

The Effort to Create a Research Agenda for the Society of American Archivists: A Report from the Project Team

Authors: Jane Fiegel, Jennifer King, Emily Lapworth, Chris Marino, Dennis Meissner

Abstract

This report details the process used to create the first Society of American Archivists (SAA) Research Agenda, a project which was funded by the Institute of Museum and Library Services Laura Bush 21st Century Librarian Grant program. The project spanned from 2024-2026, and the lifespan of the Research Agenda is 2026-2031. The authors describe planning and implementing an application process to select a diverse and representative group of archivists and stakeholders to form a Research Agenda Advisory Collective (Collective). The methods used to engage the Collective and prioritize research needs are discussed, including a two-day, in-person forum and subsequent virtual focus groups. The process of drafting the Agenda and gathering feedback is addressed, as well as plans for promotion, implementation, and maintenance. By documenting in detail how this Research Agenda was created, the authors provide transparency in how the research areas were selected and prioritized, lessons learned from the project, and a framework for creating future research agendas.

Introduction

From July 2024 through the spring of 2026, six members of the Society of American Archivists (SAA) Committee on Research, Data, and Analysis (CORDA) led a strategic effort to distill the Society's [Research and Innovation Roadmap](#) into a focused research agenda to guide SAA through 2031. Funded by an IMLS Laura Bush 21st Century Librarian Grant, the project centered on a two-day forum of thirty-two professionals. This report serves as a key deliverable, providing a detailed account of the project's design, execution, and outcomes, alongside an evaluation of lessons learned.

Background

The Committee on Research, Data, and Assessment (CORDA), is a standing committee of the SAA charged with providing SAA members with standardized tools for gathering and analyzing data; managing a repository for data and other research

outputs ([SAA Dataverse](#)); developing and offering training on gathering, analyzing, interpreting, and using data; and supplying up-to-date and reliable basic facts and figures about archives and archivists.¹ The group also organizes and hosts SAA's Research Forum, a long-running annual conference program that highlights and promotes ongoing research efforts by SAA members and other archivists.² CODA's rotating membership is dedicated to growing a community of archivists that is ever more informed by, and conversant with, practical data that can help move the profession forward.

In 2019, SAA Council charged CODA to establish a research agenda; Council then adopted the resulting [Research and Innovation Roadmap](#) in August 2023.³ The Roadmap's seven themes, 31 topics, and 64 areas for future research represent input from interviews, literature review, membership feedback and discussion with SAA committees, gathered and refined over several years, to comprehensively identify the research needs of the archives profession. It is exhaustive, but it is neither focused nor strategic.

The Roadmap's seven overarching themes are:

1. Demographics
2. Metrics and institutions
3. Diversity and inclusion
4. Ethical stewardship, maintenance, and sustainability
5. Radical collaboration and convergence
6. Audience building
7. User centered design and discovery

Grant Proposal and Project Description

In 2024, SAA requested \$150,000 from the [Institute of Museum and Library Services Laura Bush 21st Century Librarian Grant program](#) to convene a professionally facilitated two-day forum of archivists and relevant non-archivist stakeholders to transform the SAA Research and Innovation Roadmap into a research agenda for the archival profession. The archivists chosen to participate would represent key employment sectors and professional positionality in terms of experience, responsibility, and geography.

¹ <https://www2.archivists.org/groups/committee-on-research-data-and-assessment>, <https://www2.archivists.org/facts-and-figures>

² <https://www2.archivists.org/publications/research-forum>

³ CODA was charged by SAA Council in 2019 with "Engaging academic and other communities within SAA to perform research by helping to set research agendas." After four years of iterative work the Roadmap was approved by Council in 2023.

→ See the [SAA Research Agenda dataset](#) for the grant application narrative

To achieve strategic impact over the next several years, the project aimed to distill from the Roadmap a small, focused agenda of research that could best achieve the profession's informational needs to address advocacy efforts, professional practice and performance, and, especially, effective user service. This prioritization process was undertaken by archivists from diverse academic, government, private and public organizations—not by an SAA committee—so that it could be endorsed and adopted by SAA membership and professionals more broadly, pushing archival practice in critical areas. It also involved key external stakeholders with their own critical perspectives. This complex work of distillation was predicted to be onerous, requiring expert facilitation and the sort of frank, direct, and focused engagement that can best take place in a face-to-face convening encompassing multiple sessions over a couple days.

SAA received the grant in August 2024.

→ See the [SAA Research Agenda dataset](#) for the grant announcement: “SAA Receives IMLS Grant to Create a Research Agenda for the Profession”

Deliverables

The main deliverable of the grant project is a Research Agenda for the Society of American Archivists.⁴ The Research Agenda identifies critical themes for SAA and its members to focus their research efforts on in the coming years, 2026-2031. This focused research has the greatest chance to unify efforts and propel the archival profession forward in preserving the historical record and making it widely accessible to the public.

→ See the [SAA Research Agenda dataset](#) for the final and previous drafts of the Research Agenda

A framework for Research Agenda maintenance, for its strategic implementation, and an outreach plan for dissemination, adoption, and awareness are included in this report and in the Research Agenda itself.

A dataset documenting the creation of the Research Agenda, including the initial contributions and post-forum feedback of participants (stripped of any personally identifiable information) is available via the [SAA Dataverse](#).

⁴ The project originally aimed to deliver a research agenda for the archival profession, but the scope was later narrowed to the Society of American Archivists.

Project Team

The core project team consisted of the following CORDA members:

- Chris Marino: Project Director; CORDA Co-Chair (2022-2024); Head of Public Services, The Bancroft Library, UC Berkeley.
- Jane Fiegel: CORDA Co-Chair (2024-2026); Metadata Librarian, Tulane University.
- Jennifer Gunter King: CORDA Co-Chair (2019-2022); Associate University Librarian for Academic Engagement and Special Collections, Boston University.
- Emily Lapworth: CORDA Co-Chair (2023-2025); Digital Initiatives Archivist, University of Massachusetts Boston
- Dennis Meissner: CORDA member (2019-2024); SAA President (2015-2016); Retired Deputy Director for Programs, Minnesota Historical Society.
- Sarah Pratt Martin: CORDA Co-Chair (2022-2023); Associate University Archivist for Community Engagement, Harvard University.

SAA staff provided project support, administration, and logistical planning:

- Jacqueline Price Osafo, Chief Executive Officer
- Cherie Newell, Chief of Operations
- Jill Burgos, Manager, Governance
- Carlos R. Salgado, Operations Manager
- Rana Hutchinson Salzmann, Chief of Training & Organization Development
- Julia Pillard, Marketing and Communications Manager

RMC Research Corporation was contracted to serve as the forum facilitator:

- Jennifer Ballen Riccards, Education Policy Analyst
- Amy Colton, Senior Research Associate

Research Agenda Advisory Collective

To select 35 participants for the 2-day in-person forum (formally known as the Research Agenda Advisory Collective, or Collective for short), the project team developed an online application that required:

- Answering nine demographic questions
- Uploading a curriculum vitae
- Narrative responses to two open-ended questions regarding engagement, experience, and expertise

- A positionality statement asking applicants how their lived experiences and/or DEIA-related work supports the development of a research agenda for the profession.

The call for applications was shared on November 20, 2024, and the deadline for submissions was December 20, 2024. The open call was shared via SAA's communication channels, and with regional and allied archives organizations.

→ See the [SAA Research Agenda dataset](#) for a list of listservs and organizations the open call for applications was shared with.

To ensure an inclusive and diverse group, the team developed a weighted rubric, aligned with the SAA Statement on Diversity, Equity, and Inclusion⁵, to guide the selection of applicants to participate in the 2-day forum, based on the following criteria:

- **In and outside of the profession.** Practicing archivists and archival educators would form the majority of the Collective, augmented by participants affiliated with foundations and funders and allied professional groups including the American Library Association (ALA), Council of State Archivists (COSA), and regional archival associations.
- **Geographic location.** Participants would primarily represent the United States of America, (West, Midwest, Northeast, South, Pacific, Caribbean). Space would also be allocated for one international participant (e.g. IFLA, UNESCO).
- **Socio-cultural factors.** The Collective would represent different race/ethnicities and genders, related to individual and community identity, including the attributes mentioned in SAA's Equal Opportunity/Non-discrimination Policy.⁶
- **Employment seniority, status, and level.** The Collective would include archivists that are individual contributors/solo archivists; managers and senior administrators/executives in the profession; archivists that are both contract/limited term vs. permanent; and archivists that are entry level (0-5 years), mid-level (6-14 years), and senior (15+ years) in their respective careers.
- **Archives sector.** Participants would represent all sectors of the field including: Academic, Government Agency, Non-profit, For-profit, Self-employed, Community Archives, and Religious Archives.

The rubric was shared with the call for applications. To increase the chances of getting an inclusive and diverse pool of applicants, the project team identified 45 specific individuals that they invited to apply.

⁵ <https://www2.archivists.org/statements/saa-statement-on-diversity-equity-and-inclusion>

⁶ https://www2.archivists.org/governance/handbook/appendices/app_a/EONDP

→ See the [SAA Research Agenda dataset](#) for the open call for applications, the weighted rubric, the application, and anonymized applicant data.

84 unique, complete applications were received and reviewed. Chris Marino, Dennis Meissner, Emily Lapworth, Jane Fiegel, Jennifer King, and Jennifer Riccards reviewed the applications and assigned numerical ratings based on the weighted rubric to determine which applicants to invite to participate in the Research Advisory Collective. Although each team member was responsible for reviewing and ranking all applications, every team member was randomly assigned 14 applicants for which they would serve as the “discussion leader,” responsible for leading the discussion of the assigned application and serving as a primary resource during the discussion.⁷ All scores, recommendations, and notes were compiled into one primary spreadsheet for group review and discussion. Mean, median, and mode was calculated for each criterium and used by the team to set automatic inclusion and exclusion values to enable virtual discussions on applications that fell in the middle. The team also considered the information the applicants provided in relation to the representation targets in the rubric.

In addition to the participants appointed through the open call, the elected leaders of the Society of American Archivists Derek T. Mosley, SAA 80th President, and Mario Ramirez, SAA Vice-President/President-elect 2025, were asked to participate in the forum as members of the Research Agenda Advisory Collective.

→ See the [SAA Research Agenda dataset](#) for the announcement of Research Agenda Advisory Collective participants, and the biographies of participants.

Overall, the method of crafting an open call, developing a weighted rubric, and outlining representational targets enabled a transparent process and yielded a diverse group of participants. However, this process was time consuming and there were several areas where representation targets were not met, due to lack of time left to effectively communicate the open call for applications to audiences outside of SAA. The Collective fell short of representation targets for government agencies, non-profit, and for-profit archival repositories and were slightly over target for academic archivists. There were no archivists from the Pacific/Caribbean geographic region and no representation from religious or tribal archives. These shortcomings could have been mitigated with more thoughtfully targeted advance outreach and communications planning, by building more time into the overall project timeline, and by partnering with SAA and allied organizations to more effectively reach potential participants. This shortcoming could also have been avoided by preselecting representatives of specific target communities, and inviting representatives, rather than issuing an open-call.

⁷ The CORDA-core team used the SAA Annual Meeting Session Proposal process as a model.

Planning the Forum

A strong facilitation method was needed to plan a forum that would enable the assembled experts to transform the Research and Innovation Roadmap into an agenda. The project team believed that a new conversation was essential to create a convening that would produce break-through thinking. They also wanted the breakthrough thinking to build from prior work; work that included the Research and Innovation Roadmap, and Chela Weber's 2017 OCLC report, "Research and Learning Agenda for Archives, Special, and Distinctive Collections in Research Libraries."⁸

The consultant proposed asking the assembled experts broad questions to identify topics and subtopics. Though logical, that approach was inherently expansive: it risked reproducing the roadmap's breadth rather than producing the deeper, clarifying analysis the project team wanted. The team sought a methodology that would narrow and deepen inquiry to generate clarified and focused research questions.

To enable that shift, the project team sought resources that would help the experts to consider the roadmap and use it to inform a reframe. They consulted two complementary frameworks. The team considered Lee [Bolman and Terry Deal's Four-Frame Model](#) (Structural, Human Resource, Political, Symbolic) and [Liberating Structures](#) (the practical facilitation techniques developed by Henri Lipmanowicz and Keith McCandless) to boost engagement and creative contribution from everyone convened.

The convening, as designed, therefore focused on a small set of clarifying questions to guide facilitation:

- What is a "Research Agenda"? How does it differ from a professional agenda, a roadmap, or a strategic plan?
- What problems are we trying to solve through research? Which problems, if addressed, would yield the greatest benefit across the profession?
- What major thematic areas should be elevated and prioritized, and what research questions sit beneath those themes?

The project team ultimately resolved its goals and the facilitator's approach with a compromise. The convening would include a SWOT analysis. The Collective would define together a definition of the Research Agenda and create explicit prioritization

⁸ SAA Research and Innovation Roadmap: <https://www2.archivists.org/groups/committee-on-research-data-and-assessment/research-and-innovation-roadmap-update-14>. Weber, Chela Scott. 2017. *Research and Learning Agenda for Archives, Special, and Distinctive Collections in Research Libraries*. Dublin, OH: OCLC Research, <https://doi.org/10.25333/C3C34E>.

criteria to narrow what ultimately constitutes the agenda. The team agreed that the narrowing would ultimately be the most important tool for this agenda's success.

The project team drafted a set of criteria to present to the Collective as a starting point and created a pre-forum survey to collect preliminary thoughts from the Collective regarding questions that would be explored more fully during the forum.

Pre-forum Survey

On March 28, Emily Lapworth emailed participants, asking them to complete a survey by April 4, one week from the date it was shared. Participants were instructed:

Please spend 15-30 minutes on this survey, and we encourage short answers based on your gut reactions (lists are fine). No need to do research or write paragraphs to answer these questions. This survey is meant to collect initial thoughts that we will use for planning the forum. We may share the anonymized responses with all participants, and we may ask these questions again at the forum. We also plan to deposit a dataset documenting the creation of the Research Agenda into the SAA Dataverse- please indicate in the first question if you consent to including your anonymized response in the dataset.

The project team decided to ask for brief answers to maximize the likelihood that everyone would complete the survey, and because they planned to explore the same questions in greater depth at the forum. In the first section, participants were asked to conduct a SWOT analysis of the archival profession in the United States, and to also take into account an international perspective. The nine short-answer questions of the survey were phrased as follows:

- What are the top 3 strengths of the archival profession?
- What are the top 3 weaknesses of the archival profession?
- What are the top 3 opportunities that the archival profession can leverage?
- What are the top 3 threats to the archival profession?
- Based on this SWOT analysis, what are the top 3 priorities for the profession to focus on?
- What research is needed to achieve these priorities?
- Is there other research (not mentioned in your answer above) that you think is a priority for the profession?
- In 1-2 sentences, what does "Research Agenda" mean to you? You can describe what elements you think the Research Agenda should include, or what it should look like.
- What criteria do you think we should consider when prioritizing research for the archival profession?

→ See the [SAA Research Agenda dataset](#) for the full survey and the responses.

Participant Pre-work

On April 16 Emily Lapworth emailed participants to share the survey results and a list of pre-readings. Participants were asked to consider the following questions while reviewing the survey results:

- Are there any answers that surprised you, or you didn't think of?
- Are there any topics you want to learn more about before we discuss them? Now is your chance to do any background research before the forum!
- What is research, and what is not research? We asked, "what are the top 3 priorities for the profession to focus on?" The top priorities for the profession provide important context and criteria for prioritizing research, but in the end, our top priorities for the profession may not be equivalent to our top priorities for *research*, and the Research Agenda is focused squarely on research. Perhaps not all priorities require new research. Consider advocacy as an example- advocacy may be a top priority for the profession, but do we need new research to improve advocacy for archives? Or are there other research needs that are more of a priority? Those are the kinds of questions we'll be discussing and decisions we'll be making at the forum. While we recognize that there are many valuable and important research topics and questions that should and will be investigated, the goal of the Agenda is to articulate the most important priorities for the next 5-10 years.
- What are some specific examples of research questions and research designs that are most needed to move the archival profession forward? The Research Agenda won't be an exhaustive or prescriptive list of research questions and designs, but being able to articulate specific examples will aid in forum discussions and in communicating the Agenda to a wider audience.
- Thinking about the research needs identified so far, what past and current research already exists to build upon? Where are the gaps in that research area? Do follow up studies need to be conducted? Who is doing the research now? Who should do it in the future? What are the challenges (such as collecting data) or opportunities (such as potential

fundings)? What is the potential and likely impact of the research? Who will it impact?

In addition to a list of suggested optional pre-reading, the following documents were listed as required pre-reading:

- [Research and Innovation Roadmap v 1.4](#)
- [IMLS Grant Proposal: Setting a Research Agenda for the Archival Profession. Grant Narrative](#)
- To solve a tough problem, reframe it
<https://hbr.org/2024/01/to-solve-a-tough-problem-reframe-it>

The assigned pre-readings were relevant to activities undertaken during the forum, but they were not directly referenced in the forum, which was a shortcoming.

→ See the [SAA Research Agenda dataset](#) for the full email to participants, the survey results, and the list of pre-reading.

Research Agenda Forum

The in-person forum was held at the Association Forum of Chicago from May 1-2, 2025. 32 of the 35 members of the Research Agenda Advisory Council were able to attend. The forum went from 9:00 a.m. to 4:30 p.m. on Thursday May 1, and 9:00 a.m. to 2:00 p.m. on Friday May 2. Dinner for participants was held at Roanoke Restaurant at 5:30 p.m. on Thursday May 1.

→ See the [SAA Research Agenda dataset](#) for the forum agenda shared with participants, the more detailed agenda used by the forum facilitators, and the forum presentation slides.

Forum Day 1

Starting at 9:00 a.m., facilitators and SAA staff welcomed participants and gave them name placards with assigned table numbers. Participants were assigned to tables ahead of time by project team members in an effort to provide a diversity of perspectives at each table. A member of the project team was seated at each table to help facilitate conversations and take notes. Coffee, beverages, and snacks were available throughout the day.

→ See the [SAA Research Agenda dataset](#) for the list of participants at each table.

Session 1A-1B: Introductions

The forum started at 9:15 a.m. with brief introductions from SAA CEO Jacqueline Price Osafo and facilitator Jennifer Riccards. The rest of the project team was also introduced. The plan was to then have everyone at each table introduce themselves to each other for 15 minutes, including their name, affiliation, and an example of a current or past research or assessment project they were working on or excited about (maximum 2 minutes per person). However, Jennifer King suggested that it would be more beneficial if everyone introduced themselves to the entire room. Originally, the project team had thought that individual introductions from all participants might take too long, but everyone kept their introductions short and it proved to be worth the time spent.

Session 1C: Background

Next, Dennis Meissner and Jennifer King provided background information on the project, including information about CORDA, the development of the Research and Innovation Roadmap, the need for a research agenda, and the IMLS grant project itself.

Jennifer Riccards then presented an overview of the agenda for the forum, and the process the forum would follow to create the research agenda:

- History/background (establishment of CORDA, development of the Research and Innovation Roadmap, IMLS grant project)
- What is a research agenda?
- SWOT analysis of the profession (what is the state of the archival profession today?)
- Based on the SWOT analysis, what are the top priorities for the archival profession?
- What research is needed to address those priorities?
- What criteria should be used to prioritize the research needs?
- Apply the criteria to prioritize the research needs.

Session 1D: What is a research agenda?

Next, Jennifer Riccards summarized the responses to the pre-forum survey question, “what is a research agenda?” The working definition created from the survey responses was presented to participants for feedback:

“A guide to prioritize research on the profession's most pressing issues, outlining key questions, research areas, and methodologies.”

Participants noted that a similar document, OCLC's 2017 *Research and Learning Agenda for Archives, Special, and Distinctive Collections in Research Libraries*⁹ had been primarily used as an advocacy tool. In the ensuing discussion they posed several important questions:

- Who is the audience for this research agenda?
- What is the time frame for the agenda?
- How are we defining “research”?
- What is the research ecosystem?
- How can we develop research skills in archivists?
- How will CODA and SAA support the implementation of the research agenda?
- How should the agenda be used by MLIS programs?
- How do we ensure that research has a practical impact on archival work, and on the larger community outside of archives?

The project team had considered many of these same questions while planning for the forum. They did not have definitive answers for many of these questions (including “what is a research agenda?”) and acknowledged that this made both facilitation and participation in the forum more challenging. However, this was an intentional decision rather than an oversight; because this was the first time a research agenda of this kind was being created, the team wanted input from participants before making firm decisions about the scope of the research agenda. One question that CODA *could* answer was, “How can we develop research skills in archivists?”, since CODA is charged with providing tools and training to accomplish that end. A session was planned at the end of the forum to discuss implementation ideas for the Research Agenda.

→ See the [SAA Research Agenda dataset](#) for discussion notes from the forum.

Session 2: SWOT Analysis

After a 15 minute break, Jennifer Riccards introduced the next session, a SWOT analysis. Each table was instructed to consider the Strengths, Weaknesses, Opportunities, and Threats related to the archival profession today. Participants were given 30 minutes to complete the exercise and instructed to use the pre-survey data as a starting point. They were also advised to identify the key items in each quadrant, rather than attempting an exhaustive list.

→ See the [SAA Research Agenda dataset](#) for the SWOT analysis notes of each table.

⁹ Weber, Chela Scott. 2017. *Research and Learning Agenda for Archives, Special, and Distinctive Collections in Research Libraries*. Dublin, OH: OCLC Research. <https://doi.org/10.25333/C3C34F>.

Session 3A-3B: Profession Priorities

For the next session (scheduled for 70 minutes) Jennifer Riccards instructed each table to use the SWOT analysis as a starting point to identify the most important priorities for the archival profession for the next 5-10 years. Participants were advised that each SWOT item did not have to lead directly to a priority. Participants were given 10 minutes to reflect individually, then 45 minutes to discuss at their tables. The last 15 minutes were used for full-group discussion.

During the full-group discussion, the point was made that almost all roads lead back to advocacy. Codified standards and best practices help with advocacy and also with all of the work that archivists do. Metrics and measurements also help with advocacy. However, being responsible for everything at once (funding, training, creating standards, implementing standards, serving users, etc.) is a major challenge for archivists. An examination of the business model of archives was suggested. Participants asked, where did the notion that archives should be “free and cheap” come from? Archives are not “cheap” and the true costs of archiving are often unacknowledged by outsiders and/or downplayed by archivists afraid of sharing the true costs. Guidelines from other professions could be a good model for archives to adopt (for example, in hospitals one librarian is needed for every 500 employees). What skills (not just advocacy, but also technology and business management) do archivists have, and what do they need to make the profession stronger?

→ See the [SAA Research Agenda dataset](#) shared notes for each table and for the full room.

This session was followed by a 45 minute lunch break with boxed lunches delivered to the Association Forum.

What is a research agenda? (continued)

After lunch, Jennifer Riccards shared a rewritten definition for a research agenda: “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.”

Session 4A: Research Needs

The next session (scheduled for 60 minutes) focused on identifying research needs. Jennifer Riccards instructed participants at each table to brainstorm research needs based on the priorities identified. Participants were advised that some priorities may not

require research, and some research needs may not be directly connected to the priorities already identified. They were also advised that research needs could be articulated as topics, ideas, or questions, but “this is not the time for very specific research study questions.” Project team members at each table took notes in the shared notes documents.

Session 5A-5B: Criteria

Next, Jennifer Riccards introduced the criteria previously developed by the project team to prioritize research needs. Four criteria were presented with a scale of 1 (lowest priority) to 5 (highest priority), with points 1, 3, and 5 defined. Participants were instructed to discuss the criteria in groups of 3, and then after a 15 minute break, Jennifer Riccards facilitated a full group discussion to revise the criteria. The resulting draft criteria are listed below, along with the feedback from the full room discussion.

→ See the [SAA Research Agenda dataset](#) for the draft criteria document.

Criterion 1: Urgency

- 1: Urgency is low. It is not critical to study this topic right now.
- 3: Urgency is moderate. There is some need to study this sooner rather than later.
- 5: Urgency is high. It is essential to study this topic right now.
- Feedback:
 - Feels subjective; could be reframed as capacity to do research
 - Could be defined as: lack of research would cause loss of life, limbs, livelihood
 - Use urgency criteria *after* other criteria have been applied

Criterion 2: Impact

- 1: This research has an impact on a limited aspect of archival work and/or may have only a small effect on day-to-day work.
- 3: This research is of moderate use across the broader field, but may be key to some segments.
- 5: 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.
- Feedback:
 - Applicability– how does it grow the current body of research, how can others use it?
 - Could the research be applied to different types of repositories?
 - Is it actionable, is it doable, is it replicable?

- How does the research affect the work that we do on the ground?
- Clarify that we are referring to positive impact
- Does the research have long term or short term impact, does it affect a small number or large number of people?
- How can research/archives help communities?
- What are the risks - are there minimal or critical risks? (IRB standards)
- Is the research critical vs. trivial?
- What level is impact (local, state, national, etc.)?

Criterion 3: Focus on people (archivists and/or users)

- 1: This research does not focus on people (archivists and/or users)
- 3: This research is moderately focused on people (archivists and/or users)
- 5: This research is significantly focused on people (archivists and/or users)
- Feedback:
 - Use “centers” instead of “focused”
 - More focus on community? Stakeholders broadly defined rather than “people”?
 - What about research into collections damaged by natural disasters? It's important but it's not about people.
 - Maybe not a standalone, should be woven throughout other criteria

Criterion 4: Advances DEIA

- 1: This research is not focused on diversity, equity, inclusion, or accessibility.
- 3: This research is moderately focused on DEIA issues, among other priorities.
- 5: This research is significantly focused on diversity, equity, inclusion, or accessibility.
- Feedback:
 - Value and importance of this criteria, defining these terms, how the terms will evolve
 - Use “advances” rather than “focuses on”
 - What are the metrics we're going to use to measure if research advances DEIA
 - Strengthen our concepts of what equity can look like
 - One critique of previous DEIA efforts was that it was too sterile
 - These terms have lost a lot of their meaning, make our definition of DEIA more specific
 - Having DEIA as a separate criteria takes away from viewing the other criteria through a DEIA lens
 - Lift it up as a mission statement rather than its own actionable item

- If we eliminate this criteria now, there may not be opportunities in the future to apply/use these terms
- Advancing inclusive practices, not doing harm. Beneficence, respect for persons, and justice.
- Consider decolonial methodologies as a critical positive - rather than how academia has defined research - include as a strategy

In the discussion of all criteria *feasibility* was brought up multiple times, including timeliness, funding, people who can do the work, what is possible in the long term vs. the short term, and acceptance of non-traditional research (i.e. outside academia). The group decided to prioritize the criteria themselves, designating impact, focus on people, and DEIA as the most important criteria to be applied first, and then feasibility and urgency as second-tier criteria to be applied after.

Session 6A-6B: Research Clusters

In this session, Jennifer Riccards instructed participants to organize the research topics/questions into “clusters,” identifying 5-6 clusters if possible. Participants were advised that some topics may fall under multiple clusters, and clusters may be similar to priority areas. Participants were also asked to review the list of topics and clusters and determine if there were any gaps, and to consider the criteria to start prioritizing topics (and removing some if possible). 45 minutes were allotted for table discussion, and 45 minutes for full group discussion. During the full group discussion, each table reported out to the full group the research clusters they identified. This was the last session of the day, following which a group dinner was held at a nearby restaurant.

In the evening after day one, Jennifer Riccards and Amy Colton used OpenAI ChatGPT-4o to help aggregate and sort the clusters and topics from the six table groups into a synthesized set of 10 clusters. The shared notes from day one were entered into AI to synthesize the content by identifying recurring themes, grouping related research questions, and highlighting issues that were repeated across tables. The AI-generated output provided a consolidated and organized draft list of research priorities, preserving the original language whenever possible while reducing duplication. This synthesized list served as a working draft for the group to review, refine, and vote on during day two prioritization activities.

The prompt that was presented to the AI app: "Please review the attached meeting notes from small group discussions during day one of the archivist research agenda meeting. Each group conducted a SWOT analysis and generated a list of research priorities, which they then sorted into clusters. Can you synthesize these notes into a consolidated list of research priorities, grouping similar ideas together and identifying overarching themes? Please preserve the original language where possible and

organize the results in a way that can be used for group review and prioritization on Day 2.”

The facilitators did not consult with the CORDA-core team or forum participants before using ChatGPT to help aggregate and synthesize the shared notes from day one. The AI-generated output was helpful in identifying overarching research priorities, but the narrative it produced for each research priority lacked substance and accuracy. Future projects should consider incorporating AI policies into contracts, as consent of participants prior to use is imperative.

Forum Day 2

Starting at 9:00 a.m., facilitators and SAA staff welcomed participants and asked them to sit at the same tables as the day before. Coffee, beverages, and snacks were available throughout the day.

Session 7: Introductions

At 9:15 a.m., SAA president Derek Mosely and SAA Vice President Mario Ramirez welcomed participants to day two of the forum. Jennifer Riccards then outlined the agenda for day two:

- Revisit the revised criteria
- Go over aggregated research clusters
- Vote to narrow research clusters
- Deep dive into selected clusters
- Next steps, dissemination, usage of Research Agenda

Session 8: Review Criteria

Jennifer Riccards presented the revised criteria to participants and invited feedback and discussion. Revised criteria:

Criterion 1: Advances DEIA

- 1: This research does not advance DEIA issues.
- 3: This research moderately advances DEIA issues, among other priorities.
- 5: This research significantly advances DEIA issues.

Criterion 2: Centers on archivists and/or consumers

- 1: This research is not centered on archivists and/or consumers
- 3: This research is moderately centered on archivists and/or consumers
- 5: This research is significantly centered on archivists and/or consumers

Criterion 3: Impact

- 1: This research has an impact on a limited aspect of archival work and/or may have only a small effect on day-to-day work.
- 3: This research is of moderate use across the broader field, but may be key to some segments.
- 5: 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.

Criterion 4: Feasibility

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

Criterion 5: Urgency

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

→ See the [SAA Research Agenda dataset](#) for the revised criteria document.

During the full group discussion, participants noted that intellectual merit and contribution to knowledge were missing from the criteria. There was also a discussion about what the scope of this Research Agenda should be. The Agenda is not for the profession globally; it is limited to North American archivists, or more specifically, archivists in the United States. Also, because regional and allied professional organizations were not directly involved in creating the Agenda, it should be further limited to SAA.

The question was raised, “can we really prioritize research for the community?” This agenda seems more appropriate for prioritizing SAA funding or for SAA’s strategic plan. The argument was made that the prioritization is about what is included in the Research Agenda, and the Agenda is not meant to be prescriptive in telling people what research they should do. It is meant to identify the biggest emerging issues, gaps, and problem areas, and provide context about the research landscape.

Participants also noted that the criteria were themselves a valuable tool independent of the Research Agenda, and could be used to evaluate and plan individual research projects. The Agenda and the criteria are separate instruments with different lifespans. The Research Agenda identifies what needs to be addressed sooner rather than later, and those priorities will change over time. The criteria, to the contrary, will be more durable.

Session 9A-9B: Research Clusters (continued)

In the next session, Jennifer Riccards introduced the 10 research clusters that she created using ChatGPT from the work done during day one. Participants were invited to give feedback and also advocate in favor of a cluster being a top priority. The clusters are listed below, along with notes from the discussion:

1. **Partnering with Communities** (*Reciprocal and Reparative Collaboration, Community-Driven Archiving, Archives with, Not About, Communities*)

Goal: Advance community-centered archival practices rooted in mutual benefit, shared authority, and long-term relationship building

Discussion notes: “Reciprocal and Reparative Collaboration” is a better title; partnering is not collaboration.

2. **Rethinking Archivist Training** (*Making Archival Education More Inclusive, Breaking Barriers in Archival Education*)

Goal: Reimagine archival education, credentialing, and skill-building to promote accessible, practice-based learning across various pathways.

Discussion notes: Who is going to replace us? Set the precedent for the next generation. Bringing in students from other disciplines clarifies our value and expands our reach. We are not a big community, so we need to make friends and have advocates, and education seems like a natural partnership.

3. **Enhancing Archival Workplaces** (*Fair Pay, Fair Practice, Equity, and Well-Being in Archival Careers*)

Goal: Foster sustainable and inclusive working conditions, develop leadership skills, and ensure equitable organizational practices.

4. **Proving the Value of Archives** (*Measuring What Matters, Archives that Make a Difference*)

Goal: Enhance the field’s capacity to measure, communicate, and advocate for its value across sectors using both quantitative and qualitative tools.

5. **Making Archives More Accessible** (*Access for All, Removing Barriers to Use*)

Goal: Create access systems that prioritize usability, accessibility, and human rights, particularly for marginalized communities.

6. **Building Stronger Archives** (*Archives That Last, Operational Models that Work*)

Goal: Identify adaptive organizational structures, staffing benchmarks, and internal standards that promote long-term resilience.

7. **Responding to Climate and Crisis** (*Archives in a Changing World, Protecting Memory Through Crisis*)

Goal: Tackle the effects of environmental, political, and social pressures through climate-aware and future-ready archival practices.

Discussion notes: The SAA Committee on Public Policy (COPP) lobbied for legislation on archives and climate change and the representative's staff said they need more research and more data in order to push for legislation and get legislative support. More research in this area can have an impact.

8. **Leading with Ethical Technology** (*Archives and AI: Getting It Right, Human-Centered Digital Tools*)

Goal: Empower archivists to shape and ethically implement digital innovations, including AI, data extraction, and records processing.

9. **Sustaining Archives Financially** (*Rethinking Archival Funding, Business Models That Reflect Our Values*)

Goal: Explore how archives can cultivate values-aligned, sustainable financial practices that minimize reliance on unstable external funding.

10. **Collaborating Across Fields** (*Archives as Interdisciplinary Connectors, Working Across Sectors*)

Goal: Develop integrative research and practice frameworks across disciplines (e.g., law, tech, social work) to enhance archival relevance and innovation.

Discussion notes: Collaborating within the profession across different sectors is important as well. Everyone brings something to the table. Work across different frameworks, interdisciplinary and transdisciplinary.

During the discussion participants also discussed the value of this agenda for other disciplines- could these topics align with the priorities of other disciplines? How could

we make this intelligible to other disciplines? The topics are all very inward-facing; to what extent would they reinforce misunderstandings about the value of archives?

→ See the [SAA Research Agenda dataset](#) for the full “Research Priority Clusters” document.

After the clusters were discussed, participants were asked to each vote for four clusters that they thought should be included in the Research Agenda. Voting was conducted by Jennifer Riccards and Amy Colton via Google Forms. The results of the first round of voting are listed below (33 responses were submitted):

Cluster	Number of votes	Percentage of votes
1: Partnering with Communities	21	63.6%
2: Rethinking Archivist Training	16	48.5%
3: Enhancing Archival Workplaces	8	24.2%
4: Proving the Value of Archives	19	57.6%
5: Making Archives More Accessible	12	36.4%
6: Building Stronger Archives	7	21.2%
7: Responding to Climate and Crisis	19	57.6%
8: Leading with Ethical Technology	11	33.3%
9: Sustaining Archives Financially	11	33.3%
10: Collaborating Across Fields	7	21.2%

The top 4 clusters in the first round of voting were:

- 1: Partnering with Communities
- 4: Proving the Value of Archives
- 7: Responding to Climate and Crisis
- 2: Rethinking Archivist Training

→ See the [SAA Research Agenda dataset](#) for the survey instrument and data from the first round of priority cluster voting.

After a brief full group discussion, Jennifer Riccards and Amy Colton facilitated a second round of voting. The top 4 clusters were removed from the ballot, and participants were asked to vote for 2 additional clusters to be included in the Research Agenda. The results of the second round of voting are listed below (32 responses were submitted):

Cluster	Number of votes	Percentage of votes
3: Enhancing Archival Workplaces	6	18.8%
5: Making Archives More Accessible	13	40.6%
6: Building Stronger Archives	6	18.8%
8: Leading with Ethical Technology	26	81.3%
9: Sustaining Archives Financially	6	18.8%
10: Collaborating Across Fields	7	21.9%

Based on the second round of voting, the following two clusters were added to the “final list”:

- 8: Leading with Ethical Technology
- 5: Making Archives More Accessible

→ See the [SAA Research Agenda dataset](#) for the survey instrument and data from the second round of priority cluster voting.

In the next two sessions, Jennifer Riccards assigned one of the clusters to each of the six participant tables, and told participants to self-select a table to join in order to do a “deep dive” on each research cluster. The instructions for the “deep dive” were as follows:

- Decide on a title
- Refine the goal
- Develop a rationale
- Identify key research questions/studies - make sure to consider:
 - Relevance to advancing/addressing DEIA issues
 - Technology issues/considerations
 - Environmental considerations
- Identify methodological considerations and/or recommendations
- (if time) Add relevant past research/upcoming opportunities to support this research
- IF THERE IS TIME (or if it happens as you discuss): Use the criteria to prioritize the questions/studies

Participants were asked to take notes in a shared document (with the help of a project team member seated at each table). They were also advised that there would be a second round afterwards for everyone to select a different table/research cluster, and that the shared notes document would be open for additional comments and revisions for a period after the forum, as well.

→ See the [SAA Research Agenda dataset](#) for the “Research Priority Clusters_Narrowed” document.

Session 10: Overview of Next Steps

CORDA co-chairs Emily Lapworth and Jane Fiegel provided an overview of the next steps that the project team would be taking to synthesize the work from the forum into a draft of the Research Agenda. The team planned to first share the draft Agenda for feedback with the forum participants, and then at the SAA Annual Meeting in August 2025. The final products of the project would include:

- The Research Agenda
- A report describing the process used to create the Research Agenda
- A dataset of the data related to the creation of the Research Agenda, made available via the SAA Dataverse
- A maintenance framework for the Research Agenda
- A communication and outreach plan for the Research Agenda

Session 9 [sic]: Promotion and Implementation Brainstorming

Jennifer Riccards led a full group discussion asking participants for their ideas on how to disseminate the Research Agenda, and how the Agenda could be used by different audiences such as SAA, funders, universities, government entities, and community archivists. Participants suggested sharing the Agenda with regional and allied organizations. The Research Agenda could be a call to action to encourage allied professions to collaborate on research, but the project team should be conscientious about how the message is framed to acknowledge that the Agenda was created by SAA and therefore may not align with the priorities of other organizations or fields. However, the process used to create the Agenda could also be useful to share if others wish to replicate it. Organizations suggested included:

- Regional Archival Associations Consortium (RAAC)
- International Council on Archives (ICA)
- Council of State Archivists (COSA)
- National Association of Government Archives and Records Administrators (NAGARA)
- Association of Tribal Archives, Libraries, and Museums (ATALM)
- Journals such as *Comma* and *Archivaria*
- International knowledge management organizations
- United Nations allies
- Community archives and organizations

Participants surfaced a number of ideas and recommendations aimed at implementing and promoting the Research Agenda:

- The value of reaching out to non-academic archivists and researchers, on-the-ground archivists, and small archives, and broadening participation in research as much as possible.
- Academic archivists with research expertise could provide mentoring.
- There was once a research institute that sponsored impactful research. Could something like that be started again?
- Reduced funding for research is a threat to implementing the Agenda. However, the Agenda is also a valuable tool that can help identify and articulate the highest priority research needs for funding SAA has a leading role in disseminating and implementing the Research Agenda, and participants encouraged a shared ownership of the Agenda beyond CORDA.
- Participants also encouraged a peer-to-peer dissemination, rather than top-down. The Agenda could be shared within existing frameworks, such as section coffee chats. There are many specialized sections within SAA, and there is a strong tradition of applied research happening within sections.

- SAA Council could use the Research Agenda to inform SAA's strategic plan.
- The SAA Foundation could fund research that is aligned with the Research Agenda.
- The editor of the *American Archivist* pledged to work with CORDA to publish articles related to the Research Agenda.
- CORDA could create a bibliography to highlight research that is inspired by the Research Agenda.
- The call for proposals for the SAA Annual Research Forum could be guided by the themes in the Research Agenda.

Forum participants were asked to fill out a survey to provide feedback on the event. Nineteen out of 23 respondents indicated that they felt positively about the outcome of the forum, and 18 out of 23 felt that the group made significant progress toward defining research priorities.

→ See the [SAA Research Agenda dataset](#) for the post-forum feedback survey results.

Forum Outputs

In Chicago, the team expected to accomplish a lot in a condensed timeframe, but the facilitation did not narrow and synthesize the conversation enough to produce a rough draft of the Research Agenda. The CORDA core team acted as facilitators at five of the tables, but specific training or preparation for this role would have helped them feel better prepared and serve more effectively and consistently in this role. The project team wanted buy-in and consensus from the Collective on the definition of the Research Agenda, the scope of the Agenda, and the criteria to use to prioritize research before the group could begin work on actual prioritization; this left less time for actual prioritization of research than desired. This extra time spent on laying the groundwork, however, proved valuable. Although the 2-day forum did not produce a draft Research Agenda, it did produce a definition of the Research Agenda, a criteria matrix tool to prioritize research, and the six research themes that went on to serve as the foundation for the Research Agenda. The grant project proposal initially aspired to deliver a research agenda for the “archival profession;” however, at the forum participants noted that because of the gaps in representation, and a lack of involvement with allied professional organizations,¹⁰ the Agenda could really only be scoped for SAA and its membership.

¹⁰ Such as Association of Tribal Archives, Libraries, and Museums (ATALM), National Association of Government Archives and Records Administrators (NAGARA), etc.

Drafting the Research Agenda

Based on the outputs of the forum, Jennifer Riccards delivered the first draft of the Research Agenda to the core project team on May 30, 2025. The top six research clusters identified during the forum were renamed “research themes”:

1. Collaborating With Communities
2. Rethinking Archivist Training
3. Leading With Ethical Technology
4. Making Archives More Accessible
5. Proving the Value of Archives
6. Responding to the Climate Crisis

This draft summarized the goal, rationale, key research questions, and suggested methodologies and models for each theme.

→ See the [SAA Research Agenda dataset](#) for the first draft of the Research Agenda.

The project team had originally planned to share a full draft of the Research Agenda at the SAA Annual Meeting on August 25, 2025, but instead decided that more work and additional time was needed to replace the somewhat bare-boned bulleted lists in the draft with in-depth narrative discussion of the context, rationale, and recommendations for each research theme.

Re-engaging the Research Agenda Advisory Collective

The project team emailed the Research Agenda Advisory Collective with updates and next steps on August 15, 2025. The team invited the collective to re-engage in the project via a series of virtual focus groups. Collective members interested in participating were asked to complete a Google Form to indicate which research theme(s) they could lend additional expertise to, and what their maximum availability would be for a number of timeslots in October.

→ See the [SAA Research Agenda dataset](#) for the “Research Agenda Advisory Collective_ update and next steps_email.pdf”

The core project team focused on editing the six themes (also referred to as the research “priorities”) of the Research Agenda, and shared a revised description of the priorities with the Research Agenda Advisory Collective as a draft for feedback on

September 26, 2025. The draft of the Research Agenda priorities was shared as a Google Doc and the collective was invited to share their comments and edits in suggestion mode. The email also contained information about the six virtual focus groups, each of which would last 90 minutes and address a single theme.

→ See the [SAA Research Agenda dataset](#) for the Research Agenda priorities draft (one version without comments, one version with anonymized comments) and the feedback request email.

Virtual Focus Groups

The six focus groups, developed and led by the core project team, were held virtually via Zoom in October 2025. Collective members were sent calendar invites for specific focus groups based on their interests expressed in the Google Form, but an email had also been sent to the entire Collective with the final focus group schedule and an encouragement to join any session if they were interested. The sign-up and attendance numbers for each session are below, in the focus groups' chronological order:

“Research priority” topic of focus group	Date of focus group	Number of registrants	Number of actual attendees
Rethinking Archivist Training	2025-10-10	8	6
Proving the Value of Archives	2025-10-21	8	8
Collaborating with Communities	2025-10-21	7	5
Leading with Ethical Technology	2025-10-22	6	3
Making Archives More Accessible	2025-10-28	11	6
Responding to Climate Crisis	2025-10-29	4	0

Planning and Development

The feedback from the Forum made it clear that the Collective wanted additional time to delve deeper into the research priorities, especially to do so together as a group, and these six 90-minute Zoom sessions enabled that level of engagement. The core project team sought to structure the focus groups in a way that allowed all attendees to share their thoughts and engage fully with one another, while also generating discussions that would result in the clarification and refinement of the SAA Research Agenda's first draft.

After exploring different facilitation options, the team determined that [Liberating Structures'](#) Conversation [Cafe](#) method was the optimal way to frame the focus groups' discussions. In the Conversation Cafe method, each attendee would have a set, short amount of time to share their thoughts and feedback, guided by prompts or questions; after everyone has spoken, attendees would then have another round of short, set, individual time limits to respond to what was said in the previous round, after which the discussion moves into an open conversation with the group. Utilizing this method ensured that everyone would have an equal amount of space to speak and be heard while having focused discussions.

To ensure that all sessions ran smoothly, the core project team established four separate roles to manage the array of tasks that the virtual focus groups required. One member of the core project team would serve as the lead facilitator for a session, where they were in charge of moving the group through each component of the agenda and guiding the discussions on that particular session's research priority. Another team member would act as the alternate facilitator and was primarily responsible for timekeeping and alerting the lead when time limits reached. Since the 90-minute Zoom sessions were not recorded, two additional team members would handle notetaking to better ensure that the group's discussions would be accurately and fully captured. The roles of Lead Facilitator, Alternate Facilitator, Notetaker 1, and Notetaker 2 were swapped around for each focus group, so that responsibilities were more evenly spread throughout the team.

The core project team also created a handful of materials during the development phase to aid the day-of efforts when running the focus groups. A templated Google Slides presentation was created by Chris Marino to guide the flow of each session, and only required minimal adjustments between the different focus groups. Chris Marino also created six Google Documents, one for each focus group, that the team used as central information hubs when hosting the focus groups. These "run of show" documents contained links to relevant resources that would be shared during the Zoom sessions, links to the sessions' separate Google Documents the notetakers would use to record the conversations, along with a timed schedule of the different components of the focus groups (discussed more in-depth below).

Running the Focus Groups

Every focus group adhered to the same structure and framework that the core project team developed. Each session was formatted into five sections: Introductions, Context, Agreements, Discussion, and Wrap-Up.

Introductions

The focus groups opened with a round of introductions, with every person present sharing their names and, optionally, pronouns, their job titles and places of employment, and their answers to that particular session's icebreaker question. This section, along with Context, the next section, had been scheduled to take roughly eight minutes.

Context

The Lead Facilitator then provided the Collective members present with contextual information how and why the core project team pivoted efforts after the 2-day Forum and how the Collective's work had been synthesized. The final definition of "research agenda," the criteria matrix, and the six prioritized research themes were shared again, after which the Lead Facilitator would explain what the project's next steps were and what the focus groups hoped to achieve.

Agreements

A set of agreements for the virtual focus group's code of conduct were then shared, and attendees were encouraged to add anything they thought had been left out. The final version of the conduct agreements is as follows:

- Suspend judgment as best you can
- Respect one another
- Seek to understand rather than persuade
- Invite and honor diverse opinions
- Speak what has personal heart and meaning
- Go for honesty and depth without going on & on & on
- Assume best intent

The discussion portion of the sessions would occur once all attendees agreed on the code of conduct. The Lead Facilitator then explained how the conversations were going to be structured and the discussion formats the attendees would follow. This section was scheduled to only take about two minutes.

Discussions

Following Liberating Structures' Conversation Cafe method, three rounds of discussion were planned. These discussions were allotted a total of 68 minutes: 33 minutes for Round One, 11 minutes for Round Two, and 24 minutes for Round Three. The actual lengths of the rounds were expected to vary from session to session, so those numbers were treated as the maximum amount of time each round could take.

In Round One, all attendees had up to three minutes to speak without interruption. During this round, attendees were invited to share their initial impressions about the draft for the session's specific research priority as well as any other general thoughts and feedback they wanted to share. Attendees were also asked to respond to the prompts displayed on the Google Slides, which were:

- Research Agenda should communicate:
 - What the top priority research needs are
 - Why they are the top priorities (including potential impact)
 - How they might be achieved
- Please make suggestions for how to improve this draft to effectively communicate to internal (SAA/archivists) and external audiences.
- *remember the Criteria

Attendees spoke one at a time; when they were ready to share their thoughts, they used the "Raise Hand" Zoom feature, and the Lead Facilitator would call on them to speak.

After everyone spoke, the group would move onto Round Two. During this round, attendees were given up to one minute, without interruptions, to respond to something that was said in Round One. Round Two was technically an optional round; attendees were not required to share a response, so the group would immediately move onto Round Three if no one wanted to speak.

Round Three shifted the group into open conversation. While the Lead Facilitator would provide a few prompts and follow-up questions, discussions during this round were intended to be less structured and flow more naturally than before. Everyone spoke freely; attendees did not have to wait to be called on, and no time limits were applied to any responses. Members of the core project team also participated in the conversations during Round Three, which led to deeper explorations of the research themes. Since this round was designed to feel more relaxed, the Lead Facilitator had some flexibility in how they transitioned the group out of Round Three and into the final section. Some focus groups concluded their discussions early, while others went longer and borrowed time from the remaining Wrap-Up section.

Wrap-up

To close out each focus group, the Lead Facilitator gave a summary of the major points that had been discussed in the session. They reiterated the necessary changes to the research theme drafts that attendees had identified, including the different pieces of information to add to or take out of the drafts. If nothing else needed to be added to the wrap-up summary, the Lead Facilitator would end the virtual focus group session after sharing the core project team's next steps with the attendees.

Insights from the Virtual Focus Groups

Focus group participants provided helpful feedback on the draft Research Priorities shared with them on September 26, 2025. Although no attendees were able to join the last scheduled focus group on October 29, 2025, which was focused on the research theme “Responding to Climate Crisis,” three to eight Collective members attended each of the other five focus groups. Participants shared thoughtful feedback about the overall structure of the Research Agenda, the contextual narrative sections of each research theme/priority, and the individual research questions. The overlap between the themes was noted, but after discussion the consensus was that there was value in keeping all six separate themes. Both the CORDA-core members who drafted the Research Agenda and the Collective members acknowledged the challenge of keeping the focus of the Agenda specific enough to be actionable, but broad enough to avoid being overly prescriptive. Discussions were wide-ranging as participants explored the many facets of each theme, which were summarized in the contextual narrative description of each research theme, and the focus groups were able to refine the key research questions of each theme.

Re-engaging the Collective was an incredibly time consuming yet critical endeavor, involving nine hours on zoom plus additional time synthesizing notes from the discussion and incorporating content into the draft Research Agenda. Future projects should consider allotting more time for synthesis in the event that what was set out to accomplish in the in-person forum is not attainable. Zoom worked well as a convening tool to continue the conversations that began at the in-person forum in May, and programming an ice breaker to kick-off each session to get people comfortable and talking was effective. Objectives and format for the 90 minutes were clearly laid out to the participants in pre-session communication as well as at the start of each convening, which enabled the facilitators to keep to task and be efficient with time. Utilizing the [Conversation Cafe](#) format from the Liberating Structures facilitation framework was successful, giving participants the space to explore and discuss the six research themes, allowing important discussions to take place, surfacing critical themes and research questions that would otherwise not have been uncovered given the condensed timeframe of the in-person forum. Note taking during the Zoom sessions was challenging (in terms of speed needed to capture and accuracy of notes), future projects could consider recording sessions with the consent of participants and transcription using built-in zoom capabilities, although this may affect the participants candidness.

→ See the [SAA Research Agenda dataset](#) for notes from the virtual focus groups.

Public Comment Period

The core project team spent approximately a month-and-a-half incorporating the focus groups' feedback into the Research Agenda's draft, and the first public draft was finalized by mid-December 2025. This version, referred to as the SAA Research Agenda (SAA-RAD), captured the total extent of the work and ideas that came from the two-day forum and its subsequent events. The six thematic research areas were addressed in the document, with justifications as to why that theme was prioritized and suggestions for potential research questions to explore. Additionally included in the SAA-RAD were the other two major outputs from the two-day forum: the criteria rubric for prioritizing research topics and the collaboratively constructed definition of "research agenda."

The SAA-RAD was available for public comment from January 16 to January 30, 2026, a period of roughly two weeks. The announcement about the release of the SAA-RAD and the call for feedback was shared through multiple SAA communication channels, including SAA listservs and SAA's official social media accounts. A new subpage on CORDA's microsite was created as the central hub for information about the SAA-RAD, featuring the following:

- Information about the IMLS grant's history
- Purpose and goals of the Research Agenda's final draft
- Contextual information about how the SAA-RAD was created
- Instructions for submitting public feedback and what the responses will be used for
- Next steps for the SAA-RAD
- Links to the Google Doc and Google Form
- PDF copy of the original version of the SAA-RAD
- Links to related pages, including the IMLS Grant announcement, the call for forum applicants, and the list of Collective members

A copy of the SAA-RAD was shared as a comment-enabled Google Doc, in which anyone could add comments and suggestions directly. Twenty-two comments were added to the Google Doc from multiple individuals. This was the primary mechanism for collecting feedback, but a Google Forms survey was also utilized to gather feedback. Ten responses were collected via the survey. Utilizing a Google Form in addition to in line comments enabled the team to capture feedback that was relevant to the project but did not tie readily to the text of the draft. For example the team was informed of a similar project that was under way in the UK, allowing the project team to make a meaningful connection. A Google account was not required to post comments or submit survey responses, so people could share their feedback anonymously if desired.

The period for public feedback ended on January 30th. Commenting was disabled on the Google Doc and the Google Form was closed, but the SAA-RAD page on CORDA's microsite remains accessible, as does an uneditable version of the SAA-RAD that includes the public comments.

→ See the [SAA Research Agenda dataset](#) for the Research Agenda draft shared for public comment, the open call for feedback, and the feedback collected.

Publishing the SAA Research Agenda

After reviewing the public comments on the SAA-RAD, the core project team completed final revisions to the SAA Research Agenda. The final version of the 2026-2031 SAA Research Agenda was published on the [SAA website](#) and shared with SAA membership via SAA's official communication channels.

→ See the [SAA Research Agenda dataset](#) for the final version of the SAA Research Agenda.

Next steps

Promotion and Implementation

In alignment with its charge, CORDA is committed to using the Agenda to guide its programming, including events such as the Research Forum, coffee chats, panel discussions, and educational offerings. CORDA is also committed to promoting and supporting the SAA Dataverse and the Facts & Figures page as resources to preserve and share data and research about archives.

Based on input from the Research Agenda Advisory Collective, the project team submitted recommendations to the SAA Council for specific actions it can take to help promote and implement the Research Agenda within the SAA community and the wider archival profession. The recommendations include:

1. Promote the Research Agenda to the SAA community: membership, component groups, and stakeholders. Publish the Research Agenda on the SAA website in a prominent location.
2. Consider the implementation of the Research Agenda in strategic planning.
3. Strengthen SAA's data collection. Conduct A*CENSUS surveys on a regular timeline (every 5 or 10 years), and/or charge committees, sections, or SAA staff

to conduct shorter, more focused surveys in regular, staggered cycles. All data should be deposited into the SAA Dataverse.

4. Use the Research Agenda to inform programming.
5. Use the Research Agenda to frame calls for proposals for future Annual Meetings.
6. Fund research related to the top priorities identified by the Research Agenda through Foundation grants and other funding opportunities.
7. Bestow award(s) for research. Existing SAA awards focus on service, advocacy, and writing and publishing. Revise the criteria for existing award(s) to clearly communicate that research that is shared in any venue (not just a published article) can be awarded, and/or create a new award specifically for impactful research.
8. Incorporate research more explicitly into the SAA Mentoring Program. Advertise and recruit participants for mentoring relationships explicitly focused on helping archivists to plan, conduct, and share their research.
9. Create a new discussion group in SAA Connect focused on research. According to SAA's Guidelines for SAA Sections on Merging, Transitioning to a Discussion Group, and Sunsetting, "A discussion group is an informal community of practice without the formality of elected leadership. Discussion groups have listservs on SAA Connect but are not bound by the SAA Governance Manual for holding section elections, having a steering committee, or holding annual business meetings and other programming." A discussion group focused on research would facilitate research by providing an informal venue for archivists to discuss and share their research, find collaborators, solicit feedback, and ask questions.
10. Share the Research Agenda with allied organizations (such as those listed below). Organize event(s) to facilitate discussion and dialogue about the applicability and usefulness of the Research Agenda to these allied organizations.
 - a. Regional Archival Associations Consortium (RAAC)
 - b. Council of State Archivists (COSA)
 - c. National Association of Government Archives and Records Administrators (NAGARA)
 - d. Association of Tribal Archives, Libraries, and Museums (ATALM)
 - e. Community archives and organizations
 - f. Journals such as *Comma* and *Archivaria*
 - g. The international archives community: Association of Canadian Archivists (ACA), International Council on Archives (ICA), United Nations allies, and international knowledge management organizations.

Assessment and Maintenance

The intended lifespan of this Research Agenda is 2026-2031. In September 2030, CODA will convene a task force to review the implementation and adoption of the SAA Research Agenda. The task force should consider the following questions:

- What is the impact of the 2026-2031 SAA Research Agenda? How has it been used?
- What are the predicted costs and benefits of creating a new version? Do the benefits outweigh the costs?
- Should SAA and CODA convene a task force to create a new version of the Research Agenda?
- If so, how should the new version be created? Should the new version be created by revising and updating the 2026-2031 version? Should it be created from scratch? Should the same model be used to create it?
- What should the lifespan of the new version be?

If the task force recommends creating a new version of the Research Agenda, they should also propose a plan for creating it. The task force's recommendations and plan should be submitted to the SAA Council for consideration and approval at the August 2031 Council meeting.

Based on their experience developing this Research Agenda, the authors recommend that SAA supports the development of the next iteration of it by providing resources for a paid consultant to undertake this important and time-intensive work. The consultant should have expertise and experience in archives and in whatever facilitation techniques or methodology the task force recommends. The project team found that the in-person nature of the forum held in Chicago was critical in developing the Research Agenda, and recommends incorporating an in-person component in future Agenda development efforts. Futures thinking and scenario planning, modeled on professional library associations efforts like the [Association of Research Libraries ARL 2030 Scenarios](#), the International Federation of Library Associations and Associations [Trend Report](#) or [Weak Signals Report](#) will benefit a futures-oriented agenda. Conducting a survey of archivists about what research and data they need most could also be used as a method to develop the next iteration of the Research Agenda. In order to develop a research agenda beyond the scope of SAA, the team recommends collaborating more closely with allied organizations.