

**Society of American Archivists
Council Meeting
November 2025
Hybrid Meeting**

**Operations Report
(Prepared by Cherie Newell)**

I. Executive Summary

During the first quarter of FY26, SAA continued to advance its financial and operational priorities with a strong focus on efficiency and organizational resilience. Key initiatives centered on optimizing infrastructure, refining internal processes, and ensuring timely financial oversight. These efforts aim to strengthen resource management, enhance collaboration tools, and position the organization for sustained success throughout the fiscal year.

II. Finance

SAA follows a structured **fiscal year budget cycle** that aligns financial reporting with key Finance Committee & Council meetings throughout the fiscal year 2026.

Quarter	Period	Meeting Period
Q1	July – September	November
Q2	October – December	February
Q3	January – March	May
Q4	April – June	July/August

Q1 FY26 Highlights (July–September):

- **FY24 Audit:** Initiated in May 2025; on track for completion before the February meeting.
- **FY25 Financials:** Established a reporting timeline and began providing periodic data to support informed decision-making.
- **FY26 Approved Budget:** Developed using FY25 mid-year actuals, trends, and inflation; presented to the Finance Committee for recommendations.

Preliminary Financial Statement Review:

- FY25 Q4 (as of June 30, 2025) – [Council interim review](#)

- FY26 Q1 (as of September 30, 2025) – [Council interim review](#)

These reports provide leadership with timely visibility into revenue and expense trends, enabling proactive resource management.

III. Information Technology Infrastructure and Operational (Information Systems)

SAA continues to strengthen its technology infrastructure to improve workflow, collaboration, and security. Placing technology at the forefront of operations is essential to align with the organization's strategic plan and ensure a proactive, future-ready approach.

Key Priorities:

- **Q2 – Website Launch & Training:** The new website will be delivered in Q2. Staff will undergo structured training and a 60–90-day testing period to ensure functionality, accessibility, and readiness for full deployment. Selected members will participate in user testing to validate user experience and content accuracy, adding 60-90 days. Anticipated launch by the end of the fourth quarter.
- **Q1 – Collaboration Tools:** Program teams are piloting SharePoint sites for secure document sharing and improved accessibility.
- **Ongoing – Staff Training:** Managed service providers (MSPs) have prioritized training on SharePoint and OneDrive to support the adoption and long-term success of digital workflows.

Q3 – Co-pilot Training (Strategic Priority):

As part of our commitment to leveraging AI-driven productivity tools, Co-pilot training will be a major focus in Q3. This initiative will include:

- **User Readiness:** Introductory sessions for all staff to understand Co-pilot's capabilities.
- **Role-Based Training:** Tailored modules for program managers, operations staff, and leadership to maximize efficiency.
- **Governance & Best Practices:** Guidelines for responsible use, data security, and integration with existing workflows.

These initiatives aim to reduce operational bottlenecks, enhance data security, and position technology as a strategic enabler for organizational resilience and growth.

IV. Service Center Transition

The transition from Service Center Manager to Operations Manager continues to progress and is proving integral to aligning day-to-day tasks with strategic program

needs across departments. This evolution strengthens organizational agility by ensuring operational support is closely connected to broader goals.

Looking ahead to FY26 Q3–Q4, the Operations Manager role will expand to include responsibilities for information systems, organizational ecosystems, and logistics—providing a more holistic approach to operational management and supporting cross-departmental efficiency.

V. Membership

Dues Model Change Effective 01/1/2025.

The Membership Report is linked [via SAA Council Listserv](#)

SAA's membership team is preparing for the **new Membership Dues Model**, effective **January 1, 2026**. While the renewal process remains unchanged, communications and technology updates are critical for a smooth transition. Key actions include:

- **Implementation Timeline:** Launch January 1, 2026.
- **Communications Plan:** First message from Council; early renewal and dues increase reminders finalized.
- **Technology Updates:** Drupal changes identified; Nimble meeting scheduled to confirm readiness.
- **Billing & Notifications:** 90/60/30-day cadence confirmed.
- **Member Engagement:** Town Halls planned for late November and early December to reinforce value proposition messaging.

Next Steps:

- Finalize and distribute Council-approved communications.
- Complete Drupal updates and confirm Nimble readiness.
- Launch an early renewal campaign emphasizing 2025 rate lock-in.
- Promote Town Halls and monitor member feedback.

Staffing Update:

A new membership team hire began in September and is expected to be onboarded by the end of Q2 or early Q3 to support implementation and member engagement.

VI. Conclusion

The third quarter of FY25 reflects solid progress in financial and administrative functions, with continued emphasis on:

- Ensuring **fiscal responsibility** through timely filings and audit readiness.
- Strengthening **internal systems and workflows**.

- Supporting **membership** through thoughtful engagement and retention strategies.