

**Society of American Archivists
Council Meeting
October 31 – November 1, 2023
Hybrid Meeting (Chicago, IL)**

Staff Report: Operations
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I. Executive Summary

In the first quarter of FY24, SAA operations have made significant progress in several key areas. This report provides updates on finance, information technology, service center systems, and internal operations, highlighting both accomplishments and challenges. This quarter has seen pivotal advancements in improving the organization's efficiency, accuracy, and transparency in various aspects of its operations.

II. Finance

Delayed Financials

SAA has made substantial headway in reviewing and finalizing transaction data for the fiscal year-end "FYE" financials for 2023. We anticipate posting these financials in the second quarter of FY24 and integrating the approved budget into our new accounting and bill-pay systems for up-to-date financials by the 3rd quarter of FY24. This achievement underscores our commitment to financial transparency and accuracy.

New Accounting System

One of the most notable developments in this quarter has been the successful implementation of our new accounting system. This system represents a major upgrade to our financial infrastructure, offering streamlined data entry, real-time reporting, enhanced security, and improved compliance with accounting standards and regulations. These enhancements will enable SAA to make informed financial decisions promptly and improve financial accuracy.

New Bill Pay System

In conjunction with the new accounting system, SAA is introducing a new bill pay system that will streamline payment processes. Automation for recurring payments, enhanced cost center controls, and improved vendor relations are key benefits that will support financial reporting and transparency. The comprehensive audit trail for all transactions will further enhance accountability.

Financial Outlook

The future holds the promise of improved financial accuracy, more efficient operations, and increased transparency. This positions SAA to make data-driven decisions, enhance profitability, and achieve better financial results. We acknowledge the dedication and expertise of our accounting department in implementing systems for process improvement and maintaining compliance.

III. Information Technology

Technology deficits have posed significant challenges to SAA's operations, affecting efficiency, communication, member engagement, and overall effectiveness. The following impacts of concern have been identified:

- Limited Financial Management - SAA has faced difficulties in managing finances effectively due to outdated accounting and financial management software, leading to delayed financial reporting.
- Data Management Challenges - Challenges in managing member data have resulted in inaccuracies, inefficiencies, and compliance concerns, impacting member records, communications, and decision-making.
- Struggles with Remote Work - Technology deficits have hindered staff collaboration, document sharing, and access to critical information, leading to operational disruptions in a remote work environment.
- Inability to Adapt to Member Needs - SAA's inability to adapt to evolving member expectations has limited the organization's ability to offer new services and engagement methods.

To address these challenges, SAA is committed to implementing system improvements, modernizing technology, providing regular training, and incorporating technology into strategic planning to adapt to a rapidly changing digital landscape.

The technology roadmap includes transitioning to Office365 OneDrive and SharePoint, which will enhance cybersecurity measures and reduce file storage issues. These measures will ensure reliable data backup processes, reducing access limitations and improving overall IT performance.

IV. Service Center Systems

SAA's association management system (AMS), listserv, learning management system (LMS), and content management system (CMS) have played a crucial role in tracking and reporting member engagement. While some systems are fully launched and implemented, others are experiencing challenges, such as data syncing and content issues.

The upgrade project for the CMS is underway to enhance website performance, eliminate redundancy, and improve content management. This project aims to reduce file space limitations, leading to a better end-user experience.

V. Staff Transition and Internal Operations

SAA has undergone staff transitions, revealing gaps in processes where predecessor staff provided support. To bridge these gaps, SAA is committed to offering ongoing technical training, including Excel, and providing access to workflow and project management tools. This approach promotes self-service support and opportunities for staff to enhance their skills and knowledge, enabling better service to the target audience.

VI. Conclusion

In the first quarter of FY24, SAA has made commendable progress in finance, information technology, service center systems, and internal operations. The successful implementation of a new accounting system and bill pay system promises improved financial accuracy, efficiency, and transparency, positioning SAA for data-driven decisions and enhanced profitability.

Despite technology deficits, SAA is committed to addressing challenges and modernizing its IT infrastructure, with a focus on transitioning to Office365 OneDrive and SharePoint to enhance cybersecurity and reduce file storage limitations.

SAA recognizes the importance of efficient service center systems and is actively working on upgrading the CMS to improve website performance, content management, and user experience.

Staff transitions have highlighted the need for ongoing training and improved internal processes, and SAA is dedicated to bridging these gaps, providing staff with the tools and knowledge to better serve the organization's target audience.

Overall, the progress made in this quarter is a testament to SAA's commitment to growth, efficiency, and adaptability, positioning the organization for continued success in FY24 and beyond.