



**Society of American Archivists
Strategic Priority Outcomes and Activities
FY 2010 – FY 2014**

At its May 2010 meeting, the SAA Council adopted this newest version of our Strategic Priorities, setting a future course for the organization that is guided by our members’ needs and our shared values. Under development since February 2009, the plan draws on members’ comments on earlier versions and on our collective experience with previous plans. Although the Council issues this version (2010 – 2014) in its completed form for the first time, SAA members and staff have already started working on goals that took final form some time ago. By flexibly and creatively focusing effort throughout our organization on work that has the greatest potential to improve the archives profession, the plan can help us realize long-held ambitions. Make no mistake: This new strategic plan aims high!

The plan carries forward the three priorities that SAA first adopted in 2005 – technology, diversity, and advocacy/public awareness – but tackles them with new goals (“desired outcomes”) and actions. See below for the full plan, including implementation steps and timelines. A separate document lists all SAA work toward the three priorities since 2005.

The plan describes each strategic priority as an issue with which SAA must engage on behalf of its members and the profession. For technology, the issue is rapid change that requires improved archival methods and better communications. For diversity, the especially complicated issue is one of strengthening archives’ relevance to society, of increasing diversity within the profession, and of building a more complete documentary record. And for advocacy and public awareness, the issue involves increasing archives’

and archivists' influence so that we gain the support we need as professionals and as repositories to improve our work.

Although the Council did not change the three strategic issues it had adopted for earlier plans, we did devise some new goals to pursue them. The plan presented below maps out each priority with a set of desired outcomes, activities, and implementation steps that are assigned to SAA staff, volunteers, or component groups, sometimes with assistance from consultants or external experts. This is the most detailed of all SAA plans in the past five years. The staff used it to construct SAA's draft budget for FY 2011, proposing funds for each implementation step calendared from July 2010 to June 2011. By approving these resources for the beginning phases of work, the Council ensured that the plan takes off smoothly and that progress on work already started continues without interruption.

The 2009 – 2010 Council has taken a fresh look at what we must do to address long-standing issues and fulfill our dreams. These are ambitious goals that raise the bar for SAA and the archives profession. While there is no proven route to success, we can make long strides by using this plan flexibly and creatively. We must treat it as a living document and continually assess its targets and our work toward them. If we are willing to keep examining the plan's basic assumptions and to change its mechanisms in light of our experience, we will move in the right direction – toward a better future for archives and archivists.

Peter Gottlieb
SAA President, 2009 – 2010
June 14, 2010

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If you would like to comment on the plan, send an email message to:
saahq@archivists.org

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STRATEGIC PRIORITY #1: TECHNOLOGY

Issue Statement:

Rapidly changing information technologies challenge archival principles, practices, and communication protocols, demanding effective leadership from the archives community to access, capture, and preserve records in all formats.

Desired Outcome #1: SAA will provide education and training to its members to ensure that they are aware of relevant standards and adopt appropriate practices for appraising, capturing, preserving, and providing access to electronic records.

Measurable Activities:

- a. Survey SAA members to determine their perceived needs for training in appraising, capturing, preserving, and providing access to electronic records. (FY 2010)
 - Evaluate and report out on existing survey data and attendee feedback regarding perceived needs in this content area. (Education Committee, De Sutter; December 2009) **[DONE]**
 - Develop survey questions. (Education Committee, vet through Electronic Records Section; December 2009) **[DONE]**
 - Select survey mechanism. (De Sutter; December 2009) **[DONE]**
 - Disseminate survey to appropriate groups. (De Sutter, Salgado; January 2010) **[DONE]**
 - Tabulate results and prepare evaluative report/recommendations for Council consideration. (Education Committee, De Sutter; February 2010) **[DONE]**
- b. Seek input from SAA committees, sections, and roundtables for leadership and guidance about providing education on appraising, capturing, preserving, and providing access to digital records. (FY 2010)
 - Evaluate and report out on existing data collected from committees, sections, and roundtables on this subject. (Education Committee, De Sutter; December 2009) **[DONE]**
 - Based on existing data and results of member survey, consider need for further solicitation of information. (Education Committee, De Sutter, Council; March 2010) **[DONE]**
 - If appropriate, field survey to component groups; report to Council on results/recommendations. (Education Committee, De Sutter, Council; April – May 2010) **[DONE]**
- c. Survey instructors, participants, and organizers of SAA's 2006-2009 Electronic Records Summer Camp offerings to determine whether participation in the program has had an impact on their practices, and analyze survey results to determine areas for improvement. (FY 2010)

- Evaluate and report out on existing data collected from instructors, participants, and organizers. (De Sutter; August 2009) **[DONE]**
 - If additional data are needed, develop survey questions. (Education Committee, De Sutter, ERSC Instructors; January 2010) **[DONE]**
 - Select survey mechanism. (De Sutter; January 2010) **[DONE]**
 - Disseminate survey to ERSC graduates. (De Sutter, Salgado; January/February 2010) **[DONE]**
 - Tabulate results and share with ERSC instructors. (Education Committee, De Sutter; April 2010 and ongoing) **[DONE]**
- d. Modify Electronic Records Summer Camp offering based on feedback from past participants and results of member needs survey (Activity a). (FY 2011)
- Developers to submit proposals to Education Committee based on feedback; Education Committee to ensure coordination with work of Digital Archives Continuing Education Task Force (ERSC Developers, Education Committee, DACE Task Force, De Sutter; August 2010 – April 2011)
- [DEVELOPERS' PROPOSALS, NOW EXPECTED IN JULY 2011, WILL BE EVALUATED IN LIGHT OF DAS CURRICULUM]**
- Implement changes and monitor via continuous feedback loop. (Education Committee, De Sutter, ERSC Developers; May 2011 and ongoing)
- [NO PROPOSALS WERE SUBMITTED]**
- e. Develop and test a multi-year coordinated program to address members' needs for education and training in electronic records appraisal, capture, preservation, and access. (FY 2011 – FY 2012)
- Appoint Digital Archives Continuing Education Task Force of Education Committee to develop a detailed professional development curriculum on subject of digital archives. (Tibbo, July 2010) **[DONE]**
 - Draft curriculum, vet through Education Committee, incorporate committee-approved curriculum in FY 2012 draft budget for Council review. (DACE Task Force, Education Committee, De Sutter, Council; August 2010 – May 2011) **[DONE]**
- f. Implement a coordinated program to address members' needs for training in electronic records preservation and access; evaluate results and modify program based on members' feedback. (FY 2012 – FY 2014)
- [DAS CURRICULUM AND CERTIFICATE PROGRAM HIGHLIGHTED AT 2011 ANNUAL MEETING; PROGRAMS LAUNCHED IN OCTOBER 2011; ONGOING.]**
- g. Solicit development of additional literature targeted to member needs in the area of digital records. (FY 2012 – FY 2014)

Desired Outcome #2: SAA will develop standards, or endorse appropriate standards developed by other organizations, to improve the appraisal, capture, and preservation of, and access to, born-digital records, and will promulgate those standards to the archives community.

Measurable Activities:

- a. Endorse and publicize the International Standards Organization’s “Trusted Digital Repositories” standard. (FY 2010 – FY 2011)
 - Obtain draft standard from ISO; determine how SAA can disseminate (given any legal constraints). (Doyle; June 2010) **[AS OF AUGUST 2010, TABLED BY STANDARDS COMMITTEE PENDING ISO REVIEW; CURRENT ISO STATUS = 40.60 (“ENQUIRY STAGE: DIS BALLOT INITIATED”); http://www.iso.org/iso/iso_catalogue_tc/catalogue.]**
 - Determine which SAA unit(s) will vet the ISO standard for Council endorsement. (Executive Committee; August 2010)
 - Oversee dissemination and comment on standard. (Standards Committee, with comment from Electronic Records Section, Preservation Sections, Records Management Roundtable, others; August – November 2010)
 - Prepare recommendation for Council endorsement. (Standards Committee, Staff; December 2010)
 - If endorsed by Council, disseminate standard (as permitted) via existing means. (Staff; February 2011 and ongoing)

- b. Provide an effective online mechanism to share news and information about existing or developing best practices and standards for electronic records, imaging, and metadata, including commentary on such practices and standards. (FY 2010 – FY 2011)
 - Appoint a work group to develop a project plan that outlines how these desired outcomes can be embedded in Drupal. (Executive Committee; March 2010) **[DONE]**
 - Conduct a work group meeting to develop project plan. (Doyle, Communications Technology Working Group; June 2010) **[DONE]**
 - Determine a funding mechanism for “standards portal” on SAA website. (Doyle, Communications Technology Working Group, Council approval required to approach funding agency; August 2010) **[DONE; DELMAS FUNDING OF \$4,000]**
 - Apply for NHPRC or other appropriate grant. (Doyle, Grant Writer, Beaumont, Jurczak; October 7, 2010, deadline) **[SUPERSEDED BY DELMAS FUNDING OF \$4,000]**
 - Contract with vendor. (Doyle, Common Places; January 2011) **[DONE]**
 - Develop contextual content. (Standards Committee, Staff; January – April 2011) **[DONE]**
 - Implement technical mechanism for portal. (Doyle, Common Places; April 2011) **[DONE]**
 - Populate portal with standard(s); disseminate to SAA members and external groups. (Standards Committee, Staff; August 2011 and ongoing) **[BEGUN IN AUGUST 2011 AND ONGOING]**

- c. Provide education (including case studies and model implementation plans) to repositories and their representatives on the requirements to become [or use] a trusted digital repository. (FY 2013 – FY 2014)
- d. Determine baseline of member and nonmember institutions (repositories) that may qualify for ISO certification as a “trusted digital repository.” (FY 2013)
- e. Develop and implement a program to recognize trusted digital repositories, including a “Find a Trusted Digital Repository” online resource. (FY 2014)

Desired Outcome #3: SAA will make increasingly effective use of current and emerging technology in order to enhance communication with internal and external audiences and stimulate collaboration among its constituents. [Internal Radar Screen]

Measurable Activities:

- a. Working with a contractor, redeploy SAA’s website using the Drupal content management system. (FY 2010 – FY 2011)
 - Draft specifications and implement transition to Drupal. (Doyle, Common Places, Impact Solutions; January 2009 – January 2010) [Fiscal Impact: FY10 Capital Budget = \$45,000] **[DONE. TOTAL DIRECT (CAPITALIZED) EXPENSE FOR FY 2009 – FY 2011, INCLUDING PHASES 1 AND 2, WAS \$140,425]**
 - Revise and reorganize all website materials as content is migrated from Webitects to Drupal. (Staff; February 2010 – December 2010) **[ONGOING, WITH GOAL OF COMPLETING BY DECEMBER 2012]**
 - Implement Phase II development. (Doyle, Common Places; July 2010 – June 2011) **[DONE]**
- b. Reconstitute the Website Working Group as the “Communications Technology Working Group” in order to: 1) conduct an environmental scan of communication technologies currently in use by SAA and assess their effectiveness; 2) propose appropriate policies, protocols, and/or compliance mechanisms in order to enhance the use of these technologies by SAA’s constituents; and 3) promote adoption of those policies, protocols, and compliance mechanisms. (FY 2010 – FY 2011) [Revised by the SAA Council in May 2011 (0511-II-A).]

[The Communications Technology Working Group (CTWG) was envisioned as a flexible group whose tasks would evolve depending on SAA’s needs. The group was reappointed by Tibbo in March 2010 (with a charge to advance the development of the SAA “standards portal”) and by Trinkaus-Randall in April 2011 (with a charge to complete the May – December 2011 activities outlined below).]

- Appoint Working Group. **[DONE.]**

- To conduct scan: 1) review and create an index of existing communication technologies, projects, reports, documentation, policies, protocols, and procedures in use by SAA, by official component groups, and by ad hoc member groups; 2) convene a public forum at Chicago 2011 to present preliminary findings and to solicit input to identify what technology resources, capabilities, and uses individual members and groups want from SAA. (Working Group, Doyle; May – August 2011) **[SOCIAL MEDIA FORUM CONDUCTED IN AUGUST 2011 -- DONE.]**
 - Compile and disseminate via online channels the information received at the 2011 Annual Meeting forum. Solicit additional comments as necessary and supplement findings through research on trends in user adoption of technology (i.e., such resources as the Pew Internet and American Life Project). (Working Group, Doyle; September – December 2011) **[DONE.]**
 - Group to 1) analyze functional gaps between SAA’s officially sponsored communications technology and constituent needs and/or user practices; 2) identify priority areas; and 3) submit recommendations to the Council, including technologies to be acquired and/or deployed, timetables and fiscal analyses, and protocols for use. (Working Group, Doyle; September – December 2011) **[DONE. SEE AGENDA ITEM 0112-V-P.]**
- c. Based on working group recommendations and with Council approval, develop an SAA presence on appropriate social networking sites. (FY 2010)
- [THIS ACTIVITY WAS BEGUN IN JULY 2009 WITH SAA PRESENCE ON FACEBOOK AND TWITTER. NO DIRECT EXPENSES.]**
- d. Based on working group recommendations and experience with Drupal development, and with Council approval, acquire additional technologies as needed that will further enable member collaboration and enhance SAA’s communication with internal and external audiences. (FY 2012–FY 2014)
- [PENDING COUNCIL REVIEW OF CTWG FINDINGS AND RECOMMENDATIONS.]**
- e. As a prototype/proof of concept, record and provide audio and video podcasts of appropriate 2009 Annual Meeting sessions (e.g., plenaries). (FY 2010)
- [THIS ACTIVITY WAS BEGUN AT AUSTIN 2009 WITH VIDEOTAPING AND PODCASTING (VIA SAA’S FACEBOOK PAGE) OF TWO PLENARY SESSIONS, ONE EDUCATION SESSION, AND SEVERAL PERSON-ON-THE-STREET INTERVIEWS. DIRECT COSTS FOR TAPING OF PLENARIES AND EDUCATION SESSION TOTALED \$5,985; THERE WERE NO DIRECT EXPENSES ASSOCIATED WITH PODCASTING. FOR VIDEOTAPING OF THREE PLENARY SESSIONS AND ONE EDUCATION SESSION AT DC 2010, DIRECT COSTS TOTALED \$8,300. FOR VIDEOTAPING OF THREE PLENARY SESSIONS AT CHICAGO 2011, DIRECT COSTS TOTALED \$8,500.]**
- f. Pending CTWG recommendations, Finance Committee review, and Council approval, apply for IMLS funding to support virtual access to annual meeting. (FY 2012 – FY 2013)
- Conduct scan of associations to determine possible/likely impact of virtual meeting access on Annual Meeting revenue. (Felker, Jurczak; January – March 2012)

- If deemed appropriate, identify potential grant writers and hire a writer to prepare an IMLS grant. (Executive Committee, Beaumont, Jurczak; May – June 2012) [Fiscal Impact: FY12 Budget = \$2,000 for grant writer]
 - Following consultation with all appropriate parties (e.g., Communications Technology Working Group, meeting planners) and review by Executive Committee of key narratives, submit grant to IMLS (assuming no other, higher-priority grant proposal is being submitted during same cycle). (Executive Committee, Beaumont, Jurczak, Grant Writer; December 2012)
- g. Based on evaluation of outcome of activities e. and f. (participant feedback, cost/benefit analysis), consider broadening opportunities to participate in the Annual Meeting via current and emerging technologies. (FY 2013 – FY 2014)
- h. Investigate feasibility of virtual participation in traditional-format workshops and other educational offerings, including mechanisms for evaluating participant satisfaction. (FY 2013 – FY 2014)

[INVESTIGATION OF VIRTUAL CONFERENCING OPTIONS INCLUDED AMONG THE ISSUES TO BE REVIEWED BY THE ANNUAL MEETING TASK FORCE CREATED BY THE COUNCIL IN AUGUST 2011.]

- i. Investigate feasibility of revenue-based electronic publishing of monographs via Drupal, complete with authenticated access based on completed transactions. (FY 2013)

Desired Outcome #4: SAA will harness and cultivate the technology expertise of its members to inform strategic planning, educational programming, and internal and external communication. [Added by the SAA Council in May 2011 (0511-II-A).]

Measurable Activities:

- a. Establish a Technology Futures Working Group charged with surveying the current and emerging technology landscape and advising SAA members, Council, and staff on new developments and tools that significantly affect the documentary record and/or can be applied by the archival endeavor. Recognizing the fast pace of technological change, the Working Group will be expected to work informally, and even experimentally, with a potentially fluid membership, with the goal of providing timely updates on new technologies as they affect archives and archivists. (FY 2012)

[HYRY, WHO PROPOSED FORMATION OF GROUP AND WAS CHARGED WITH DEVELOPING GROUP DESCRIPTION, QUESTIONS WHETHER NEED PERSISTS. RE-ASSIGN TASK OF DEVELOPING DESCRIPTION? OR CONSIDER WHETHER THIS WORK, PARTICULARLY ACTIVITIES C. AND D., COULD BE COMPLETED BY A COMMUNICATIONS TECHNOLOGY WORKING GROUP WITH A REVISED DESCRIPTION.]

- b. Consult select members to identify potential Working Group members; appoint. (Trinkaus-Randall, Doyle; September 2011)
- c. In consultation with appropriate SAA component groups, Working Group members to identify sources for new technology developments (e.g., blogs, websites, publications, etc.) and determine a methodology for reviewing new tools and trends for their applicability to archives and archivists. (Working Group; FY 2012 – FY 2014)
- d. Determine best methods for disseminating news, reviews, and other information using tools such as a blog, Twitter, podcasts, and/or other methods. (Working Group; FY 2012 – FY 2014)

STRATEGIC PRIORITY #2: DIVERSITY

Issue Statement:

The relevance of archives to society and the completeness of the documentary record hinge on the profession's success in ensuring that its members, the holdings that they collect and manage, and the users that they serve reflect the diversity of society as a whole.

Desired Outcome #1: The Mosaic Scholarship will evolve into a program that encompasses a broad set of activities, including conference attendance, enhanced mentoring, and cohort development, and the number of Mosaic Scholarships that SAA (and/or the SAA Foundation) offers will increase to ten by FY 2013.

Measurable Activities:

- a. Charge an appropriate appointed group to coordinate work. (FY 2010)
 - Consider reconstituting the Diversity Committee to include stakeholders from, e.g., AACRT, NAAR, LACCHA, LAGAR (recommended by the respective component's chair), cycled so that one stakeholder appointee rotates on/off per year. (Council, Diversity Committee, Doyle; February 2010) **[DONE]**
 - Charge a 6-person work group of the Diversity Committee to develop a three-year work plan for expanding the Mosaic Scholarship program, including scholarships and the possibility of internships or fellowships, per the desired outcome, with a draft to the Council by **January** 2011. (Tibbo, Work Group, Staff; June 2010 – February 2011) **[DONE]**
- b. Consult with allied organizations, such as the American Library Association and Association of Research Libraries, to develop program models for consideration. (FY 2011)
 - Work group to meet via conference call to assign tasks re information and data collection prior to meeting. (Work Group, Staff; August 2010) **[DONE]**
 - Collect data and discuss. (Work Group, Staff; September – November 2010) **[DONE]**
 - Report results, prepare recommendations for the Council. (Work Group, Staff; **January** 2011) **[DONE]**
- c. Identify target audiences and expand publicity for Mosaic Scholarship to stimulate applications and ensure a strong applicant pool. (FY 2010 – FY 2014)
 - Based on past efforts (see Council item 0509-V-M-Mosaic for 2008 publicity efforts), continue to expand publicity to increase applications for scholarship. (Mosaic Scholarship Selection Committee, Brinati; September – October 2009) **[DONE]**

- Implement enhanced publicity efforts. (Mosaic Scholarship Selection Committee, Brinati; September 2009 – February 2010 and ongoing) **[ONGOING]**
- d. Articulate a vision of an expanded program and determine associated costs. (FY 2011)
- [SEE ACTIVITY a.]**
- e. Apply for IMLS funding for initial expansion of Mosaic scholarship program. (FY 2011) **[REVISE TO FY 2012]**
- Discuss parameters for scholarship program (key audiences, scholarship / fellowship / internship, involvement of graduate programs / undergraduate programs, etc). (Tibbo, Council; June 2010) **[DONE]**
 - Refine specific aspects of proposal to ensure good understanding by prospective grant writer(s). (See Activities a. and b. Diversity Committee Work Group, Tibbo, Beaumont, Jurczak; May 2011) **[SUGGESTIONS SUBMITTED BY BAXTER AND JULES IN JULY 2011]**
 - Identify prospective grant writers, select one via appropriate process based on Council discussions. (Tibbo, Beaumont; July 2011)
- [PER MEETING OF TIBBO, JULES, AND BEAUMONT IN NOVEMBER 2011, NOT REALISTIC TO SUBMIT PROPOSAL BY DECEMBER 15 DEADLINE. PURSUING, WITH EXECUTIVE COMMITTEE AND COUNCIL AGREEMENT, OPTIONS FOR JOINT PROPOSAL WITH ASSOCIATION OF RESEARCH LIBRARIES.]**
- Submit grant proposal to IMLS following review of key narratives by Executive Committee. (Executive Committee, Beaumont, Jurczak, Grant writer; December 2011) **[SEE ABOVE.]**
- f. Charge the Foundation Development Committee to consider means for developing a funding stream to support scholarships (including grants, giving opportunities, bequests, etc.). (FY 2011) **[REVISE TO FY 2012]**
- Charge Foundation Development Committee to develop recommendations, with report to **January** 2011 Foundation Board meeting. (Foundation Board, Development Committee, Staff; July 2010 – February 2011) **[FUNDING PRIORITIES ADOPTED; “75 FOR 75” CAMPAIGN APPROVED; BROADER DEVELOPMENT PLAN PENDING]**
- [NOTE: FOUNDATION SELECTED TO HOUSE UNITED METHODIST CHURCH’S FORMAN SCHOLARSHIP BASED ON MOSAIC SCHOLARSHIP PROGRAM.]**
- Implement recommendations as appropriate. (Development Committee, Foundation Board, Staff; February 2011 and ongoing) **[REVISE TO FEBRUARY 2012 AND ONGOING]**
- g. Implement Foundation Board-approved recommendations for fundraising. (FY 2011 – FY 2013)
- Specifics pending outcome of Activity f. (Foundation Board, Development Committee, Staff; TBD)

- h. Based on recommendations of Diversity Committee work group and with Council approval, develop networking and internship opportunities for scholarship recipients. (FY 2011 – FY 2013)

[EMBEDDED IN MOSAIC PLAN.]

- i. Based on recommendations of Diversity Committee work group and with Council approval, establish a mentoring program for Mosaic Scholars. (FY 2013)
- j. Develop a leadership workshop targeting diverse archivists and other SAA members, employing Mosaic scholars and Diversity Award winners as prospective instructors. (FY 2013)
- k. Meet annually with award recipients to determine the impact of the scholarship on their career and how the scholarship might be modified or enhanced to meet future students' needs. Use positive experiences as publicity to attract future applicants. (FY 2011 – FY 2014) **[REVISE TO FY 2012 – FY 2014]**
- Contact all previous award recipients in advance of Annual Meeting(s) to determine availability for meeting. Arrange phone discussions with those who can't attend. (President, Diversity Committee Chair, Beaumont; early spring of each year)
 - Report to the Council on Scholars' impressions and feedback. (President, Diversity Committee Chair, Beaumont; fall of each year)
 - Modify Scholarship requirements, publicity as needed in continuous feedback loop. (Council, Mosaic Scholarship Selection Committee, Staff; ongoing)

Desired Outcome #2: Identify and promote existing models and develop new methods for assisting archives and archivists to diversify the documentary record within their repositories and to promote archives to diverse communities.

Measurable Activities:

- a. Develop an Annual Meeting session on methods for documenting under-documented communities. (FY 2010 – FY 2011)
- Notify Program Committee chair(s) of intent to include on program an invited session on this topic. (Gottlieb, Beaumont; August 2009) **[DONE]**
 - Contact prospective presenter(s) regarding interest, availability, qualifications, desired outcomes of session. (Gottlieb, Beaumont; December 2009)
- [V. CHAPMAN-SMITH, NARA MID-ATLANTIC REGION, PRESENTED SESSION 108: ACHIEVING POSITIVE DIVERSITY OUTCOMES, AT DC 2010, AUGUST 2010.]**
- b. Issue an RFP for a publishing project on how to ensure the documentation of diverse communities. (FY 2010)

[THE PUBLICATIONS BOARD HAS CONTRACTED WITH MARY CALDERA AND KATHI NEAL, TOGETHER WITH 24 CONTRIBUTORS, FOR ARCHIVES DIVERSITY READER, A BOOK THAT WILL COVER SUCH TOPICS AS “UNDERSTANDING, SELECTING, AND OBTAINING THE ‘RECORD’ OF A DIVERSE SOCIETY,” “IDENTITY AND INCLUSION IN THE ARCHIVES: CHALLENGES OF DOCUMENTING ONE’S OWN COMMUNITY,” “DIVERSITY IN THE ARCHIVAL CONTEXT,” “CONNECTING TO MARGINALIZED GROUPS THROUGH WEB 2.0,” AND “FAMILY AND COMMUNITY ARCHIVES.” THE PUBLICATION IS PROJECTED TO BE AVAILABLE BY 2013; FISCAL IMPACT APPROXIMATELY \$14,000 FOR RESEARCH AND DEVELOPMENT, HONORARIA, PRODUCTION, AND MANUFACTURING.]

[IN AUGUST 2011, THE EDITORS REPORTED TO THE PUBLICATIONS BOARD: “AFTER CAREFUL CONSIDERATION AND KEEPING YOUR FEEDBACK IN MIND, WE HAVE DECIDED TO REDUCE THE NUMBER OF CHAPTERS IN THE BOOK TO 12 (OR 10, DEPENDING ON OUR SUCCESS WITH A COUPLE OF SUBMISSIONS.)”]

- c. Develop and begin offering a workshop that instructs archivists in 1) best practices for promoting archives and the archives profession to diverse communities and 2) identifying specific projects that may be of interest to the communities. (FY 2012 – FY 2013)
- Identify which group(s) / individuals are best qualified to determine “best practices” for promoting archives and the profession to diverse communities; solicit participation and assign task. (Council; February 2011)
 - Convene group via conference call(s) to discuss charge, assign research and compilation tasks. (Executive Committee, Staff; September 2010 – April 2011)
 - Review recommendations of work group and recommend, as appropriate, adoption of best practices. (Standards Committee; May - July 2011)
 - Consider adoption of best practices. (Council; August 2011)
 - Charge Education Committee and staff to develop workshop based on best practices. (Council; August 2011)
 - Identify developer(s)/instructor(s) to develop and present the workshop. (Education Committee, De Sutter; October 2011)
 - Provide first offering in conjunction with 2012 Annual Meeting. (Education Committee, Instructor(s), De Sutter; August 2012) [Fiscal Impact: \$3,000 for pre-conference program; \$4,000 - \$5,000 for Web seminar]
- d. Develop and promote successful outreach initiatives that bring archivists into partnership with communities to promote the value of archives and to teach methods for managing and preserving records. (FY 2012 – FY 2014)

Desired Outcome #3: In cooperation with appropriate communities, develop SAA guidelines and resources on managing cultural property that will assist the broader archives community in dealing with cultural property issues.

[As the Cultural Property Working Group's work progresses following its appointment in 2010, measurable activities may change.]

Measurable Activities:

- a. Identify allied professions/professionals and others whose practices could be considered. (FY 2011)

[ASSIGNED TO CULTURAL PROPERTY WORKING GROUP.]

- b. Appoint an individual or group to work with the American Library Association on its Traditional Cultural Expressions initiatives and make recommendations regarding additional tasks that SAA might undertake to advance this outcome. (FY 2010 – FY 2011)

- Engage in review of ALA's Traditional Cultural Expressions document (draft 6), and provide comments as appropriate. (Gottlieb, SAA groups [Diversity Committee, Intellectual Property Working Group, Native American Archives Roundtable, LACCHA Roundtable, Archives and Archivists of Color Roundtable, Archivists of Religious Collections Section] and general membership; Staff; November 2010 – February 2011) **[DONE]**
- Monitor development of ALA document and comment as appropriate. (**SAA President**, SAA groups [as above, and including Cultural Property Working Group], Staff; ongoing)

- c. Identify major national/international initiatives taking place within the archives and allied professions that pertain to the management of cultural property. (FY 2011)

[ASSIGNED TO CULTURAL PROPERTY WORKING GROUP.]

- d. Establish an online clearinghouse of information about managing cultural property, gathered from multiple sources. (FY 2012)

[ASSIGNED TO CULTURAL PROPERTY WORKING GROUP.]

- e. Enter into proactive communication with communities that have created cultural property to share views and, if possible, develop protocols that define mutually acceptable standards for care, access, and use of cultural material. (FY 2012 – FY 2014)

[ASSIGNED TO CULTURAL PROPERTY WORKING GROUP.]

- f. Identify key cultural property texts and submit proposal(s) to the Publications Board for their addition to the SAA online bookstore. (FY 2012)

[DENNIS MEISSNER SUGGESTED "CATALOGING CULTURAL OBJECTS: A GUIDE TO DESCRIBING CULTURAL WORKS AND THEIR IMAGES" (2006), WHICH WAS ADDED IN 2008. NO OTHER SUGGESTIONS RECEIVED TO DATE.]

- g. Develop and implement a strategy for the creation of resources and tools, such as case studies and model policies, that could assist archivists in collecting and developing access policies for property from other cultures. (FY 2012 – FY 2014)
- h. Identify, develop, and submit proposal(s) to the **Glossary Working Group** of the Publications Board for the addition of appropriate terminology on cultural property issues to SAA's *A Glossary of Archival and Records Terminology*. (FY 2012 – FY 2013)
- i. Promote cultural property issues through the development of annual meeting sessions and articles in *American Archivist* and *Archival Outlook*. (FY 2012 – FY 2014)

[PUBLISHED “DOCUMENTING CAPTURED RECORDS FROM TERRORIST ORGANIZATIONS” IN THE JULY/AUGUST 2011 ISSUE OF ARCHIVAL OUTLOOK.]

Desired Outcome #4: SAA will adopt a Statement on Diversity, develop new programs, and enhance existing programs that promote diversity as a value while fostering an organizational environment of inclusiveness.

Measurable Activities:

- a. Ensure that SAA's Equal Opportunity / Non-Discrimination Policy remains up to date and widely available to SAA members and the profession at large. (Ongoing)
 - Conduct an annual review of the Equal Opportunity / Non-Discrimination Policy to ensure that it remains up to date. (Council, Staff; annual review at winter Council meeting) **[DONE FOR FY11. REVIEW OCCURS AT WINTER COUNCIL MEETING. ON AGENDA FOR 0112 MEETING.]**
 - Make policy available in an easy-to-find location on the SAA website. (Staff; ongoing) **[DONE]**
- b. Adopt a Statement on Diversity that expresses SAA's understanding of diversity. (FY 2011)
 - Draft a Statement on Diversity. (Council, Staff; May – June 2010) **[DONE]**
 - Post draft Statement on Diversity for member comment. (Gottlieb, Beaumont; June – July 2010) **[DONE]**
 - Adopt SAA Statement on Diversity. (Council, August 2010) **[DONE]**
- c. Establish and give an annual Diversity Award to both an individual and a repository. (FY 2011 – FY 2014)
 - Determine qualifications for Diversity Award based on Council-drafted Statement on Diversity. (Executive Committee, Staff; August 2010)

[DIVERSITY AWARD DRAFTED BY THE DIVERSITY COMMITTEE AND ADOPTED BY THE COUNCIL IN AUGUST 2011. FIRST AWARD TO BE OFFERED IN 2012.]

- Seek nominations and make awards. (Awards Committee, Staff; September 2010 – February 2011 and ongoing) **[ONGOING AS OF AUGUST 2011]**
- d. Develop a cultural competencies framework as it relates to archivists and the archives profession. (FY 2013 – FY 2014)

STRATEGIC PRIORITY #3: ADVOCACY / PUBLIC AWARENESS

Issue Statement:

Archivists must take an active role in promoting the importance of archives and archivists in order to increase public support, shape public policy, and obtain the resources necessary to protect the accessibility of archival records that serve cultural functions as well as ensure the protection of citizens' rights, the accountability of organizations and governments, and the accessibility of historical records.

Desired Outcome #1: By FY 2013, SAA will identify its public policy priorities in a legislative agenda that 1) describes each priority in an "issue statement" that defines the challenge and explains SAA's objectives related to it, and 2) includes an action plan for accomplishing each public policy objective.

Measurable Activities:

- a. Adopt a legislative agenda based on recommendations from the Government Affairs Working Group, with input from SAA leaders, members, and others. (FY 2010)
 - Draft an Advocacy Agenda for member feedback, Council review and approval. (Boles, Government Affairs Working Group, Beaumont; June – August 2009) (Adopted by the Council August 2009) **[DONE]**
- b. Develop an issue statement for each legislative priority, vet the statement appropriately, and post all issue statements on the SAA website as they are adopted. (FY 2011 – FY 2012)
 - Draft issue briefs, for Council review and approval, on issues related to the following topical areas outlined in the SAA Advocacy Agenda:
 - Public's access to information (e.g., declassification);
 - Public's right to timely and reasonable use of information (e.g., copyright);
 - Public's right to personal privacy;
 - Public's need for comprehensive, comprehensible historical record;
 - Public's need for strong institutional stewardship of American historical record

(Government Affairs Working Group, Intellectual Property Working Group, Beaumont, NCH Executive Director; August 2009 – December 2010)

- Publish and publicize to appropriate audiences (members, media, public) issue briefs as they are vetted and as the need arises due to legislative calendars and policymaker and media queries. (Staff, NCH Executive Director; as available and ongoing) [Fiscal Impact: Subscription to news release service]
- c. Develop a set of activities (action plan) associated with each issue on the legislative agenda that are most likely to lead to its accomplishment, including the resources needed to accomplish each activity (direct expenses plus volunteer and staff time) and a realistic timeline for completion. (FY 2011 – FY 2013) **[REVISE TO FY 2012 – FY 2013]**
- Draft first action plan to serve as model for additional plans. (Government Affairs Working Group chair, Frusciano, Beaumont, NCH Executive Director; September 2010)
 - Assign Government Affairs Working Group members (or others as appropriate) to draft additional action plans as issue statements are developed and approved, with a goal of having all action plans incorporated into the FY 2012 budget planning process. (Government Affairs Working Group, Frusciano, Beaumont, NCH Executive Director; August 2010 – February 2011)

Desired Outcome #2: By FY 2013, SAA will have a greater understanding of key stakeholders’ and audiences’ levels of awareness of archives and archivists and of the challenges that compromise archivists’ ability to ensure the accessibility of the American historical record, and will use that information to craft public awareness plans going forward.

Measurable Activities:

- a. Conduct a benchmark survey of resource allocators (key stakeholders) to determine their level of awareness of the “value” of archives/archivists to their enterprise, and to understand the challenges that must be overcome in order to improve awareness of the important role of archives/archivists and increase funding for them. (FY 2012)
- Appoint 2-3 members to work with staff and public relations counsel to review previous study(ies) of resource allocators (e.g., Levy Report), determine work plan for conducting survey. (Tibbo, Beaumont, PR Counsel, Task Force Members; appoint by October 2010, review and draft work plan October 2010 – April 2011) [Fiscal Impact: FY 2011 draft budget included \$5,000 for PR Counsel on “B List”; this activity was not incorporated into the budget.] **[NOT DONE. SEE NEXT ACTIVITY.]**
 - Approve / revise work plan; include funding for work plan in proposed FY 2012 budget. (Council, Staff; May 2011) **[FUNDING INCLUDED IN PROPOSED FY 2012 BUDGET]**
- [DUE TO BUDGET CONSTRAINTS, THIS ITEM WAS REMOVED FROM THE FY 2012 BUDGET. INCLUDE IF POSSIBLE IN FY 2013 BUDGET.]**
- Implement survey as feasible. (PR Counsel, Beaumont, Task Force Members; September – December 2011) **[CHANGE DATES BASED ON AVAILABILITY OF FUNDING FOR SURVEY]**
 - Analyze and report results. (PR Counsel, Beaumont, Task Force Members; February 2012) **[CHANGE DATES BASED ON AVAILABILITY OF FUNDING FOR SURVEY]**

b. Work with members and public relations counsel to determine a method or methods for measuring the impact of archives, or return on investment of archives, as one means of crafting a compelling message to resource allocators. (FY 2011 – FY 2012)

- Audit DC 2010 pre-conference course, “When It’s All About the Money,” by Pleva-Flynn and Flynn, to learn about alternative models for measuring ROI; follow up with presenters. (Beaumont; August 2010) **[DONE]**
- Appoint 2-3 members to work with PR Counsel and staff to determine whether methods of measuring impact (or ROI) of archives currently exist. Include scan of archives literature. (Vice President, Beaumont, PR Counsel, Task Force Members; appointments by September 2010, report by February 2011) **[FUNDING FOR PR COUNSEL INCLUDED IN PROPOSED FY 2012 BUDGET]**

[DUE TO BUDGET CONSTRAINTS, THIS ITEM WAS REMOVED FROM THE FY 2012 BUDGET. INCLUDE IF POSSIBLE IN FY 2013 BUDGET.]

- As feasible, test one or more methods for measuring the impact/ROI of archives, using members and their repositories as test cases. (Task Force Members, Member Volunteers [test cases], Staff; March – June 2011) **[CHANGE DATES BASED ON AVAILABILITY OF FUNDING FOR PR COUNSEL]**
- Draft and test one or more “compelling” messages. (PR Counsel, Beaumont, Task Force Members, Member Volunteers [test cases]; July – September 2011) **[CHANGE DATES BASED ON AVAILABILITY OF FUNDING FOR PR COUNSEL]**

c. Conduct a benchmark survey of archives users to determine a baseline of their level of awareness of the “value” of archives and archivists in their communities and at the national level. (FY 2012 – FY 2013)

- Appoint 2-3 members to work with staff and public relations counsel to draft a work plan for conduct of an omnibus survey of archives users. (Vice President, Beaumont, PR Counsel, Task Force members; appointments by May 2011, work plan by November 2011) [Fiscal Impact: Estimated cost for inclusion in FY12 budget = PR Counsel @ \$3,000] **[FUNDING FOR PR COUNSEL INCLUDED ON B LIST – BUT NOT FUNDED – IN PROPOSED FY 2012 BUDGET]**

[CONSIDER WHETHER INCLUSION IN PROPOSED FY 2013 BUDGET IS FEASIBLE.]

- Approve work plan, pending review and approval of FY13 budget. (Council; February 2012)
- Develop and test survey instrument. (PR Counsel, Task Force Members, Staff; March – May 2012) [Fiscal Impact: Estimated cost for inclusion in FY12 budget = PR Counsel @ \$4,000]
- Conduct survey. (PR Counsel, Staff; June – August 2012) [Fiscal Impact: Estimated cost for inclusion in FY13 budget = survey @ \$25,000]
- Interpret survey results, distribute results and analysis. (PR Counsel, Task Force Members, Staff; November 2012) [Fiscal Impact: Estimated cost for inclusion in FY13 budget = PR Counsel @ \$4,000]

- d. Based on the results of the resource allocators survey, develop and implement a communication plan (including key messages, media, and timelines) for use by the SAA office and SAA members and disseminate the plan via the SAA website, publications, and workshops. (FY 2013)
 - Develop communication plan for Council review/approval. (PR Counsel, Staff, Task Force Members; May 2012)
 - Implement plan. (Staff, Task Force Members, SAA Leaders; May 2012 and ongoing) [Fiscal Impact: Estimated cost for inclusion in FY13 budget = PR Counsel @ \$3,000]

- e. Based on the results of the users survey, develop and implement a communication plan (including key messages, media, and timelines) for use by the SAA office and SAA members and disseminate materials via the SAA website, publications, and workshops. (FY 2013)
 - Develop communication plan for Council review/approval. (PR Counsel, Staff, Task Force Members; February 2013) [Fiscal Impact: Estimated cost for inclusion in FY13 budget = PR Counsel @ \$5,000]
 - Implement plan. (Staff, Task Force Members, SAA Leaders; July 2013 and ongoing) [Estimated cost for inclusion in FY14 budget = PR Counsel @ \$5,000]

Desired Outcome #3: Using American Archives Month as one communication vehicle, plan and implement a public relations campaign, directed to users of archives, whose goals are to 1) increase users' appreciation of archives; 2) continue to "brand" American Archives Month as a profession-wide opportunity to build public awareness; and 3) increase archivists' involvement in public awareness activities. (FY 2011 – FY 2014)

Measurable Activities:

- a. Working with members and public relations counsel, develop and implement a "modest" public relations campaign that uses American Archives Month, the SAA website, social networking tools, and other media to influence archives users to advocate for the value of archives and archivists. (FY 2011 – FY 2014)
 - **FOR FY 2011:** Based on February 2010 Council strategic planning session and suggestion by Vogt-O'Connor, develop and implement a campaign based on the theme of "I Found It In The Archives!" (See also Activity 3.b.) (Gottlieb, Vogt-O'Connor, Beaumont, Brinati, PR Counsel, Schooley; September – October 2010) [Fiscal Impact: Estimated costs included in FY11 budget = PR Counsel @ \$4,000, Design/Production @ \$5,000, Photography @ \$2,000, Printing @ \$6,000, Postage/Freight @ \$1,040] **[DONE]**
 - Evaluate member participation in campaign. (Staff, October – December 2010) **[ONGOING; NATIONAL CONTEST COMPLETED IN JUNE 2011; WINNER WAS ARCHIE RISON WORKING WITH THE EAST TEXAS RESEARCH CENTER AT STEPHEN F. AUSTIN UNIVERSITY. ALL (FIVE) MEMBER PARTICIPANTS WERE INTERVIEWED FOR FEATURE ARTICLE IN SEPTEMBER/OCTOBER ISSUE OF ARCHIVAL OUTLOOK.]**

- Develop and implement mechanisms for measuring impact of campaign on public awareness of archives and archivists. (PR Counsel, Staff; October – December 2010)
 - **FOR FY 2012 – FY 2014:** Appoint a 3- to 5-person task force or committee to work with staff and public relations counsel to develop and implement a plan for an ongoing public relations campaign using available tools (e.g., American Archives Month). (Vice President, Beaumont, Brinati, PR Counsel, Task Force Members; appointments by September 2010, implementation in conjunction with annual May/June issue of *Archival Outlook*) [Fiscal Impact: Estimated cost for inclusion in FY12 and FY13 budgets = PR Counsel @ \$5,000 plus Design/Production @ \$5,000, Photography @ \$2,000, Printing @ \$6,000, Postage/Freight @ \$1,040] **[FUNDING INCLUDED IN PROPOSED FY 2012 BUDGET AT \$16,040, WITH \$2,000 IN ESTIMATED REVENUE FROM SPONSORSHIP.]**
 - Continuously monitor and evaluate member reaction to and participation in campaign.
 - Implement mechanisms for measuring impact of campaign on public awareness of archives and archivists. (PR Counsel, Staff; ongoing)
- b. Redesign American Archives Month to focus on one campaign-related activity that can be adopted or adapted by members at the local level for the purpose of raising awareness of key audiences. (FY 2011 – FY 2014)

[See also Activity 3.a.]

- **FOR FY 2010-2011:** Develop plan for “**I Found It In The Archives!**” as the centerpiece activity for AAM 2010. (Gottlieb, Vogt-O’Connor, Beaumont, Brinati, Schooley, PR Counsel; June – August 2010) [\$2,000] **[DONE]**
- Research and prepare content for “**I Found It In The Archives!**” (Brinati, Schooley, Beaumont; July - September 2010) [\$2,000] **[DONE]**
- Design PR kit and poster; produce in print and online; mail to SAA members. (Brinati, Schooley, Beaumont, Next Year’s News; July – September 2010) **[DONE; ONLINE ONLY]**
- Harness social medial (Facebook, Twitter, YouTube) to supplement campaign (including video capture as model for what members might do at local level). (Schooley, Brinati, Beaumont, Doyle; August – October 2010) **[DONE]**
- Reorganize AAM content in Drupal to eliminate redundancy, ensure complete information. (Brinati, Schooley, Mueller; July – October 2010) **[DONE]**

FOR FY 2012: POSTER AND FLYER CO-MAILED WITH JULY/AUGUST 2011 ISSUE OF ARCHIVAL OUTLOOK; ENTIRE KIT AVAILABLE ONLINE.

- c. Build into the campaign an evaluation mechanism that allows members to share their experiences and provide their feedback on the value of the tools provided. (FY 2011 – FY 2014)
- Solicit member feedback in all versions of campaign materials made available to members. **[ONGOING]**
 - Provide “evergreen” member feedback mechanism via SAA website. (Schooley, Brinati, Beaumont, Mueller; mount on SAA website by October 1, 2010, and maintain on ongoing basis)

- d. Seek partnership with the National Archives and Records Administration and prominent archives users in implementing the campaign at the national level. (FY 2011 – FY 2014) **[REVISE DATES TO FY 2012 – FY 2014]**
- Discuss potential for “testimonial” with 2010 keynote speaker Juan Williams. (Gottlieb, Beaumont; August 2010) **[NOT DONE]**
 - Discuss potential for “testimonial” with prominent users who come forward on behalf of PAHR. (Gottlieb/Tibbo, Beaumont, NCH Executive Director; August – December 2010) **[HAVE BEEN UNABLE, AS OF 0112, TO ROUND UP PROMINENT USERS ON BEHALF OF PAHR.]**
 - Arrange meeting with NARA to discuss one opportunity for cooperation in implementing campaign at national level (e.g., press conference). (**Trinkaus-Randall**, Beaumont, Ferriero, NARA Staff; February 2011) **[REVISE DATES TO FEBRUARY 2012. NARA IS PARTICIPATING IN 2012 I FOUND IT CAMPAIGN.]**
 - Develop partnership plan for implementation beginning with 2011 American Archives Month. (Tibbo, Beaumont, Brinati; March – April 2011) **[REVISE DATES TO 2012.]**
 - Execute activities per the partnership plan. (TBD; beginning May 2011) **[REVISE DATES TO 2012.]**
- e. Seek sponsorship for the campaign, or portions of it, by one or more major commercial enterprises (e.g., History Channel, Ancestry.com, Discovery Channel). (FY 2011 – FY 2014) **[REVISE DATES TO FY 2012 – FY 2014]**
- Invite “Collector-in-Chief” to co-sign solicitation letter. (SAA President, Executive Director; February 2011)
 - Tap existing channels (e.g., NCH, CoSA, others) for ideas about likely sponsors. (SAA President, Executive Director; February – April 2011)
 - Develop plan for sponsorship solicitation. (Staff; TBD)
 - Implement sponsorship plan. (Staff; TBD)