool as a series of webcasts made available free of charge on website. Recordings completed and will be made available after 2017 Annual Meeting. Enhanced by homework assignments and tips for conducting discussion groups.</a></li> </ul>
<b>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.</b>		
<b>Specific Actions</b>	<b>Status</b>	<b>Progress Notes</b>
A. Continue development of online resources (e.g., bibliography), gathered from multiple sources, about managing cultural heritage materials.	●	Ongoing by Cultural Heritage Working Group. See "Definitions and Resources" at <a href="http://www2.archivists.org/groups/cultural-heritage-working-group">http://www2.archivists.org/groups/cultural-heritage-working-group</a> . <a href="#">May need charge from the Council to update the bibliography, as little has been done on it for several years. Suggest Lawrimore check in with group on current status.</a>

## 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.**

**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	Progress 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"> <li>• <del>Implement Phase I of A&amp;D curriculum.</del></li> <li>• Increase number of DAS courses in Tools and Services and Transformational tiers.</li> <li>• Update/revise DAS and A&amp;D course exams.</li> <li>• <a href="#">Increase number of webcasts available online and introduce online courses to reach broader member base.</a></li> <li>• <a href="#">Improve quality of existing webcasts to assist members in achieving professional development goals.</a></li> <li>• <a href="#">Introduce online DAS Practice Exam as a new study tool for members seeking to earn DAS Certificate.</a></li> </ul>	●	<ul style="list-style-type: none"> <li>- <del>A&amp;D Curriculum and Certificate Program approved by the Council in August 2015. (See <a href="#">0815-1-III-A-A&amp;DCertificate.</a>)</del></li> <li>- <a href="#">A&amp;D: 25 courses scheduled in FY17.</a></li> <li>- <a href="#">A&amp;D: Five new courses developed; five existing courses revised and exams added; two new courses under development.</a></li> <li>- <a href="#">DAS: Three new courses and four new webcasts under development.</a></li> <li>- <a href="#">DAS course exams under continuous review.</a></li> </ul>
<p>B. Explore collaborations with other communities to expand training for archivists in areas in which SAA does not have expertise or capacity.</p> <ul style="list-style-type: none"> <li>• <a href="#">Leverage appropriate groups for specific topics to avoid competition and bolster all.</a></li> </ul>	●	<ul style="list-style-type: none"> <li>- CoE members audited Lyris online courses and POWRR face-to-face courses to evaluate potential for collaboration.</li> <li>- <a href="#">McGovern has invited a number of allied organizations to the 2017 Annual Meeting to discuss various collaboration opportunities.</a></li> </ul>

<ul style="list-style-type: none"> <li>• <a href="#">Investigate option of offering Municipal Clerks Archival Education Program (MCARP) as an online course to reach new audience.</a></li> <li>• <a href="#">Explore collaboration with Hong Kong Government Records Service to offer DAS Certificate series to government archivists in China.</a></li> <li>• <a href="#">Explore collaboration with the Association of Canadian Archivists (ACA) to offer DAS Certificate series and expand SAA's audience to Canada.</a></li> </ul>			
C. Develop evaluation tools to enhance current feedback mechanisms.			<a href="#">Currently feedback is received and reviewed for every course. Better evaluation tools will be available once BlueSky LMS is implemented, Fall 2017.</a>
D. Develop webinars that use SAA publications as basis for content.			<ul style="list-style-type: none"> <li>- Produced "Introduction to Processing Digital Records and Manuscripts" using Trends Module 2 as an enhancement to the offering.</li> <li>- <a href="#">Both Education and Publications directors, along with Committee on Education and Publications Board, are considering how to more effectively integrate program activities.</a></li> </ul>
<b>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.</b>			
<b>Specific Actions</b>	<b>Status</b>		<b>Progress Notes</b>
A. Assess/enhance Trends in Archives Practice series to ensure that it meets evolving needs of members.			<ul style="list-style-type: none"> <li>- See <a href="http://www2.archivists.org/publications/book-publishing/trends-in-archives-practice#.Vx6LOlYrKUK">http://www2.archivists.org/publications/book-publishing/trends-in-archives-practice#.Vx6LOlYrKUK</a>.</li> <li>- <a href="#">20<sup>th</sup> module in Trends series now available. With critical mass of modules, staff will "relaunch" this series via marketing efforts.</a></li> </ul>
B. Ensure timely preparation and production of Archival Fundamentals Series III.			<ul style="list-style-type: none"> <li>- See <a href="https://offtherecord.archivists.org/2014/10/16/looking-forward-to-the-archival-fundamentals-series-iii/">https://offtherecord.archivists.org/2014/10/16/looking-forward-to-the-archival-fundamentals-series-iii/</a>.</li> <li>- <a href="#">Three contracted volumes already are running late due to authors missing deadlines.</a></li> </ul>
C. Reevaluate <a href="#">Continuously review</a> business model for book publishing program.			Primary focus of Publications Board in 2016-2017.
D. <del>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).</del>			Delete.

<b>2.2. Deliver information and education via methods that are accessible, affordable, and keep pace with technological change.</b>			
<b>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.</b>			
Specific Actions	Status		Progress 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 FY 2017 budgets (Program 105). - <a href="#">BlueSky eLearn Path LMS to be implemented in Fall 2017 (included in FY18 budget).</a> - <a href="#">Introduced AdobeConnect virtual event platform to host webcasts and develop online courses.</a>
B. Implement Allen Press solution for production of <i>The American Archivist</i> , from manuscript tracking to multi-platform publication and distribution.			Done. Phase I implemented in late April 2015. Phase II (manuscript tracking/peer review) implemented in October 2016.
C. Acquire software that allows collaborative editing and online publishing of <i>Dictionary of Archives Terminology</i> .			Done. Software purchased in March 2016, training is ongoing. (Funding included in FY16 budget, Program 104.)
<b>2.3. Support the career development of members to assist them in achieving their goals.</b>			
<b>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.</b>			
Specific Actions	Status		Progress Notes
A. Survey members to determine what career development resources would be most valuable to them.			Hold for 2016-2017. <a href="#">Zanish-Belcher is drafting questions for a member pop-up survey on what resources mid-career archivists would like. Coordinate with COR/DE TF.</a>
B. <del>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.</del>			Hold for 2016-2017. <a href="#">[Consider deleting or significantly modifying this activity in next version of Strategic Plan.]</a>

C. Expand Online Career Center to include information for those who are interested in a career in archives.		<ul style="list-style-type: none"> <li>- Some progress made with redesign of website and creation of new content. See <a href="http://www2.archivists.org/careers/beanarchivist#.Vx6MyVYrKUK">http://www2.archivists.org/careers/beanarchivist#.Vx6MyVYrKUK</a> for information available at website launch.</li> <li>- <a href="#">In February 2017, an internship component was added to the Online Career Center.</a></li> </ul>
D. Increase Education Directory listings to make this guide more comprehensive.		Decision made to move to free listings in FY17 as a means of making the directory as comprehensive as possible. <a href="#">Committee on Education will be reaching out to all the education programs to update the directory.</a>
<b>2.3.2. Examine and respond to archival employment issues.</b>		
<b>Specific Actions</b>	<b>Status</b>	<b>Progress Notes</b>
A. Conduct periodic pop-up surveys to determine trends in archival employment.		<ul style="list-style-type: none"> <li>- One pop-up <a href="#">survey</a> conducted in January 2015. A total of 3,976 individuals responded to the 23-question survey.</li> <li>- <del>In discussion with Women Archivists Roundtable re conduct of a survey to probe employment issues.</del></li> <li>- <a href="#">In April 2017, the Women Archivists Section launched a survey to probe employment issues; will be hiring a project assistant to analyze and present results in July 2017.</a></li> </ul>
B. Publicize “Best Practices for Internships as a Component of Graduate Archival Education.”		<ul style="list-style-type: none"> <li>- <del>Brought forward recently via <a href="#">Call for Internship Directory Listings</a>, a staff effort to update a directory originally created by members in 2005.</del></li> <li>- <a href="#">Listed prominently on the SAA website with the new internship component of the Online Career Center.</a></li> <li>- <a href="#">[Consider developing a webinar, presented by Bastian or Weber?]</a></li> </ul>
C. Publicize “Best Practices for Volunteers.”		<ul style="list-style-type: none"> <li>- Ongoing.</li> <li>- <a href="#">[Consider developing an interactive webinar.]</a></li> </ul>

### 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.		
3.1.1. Conduct ongoing environmental scans to facilitate awareness of gaps and of relevant external standards.		
Specific Actions	Status	Progress 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"> <li>- Existing Standards infrastructure may not support this. Consider resources before moving forward.</li> <li>- Consider revised structure for maintenance of standards (to be proposed by Standards Committee, 0815).</li> <li>- <a href="#">The Council should explore the unintended consequences (principally on book sales) of its previous decision to support continuous review of certain standards (e.g., DACS).</a></li> </ul>
B. Encourage component groups and members to identify needs and gaps for standards development and to contribute “related resources” to the Standards Portal.	●	<a href="#">[Digital Practice and Metadata environmental scan due to be completed in November 2017.]</a>
C. Consulting broadly, determine areas in which standards, guidelines, and best practices are most needed by practicing archivists.	●	<p><del>May be addressed in environmental scan commissioned by the Council in August 2016.</del></p> <p><a href="#">[Digital Practice and Metadata environmental scan, due to be completed in November 2017, will include relevant recommendations,]</a></p>
D. Ensure that the Standards Portal documents the relationship(s) among archival standards and those of related professions.	●	<a href="#">[There has been little action on this by the Standards Committee. Reconsider this activity?]</a>
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	Progress Notes
A. Encourage member engagement with published research with hosted discussion groups both online and at the Annual Meeting.	●	<i>The American Archivist</i> discussion groups at Annual Meeting are now standard. Also ongoing during Research Forum at Annual Meeting.

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"> <li>- Participation has increased significantly since 2014 as individuals have become more familiar with the Sched platform.</li> <li>- <a href="#">[Consider developing a webinar on research methods with archival examples to encourage greater participation.]</a> <a href="#">[Check with McGovern re “short list.”]</a></li> </ul>
C. Lead a series of Twitter chats based on research presented at the Annual Meeting or published in <i>The American Archivist</i> .		<ul style="list-style-type: none"> <li>- <a href="#">[Host a Twitter chat with Mark Matienzo re: the environmental scan.]</a></li> <li>- <a href="#">[Have the Research Forum program committee invite presenters to lead/participate in Twitter chats.]</a></li> </ul>
D. <a href="#">[Develop a Research Agenda for SAA.]</a>		<ul style="list-style-type: none"> <li>- <a href="#">[Seek feedback from Research Forum program committee on Research Agenda items.]</a></li> </ul>
E. <a href="#">[Launch CORE/CODE, emphasizing connections to research methods and good practice.]</a>		<ul style="list-style-type: none"> <li>- <a href="#">[Task Force on COR/DE created in 0517.]</a></li> </ul>

**3.2.2. Provide opportunities for joint meetings and information exchanges with other organizations and disciplines.**

		<b>[Consider combining 3.2.2. and 3.2.3. but keep all sub-points, as they appear to be interrelated?]</b>
Specific Actions	Status	Progress Notes
A. Seek out, and be responsive to, opportunities to collaborate with other organizations. <ul style="list-style-type: none"> <li>• Apply “<a href="#">Principles and Priorities for Planning Joint Meetings with Other Professional Organizations</a>” to all discussions.</li> </ul>		<ul style="list-style-type: none"> <li>— Made a successful proposal to CoSA for the 2016 Joint Annual Meeting.</li> <li>— Proposal to co-host Joint Meeting with the International Council on Archives in 2018 or 2020 was declined by the ICA Executive Board.</li> <li>- <a href="#">SAA has signed agreement with NAGARA for joint meeting in 2018; agreement with CoSA signed in June 2017.</a></li> <li>- <a href="#">McGovern has invited various allied organizations to the 2017 Annual Meeting to discuss opportunities to collaborate for archives. Consider having a conference call with those who cannot attend in Portland.</a></li> </ul>
B. Coordinate relevant activities with the Regional Archival Associations Consortium (RAAC).		<ul style="list-style-type: none"> <li>- Currently coordinating on advocacy issues; RAAC on NCH Policy Board and JWG.</li> <li>- SAA provides meeting space and microsite.</li> <li>- RAAC has approached SAA about establishing a memorandum of agreement.</li> </ul>

**3.2.3. Establish or strengthen alliances with allied professional fields.**

Specific Actions	Status	Progress Notes
A. Actively work to strengthen involvement and/or alliances with RBMS; <del>the Coalition to Advance Learning in Archives, Libraries and Museums (CALALM);</del> and others as appropriate and feasible.		<ul style="list-style-type: none"> <li>- Working with RBMS on three joint task forces: Holdings Metrics, User Metrics, and Primary Source Literacy.</li> <li>- Working with CALALM (and offshoots) on a variety of IMLS grant-funded projects regarding professional development/continuing education across LAMs.</li> </ul>

## 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	Progress Notes
A. <del>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.</del>		<ul style="list-style-type: none"> <li>- Although funding was included in FY 2016 budget (Program 100), website redesign took precedence. Funding included in FY 2017 budget (Program 100).</li> <li>- <a href="#">We're taking a different approach for this project, given the finite number of options available without significant customization. Current schedule has a "go live" date of February 2018.</a></li> </ul>
B. By early FY 2016, develop staff development plan to address augmenting staff capacity to specify and analyze SAA business requirements for AMS RFP.		<ul style="list-style-type: none"> <li>- Although funding was included in FY 2016 budget (Program 100), website redesign took precedence. Funding included in FY 2017 budget (Program 100).</li> <li>- <a href="#">See progress note in A. above.</a></li> </ul>
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.		<ul style="list-style-type: none"> <li>- Although funding was included in FY 2016 budget (Program 100), website redesign took precedence. Funding included in FY 2017 budget (Program 100).</li> <li>- <a href="#">See progress note in A. above.</a></li> </ul>

#### 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	Progress Notes
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.		<ul style="list-style-type: none"> <li>- Done. Accomplished with website redesign in March 2016.</li> <li>- New page on "<a href="#">SAA's Communication Channels</a>" created at request of McGovern in October 2016.</li> </ul>

B. <a href="#">[Focus on more effective use of sharing SAA information via listservs, including the Leadership, Archivists, and Fellows listservs.]</a>			
C. <a href="#">[Explore developing fuller advocacy program (briefs, statements, contacts, website information) both for lobbying purposes by SAA and resources for individual archivists.]</a>			
B. <del>Reorganize website navigation to optimize ease of use and highlight organizational priorities.</del>	●		Completed spring 2014. Launched with new website in March 2016.
C. <del>Redesign website to incorporate contemporary design principles and a home page that features the breadth of SAA's work.</del>	●		Completed fall 2014 with outside designer. Launched with new website in March 2016.
D. <del>Implement new navigation structure and branding in Drupal for staging site.</del>	●		
E. <del>Conduct user testing with staff and members.</del>	●		
F. <del>By early FY16, launch redesigned website.</del>	●		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		Progress Notes
A. Implement feedback mechanisms to accommodate members' preferred communication methods. <ul style="list-style-type: none"> <li>• Periodic "pop-up" surveys to take pulse of members on various issues.</li> <li>• Provide place and schedule for Council members to meet with members (via forums and/or in informal settings) during Annual Meeting <a href="#">and determine other opportunities throughout the year.</a></li> </ul>	●		<ul style="list-style-type: none"> <li>- <a href="#">WARs is conducting an in-depth survey on employment that precludes the need right now for a follow-up pop-up survey. Report expected July 2017.</a></li> <li>- Have provided Council "office hours" in the Expo Hall as well as Town Hall meeting with the President at 2014-2017 conferences.</li> <li>- <a href="#">Consider attending more allied organization meetings as a representative of SAA Council, marketing as an opportunity for members to connect with the Council.</a></li> </ul>

**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		Progress Notes
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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. - <a href="#">Have the Membership Committee explore further development.</a>
B. Ensure that SAA has the technological capability to support a robust Mentoring Program matching system, including a feedback mechanism.		Pending AMS selection.
C. <a href="#">[Investigate specific programming in which mentoring partners might participate in order to build their connection and relationship.]</a>		<a href="#">[Invite to existing programming (e.g., take this tour together, attend the Research Forum together) to provide opportunities to connect.]</a>

## 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	Progress Notes
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 <del>extremely 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.</del> - <a href="#">Barriers to Participation survey fielded by Membership Committee in March; report to the Council scheduled for 0717.</a> - <a href="#">[Provide listening circles on topics at the Portland (2017) and Washington, D.C. (2018) meetings.]</a>
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.		Three Council Exemplary Service Awards in 2016 highlighted the work of SAA component groups. <a href="#">RAO Teaching with Primary Sources Committee awarded a 2017 Council Exemplary Service Award.</a>
F. <a href="#">[Develop a training or free webinar on “How to Advocate for Institutional Support for Professional Development.”]</a>		
G. <a href="#">[With the SAA Foundation, investigate how to build financial support from foundations for Annual Meeting attendance.]</a>		
<b>4.2.2. Assess the structure of component groups and develop nimble structures to meet member needs for affiliation.</b>		
<b>Specific Actions</b>	<b>Status</b>	<b>Progress Notes</b>
A. <del>Council Working Group on Member Affinity Groups to address recommendations of Task Force on Member Affinity Groups, propose structural revisions as needed.</del>		Discussed at length by the Council from May 2015 to August 2016.
B. Implement Council-approved revisions of the component group structure.		<a href="#">Will be completed by July 2017.</a>
<b>4.2.3. Develop resources and tools that encourage and expand leadership opportunities throughout SAA.</b>		
<b>Specific Actions</b>	<b>Status</b>	<b>Progress Notes</b>
A. Continue to monitor the SAA appointments process to ensure that at least 40% of appointees are first-time appointees.		Ongoing.
B. Encourage former elected leaders, Fellows, ALI alumni to serve as leadership mentors.		Ongoing.
C. <a href="#">[Revise Leadership Orientation and create onboarding leadership toolkit for new SAA leadership.]</a>		
D. <a href="#">[Investigate methods of involving more volunteers in the work of the Society.]</a>		<ul style="list-style-type: none"> <li>- <a href="#">[Consider how to leverage un-appointed volunteers – listening sessions, local meet-ups, list of projects SAA would like to have done.]</a></li> <li>- <a href="#">[Direct un-appointed volunteers to Section elections, which often struggle for candidates.]</a></li> </ul>

**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	Progress Notes
A. Implement the IMLS-funded Mosaic Program grant in partnership with the Association of Research Libraries.	●	— Current grant implemented through August 2016. - Mosaic II 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.	●	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.	●	Contacts made with past recipients to gather testimonials for use in promoting donations to the scholarship. Many past recipients are no longer SAA members.
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.	●	[Re-assign to CORE/CODE – or task force in the interim?]
E. <a href="#">[Explore creation of Diversity and Inclusion and Leadership Certificates (or workshop series) as part of the SAA Education Program.]</a>		- <a href="#">[Could include both courses and a community/organizational service component.]</a> - <a href="#">[Start by conducting research to determine if there is a demand/need for these types of programs or certificates.]</a>

**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]~~**

Specific Actions	Status	Progress Notes
A. <a href="#">[Explore methods for providing information about archives as a career (e.g., Workforce Development programs, 9-12 high school, college students, VISTA).]</a>		- <a href="#">[Incorporate in National History Day communications.]</a> - <a href="#">[Leverage Evans’ and Booth’s positions at presidential libraries to do some beta testing on community outreach.]</a>