Society of American Archivists
Council Meeting
May 15 – 17, 2013
Chicago, Illinois

DRAFT Strategic Plan, 2013 – 2018
Some Possible Tactics, Activities, and Key Performance Indicators

The following draft reflects the work of the SAA Council, beginning at its January 2013 meeting, in reimagining SAA's strategic plan. Included here are an all-new Vision Statement, a revised Mission Statement, and suggested Goals and Strategies to address the opportunities and challenges that exist for archives, archivists, and SAA in the next five years.

The SAA Council welcomes member comments on the "high-level" aspects of the draft Strategic Plan 2013 – 2018, i.e, Vision and Mission statements, Goals, and Strategies. Does the draft plan reflect what you see as SAA's highest priorities? Do you have other ideas for goals and strategies to meet future needs?

Ultimately the Strategic Plan 2013-2018 will include tactics, activities, key performance indicators, task assignments, and timelines that will allow us to measure our progress toward meeting the goals. To assist members in interpreting the draft goals and strategies, this document includes some examples of possible tactics and activities.

The Council will consider at its May 15-17 meeting all **member comments received by Tuesday, April 23.** There will be another opportunity to comment on a draft following that meeting and at a Forum to be held at the Joint Annual Meeting in New Orleans on Thursday, August 15.

To comment:
* Add a comment at DRAFT Strategic Plan (2013-2018) *or*
* Complete the form *or*
* Send an email message to saahq@archivists.org *or*
* Respond via SAA President Jackie Dooley's blog at http://offtherecord.archivists.org *or*
* Comment via Facebook (https://www.facebook.com/archivists) or Twitter (#saastratplan).

GOAL 1: ADVOCATING FOR ARCHIVES AND ARCHIVISTS

Society values the vital role of archives and archivists.

1.1. Promote the value of archives and archival practices to society at large.

Possible Tactics	Possible Specific Activities
1.1.1. Provide programming and sponsor public awareness campaigns (including American Archives Month) that demonstrate the value of archives in individuals' everyday lives.	• Identify and target key media and communication channels affecting public opinion. • Compile and provide access to "stories" (testimonials) demonstrating the value of archives.
1.1.2. Work with PR counsel to determine method(s) for measuring baseline public understanding of the role of archives and archivists so that progress toward goal can be measured.	• Implement study to determine baseline level of understanding of archives among general population and/or target audiences. • Repeat studies periodically (TBD) to measure effectiveness of efforts.

1.2. Educate and influence decision makers about the importance of archives in the success of their organizations and constituencies.

Possible Tactics	Possible Specific Activities
1.2.1. Develop and maintain a wide variety of advocacy resources, including up-to-date, useful issue briefs and talking points on a variety of topics that can be adapted easily by archivists and the media.	• By 2014, assign appropriate component groups to develop issue briefs covering topics outlined in SAA's Advocacy Agenda. • By 2014, provide briefs and talking points online and in formats that can be delivered in person (e.g., for meetings with legislators).
1.2.2. In collaboration with CoSA, NAGARA, and other influential advocates for archives (associations, industries, policymakers, individuals), develop a broad-based archival advocacy program directed at resource allocators, policymakers, and other "influencers."	• By 2015, put in place a diverse nationwide "grassroots" network of advocates for archives that allows for proactive actions in addition to timely reactions. • By 2015, identify and target key media and communication channels affecting resource allocators.

1.3. Strengthen the capacity of those who work with archival material to articulate the value of archives.

Possible Tactics	Possible Specific Activities
1.3.1. Develop and provide resources and education, using a variety of delivery modes, to assist archivists in advocating for archives.	• Provide "Advocating for Archives" preconference workshop beginning at 2014 annual meeting for up to 60 attendees. (Free for conference registrants.) Evaluate and refine for future offerings.

	• By 2014, develop and host free "Advocating for Archives" online, on-demand webinar. Update as needed. • By 2015, develop a broad array of practical resources (online testimonials, brochures, email-able "squibs") to help archivists make the case for archives passionately and convincingly.

1.4. Continue to enrich the profession by expanding opportunities for a more diverse membership.

Possible Tactics		Possible Specific Activities
1.4.1.	Partner with the SAA Foundation, the Association of Research Libraries, and others as appropriate to expand the Mosaic Program to support 10 minority scholarships by FY 2016.	• Seek grant funding to support expansion of scholarship program. • Work with the SAA Foundation to develop compelling messages resulting in increased contributions to Mosaic Fund.
1.4.2.	Expand the Mosaic Program to include support for a year-long internship experience in a partner ARL archives or special collections, as well as career placement assistance and leadership development.	• Seek grant funding to support expansion of Mosaic program. • Work with the SAA Foundation to develop compelling messages resulting in increased contributions to Mosaic Fund.

Goal 1 Key Performance Indicators (Examples):

FY 2014	FY 2015	FY 2016
Number of institutions participating in American Archives Month increases by X%. [1.1.1.]	Number of institutions participating in American Archives Month increases by Y%. [1.1.1.]	Number of institutions participating in American Archives Month increases by Z%. [1.1.1.]
Cadre of influential advocates has agreed to speak on behalf of archives as needed. [1.2.2.]	X media stories quote influential advocates speaking out on behalf of archives. [1.2.2.]	Y media stories quote influential advocates speaking out on behalf of archives. [1.2.2.]
X members participate in Advocating for Archives workshop and/or webinar. [1.3.1.]	Y members participate in Advocating for Archives workshop and/or webinar. [1.3.1.]	Z members participate in Advocating for Archives workshop and/or webinar. [1.3.1.]
SAA receives more [TBD] requests from the media for interviews and comments, and coverage is increasingly accurate.	SAA receives more [TBD] requests from the media for interviews and comments, and coverage is increasingly accurate.	SAA receives more [TBD] requests from the media for interviews and comments, and coverage is increasingly accurate.
A grant proposal to support the Mosaic Program is funded. [1.4.1.]	The Mosaic Program receives X applications for scholarships and sponsors a highly rated leadership development experience. [1.4.1. and 1.4.2.]	Ten Mosaic scholarships are awarded, and earlier cohorts of scholars remain engaged via leadership opportunities. [1.4.1. and 1.4.2.]

GOAL 2: ENHANCING PROFESSIONAL GROWTH
Archivists have access to the professional resources they need to be successful and effective in their careers.

2.1. Provide education programs that are sustainable, keep pace with technological change, and promote best practices.

Possible Tactics	Possible Specific Activities
2.1.1. Provide education content in a wider array of formats, addressing both affordability and accessibility.	• By 2014, increase promotion of the fact that all members can arrange for training in their regions. • By 2016, create monthy 15-minute audio podcasts on a wide variety of archives topics and distribute these via iTunes or other outside podcast-supporting service.
2.1.2. Modernize the process of reviewing, expanding, and continuously improving SAA's course content.	• By 2017, refine the education program's processes to bring them in line with the DAS model: develop natural training plans for archivists, integrate courses across different realms of archival knowledge, and constantly refine training materials.

2.2. Provide content that reflects the latest thinking and practice in the archival field.

Possible Tactics	Possible Specific Activities
2.2.1. Publish modules that are timely and cutting-edge, fill in professional gaps, address current professional needs, and build on the corpus of the basic manuals.	• Develop and publish content that supports SAA's DAS curriculum.
2.2.2. Diversify published research and case studies in *The American Archivist*.	• Proactively identify and nurture new authors.
2.2.3. Experiment with new delivery modes, genres (e.g., instructional leaflets), and price points to ensure that SAA periodicals and books are relevant to members.	• Develop better understanding of and respond to members' preferences for the delivery of electronic content. • Publish more case studies online, on new topics, following the model of Campus Case Studies.

2.3. Continually refine career development program to meet members' diverse needs.

Possible Tactics	Possible Specific Activities
2.3.1. Expand and refine SAA's Mentoring Program to ensure that all participants (mentors and protégés) have a positive experience.	• Survey program participants periodically [TBD] to determine level of satisfaction and ideas for improvement. • Engage SAA Fellows, Mosaic scholars, and others to serve as mentors.

2.3.2	Develop for the SAA website a "Career Development" destination that provides practical information on archival education, career paths and options, professional development, job hunting, etc., for archivists at all stages of their careers.	• Develop an online guide for young people who are interested in a career in archives. • Work with component groups to develop an online guide for young archivists on possible career paths (university archivist, manuscripts curator, government archivist, historical society archivist, business archivist, etc.).

Goal 2 Key Performance Indicators (Examples):

FY 2014	FY 2015	FY 2016
X members participate in SAA workshops and/or webinars. [2.1.1.]	Y members participate in SAA workshops and/or webinars. [2.1.1.]	Z members participate in SAA workshops and/or webinars. [2.1.1.]
Sales of SAA publications (in X, Y, Z formats) increase by X%. [2.2.1. and 2.2.3.]	Sales of SAA publications (in X, Y, Z formats) increase by Y%. [2.2.1. and 2.2.3.]	Sales of SAA publications (in X, Y, Z formats) increase by Z%. [2.2.1. and 2.2.3.]
Members frequently [TBD] discuss and cite SAA publications and *AA* articles in their professional communications.	Members frequently [TBD] discuss and cite SAA publications and *AA* articles in their professional communications.	Members frequently [TBD] discuss and cite SAA publications and *AA* articles in their professional communications.
Participation in SAA's career services (Career Center, Mentoring Program, website) increases by X%.	Participation in SAA's career services (Career Center, Mentoring Program, websit) increases by Y%.	Participation in SAA's career services (Career Center, Mentoring Program, website) increases by Z%.
	Member satisfaction in SAA's education, publications, and career services offerings increases by X%, Y%, and Z%, respectively, from the 2012 Member Loyalty Survey.	Readership of *AA Online* increases by 20% from FY 2014 to FY 2018.

GOAL 3: ADVANCING THE FIELD
Professional knowledge expands to keep pace with an increasingly diverse archival record.

3.1. Identify the need for new standards and participate in the development of relevant standards and best practices.

Possible Tactics	Possible Specific Activities
3.1.1. Maintain ongoing environmental scan to facilitate awareness of gaps and relevant external standards.	• Promote Standards Portal to SAA members to encourage identification of gaps and needs. • Standards Committee to communicate regularly with key component groups to assess needs for standards development.

Possible Tactics	Possible Specific Activities
3.1.2. Collaborate with other standards-creating organizations (e.g., ARMA, ICA) to develop standards that SAA can endorse.	• By 2015, identify those standards the profession most desperately needs to meet its mission.

3.2.   Foster and disseminate research in the field.

Possible Tactics	Possible Specific Activities
3.2.1. Explore ways to collect and distribute content presented at annual meetings more comprehensively.	• Integrate poster sessions more fully into the annual meeting to expand professional communication and encourage engagement. • Encourage member engagement with published content with hosted discussion groups online or at the annual meeting.
3.2.2. Support the creation of new knowledge by sponsoring opportunities for creative collaboration and sharing (eg, unconferences).	• Work with grant agencies to sponsor gatherings, workshops, symposia that bring together potential collaborative partners (ie, institutions that might not work together otherwise) and stimulate development of new research and projects. • Expand distribution of SAA publications in allied fields.
3.2.3. Conduct and publish research on the archives profession and its practitioners (A*CENSUS II).	• Develop a methodology for canvassing archivists via a new version of A*CENSUS. • Determine availability of external funding. Submit grant application(s) if external funding seems likely.

3.3.   Participate actively in relevant partnerships and collaborations.

Possible Tactics	Possible Specific Activities
3.3.1. Forge new alliances with the information technology community nationally.	• By 2014, begin discussions with national information technology associations on how to collaborate on issues of mutual concern. • By 2015, complete plan for undertaking a joint archives/IT project, with a national scope, to highlight society's exceptional need for access to data sources.
3.3.2. Identify and highlight our shared values with the library and records management communities.	• Organize a periodic symposium on shared issues. • By 2015, develop plans with a) ALA and other library associations and b) ARMA to work collaboratively on issues of shared interest.
3.3.3. Enhance SAA's relationship with regional/state archival associations to increase our collective capacity by sharing knowledge and resources.	• By 2014, develop a Joint Committee on Archival Cooperation representing SAA and the nation's regional/state archival associations, with a focus on sharing resources and knowledge and meeting shared advocacy goals. • Host annual meeting regional summit and provide infrastructure for SAA/regional committee.

Goal 3 Key Performance Indicators (Examples):

FY 2014	FY 2015	FY 2016
An increasing number [TBD] of non-archivists (e.g., records managers, IT professionals) attend SAA annual meetings and courses. [3.3.1. and 3.3.2.]	An increasing number [TBD] of non-archivists (e.g., records managers, IT professionals) attend SAA annual meetings and courses. [3.3.1. and 3.3.2.]	An increasing number [TBD] of non-archivists (e.g., records managers, IT professionals) attend SAA annual meetings and courses. [3.3.1. and 3.3.2.]
SAA and regional/state archival associations effectively [TBD] share knowledge and resources to strengthen the position of archives and archivists. [3.3.4.]	SAA and regional/state archival associations effectively [TBD] share knowledge and resources to strengthen the position of archives and archivists. [3.3.4.]	SAA and regional/state archival associations effectively [TBD] share knowledge and resources to strengthen the position of archives and archivists. [3.3.4.]
	By FY 2015, most papers and posters delivered at SAA's annual meeting are available long term on SAA's website. [3.2.1.]	

GOAL 4: MEETING MEMBERS' NEEDS
SAA is an agile association that delivers outstanding service and fosters a culture of participation.

4.1.   Invest in an effective and sustainable technology infrastructure.

Possible Tactics		Possible Specific Activities
4.1.1.	Implement a new association management software system for all aspects of membership services and operations.	• Issue an RFP for a new AMS as soon as the budget situation permits.
4.1.2.	Use social media tools with high member comfort levels to facilitate member-to-member communication.	• Solicit member feedback annually, especially that of component group leaders, to inform ongoing decisions about social media platforms that SAA supports and/or encourages for use of its members through the component groups to which they belong.
4.1.3.	Upgrade and implement a single web interface using current Drupal CMS technology that integrates standard Web 2.0 social media features, including the capacity to create virtual groups (Drupal Commons) within SAA.	• Produce a three-year plan that addresses: completion of a full migration of relevant legacy data, upgrade to current versions of Drupal, freshening of the user interface, and a plan for establishing virtual SAA groups through the Drupal Commons application. • Roll out comment version of an updated Drupal website with additional social media features by the time of the January 2016 Council meeting.
4.1.4.	Test, evaluate, and deploy a strategic implementation of online	• Present to the Council by January 2015 a projected three-year timeline to

access to select portions of SAA's annual meeting within a business model that projects eventual cost recovery.	include the technology requirements, cost impact statement, and operational overhead concerns for making online annual meeting sessions available.
4.1.5. Develop a healthy technology reserve to assist SAA in meeting its members' needs in an era of rapidly changing management and communications technologies.	• Annually add net budget gains to a technology reserve unless more pressing needs are overriding.

4.2.   Facilitate effective communication with and among members.

Possible Tactics	Possible Specific Activities
4.2.1. Implement short-term measures to enhance SAA's web and social media presence.	• Implement an aggregator tool to provide one-stop access to all of the social media accounts used by the SAA office and by all component groups. • Build on "Off the Record" blog to continue to engage with members in an informal context; ensure an active Council presence on Twitter.
4.2.2. Promote member input and increase means for members to tell SAA what they think and what they need.	• By 2015, use periodic blip-surveys to find out what members are thinking. Collect basic data on respondents to enable more robust evaluation of responses. • Beginning in 2015, use the results of these surveys to review and revise, in a continuous improvement model, SAA services and information delivery.

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

Possible Tactics	Possible Specific Activities
4.3.1. Remove barriers, perceived and actual, to broad participation by SAA members in Section and Roundtable activities.	• Council members to participate in at least one annual discussion of possible projects or issues with each Section/Roundtable leadership group for which they serve as liaison, encouraging activities that involve members who are not part of the group's leadership. • Publish at least one Off the Record post per month that highlights an impressive Section or Roundtable activity.
4.3.2. Formally adopt revenue-neutral, low-barrier social media tools to enable broader participation by members in SAA activities.	• Implement an aggregator on the SAA website to make it easier for SAA members and others to follow the social media posts of SAA and its component groups. • Launch annual meeting blog and encourage component groups to organize volunteers to contribute summaries of education sessions.

4.4. Foster a culture of creativity and experimentation across the association.

Possible Tactics	Possible Specific Activities
4.4.1. Take risks and be willing to fail.	• Implement changes stemming from the recommendations of the Annual Meeting Task Force, including those that may be "risky." • Communicate clearly with members about the level of risk and outcomes.
4.4.2. Develop different and more flexible component group/affiliation opportunities.	• By 2014, consider affiliations that may substitute for, or be created in addition to, Sections and Roundtables.
4.4.3. Develop a willingness to apply—and withdraw—resources as needs change.	

Goal 4 Key Performance Indicators (Examples):

FY 2014	FY 2015	FY 2016
		Following implementation of a new AMS, staff time required to register and track completion of DAS courses, tests, and certificate requirements is reduced by X%. [4.1.1.]
Each of SAA's Sections/RTs undertakes one activity (not including developing session proposals, planning group meetings, or soliciting candidates for office) that addresses concerns raised by members and includes participation beyond the group's leaders. [4.3.1.]	Each of SAA's Sections/RTs undertakes one activity (not including developing session proposals, planning group meetings, or soliciting candidates for office) that addresses concerns raised by members and includes participation beyond the group's leaders. [4.3.1.]	Each of SAA's Sections/RTs undertakes one activity (not including developing session proposals, planning group meetings, or soliciting candidates for office) that addresses concerns raised by members and includes participation beyond the group's leaders. [4.3.1.]
At the 2014 joint annual meeting, each education session is summarized by at least one participating member on an SAA-hosted blog within 24 hours of the end of the sessions. [4.3.2.]	At the 2015 annual meeting, each education session is summarized by at least one participating member on an SAA-hosted blog within 24 hours of the end of the sessions. [4.3.2.]	At the 2016annual meeting, each education session is summarized by at least one participating member on an SAA-hosted blog within 24 hours of the end of the sessions. [4.3.2.]