



## Strategic Plan 2014 – 2018

### 2014-2015 WORKPLAN: STATUS UPDATE (November 2014)

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

<b>1.1. Provide leadership in promoting 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		Notes
A. Identify influential audiences and craft targeted messages.			
<ul style="list-style-type: none"> <li>Create Committee on Public Awareness (COPA) to coordinate efforts.</li> </ul>	Done.		COPA created 3/7/14, appointed 5/14. See description at <a href="http://www2.archivists.org/governance/handbook/section7/groups/Public-Awareness">http://www2.archivists.org/governance/handbook/section7/groups/Public-Awareness</a> . Group met in late 6/14 to address audiences, messages, work plans. See 1114-VII-C-COPA-WorkPlan for 2014-2015 work plan. Funds included in FY15 budget (Program 107) for face-to-face meeting with facilitation by PR Counsel, as well as implementation of activities/campaigns. [\$17,500]
<ul style="list-style-type: none"> <li>Identify audiences.</li> </ul>	Done.		See above. Key audience for 2014-2015 is SAA members.
<ul style="list-style-type: none"> <li>Craft targeted messages.</li> </ul>			See above.
B. Compile and distribute stories demonstrating the practical value of archives.	Ongoing.		Launched collection of stories in 8/14 with Roe’s incoming presidential address, “A Year of Living Dangerously for Archives.” Call to Action #1 (9/14): Demonstrate the Value of

		Archives. Call to Action #2 (10/14): Archives and the Human Face of War.
C. Based on variety of inputs, develop a broad array of practical resources (eg, online testimonials, brochures, email-able squibs) in various formats to help archivists make the case for archivists and archives passionately and convincingly.		Website resources currently under review by COPA members and staff.
<b>1.1.2. Identify key stakeholders and assess their understanding of archives to establish a baseline against which to measure progress.</b> <b>[HOLD FOR 2015-2016]</b>		
<b>1.1.3. Implement an ongoing publicity and media plan and sponsor public awareness campaigns (including American Archives Month) that demonstrate the value of archives in individuals' everyday lives.</b>		
Specific Actions	Status	Notes
A. Seek member, public, and media feedback to continuously increase the effectiveness of and involvement with AAM activities.		6/14 meeting of COPA intended to result in work plan for publicity and public awareness plan(s) that will address all of 1.1.3. As in 1.1.1.A., funds included in FY15 budget (Program 107) for face-to-face meeting of COPA with PR Counsel to facilitate.
B. Create and distribute via SAA website resources to assist archivists in learning about and participating in PA campaigns.		Launched #AskAnArchivist Day (October 30) on 10/20/14, with ideas for how to participate, sample language for promotion to users and local media, press release from SAA HQ to major and secondary media markets. See <a href="http://www2.archivists.org/initiatives/askanarchivist-day-october-30">http://www2.archivists.org/initiatives/askanarchivist-day-october-30</a> .
C. Increase visibility of archives within existing PA campaigns (eg, Preservation Week) through efforts at the national level and by supporting SAA component groups' activities.		
<b>1.2. Educate and influence decision makers about the importance of archives and archivists.</b>		
<b>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."</b>		
Specific Actions	Status	Notes
A. Convene or participate actively in meetings with coalition partners to determine priorities, develop ongoing communication plans, and evaluate progress.	Ongoing.	Funds included in FY15 budget (Program 107) for member travel to one meeting of coalition partners (e.g., Issues and Awareness Joint Working Group). [\$740] Reps of CoSA, NAGARA, SAA met at DC 2014 to discuss joint efforts. CAPP worked with CoSA and NAGARA reps to draft issue brief on Funding of

		Government Archives Programs (1114-VII-B-IssueBrief-FundingGovtArchives).	
<b>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.</b>			
Specific Actions	Status	Notes	
A. Develop issue briefs covering topics outlined in SAA's Advocacy Agenda.	Ongoing.	<u>0114 Agenda</u> : Council reviewed drafts of seven issue briefs and provided feedback to CAPP. <u>0514 Action Agenda</u> : Briefs on Presidential Records Act, FOIA, Orphan Works, Copyright Act Section 108 adopted. <u>0814 Action Agenda</u> : Brief on HIPAA adopted. <u>1114 Action Agenda</u> : Brief on Funding of Government Archives Programs.	
B. Query members about what resources/ info they need to assist them in advocating in their own institutions.			
C. Based on a variety of inputs, develop and disseminate practical resources to aid archivists in advocating for archives and archivists.	Hold for 2015-2016.	SAA sponsored low-cost Advocacy Workshop (taught by Carmicheal and Chubb) at DC 2014; plans in place to convert to low/no-cost webinar. (See 1.4.1.B.) Website resources currently under review by CAPP and staff.	
<b>1.2.3. Measure and report on the "state of America's archives" (using metrics such as employment rates and salaries, funding for archives, media citations, etc).</b>			
Specific Actions	Status	Notes	
A. Determine what we know (via existing studies, including A*CENSUS) and don't know about the current state of American archives.			
B. Define metrics for selected data points.	Hold for 2015-2016.		
C. In the absence of a baseline study, gather existing data and publish a periodic compilation about the "state of America's archives."	Hold for 2015-2016.		
D. Review and address IMLS comments on February 2012 grant proposal.	Done.	Task completed by Executive Committee and staff in 2013. Discussion ongoing about fielding "quick-and-dirty" survey on employment rates and salaries.	
E. Evaluate merits of resubmitting to IMLS versus seeking other external funding, and submit a proposal in the next appropriate grant cycle.	Hold for 2015-2016.	Meissner to lead 1114 Council discussion on "Data Gathering and Assessment" (1114-VII-D).	
F. Consider ways in which to begin work on the survey without external funding.	Hold.		

<b>1.2.4. Determine methods for measuring the impact (return on investment) of archives as the basis for crafting compelling messages about the value of – and appropriate level of funding for – archives and archivists. [HOLD FOR 2015-2016]</b>			
<b>1.3. Provide leadership in ensuring the completeness, diversity, and accessibility of the historical record.</b>			
<b>1.3.1. In concert with allied professionals, ensure that the historical record is as representative as possible.</b>			
Specific Actions	Status		Notes
A. Develop tools to help archivists advocate for the completeness of the historical record.			1114 Council Agenda: Mega Issue Discussion on diversifying the archival record.
B. [Bullet re “diversity” and its importance in a more complete historical record.]			[Modify or delete.]
<b>1.3.2. Promote existing models and develop new methods to help archives and archivists diversify the documentary record and promote archives to diverse communities.</b>			
Specific Actions	Status		Notes
A. Initiate and promote discussion within the archival community re what it means to “diversify the archival record,” including discussion re successes, failures, lessons learned.			Diversity Committee hosted forum at DC 2014.
B. Solicit and disseminate a comprehensive selection of case studies on diversifying the archival record.			Call for Case Studies issued by Diversity Committee in 8/13. See <a href="http://www2.archivists.org/groups/diversity-committee/diversifying-the-archival-record-a-call-for-case-studies">http://www2.archivists.org/groups/diversity-committee/diversifying-the-archival-record-a-call-for-case-studies</a> and annual report at 1114-VIII-H-DivComm.
<b>1.3.3. In collaboration with appropriate communities, develop resources for managing cultural heritage materials to assist the broader archives community in managing cultural property issues.</b>			
Specific Actions	Status		Notes
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> .
B. Remain engaged with ALA’s Traditional Cultural Expressions initiative.			Contingent on Baxter’s report back on TCE initiative.

<b>1.3.4. Advocate for and develop resources to make the historical record more accessible. [HOLD]</b>			
<b>1.4. Strengthen the ability of those who manage and use archival material to articulate the value of archives.</b>			
<b>1.4.1. Develop and provide resources and education, using a variety of delivery modes, to assist archivists in advocating for archives.</b>			
Specific Actions	Status		Notes
A. Develop resources/education programs designed to meet the advocacy needs identified by members, including free “Basics of Advocating” guide.			Review Issues and Advocacy RT’s and others’ advocacy “toolkits” to determine whether SAA will adopt and publicize or move in different direction.
B. Provide free “Advocating for Archives” workshop at 2014 Joint Annual Meeting for up to 60 attendees.	Done.		Offered \$39, full-day “Advocating for Archives” workshop at DC 2014, taught by Carmicheal and Chubb; 30 attendees; offered to regional representatives for free. (See 1.2.2.C.)
C. Develop and host a free, on-demand “Advocating for Archives” webinar.			Plans in place to convert workshop to low/no-cost webinar.

**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 and publications, 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		Notes
A. Refine SAA’s entire education program based on the 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.			See plans for creation of Arrangement and Description curriculum at 0514-V-C-A&DCurriculum. Final report on A&D curriculum due for 0515 Council meeting.
B. Explore collaborations with other communities to expand training for archivists in areas in which SAA does not have expertise or capacity.			
C. Develop evaluation tools to enhance current feedback mechanisms.			

**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 member needs.			Ongoing. See <a href="http://www2.archivists.org/sites/all/files/TAP_Series_Overview_2014_0.pdf">http://www2.archivists.org/sites/all/files/TAP_Series_Overview_2014_0.pdf</a> . In addition, see Prom’s <i>Off The Record</i> blog post for plans for Archival Fundamentals Series III: <a href="http://offtherecord.archivists.org/2014/10/16/looking-forward-to-the-archival-fundamentals-series-iii/#more-1210">http://offtherecord.archivists.org/2014/10/16/looking-forward-to-the-archival-fundamentals-series-iii/#more-1210</a> .

**2.2. Deliver information and education via methods that are accessible, affordable, and keep pace with technological change.**

**2.2.1. Develop a better understanding of members’ preferences for delivery of content and respond to them. [HOLD]**

**2.2.2. 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.			
Specific Actions	Status		Notes
A. Acquire software that streamlines the submission, peer review, and communication processes for publications, including <i>The American Archivist</i> .	Ongoing.		This activity sidetracked from May through November 2014 as Editorial Board and staff focus on finding replacement for MetaPress as host for <i>AA Online</i> .
<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		Notes
A. Survey members to determine what career development resources would be most valuable to them.			
B. Provide information on how to create a good job description.			Active and well-received Career Center – with one-on-one career advisors – provided at DC 2014.
<b>2.3.2. Expand our conception of what an archivist can be and what an archivist can do. [CONSIDER REWORDING]</b>			
Specific Actions	Status		Notes
A. Work with component groups to develop an online guide for new archivists on possible career paths, including new areas in which archivists are making an impact.			
<b>2.3.3. Provide information for those who are interested in a career in archives (“So You Want To Be An Archivist?”) [OR MOVE TO 2.3.1.? THIS ACTIVITY IS DIRECTED TO INDIVIDUALS WHO ARE NOT YET IN AN ARCHIVAL EDUCATION PROGRAM.]</b>			
Specific Actions	Status		Notes
A. Expand Online Career Center to include information for those who are interested in a career in archives.			

2.3.4. Examine and respond to archival employment issues.			
Specific Actions	Status		Notes
A. Charge a task force to examine employment issues by engaging with appropriate communities and make recommendations to the Council for action.			SNAP and Archival Educators Roundtable co-sponsored DC 2014 forum entitled "Continuing the Conversation: Archival Education—and Beyond."
B. Publicize "Best Practices for Internships as a Component of Graduate Archival Education."	Ongoing.		See <a href="http://www2.archivists.org/standards/best-practices-for-internships-as-a-component-of-graduate-archival-education">http://www2.archivists.org/standards/best-practices-for-internships-as-a-component-of-graduate-archival-education</a> .
C. Create and disseminate widely best practices for volunteers.	Done.		Adopted by the Council in 0814 following broad dissemination for comment. See <a href="http://www2.archivists.org/standards/best-practices-for-volunteers-in-archives">http://www2.archivists.org/standards/best-practices-for-volunteers-in-archives</a> .



**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		Notes
A. Promote member awareness of the Standards Portal and processes for developing, reviewing, endorsing, or including new standards, guidelines, or best practices.			
B. Encourage component groups and members to identify needs and gaps for standards development and regularly 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. Develop creative ways to increase research by archivists. [HOLD]**

**3.2.2. Consider ways in which to expand the conversation within the profession about published 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.			Two discussion groups at DC 2014 addressed Ricardo Punzalan’s AA article, “Archival Diasporas: A Framework for Understanding the Complexities and Challenges of Dispersed Photographic Collections.”
B. Increase participation by Annual Meeting presenters in posting their materials (abstracts, posters, slides, full papers) on the AM website.			All-out effort launched to encourage participation by speakers in posting their materials on the conference website. To date, approximately 45 speakers have provided their materials for posting.

C. Record and distribute via the website and other mediums those Annual Meeting presentations that are most likely to engage members in conversations about practical and theoretical research.		Although not specific to this activity in terms of selecting engaging presentations, we have posted – and made freely available – all session recordings from the 2006 to 2012 annual meetings and were able to negotiate MP3 downloads of all DC 2014 recordings for just \$29.99 (members).
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**3.3. Participate actively in relevant partnerships and collaborations to enhance professional knowledge.**

**3.3.1. Provide opportunities for joint meetings and information exchanges. [HOLD]**

Although this is on hold, the Council has discussed – and is likely to adopt at its November 2014 meeting, “Principles and Priorities for Planning Joint Meetings with Other Professional Organizations,” an important first step in this set of activities.

**3.3.2. Enhance SAA’s relationship with state and regional archival associations to increase our collective voice and to share resources and knowledge. [0114: THIS SEEMS IMPORTANT, BUT NO LONGER HAS SUB-ACTIONS UNDER IT....] [HUTH SUGGESTS A – B BELOW.]**

Specific Actions	Status	Notes
A. Coordinate relevant activities closely with the Regional Archival Associations Consortium (RAAC).		RAAC subcommittee chairs have been in touch with SAA committee chairs in such areas as advocacy and public awareness as one means of initiating collaboration and cooperation.
B. Assign Council members to work closely with individual regional associations, identify areas of cooperation, and maintain and enrich relationships.		

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

Specific Actions	Status	Notes
A. Strengthen the impact and influence of the Joint Committee on Archives, Libraries, and Museums.		

**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
A. By early 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.		
B. By late FY 2015, complete development of an RFP to be issued to a wide range of AMS providers.		

**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
A. Implement an aggregator tool to provide one-stop access to all social media accounts used by SAA.		
B. By FY 2014, create a mobile-friendly version of the SAA website and the Annual Meeting program.		Mobile-friendly version of Annual Meeting web page and program now available at <a href="http://www2.archivists.org/2014#.U2fS5PldWPU">http://www2.archivists.org/2014#.U2fS5PldWPU</a> . Mobile-friendly version of entire website is awaiting launch of redesign (4.1.2.C.).
C. By FY 2015, complete user testing and launch a redesigned and more robust SAA website, including integration of component group microsites and, to the extent possible, “unofficial” communication tools.		

**4.1.3. Promote member input on an ongoing basis, and improve means for members to tell SAA what they think and what they need.**

Specific Actions	Status	Notes
A. Implement a suite of 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, schedule for Council members to meet with members (via forums and/or in informal settings) during Annual Meeting.</li> </ul>		
<b>4.1.4. Expand SAA's Mentoring Program to ensure that members who want a professional mentor can find one through SAA.</b>		
Specific Actions	Status	Notes
A. Initiate a campaign to increase the rate of participation by Fellows and past leaders as mentors.	Done and ongoing.	
B. Ensure that SAA has the technological capability to support a robust Mentoring Program matching system, including a feedback mechanism.	Low priority?	
<b>4.2. Create opportunities for members to participate fully in the association.</b>		
<b>4.2.1. Based on feedback from the 2012 Member Loyalty Study, the Council-adopted recommendations of the Communications and Annual Meeting task forces (2013), and periodic pop-up surveys of members: [HOLD]</b>		
<b>4.2.2. Remove barriers, perceived and actual, to broad participation by SAA members in the activities of the organization.</b>		
Specific Actions	Status	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.	Hold?	
B. For member-identified barriers that are structural: Explore how to remove them and	Hold?	

remove as many as possible.			
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.	Hold?		
D. Regularly assess progress on members' perceptions of SAA as an organization that fosters participation.	Hold?		
E. Publish at least one post per quarter in <i>Off The Record</i> that highlights a component group project.			
<b>4.2.3. Assess the structure of component groups and develop nimble structures to meet member needs for affiliation.</b>			
Specific Actions	Status		Notes
A. Appoint Task Force to Study Member Affinity Groups, with final report date of August 2014.	Done.		TF-MAG appointed. Interim report at 0514-VII-I-MembAffinityGroupsTF. Final report at 1114-VII-E-MembAffinityGroupsTF.
B. Initiate activities based on Council-approved recommendations of the Task Force.			
<b>4.3. Continue to enrich the association and the profession with greater diversity in membership and expanded leadership opportunities.</b>			
<b>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.</b>			
Specific Actions	Status		Notes
A. Implement the IMLS-funded Mosaic Program grant in partnership with the Association of Research Libraries.	Ongoing.		<b>First cohort:</b> Leadership Symposium scheduled at 2014 Joint Annual Meeting. See <a href="http://www.arl.org/leadership-recruitment/diversity-recruitment/arl-saa-mosaic-scholarship-program/3125-current-fellows#.U2fUifldWPU">http://www.arl.org/leadership-recruitment/diversity-recruitment/arl-saa-mosaic-scholarship-program/3125-current-fellows#.U2fUifldWPU</a> for information about the five fellows. <b>Second cohort:</b> See <a href="http://www.arl.org/leadership-recruitment/diversity-recruitment/arl-saa-mosaic-scholarship-program?#.U2fTxfldWPU">http://www.arl.org/leadership-recruitment/diversity-recruitment/arl-saa-mosaic-scholarship-program?#.U2fTxfldWPU</a> .
B. 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.			
C. Work with AACRT and NAAR to establish metrics for, gather qualitative data about, and evaluate effectiveness of awards and scholarship programs related to diversity.	Hold for 2015-2016?		
D. <u>Rewrite by Huth</u> : Work with administrators of all ALIs [tribal leadership institute—Larry Landis] to determine extent to which diversity of attendees was achieved, understand what actions helped to ensure diversity, ID diverse leaders we can encourage to participate more deeply in SAA.	Hold?		
<b>4.3.2. Identify underrepresented populations and develop recruitment efforts for the profession that include focused marketing and communication resources.</b>			
<b>Specific Actions</b>	<b>Status</b>		<b>Notes</b>
A. Examine recruitment policies and practices in graduate archival education programs and evaluate their effectiveness in reaching underrepresented groups.			
B. Work with Archival Educators RT to improve the effectiveness of graduate archival education programs in recruiting and retaining students from underrepresented populations.			
<b>4.3.3. Develop a plan for building on SAA’s progress in achieving greater diversity in membership and in leadership positions. [HOLD]</b>			
<b>4.3.4. Develop resources and tools that encourage and expand leadership opportunities throughout SAA.</b>			
<b>Specific Actions</b>	<b>Status</b>		<b>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.			