Strategic Plan 2018 – 2020

WORKPLAN UPDATE, NOVEMBER 2018

NOTE: At its November 2017 meeting, the SAA Council revised SAA's Vision, Mission, and Core Organizational Values statements:

VISION: The Society of American Archivists empowers archivists to achieve professional excellence and to foster innovation to ensure the identification, preservation, understanding, and use of records of enduring value.

MISSION: SAA is a vital community that promotes the value and diversity of archives and archivists and serves as the preeminent resource for the profession.

CORE ORGANIZATIONAL VALUES: The Society of American Archivists is committed to:

- Advancing the public standing of archivists.
- Ensuring the diversity of its membership and leaders, the profession, and the archival record.
- Fostering an open and inclusive culture of creativity, collaboration, and experimentation across the association.
- Providing excellent customer service.
- Ensuring transparency, accountability, integrity, professionalism, and social responsibility in conducting its activities.

The following Goals and Strategies represent areas of focus for the next three to five years. The Goals articulate the outcomes that SAA would like to achieve and answer the question, "What will constitute future success?" The Goals are not necessarily identified in priority order, but are numbered to enable easy reference.

To view the 2015-2018 version of the Strategic Plan work plan: https://www2.archivists.org/sites/all/files/1117-III-B-StratPlanActions-Dashboard.pdf.

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.

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		Progress Notes	
A. For key audience of SAA members: Implement campaign to educate and motivate members to speak/write about "the value of archives." • Develop video of members speaking about the value of archives. • Compile and distribute stories re the practical value of archives. • Implement "Archives on the Hill" event during 2018 Joint Annual Meeting.	✓		- COPA work plan updated in September 2017. - 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." - Supplement "Archives Change Lives" with StoryCorps material from 2015 Annual Meeting, COPA's Federal Funding Impact Stories, etc. - Archives on the Hill event implemented in August 2018 by joint working group of SAA, CoSA, NAGARA, RAAC.	
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.			- COPA work plan updated in September 2017.	
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. - Created and publicized "elevator speech" template.	
D. Seek member, public, media feedback to continuously improve effectiveness of and involvement in American Archives Month.				
E. Implement #AskAnArchivist Day annually.	✓		Ongoing.	

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.			- SAA representatives meet monthly via phone with JWG on Issues and Awareness representatives from CoSA, NAGARA, and RAAC.	
B. ID opportunities to collaborate on advocacy with RAAC, NCPH, AASLH, ALCTS, RBMS, AMIA (groups that also have a stake in archives).			- Four SAA leaders (Riley, Roe, Winn, Beaumont) attended NHA Advocacy Day in March 2018. - Archives on the Hill 2018.	

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.	✔		Ongoing.	
B. Based on variety of inputs, develop and disseminate practical resources to aid archivists in advocating for archives and archivists.	✔		- Archives on the Hill 2018. - Advocacy Guide posted on website in September 2018. - Issue briefs and talking points on federal funding, other key topic areas.	

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		Progress Notes	
A. Develop resources/education programs designed to meet the advocacy needs identified by members, including free "Basics of Advocating" guide.	✔		- Two webcasts on Advocacy released in preparation for 2018 "Archives on the Hill" event. First webcast to be re-recorded, then made available broadly. - Roe manuscript on Advocacy (Archival Fundamentals Series) submitted Oct 2018.	
B. Provide free "Advocating for Archives" workshops.	✔		- Plans underway for Advocacy programming at regional meetings (via COPP members), full-day pre-con at 2019 Joint Annual Meeting.	

1.2.4. Develop evidence-based value proposition for archives and archivists.

Specific Actions	Status		Progress Notes	
A. Consider options for standing group to oversee conduct, gathering, and analysis of research related to the profession.			- Task Force on COR/DE created at 0517 Council meeting, with final report due 1118.	
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.			- [Review "Archival Metrics" by Yakel/Tibbo/Duff as a starting point.]	

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.			- Summary of D/I initiatives to date included on web page.	
B. Publish five case studies on diversifying the archival record.			- One case study published online in January 2016 ("Preservation Workshops with Restricted Resources: Preserving Cham Manuscripts in Vietnam"). - [Given pace of progress, consider viability of this activity going forward.]	
C. Increase the "cultural competence" of SAA members via education and training.			- Council Working Group on Diversity and Inclusion: 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. - Council Working Group: Diversity Toolkit on SAA website. - Wong Smith online course on Cultural Competence available for free via SAA. - Wong Smith course presented at MAC (at SAA expense) and at JAM 2018.	

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		Progress Notes	

	Specific Actions	Status		Notes	
A.	Continue development of online resources (e.g., bibliography), gathered from multiple sources, about managing cultural heritage materials.			- Council to consider role of Cultural Heritage Working Group to complete work on: http://www2.archivists.org/groups/cultural-heritage-working-group.	

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

1.4.1 Develop and provide resources and education, using a variety of delivery modes, to assist archivists in advocating for archives.

	Specific Actions	Status		Notes	
A.	Develop resources/education programs designed to meet the advocacy needs identified by members, including free "Basic of Advocating" guide.			- Review Issues and Advocacy Section's and others' advocacy "toolkits" to determine whether SAA will adopt and publicize or move in different direction. - See 1.1.1.A. Advocacy Guide developed in conjunction with 2018 Archives on the Hill event.	
B.	Provide free "Advocating for Archives" workshop at 2014 Joint Annual Meeting for up to 60 attendees.	✓		- 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- or no-cost webinar.	

Goal 2: ENHANCING PROFESSIONAL GROWTH
Archivists have access to the professional community and
resources they need to be successful and effective in their careers.

2.1.   Mentor and support the career development of members to assist them in achieving their goals.

2.1.1.   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.

	Specific Actions	Status		Progress Notes	
A.	Survey members to determine what career development resources would be most valuable to them.	✔		- Zanish-Belcher drafted pop-up survey for mid-career archivists that was fielded in late April. See June 25 *Off The Record* blog post for survey results.	
B.	Expand Online Career Center to include information for those who are interested in a career in archives.			- Evaluate and revise existing content at "So You Want to be an Archivist." - Internship component added to Online Career Center in February 2017.	
C.	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. GAE Subcommittee to reach out to all graduate education programs to update directory.	

2.1.2.   Examine and respond to archival employment issues.

	Specific Actions	Status		Progress Notes	
A.	Conduct periodic pop-up surveys to determine trends in archival employment.	✔		- Pop-up survey conducted in January 2015; 3,976 individuals responded to 23-question survey. - Women Archivists Section survey (4/17) probed employment issues; results posted and presented in July 2017. - Webcast under development re negotiating for salary/benefits.	
B.	Publicize "Best Practices for Internships as a Component of Graduate Archival Education."	✔		- Listed prominently in Online Career Center. - [Consider developing a webinar, presented by Bastian or Weber?]	
C.	Publicize "Best Practices for Volunteers."	✔		- Undergoing review for possible revision. Publicize when revision available.	

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

2.2.3. 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	
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. • Increase number of DAS courses in Tools/ Services and Transformational tiers. • Update/revise DAS and A&D course exams. • Increase number of webcasts available. • Improve quality of existing webcasts. • Introduce online DAS Practice Exam.	✔		Ongoing.	
B. Explore collaborations with other communities to expand training for archivists in areas in which SAA does not have expertise or capacity. • Leverage appropriate groups for specific topics to avoid competition and bolster all. • Investigate MCARP options. • Explore collaboration with Hong Kong Government Records Service. • Explore collaboration with ACA (Canada) DAS Certificate series.			- Investigations underway regarding expanding capacity to offer diversity education and training, management education and training. - Investigation underway regarding interest among municipal clerks nationwide in MCARP product. - Discussions ongoing with Hong Kong Government Records Service.	
C. Develop evaluation tools to enhance current feedback mechanisms.	✔		Ongoing.	
D. Develop webinars that use SAA publications as basis for content.	✔		Ongoing.	

2.1.3. 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		Progress Notes	
A. Assess/enhance Trends in Archives Practice series to ensure that it meets evolving needs of members.	✔		- See http://www2.archivists.org/publications/book-publishing/trends-in-archives-practice#.Vx6L0lYrKUk. - Series "relaunched" in late 2017 with publication of 20th module (critical mass).	
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/. - Many books delayed due to authors missing deadlines.	
C. Continuously review business model for book publishing program.	✔		Ongoing.	

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

2.3.1. 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.

Specific Actions	Status		Progress Notes	
			- Implemented online manuscript submission and peer review tracking system in 2017.	
			- Implemented BlueSky learning management system in July 2017.	

2.4. Foster communities for professional interaction.

Specific Actions	Status		Progress Notes	
			- Implemented SAA Connect in January 2018.	

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.			- Existing Standards infrastructure may not support this. Consider resources before moving forward. - [Council to explore unintended consequences (principally on book sales) of previous decision to support continuous review of certain standards (DACS).]	
B. Encourage component groups and members to identify needs and gaps for standards development and to contribute "related resources" to the Standards Portal.			- [Digital Practice and Metadata environmental scan due to be completed in November 2017. Not done.]	
C. Consulting broadly, determine areas in which standards, guidelines, and best practices are most needed by practicing archivists.			- [Digital Practice and Metadata environmental scan, due to be completed in November 2017, was to include relevant recommendations.]	
D. Ensure that the Standards Portal documents the relationship(s) among archival standards and those of related professions.			- Assign to Standards Committee?	

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.	✔		- Annual Meeting discussion groups ongoing and well-subscribed.	
B. Continue to increase participation by AM presenters in posting their materials (abstracts, posters, slides, full papers) on the website.			- [Consider developing web course on research methods with archival examples to encourage greater participation.] [McGovern]	

	Specific Actions			Progress Notes	
C.	Lead a series of Twitter chats based on research presented at the Annual Meeting or published in *The American Archivist*.		-	[Have Research Forum program committee invite presenters to lead/participate in Twitter chats.] [McGovern]	
D.	[Develop a Research Agenda for SAA.]		-	[Seek feedback from Research Forum program committee on Research Agenda items.] [McGovern]	
E.	[Launch CORE/CODE, emphasizing connections to research methods and good practice.]		-	Task Force on COR/DE recommendations due in 1118.	

3.3. Participate actively in relevant partnerships and collaborations to enhance professional knowledge.

3.3.1. Establish or strengthen alliances and provide opportunities for joint meetings and information exchanges with other organizations and disciplines.

	Specific Actions	Status		Progress Notes	
A.	Seek out, and be responsive to, opportunities to collaborate with other organizations.		-	Apply "Principles and Priorities for Planning Joint Meetings with Other Professional Organizations" to all discussions.	
			-	SAA president met with allied organization leaders, by invitation, at 2017 and 2018 annual meetings. Discussion ongoing re what groups might do together, how to collaborate, shared priorities.	
B.	Work to strengthen involvement and/or alliances with CoSA, NAGARA, RAAC, RBMS, ARL, and others as appropriate and feasible.			Ongoing via Joint Working Group on Issues and Awareness, Archives on the Hill Planning Group, ARL/SAA Mosaic Program collaboration, etc.	

3.4. Support development of executive leadership skills and encourage participation in leadership opportunities by archivists at all stages of their careers. [NEW IN 1117]

GOAL 4: MEETING MEMBERS' NEEDS
SAA delivers outstanding service, fosters a culture of inclusiveness and participation, and is proactive and responsive to member needs.

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	
		-	System selected September 2018; implementation to be completed by early April 2019.	

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. [Focus on more effective use of sharing SAA information via listservs, including the Leadership, Archivists, and Fellows listservs.]	✓		Ongoing.	
B. [Explore developing fuller advocacy program (briefs, statements, contacts, website information) both for lobbying purposes by SAA and resources for individual archivists.] [From 11/17]			Ongoing. See Goal 1, 1.2.2.	

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.			Ongoing.	
B. Provide place/schedule for Council members to meet with members during Annual Meeting;		-	Consider attending more allied organization meetings as a representative of SAA Council, marketing as an opportunity for members to connect with the Council.	

determine other opportunities throughout the year.	

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	
A. Implement campaign to increase rate of participation by Fellows and past leaders.				
B. Ensure that SAA has the technological capability to support a robust matching system, including a feedback mechanism.			- Pending AMS implementation.	
C. [Investigate specific programming in which mentoring partners might participate in order to build their connection and relationship.]			- [Invite to existing programming (e.g., take this tour together, attend the Research Forum together) to provide opportunities to connect.] [From 11/17]	

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.			- Refer to results of Barriers to Participation survey fielded by Membership Committee in March 2017. - [Provide listening circles on topics at the Washington, D.C. (2018) meeting.] [Not done.]	
B. For structural barriers: Explore and remove as many as possible.				
C. For barriers that may be more perceived than structural: Implement regular communication to mitigate perception and explore cause of the perception.				
D. Regularly assess progress on members' perceptions of SAA as an organization that fosters participation.				
E. Publish at least one post per quarter in *OTR* highlighting a component group project.				

	Specific Actions	Status		Progress Notes	
F.	[Develop a training or free webinar on "How to Advocate for Institutional Support for Professional Development."] [From 11/17]				
G.	[With the SAA Foundation, investigate how to build financial support from foundations for Annual Meeting attendance.] [From 11/17]				

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

Specific Actions	Status		Progress Notes	

4.2.3. Develop resources and tools that encourage and expand leadership opportunities throughout SAA.

	Specific Actions	Status		Progress Notes	
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 via invitations from Mentoring Subcommittee to Leader List, Fellows List, etc.	
C.	[Revise Leadership Orientation and create onboarding leadership toolkit for new SAA leadership.]				
D.	[Investigate methods of involving more volunteers in SAA's work.]			- [Consider how to leverage non-appointed volunteers (listening sessions, local meet-ups, list of SAA projects).] [From 11/17] - Direct volunteers to Section elections, which often struggle for candidates.	

4.3. Foster an inclusive association and profession through greater diversity of membership and expanded leadership opportunities.

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	

Specific Actions	Status		Progress Notes
A. Implement the IMLS-funded Mosaic Program grant in partnership with the Association of Research Libraries.	✔		Ongoing.
B. Consider ways in which the Program can be sustained after the current grant period.			- Under discussion by 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 AACS and NAAS to establish metrics for, gather qualitative data about, and evaluate effectiveness of awards and scholarship programs related to diversity.			- [Re-assign to COR/DE?] [From 11/17]
E. [Explore creation of Diversity and Inclusion and Leadership Certificates (or workshop series) as part of the SAA Education Program.]			- [Could include both courses and a community/organizational service component.] [From 11/17] - [Start by conducting research to determine if there is a demand/need for these types of programs or certificates.] [From 11/17]

4.3.2. Identify underrepresented populations and develop recruitment efforts for the profession that include focused marketing and communication resources.

Specific Actions	Status		Progress Notes
A. [Explore methods for providing information about archives as a career (e.g., workforce development programs, 9-12 high school, college students, VISTA).]			- [Incorporate in National History Day communications.] [From 11/17] - [Leverage Evans' and Booth's positions at presidential libraries to beta test on community outreach.] [From 11/17]

4.4. Ensure that leaders are accessible and that their work is transparent. [NEW IN 1117]