

# Society of American Archivists

## Research Agenda

### Draft for Comment

#### Acknowledgments

This work was made possible through funding from the [Institute of Museum and Library Services Laura Bush 21st Century Librarian Grant program](#).

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## Background

The Society of American Archivists was awarded \$150,000 from the Institute of Museum and Library Services Laura Bush 21st Century Librarian Grant program in July 2024 to develop a prioritized research agenda for the archival profession that builds upon SAA's [Research and Innovation Roadmap](#). The project team, consisting of

members from the Committee on Research, Data, and Assessment (CORDA), SAA leadership (Jacqualine Price Osafo and Cherie Newell), and a professional facilitator, hosted a two-day in-person forum to bring together 35 archival experts, practitioners, educators, community leaders, and grantmakers to transform the Research and Innovation Roadmap into a concrete Research Agenda.

To select the forum participants, [an open call application process](#) that included a weighted rubric for participant selection criteria and protocols for the review process was designed. From November 2024 to December 2024, 84 applications were received, and in January 2025, 35 applicants were selected to join the Research Agenda Advisory Collective (Collective) and attend the two-day forum.

The two-day forum took place in Chicago, Illinois, from May 1-2, 2025. In attendance were 32 of the 35 Collective members, SAA President Derek Mosley, SAA Vice President Mario Ramirez, the CORDA-core team (Jane Fiegel, Jennifer King, Emily Lapworth, Chris Marino, and Dennis Meissner), and two professional facilitators. The participants worked collaboratively throughout the forum to identify the profession's most pressing research needs.

Four outputs were produced:

- A definition of “research agenda”
- A criteria rubric for prioritizing research topics
- The six research themes of the Research Agenda
- A redefinition of the audience from the profession writ large to the Society of American Archivists

After the forum, the CORDA-core team re-engaged with the Collective via virtual focus groups to further refine the six research themes. The project team synthesized the forum's outputs and the Collective's feedback to create this Research Agenda.

# Criteria Rubric

## PRIORITIZING RESEARCH TOPICS CRITERIA REVISED

### CRITERIA 1: ADVANCES DEIA

| 1                                                                               | 3                                                                           | 5                                                                                         |
|---------------------------------------------------------------------------------|-----------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| This research is not focused on diversity, equity, inclusion, or accessibility. | This research is moderately focused on DEIA issues, among other priorities. | This research is significantly focused on diversity, equity, inclusion, or accessibility. |

### CRITERIA 2: CENTERS ON ARCHIVISTS and/or CONSUMERS

| 1                                                             | 3                                                                    | 5                                                                       |
|---------------------------------------------------------------|----------------------------------------------------------------------|-------------------------------------------------------------------------|
| This research does not center on archivists and/or consumers. | This research is moderately centered on archivists and/or consumers. | This research is significantly centered on archivists and/or consumers. |

### CRITERIA 3: FEASIBILITY

| 1                                                                                                                    | 3                                                                                          | 5                                                                                              |
|----------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| Significant concerns about ability to carry out the research, because of funding, staff, institutional support, etc. | Research is doable but may face some funding, staffing, institutional support constraints. | Clear pathway for completion, because of adequate funding, staff, institutional support, etc.. |

### CRITERIA 4: IMPACT

| 1                                                                                                                     | 3                                                                                           | 5                                                                                                                                                                   |
|-----------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| This research has impact on a limited aspect of archival work and/or may have only a small effect on day-to-day work. | This research is of moderate use across the broader field, but may be key to some segments. | This research would have a significant impact on how we do our work and serve our consumers, across the archival community. It could also be a catalyst for change. |

### CRITERIA 5: URGENCY

| 1                                                                 | 3                                                                        | 5                                                               |
|-------------------------------------------------------------------|--------------------------------------------------------------------------|-----------------------------------------------------------------|
| Urgency is low. It is not critical to study this topic right now. | Urgency is moderate. There is some need to study this sooner than later. | Urgency is high. It is essential to study this topic right now. |

## Definition

A guide to prioritize research on the profession's most pressing issues, outlining key questions, research areas, and ethical methodologies, to be used to help advocate for and influence research done in all areas of the profession by anyone involved in research on archives and the archival profession.

## Research Agenda

### The Future of the Archives Profession: a Call to Action

The archival profession is at an inflection point. In the 89 years since the founding of the Society of American Archivists, the nature of archival work has drastically changed. Archivists<sup>1</sup> are faced with consistent challenges, including but not limited to, term-based employment, sustainability, digital transformation, climate change, harmful or inadequate description, and ever-growing backlogs.<sup>2</sup>

The next several years are critical to enact change. Building on the profession's strengths in the form of shared ethics, belief in the importance and power of archival work, existing research, best practices and standards, archivists must advocate for the resources needed and adapt their practices to ensure that the cultural heritage of today continues to exist and is accessible well into the future.<sup>3</sup> Advocacy and the evolution of archival work to adapt to the challenges and opportunities of the world today can best be accomplished by archivists when they are in full possession of the data to substantiate and drive change.

This data to drive change requires targeted research in several key areas: rethinking archival training, demonstrating the value of archives, collaborating with communities, making archives more accessible, engaging ethically and strategically with evolving technology, and responding to the climate crisis.

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<sup>1</sup> Archivist, in the context of the Research Agenda, is defined as an individual responsible for records of enduring value. Definition taken from Society of American Archivists glossary.

<sup>2</sup> For a full discussion of the challenges archivists currently face, see dataverse SWOT analysis [insert link here once published]. Cuellar, Jillian; Eagle Yun, Audra; Meehan, Jennifer; and Tai, Jessica (2023) "Defining Archival Debt: Building New Futures for Archives," *Journal of Contemporary Archival Studies*: Vol. 10, Article 8. Available at: <https://elischolar.library.yale.edu/jcas/vol10/iss1/8>.

<sup>3</sup> Tansey, Eira. *Research Project on Climate Change and Archives Final Report for Mellon Foundation, Public Knowledge program*, October 2024, <https://memoryrising.net/research-project-on-climate-change-and-archives-reports-on-people-infrastructure-and-collections/>, 4.

## Areas of Investigation

### **Rethinking Archival Training**

Since the founding of the Society of American Archivists in 1936, archival work has evolved into a distinct profession supported by formal education, credentialing programs, and training opportunities. These include accredited Master of Library and Information Science programs (LIS), doctoral programs in information science, certificate programs like the Academy of Certified Archivists, continuing education, and mentorship programs.

There exist fundamental questions about the affordability of educational programs, limited employment prospects, and market saturation—saturation exacerbated by LIS enrollment strategies. The field today can be viewed as facing an existential crisis when archival work is seen as unsustainable, underfunded, underutilized, and undervalued. To navigate archival work today, archivists must possess a range of skills and a depth of knowledge in many disparate areas—spanning records management, digital technology, intellectual property and copyright law, accessibility, management, finance, and community-engaged frameworks.

As a relatively young profession facing these contemporary challenges, such as funding shortages, shifting practitioner roles, and rapid technological changes, we must reconsider the framing and delivery of archival education.

Key research questions:

- How can archival education be designed to prepare professionals, not only for initial entry, but also for ongoing development throughout their careers amid a changing informational landscape?
- What are the core competencies archivists need to be successful, now and in the future? Are graduate degrees and continuing education programs aligned with these competencies? How is effectiveness of archival training defined, and how are training programs evaluated against emerging industry standards in the future? How can admissions criteria be reshaped to better reflect the competencies needed for successful practice?
- Who gets trained, and what does ongoing support look like? Who currently receives archival training, and who finances this education? Given limited societal resources for archives, how can training investments be optimized to broaden access while maintaining quality?
- Which educational platforms and models prove most effective when considered individually and in combination? How might archival education offer greater

diversity in instructional styles, structural models, content coverage, credentials, and educational outcomes to meet evolving needs? What is the optimal mix of training in information science and training in the humanities?

- What constitutes sustainable growth for LIS programs throughout North America, and how can credentialing programs be calibrated to better match employment prospects?

## **Demonstrating the Value of Archives**

Archivists recognize an urgent need to calculate and communicate the value of their work, their institutions, and their holdings. Yet a major challenge persists: a lack of common understanding regarding what exactly needs to be demonstrated and the best approaches to achieve this. Successful advocacy is critical in garnering the financial support to sustain archives and reach a larger universe of users. Therefore achieving a clear understanding and consensus on the data collected and how the data is packaged and communicated to both internal and external audiences is key.

Internal advocacy efforts must convince distinct segments comprising the archival community<sup>4</sup> to routinely collect and share a common set of data points that can evidence the compelling stories that archivists share with resource allocators, their users, and the general public. External advocacy requires archivists to share convincing stories about their work. Archivists need to showcase the economic and social value archivists and archives add to their institutions and communities. Those stories may prove highly effective, but they must be grounded in accurate, revelatory, and uniform data. Significant work has been accomplished on identifying and defining important data points that can measure archival performance.<sup>5</sup> How do archivists proceed from this point to drive better data collection and analysis across archives? Which tactics and tools will produce the best results? After archivists agree on data points to be routinely collected, they still lack a consistent strategy to systematically harvest, integrate, analyze, share, and store the data.<sup>6</sup>

Key research questions:

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<sup>4</sup> For example, archivists working in university libraries and those in government archives may not automatically perceive a common set of data points as being relevant to their particular situations.

<sup>5</sup> See, for example, *Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries*. SAA-ACRL/RBMS Joint Task Force on Public Services Metrics. *Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries*. Chicago: Association of College and Research Libraries, October 2017. PDF accessible at: [https://www2.archivists.org/sites/all/files/Standardized%20Statistical%20Measures%20and%20Metrics%20for%20Public%20Services%20in%20Archival%20Repositories%20and%20Special%20Collections%20Libraries\\_011718\\_0.pdf](https://www2.archivists.org/sites/all/files/Standardized%20Statistical%20Measures%20and%20Metrics%20for%20Public%20Services%20in%20Archival%20Repositories%20and%20Special%20Collections%20Libraries_011718_0.pdf).

<sup>6</sup> Much technical research is needed in this area. Certainly CORDA has a continuing role to play in this work. To date it has developed and maintains the [SAA Dataverse](#) to preserve and share archival datasets, as well as the SAA Facts & Figures resources to share at-a-glance facts and findings.

- How do archivists determine a lean and effective set of core data points and then convince repositories to routinely collect and communicate them? How can archivists achieve higher levels of data and financial literacy? How can archivists become more comfortable talking about the costs and risks of stewardship and building those considerations into their values? How can archivists better estimate the true cost of preserving and sharing archives?
- How can the value added through direct services to the users of archives be measured? What strategies can help repositories grow the population of users? What public engagement tactics are most effective? How can archivists leverage fundamental values like *authenticity* and *trustworthiness*? What economic value is added by researcher visits to repositories? Museum and library professional associations have pioneered the way in demonstrating economic value; how can archivists adapt their work to create their own models?
- What strategies for collaboration (both inside and outside the profession) could produce the greatest value for archives and their users? Understanding that collaborations are situational, how can discrete strategies be developed to suit diverse objectives and partners? How can the archives community develop more robust partnerships with grantmakers? What existing models can be drawn on for effective political advocacy?

## Collaborating with Communities

Historically, archival institutions have privileged institutional and colonial perspectives while excluding or marginalizing the voices and knowledge systems of the communities often closely related to, and involved with, the records. Archivists must move beyond mindsets and actions that emphasize providing expertise to and for communities toward authentic collaboration and co-creation that deemphasizes control—practices that shift from extractive collecting models to collaborative, reparative approaches that prioritize ethical co-creation, shared stewardship, ethical return, human rights, and community sovereignty and autonomy. By embedding reciprocity and accountability, incorporating an ethics of care, and building right relationships, this research area seeks to center and expand upon the process and purpose of archiving toward equity and inclusion.

There are many different examples of what archives and communities can collaborate on, such as collecting, description, stewardship, access, outreach, and education, as well as many different possibilities for how that collaboration can take place.<sup>7</sup> Every community is different and there is no one-size-fits-all approach to community-archives collaboration. Research related to one community may not be applicable to any other

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<sup>7</sup> In the spirit of this theme, building a right relationship with a community can also include not actively collaborating on any “work,” but sometimes just listening.



communities, but comparing models for collaboration can help identify when specific strategies and approaches are effective in multiple contexts, leading toward the creation of frameworks (such as the “Protocols for Native American Archival Materials”).<sup>8</sup>

While there is value in archivists interrogating ourselves and our own work, the slogan “nothing about us without us” is an important reminder for this research area—research about or affecting a community should involve participants and representatives from that community, or if possible, come from the community itself. Archivists must also keep in mind that one person cannot represent an entire community—thoughtfully acknowledging the nuances of the definition and representation of a specific “community” is also an important consideration in this research area.

Key research questions:

- How can archival practices be reshaped to amplify unheard voices?
- How can archives and communities benefit from collaborating?
- What harms have come to communities from past experiences with archives that must now be acknowledged and addressed?
- How can practicing archivists reduce barriers between archives and communities?
- What are effective models for building and maintaining relationships, sustaining collaboration, and succession-planning?
- How can communities be empowered in the creation, description, and stewardship of the historical record?
- How can archives embrace and support Indigenous and non-Eurocentric cultural norms and knowledge practices?
- How can archives promote participatory access and human rights through collaboration?
- How can archives professionals use technology to enhance collaboration?
- What are the knowledge and training gaps in the archival profession that affect community archives and community collaboration?

### **Making Archives More Accessible**

Improving access to archival materials is a core tenet of the profession, and a commitment to increasing the availability and use of materials is expressed in multiple

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<sup>8</sup> First Archivist Circle, “Protocols for Native American Archival Materials” (2007), <https://www2.nau.edu/libnap-p/protocols.html>.

codes of ethics and statements of core values for the field.<sup>9</sup> Despite the continued importance of archival accessibility, there remains an insufficient understanding of how to effectively support the use of and access to archival materials and services. The term accessibility itself possesses multiple meanings, especially within the context of archives. As noted by the *Guidelines for Accessible Archives for People with Disabilities*, accessibility can refer to the "discoverability and ease of use of archival collections," but it can also refer to the reduction or removal of barriers that prevent "equal or equivalent access to archival facilities, resources, and services for people with disabilities."<sup>10</sup> If archives are to truly be made more accessible, research in this area must embrace both applications. In a time where it is increasingly vital for archives to demonstrate their value to the public, improving users' access to archival resources is imperative for the field's survival.

The need to improve accessibility is urgent because so much of this profession is impacted by access. A great deal of archival labor is connected to access, in one way or another; fielding reference questions, digitizing items, implementing reparative description practices, staffing reading rooms, creating multilingual finding aids, providing assistive technology, and processing collection backlogs all affect how users discover, access, and use archival holdings and services. Advancing accessibility will require a deeper understanding of users, their needs, and to what degree archivists are meeting those needs. Accessibility is multi-faceted, as are the needs, behaviors, and desires of archival users themselves; there are numerous dimensions of archival access that would benefit from new or continuing research.<sup>11</sup>

Key research questions:

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<sup>9</sup>"SAA Core Values Statement and Code of Ethics," Society of American Archivists, revised August 2020, <https://www2.archivists.org/statements/saa-core-values-statement-and-code-of-ethics>. "ACRL Code of Ethics for Special Collections Librarians," Rare Books and Manuscripts Section, revised 2020, [https://rbms.info/standards/code\\_of\\_ethics/](https://rbms.info/standards/code_of_ethics/). "ACRL/RBMS-SAA Guidelines on Access to Research Materials in Archives and Special Collections Libraries (2020)," Society of American Archivists, revised September 2020, <https://www2.archivists.org/groups/saa-council/acrl-rbms-saa-guidelines-on-access-to-research-materials-in-archives-and-special-collections-libraries>.

<sup>10</sup> "Guidelines for Accessible Archives for People with Disabilities," Society of American Archivists, revised 2024, <https://www2.archivists.org/sites/all/files/2.0%20SAA%20Guidelines%20for%20Accessible%20Archives%20for%20People%20with%20Disabilities.pdf>

<sup>11</sup> Usability testing of existing tools, platforms, and services can be performed to evaluate their effectiveness with users and would also provide insights into user behaviors and information needs. Reference and demographic information about archival users can be gathered to give institutions clear data about who their users are, how their materials are being used, and where the gaps lie in the communities and groups they serve. Examinations of potential access barriers could be made into reading room policies and hours, online resources about visiting and using archives, availability of public transportation and parking around archival facilities, communities' perceptions of archives, and facilities' compliance with the Americans with Disabilities Act's (ADA) rules and standards on physical spaces. Research on archives' overall compliance with ADA's rules and regulations would also offer valuable data about the field's current ability to provide users with disabilities access to archival services.

- Who are the current users of archives? What are their information needs? What are their expectations for accessing archival resources, and how do users actually access them? What services and records do they use and why?
- What do users identify as the barriers that prevent or hinder their access to archives? What are the factors that impact users' abilities to access materials and services? What makes it easier for users to access archival resources?
- Are people with disabilities able to acquire the accommodations they need in archives? What are the accommodations that are currently being made available to archival users and archival workers with disabilities? Are accessibility measures being incorporated into archives' policies and procedures?
- How have reparative description practices impacted archival access? Are the communities represented in archival collections able to find and use those materials, and if not, what is preventing or discouraging access?
- How do the policies and practices of repositories affect the way users are able to access and utilize archives?

### Engaging with Technology

Digital technology advances continue to transform archival practice, whether archivists are prepared for them or not. Archivists must prioritize research into the opportunities and challenges of new and “disruptive” technologies in order to leverage them to streamline institutional workflows, strengthen existing infrastructure, and enhance access and use. This research area emphasizes ethical and strategic engagement with technology, balancing archivists' commitment to preserve and provide open and equitable access to trustworthy digital records with their responsibility to protect privacy, respect the people and cultures represented in archival collections, mitigate harm, employ environmentally sustainable methods, and root the work of archivists in an ethic of care.<sup>12</sup>

Emerging technologies such as artificial intelligence (AI), specifically generative AI, raise concerns about archival integrity, authenticity, and ethics. Research is crucial to address key issues such as data scraping, data sovereignty, surveillance, bias, environmental costs, and policies that protect the rights of donors, users, and records subjects alike. Technological advances have also increased the quantity and complexity of archival records, and archivists must leverage technology and develop new approaches to effectively appraise, accession, process, preserve, and provide access to this digital deluge.

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<sup>12</sup> “SAA Core Values Statement and Code of Ethics,” Society of American Archivists, revised August 2020, <https://www2.archivists.org/statements/saa-core-values-statement-and-code-of-ethics>.

Secure, efficient, scalable, and sustainable digital infrastructure is essential, yet a digital divide remains between well-resourced institutions on the cutting edge of new technologies, and small, under-resourced archives struggling just to keep their doors open (including individual contributors/solo archivists and community archives). Exploratory and rigorous deep-dive research will continue to be essential in evaluating and applying new technology, but equally as important are quick-start, beginner-level resources, and research to identify training needs, resources, and strategies that can help narrow this digital divide.

Key research questions:

- How can archival practice (e.g. processing, description, preservation, access, discoverability) be improved through the ethical use of AI and digital technology? What are the current and potential use cases?
- How can archivists leverage technology for shared stewardship and digital repatriation?
- What labor implications arise from applying AI and automation to archival work?
- How can archivists protect their collections, users, donors, and records subjects from unethical exploitation or harm by AI, while also balancing professional commitment to open and equitable access?
- As the quantity of digital records and the complexity of digital formats increases, how can archivists adapt local and best practices, especially those related to appraisal, storage, and discoverability, to achieve sustainable and effective outcomes?
- How can archivists successfully collaborate with technologists and commercial entities to inform product design, development, and policies?
- How can archives negotiate relationships with commercial entities that adhere to archival core values and ethics?<sup>13</sup>
- What are the characteristics of technology projects that created successful systems purpose-built for archives? What is replicable or adaptable to other projects?
- What role can archivists play in using their specialized expertise to educate stakeholders or the general public about issues related to technology, data, and AI?
- How can the profession shrink the digital divide to ensure that digital records are safely preserved and accessible, even in the most under-resourced archives?

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<sup>13</sup> "SAA Core Values Statement and Code of Ethics," Society of American Archivists, revised August 2020, <https://www2.archivists.org/statements/saa-core-values-statement-and-code-of-ethics>.

## Responding to the Climate Crisis

Natural disasters and unpredictable weather patterns negatively affect archives and their users by placing holdings, physical facilities, and the workers therein in increasing jeopardy. Archival practices, especially those relating to preserving and providing physical access (e.g. HVAC systems for storage climate management), but also in the digital environment (e.g. cloud storage for preservation), contribute to the increased use of fossil fuels and water resources, thus exacerbating the problem.

Given the projected growth of archival energy use and the impact of increasingly erratic weather patterns, natural disasters, and precarious employment, research must focus on climate adaptation—“preparing and responding to the climate change reality already here and in the future.”<sup>14</sup> The field, however, lacks longitudinal nationwide baseline data (storage location/s, facility type and use, collection size, storage conditions, and/or level of emergency preparedness) and a centralized reporting mechanism for disasters, which is critical to illustrate how American archives and archivists are impacted.<sup>15</sup>

Key research questions:

- How can archival practice (collecting, appraisal, deaccessioning, digital infrastructure, use of emerging technologies, among others) evolve to reflect environmental ethics and responsible resource stewardship?
- What models support low-energy and climate-adaptive archival storage and operations, and how can they be applied?
- How can archivists conceptualize and quantify acceptable loss; what can society reconcile losing, how can archivists communicate this?
- What archival practices can help communities impacted by climate change, including, but not limited to, assisting migrating or displaced communities in safeguarding their records?
- How do climate concerns relate to archival labor and financial concerns?

## Next steps

### Dissemination and implementation

SAA is committed to stewarding this important document which will guide its efforts to support and foster research for the next five years (2026-2031). It will be shared with SAA members via standard SAA communications channels (Announcements, *In The*

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<sup>14</sup> Tansey, Eira. *Research Project on Climate Change and Archives Final Report for Mellon Foundation, Public Knowledge program*, October 2024, <https://memoryrising.net/research-project-on-climate-change-and-archives-reports-on-people-infrastructure-and-collections/>, 6.

<sup>15</sup> *Ibid*, 4.

*Loop*, *Archival Outlook*, social media) and with the public via a press release. CORDA will work closely with SAA to integrate the agenda into its programming (the annual meeting and the research forum<sup>16</sup>) and research funding opportunities with its Foundation.<sup>17</sup> The agenda reflects the current status of the profession with the intended audience being the Society of American Archivists and as such is US-centric.<sup>18</sup> CORDA's hope is that this document serves as a framework that encourages research, innovation, collaboration, and meaningful change.

To document the process of agenda creation for transparency and replicability, a white paper will be published on the SAA website and submitted to the *American Archivist* for publication. The data<sup>19</sup> collected from the facilitated discussions and findings will be deposited into the SAA Dataverse for public online access and reuse.

## Maintenance

The intended lifespan of this research agenda is 2026-2031.

In September 2030, CORDA will convene a task force to assess the agenda's implementation, adoption, and impact and to propose a plan for creating the next version. The task force's findings and proposal will be submitted to the SAA Council for consideration and approval during the SAA Council convening at the annual meeting in 2031.

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<sup>16</sup> <https://www2.archivists.org/publications/research-forum>

<sup>17</sup> Currently, the SAA Foundation Board awards grants that meet the [mission and goals](#) of the Foundation and/or the [strategic planning](#) priorities of the Society of American Archivists.

<sup>18</sup> The Research Agenda Advisory Collective did include one international member. Future work could include engaging non-US partners for their thoughts over the next years to better understand how it represents international needs.

<sup>19</sup> The data will be de-identified.