

Strategic Plan Actions and Timelines, FY 2020 – FY 2022

At its November 2018 meeting, the SAA Council reviewed the Society’s [Strategic Plan 2014-2018](#) and discussed SAA’s evolving priorities, with a goal of revising the plan to reflect those priorities in the mid-term future. In a facilitated session, Council members identified three major areas of focus—Advocacy, Research, and Culture—as well as its highest priorities. The facilitator then mapped these to SAA’s four existing goals (Appendix).

Based on this work, the SAA staff drafted activities that staff members believe are 1) responsive to the Council’s priorities and 2) achievable given SAA’s resources. The activities were put forward in draft form for Council comment. The following reflects the revisions made during discussion at the May 20-22 Council meeting. The staff recommends that the activities in this “dashboard” be approved, with an understanding that the Council and staff will monitor progress and adjust the activities as needed.

Note: Throughout the dashboard, “WE” designates our “Welcoming Environment” initiative, a reminder to all of us that SAA intends to provide an open, inclusive, and collaborative environment in which all members have the opportunity to participate fully.

Goal 1: Advocating for Archives

Society values the vital role of archives and archivists.

1.1 Provide leadership in promoting the value of archives and archivists to institutions, communities, and society.

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| FY20 | A. Publish <i>Creating Family Archives</i> . | Publications Board |
| | B. Provide media training for 5-7 members; create media opportunities. | COPA / PR Counsel |
| FY21 | C. Promote <i>Creating Family Archives</i> broadly. | Staff / Marketing Counsel |
| | D. Provide media training for second cohort; create media opportunities. | COPA / PR Counsel |
| FY22 | E. Develop service-oriented competency training that recognizes a continuum of advocacy and focuses on the need for archivists to cultivate non-custodial, reciprocal relationships. | Committee on Education / Diversity Committee / RAO Section / Council / Staff |

1.2 Educate and influence decision makers in any setting about the importance of archives and archivists.

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| FY20 | A. Update/enhance online Advocacy Guide and webcasts. | COPP |
| | B. Craft compelling messages to target audience(s) for SAA and member use. | COPP |
| | C. Develop letters/editorials on two key public policy issues for members’ use. | COPA |
| FY21 | D. Draft legislation for national funding initiative; seek sponsors. | COPP / Joint Working Group / NCH |
| | E. Develop graphics, interactive map to track district visits; participation “count down” to all 50 states. | Staff / COPP |
| FY22 | F. Seek co-sponsors for federal funding initiative; hold member fly-in to advocate. | COPP / Joint Working Group / NCH |
| | G. Use A*CENSUS II data to craft messages re: funding for archives/archivists. | CORDA / COPP |
| | H. Produce guides and toolkits to assist archivists in advocating for support from public and private funders. | Task Force to be determined |

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

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| FY20 | A. Case study series on <i>Native American Protocols</i> ; ATALM exhibit. [WE] | NAAS / Publications Board |
| | B. Complete “IP Guide” to <i>Native American Protocols</i> . [WE] | IPWG |
| | C. Revise/distribute <i>Guidelines for Accessibility in Archives</i> . [WE] | Accessibility TF / Council |
| FY21 | D. Additional case studies on <i>Native American Protocols</i> ; ATALM exhibit. [WE] | NAAS / Publications Board |
| | E. Webcasts on <i>Native American Protocols</i> and <i>Guidelines for Accessibility in Archives</i> . [WE] | Committee on Education / Staff |
| | F. Publish <i>Archival and Special Collections Facilities</i> . | TS-AFG / Publications Board |
| FY22 | G. Webcast series on working effectively with community archives. [WE] | Committee on Education / Staff |
| | H. Podcast series for community/public on keeping/donating materials. | COPA / Podcast Team |

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

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| FY20 | A. Publish <i>Advocacy and Awareness for Archivists</i> (AFS III). B. Rally SAA members to conduct district visits. C. Pre-con course on conducting advocacy at state/district level. D. Enable Council/leaders to model district advocacy; publicize their activities. | Publications Board COPP / Joint Working Group COPP / Education Staff Council |
| FY21 | E. Continue to build cohort of media-trained archivist/spokespersons; create media opportunities for them. | COPA / PR Counsel |
| FY22 | F. Continue to build cohort of media-trained archivist/spokespersons; create media opportunities for them. | COPA / PR Counsel |

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.

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| FY20 | A. Develop a comprehensive Management Track. B. Publish <i>Leading and Managing Archives and Manuscript Repositories</i> (AFS III). C. Consider how to strengthen Mentoring Program/opportunities; implement. | Committee on Education / Staff Publications Board / Staff Membership Committee / Staff |
| FY21 | D. Implement 50% of Management Track programs. E. Explore feasibility of train-the-trainer program (Instructor Academy) to build teaching expertise among current and prospective instructors. | Committee on Education / Staff Consultant / Staff |
| FY22 | F. Implement remaining Management Track programs. G. If feasible, implement train-the-trainer program. H. Based on A*CENSUS II results: Work with O-Net, BLS, others to upgrade descriptions of archivist positions. (See 3.2.) | Committee on Education / Staff Consultant / Staff CORDA / Staff |

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

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| FY20 | A. Publish <i>Arranging & Describing Archives & Manuscripts</i> (AFS III). | Publications Board / Staff |
| | B. Retool/refresh DAS offerings as needed to remain current. | Committee on Education / Staff |
| | C. Capture annual meeting audio + synched slides to enhance education value. | Staff |
| FY21 | D. Publish <i>Advancing Preservation and Providing Reference & Access Services</i> (AFS III). | Publications Board / Staff |
| | E. Retool/refresh DAS and other professional development offerings as needed to remain current. | Committee on Education / Staff |
| | F. Convene group to consider leveraging Section-developed content for broader distribution to members. | Council |
| FY22 | G. Publish <i>Appraising & Acquiring Archives and Manuscripts</i> (AFS III). | Publications Board / Staff |
| | H. Implement advanced DAS track for “recertification.” | Committee on Education / Staff |
| | I. Create sandbox for Sections to develop/vet content for broader distribution. | Council |

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

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| FY20 | A. Audio-record Section meetings (no charge to attendees, small fee to non-attendees). | Staff |
| | B. Webcasts on key topics in archives management. | Committee on Education / Staff |
| FY21 | C. Enhance distribution options (via Amazon); make hidden content more accessible; consider reducing embargos. | Publications Board / Staff |
| | D. Regional rotation of “boot camps” with more advance notice. | Education Staff |
| FY22 | E. Ensure that members may complete DAS certificate 100% online. | Committee on Education / Staff |

2.4. Foster communities for professional interaction.

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| FY20 | A. “WE” Initiative: Explore and implement advanced features in Higher Logic to increase member engagement. | Staff |
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| | B. Based on recommendations of Tragedy Response Initiative TF, develop implementation work plan. | |
| FY21 | C. Implement Tragedy Response work plan. | Appointed Group / Council / Staff |
| FY22 | D. Continue to refine use of technologies to support member communities. | Staff |

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.

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| FY20 | A. Continuously update Standards Portal. | Standards Committee |
| | B. Launch <i>Dictionary of Archives Terminology</i> . | Dictionary Working Group / Staff |
| FY21 | C. Identify need for new standards and prepare development work plan. | Standards Committee |
| | D. Survey external standards and recommend Council approval as appropriate. | Standards Committee |
| FY22 | E. Continuously update Standards Portal. | Standards Committee |

3.2. Foster and disseminate research in and about the field.

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| FY20 | A. Determine most effective means to field A*CENSUS II; apply for funding. | A*CENSUS II Task Force |
| | B. Draft Research Agenda for Council review/approval. | CORDA |
| FY21 | C. Implement A*CENSUS II. | A*CENSUS II Implementation Group |
| | D. Begin implementation of Research Agenda; seek out data repository. | CORDA |
| | E. Seek effective means to elevate information presented at Research Forum. | CORDA |
| FY22 | F. Publish A*CENSUS II results and special reports. | A*CENSUS II Implementation Group / CORDA / Journal Editorial Board |

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| G. | Promote availability of data, encourage member engagement with it. | A*CENSUS II Implementation Group |
| H. | Continue implementation of Research Agenda. | CORDA |
| I. | Implement data repository. | CORDA |

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

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| FY20 | A. | Continue discussions with RBMS re feasibility of joint annual meeting. | Council / Staff |
| | B. | Consider strategic advantages of partnering with other organizations; initiate conversations as appropriate. | Council / Staff |
| FY21 | C. | Pursue likely external sponsors/supporters to supplement SAAF’s Strategic Growth Fund grants. | Executive Committee / Foundation Board |
| FY22 | D. | Hire Foundation development officer. | Foundation Board / Executive Committee |

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

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| FY20 | A. | See 2.1., FY20. | |
| | B. | “WE” Initiative: Consider how to stimulate interest in developing leadership skills, becoming an SAA leader. | Council / Staff |
| | C. | Consider partnership with and/or alternatives to Archives Leadership Institute training. | Council |
| FY21 | D. | “WE” Initiative: Provide periodic online engagements with members to address questions, foster interest in leadership development. | Council / Section Leaders |
| | E. | Implement partnership/other means to develop leadership training. | Council / Staff |
| | F. | Sponsor a half-day executive forum at the 2020 Joint Annual Meeting. | Council / Staff |
| FY22 | G. | “WE” Initiative: Build on successes to continue engagement with members in developing their leadership skills. | Council / Staff |
| | H. | Implement leadership education/training. | Committee on Education / Staff |

Goal 4: Meeting Members' Needs

SAA delivers outstanding service, fosters a culture of inclusiveness and participation, and is proactive and responsive to members' needs.

4.1. Facilitate effective communication with and among members.

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| FY20 | A. Implement NimbleUser, focusing on those features that streamline member interaction and create a vibrant user experience. | Staff |
| | B. Tag member database with "persona" information to increase understanding of member preferences, enhance customer experience. | Staff |
| FY21 | C. Implement appropriate refinements in Higher Logic. | Staff |
| FY22 | D. Conduct triennial member needs/preferences survey. | Marketing Consultant / Membership Committee / Staff |

4.2. Create opportunities for members to participate fully in the association.

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| FY20 | A. Create "Member Recruitment/Retention Plan 2020-2022," including 1) initiatives to "welcome" member participation and 2) crafting and testing value proposition messages. | Marketing Consultant / Membership Committee / Staff |
| | B. "WE" Initiative: Complete first round of staff development on DEI. | Staff |
| | C. "WE" Initiative: Develop work plan of initiatives to "welcome" member participation in SAA. | Council / Staff |
| FY21 | D. "WE" Initiative: Implement year 1 of work plan. | Council / Staff |
| | E. Explore technologies that would enable greater participation via remote means (eg, virtual section meetings, hosted discussions, etc). | Staff |
| FY22 | F. "WE" Initiative: Implement year 2 of work plan. | Council / Staff |

4.3. Foster an inclusive association and profession through educational and leadership opportunities.

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| FY20 | A. Review and recommit to Statement on Diversity and Inclusion. | Council / Diversity Committee / Staff |
| | B. Ensure that management and leadership training opportunities explicitly address inclusion in the workplace and the profession at all levels. | Committee on Education / Staff |
| | C. Diversify the instructor base for SAA education programs. | Committee on Education / Staff |
| FY21 | D. Develop and promote training for members to transform practice and move beyond representative diversity in order to create inclusive workplace cultures. | Diversity Committee / Committee on Education / Staff |
| | E. Develop training and educational opportunities on navigating workplace culture for archivists who are of color, who identify as LGBTQ+, and/or who have disabilities. | Diversity Committee / Committee on Education / Staff / Archives and Archivists of Color Section / Diversity Sexuality and Gender Section / LACCHA Section |
| FY22 | F. Based on A*CENSUS II results, work with partner organizations to strategize on recruitment and retention of a diverse workforce. | CORDA / Council / Task Force TBD / Staff |
| | G. Expand training and educational opportunities on navigating workplace cultures for archivists from other marginalized groups (i.e., those not mentioned in 4.3.E.). | Diversity Committee / Committee on Education / Staff / Others TBD |

4.4. Ensure that leaders are accessible and that their work is transparent.

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| FY20 | A. Conduct series of virtual “town hall” meetings at which members can interact with Council members, others. | Council / Staff |
| FY21 | B. Refine “town hall” meetings concept as appropriate. | Council / Staff |
| FY22 | C. Refine “town hall” meetings concept as appropriate. | Council / Staff |