



SOCIETY OF  
**American  
Archivists**

# Fiscal Year 2009 ANNUAL REPORT

July 1, 2008 – June 30, 2009



“Your professional partner...”

**Providing members with timely information, high-quality education, and robust representation continued to be SAA's focus in Fiscal Year 2009.**

From a growing collection of online resources to useful public relations tools . . . From 71 workshops on leading topics held across the country to the largest West Coast Annual Meeting in SAA's history . . . From advocating for access to government records to online access to the back issues of *American Archivist* . . .

SAA was there to meet your evolving needs, represent your interests, and express the collective voice of the American archives profession. Reflected throughout these activities was special attention to the strategic priorities of Technology, Diversity, and Public Awareness and Advocacy.

## M E M B E R S H I P

**SAA's membership continued to grow in FY 2009**, peaking in April at 5,561 members. By June end, it had declined slightly to 5,489 members. It declined in most categories—except for ID 1 (which grew 8.5%), ID 7 (the new category at the upper end of the salary scale, which increased from 63 to 203 members over the course of the year), and students (which grew a whopping 29% to a new total of 1,282). There also has been a dramatic increase in the number of members taking advantage of the one-time “bridge” rate—and we hope that the special rate is helpful to those who are experiencing financial hardship.

### *Membership*

	July... 2004	2005	2006	2007	2008	2009
Individual	3,359	3,650	4,062	4,295	4,621	4,923
Institutional	494	516	551	564	593	566
<b>TOTAL</b>	<b>3,853</b>	<b>4,166</b>	<b>4,613</b>	<b>4,859</b>	<b>5,214</b>	<b>5,489</b>

# EDUCATION



**SAA Education Committee** member Patricia Galloway of the University of Texas at Austin facilitates discussion on graduate archival education during a student forum held in August 2008 at the SAA Annual Meeting in San Francisco.

The Education Department had another very strong year, with **71 programs** scheduled, including **3 web seminars**. The 68 face-to-face programs served more than 1,550 attendees from San Diego to Kingston, Rhode Island, from Atlanta to Denver and Bellevue, Washington. In addition, Education developed 14 new program topics and secured 18 new co-sponsors to work with SAA on bringing programs to their institutions.

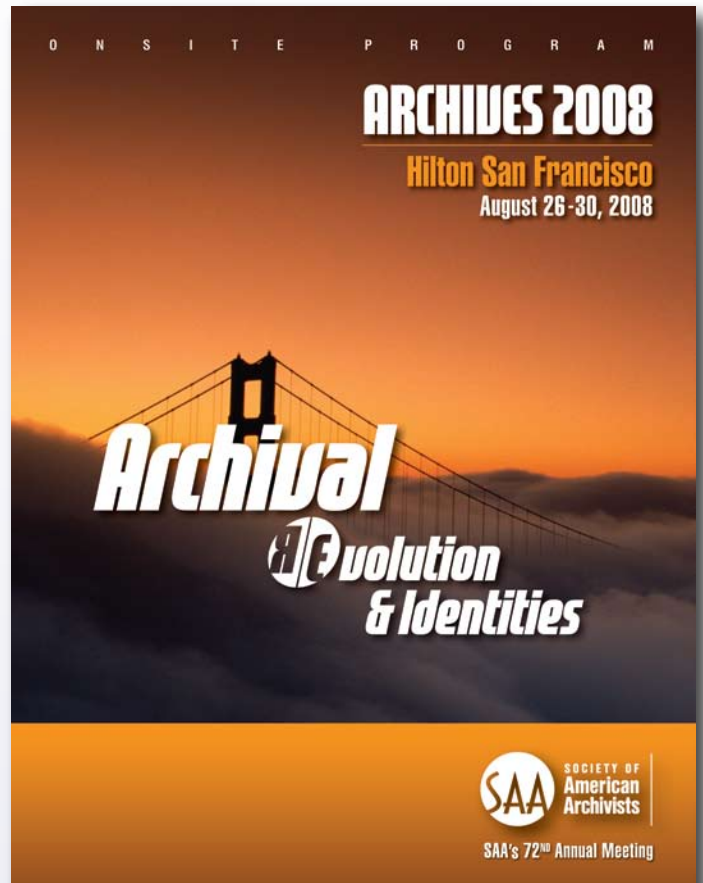
The Committee on Education researched the feasibility of SAA becoming an accrediting body for graduate education programs. The SAA Council adopted the committee's well-reasoned recommendation that the organization not pursue an accreditation program.

## ANNUAL MEETING

**"Archival R/Evolution and Identities"** got SAA off to a good start in FY 2009. The August 2008 conference in San Francisco exceeded all expectations for attendance, and with 1,795 paid registrants, it was SAA's largest-ever West Coast meeting.

### Annual Meeting Attendees

<b>San Francisco – 2008</b> .....	<b>1,795</b>
<b>Chicago – 2007</b> .....	<b>1,931</b>
<b>Washington, D.C. – 2006</b> .....	<b>2,100</b>
<b>New Orleans – 2005</b> .....	<b>1,420</b>
<b>Boston – 2004</b> .....	<b>1,456</b>
<b>Los Angeles – 2003</b> .....	<b>1,211</b>
<b>Birmingham – 2002</b> .....	<b>1,071</b>
<b>Washington, D.C. – 2001</b> .....	<b>1,471</b>



# PUBLICATIONS



## *American Archivist*

Journal Editor Mary Jo Pugh and the Editorial Board published two issues of the *American Archivist* in FY 2009. In addition, great progress was made in digitizing the back issues of the journal. Thirty-seven issues from the 1990s have been uploaded to the *American Archivist Online* website at <http://archivists.metapress.com/home/main.mpx>. Twenty volumes of the journal are now available electronically (issues from 1990 through 2009). The balance of the backlog—issues from 1938 through 1989—is being digitized and will be uploaded by 2010, at which time all issues of this important body of scholarship will be available electronically for the first time.

SAA signed an agreement in April to participate in JSTOR, an independent, not-for-profit organization dedicated to making a wide range of intellectual content available in a trusted digital archives. *American Archivist* is expected to debut on JSTOR in late 2010.

## Books and Brochures

SAA's publishing program is remarkably robust for our relatively small size, and we've come to rely on book sales as an important source of non-dues income. Four new titles were launched during the conference in San Francisco in August 2008:



**Archival Internships:  
A Guide for Faculty, Supervisors, and Students**  
by Jeannette A. Bastian and Donna Webber

**College and University Archives:  
Readings in Theory and Practice**  
edited by Christopher J. Prom and Ellen D. Swain

**Managing Congressional Collections**  
by Cynthia Pease Miller

**Navigating Legal Issues in Archives**  
by Menzi Behrnd-Klodt

In addition, another of SAA's brochures—"Donating Your Organizational Records to a Repository"—was translated into Spanish ("Guía para donar los registros de su organización a un depósito").

Despite the new publications, publishing revenues came in at 10% under budget.

## ePublications

Publications Editor Peter Wosh and the Publications Board thought very strategically about the future of SAA's publication offerings and spent quite a bit of time in FY 2009 identifying content for free downloading by SAA members, including:

*Thesaurus for Use in College and University Archives* (Feb. 2009), compiled and edited Kate Bowers, consisting of a set of 1,300 terms compiled from a variety of sources that can be used by any college or university archives for describing its holdings.

*Orphan Works: Statement of Best Practices* (June 2009) by the Intellectual Property Working Group with financial support from OCLC.

*EAD@10: Proceedings from a 2008 Symposium Celebrating the 10th Anniversary of Encoded Archival Description*.

The proceedings of the 2007 and 2008 SAA Research Forums (with a nod to Forum organizers Nancy McGovern and Helen Tibbo).

Campus Case Studies Series, which now has 11 case studies by university archivists on working solutions for born-digital records.

And two formerly out-of-print books: *Encoded Archival Description: Tag Library* (Version 2002) by the EAD Working Group and *Modern Archives: Principles and Techniques* (1956), the archival classic by Theodore Schellenberg.

# ADVOCACY

A leap forward in SAA's advocacy efforts occurred in August 2008 when the Council established a **Government Affairs Working Group** (GAWG) to take on the tasks of tracking government affairs issues of concern (or potential concern) to archivists and drafting for the Council's approval responses or position statements as needed. Although the Working Group's purview is broad, its overarching priority is the set of issues relating to preservation of and access to government records. GAWG's first task was to draft an Advocacy Agenda with recommendations for priorities.

High on SAA's agenda is passage of the **Preserving America's Historical Records Act** (or PAHR), which



would provide formula-based funding to states, territories, and the District of Columbia for statewide projects and redistribution to

local governments, historical societies, library historical collections, universities, and other organizations. The goal is to ensure essential care of, and improve access to, documents and historical records in many forms, from paper to electronic media. We're at a critical juncture with PAHR, and we encourage you to speak with or write to your members of Congress to convince them to sign on to the House legislation (H.R. 2256), and with your senators to find sponsors for a Senate bill. Kathleen Roe, chair of the PAHR Task Force made up of CoSA, NAGARA, and SAA representatives, has done yeoman's work in leading the charge to gain House sponsors—as well as to gain support from 36 organizations that have signed on in support of our efforts. See [www.archivists.org/pahr/](http://www.archivists.org/pahr/).

As in the past, SAA was heavily involved in bringing together those groups with a significant interest in the position of **Archivist of the United States**. SAA President Frank Boles built a coalition of 18 organizations that signed

on to “A New Archivist of the United States: Qualities of a Successful Candidate”—published in December 2008 soon after we learned of Allen Weinstein's resignation from that post. The joint statement drew the interest of the Obama Transition Team, and in January Boles, CoSA President David Hauray, NAGARA President Tracey Berezansky, NCH Executive Director Lee White, and Executive Director Nancy Beaumont met in Washington with two members of the Transition Team who were assigned to the National Archives. In addition, both Boles and Beaumont spoke with the White House Office of Personnel Management as the selection screening process got underway.

On January 21, 2009, with the stroke of a pen, President Obama eliminated the need for SAA to speak out against President George W. Bush's Executive Order 13233, a directive that severely limited public access to presidential records. SAA continues to support passage of the **Presidential Records Reform Act**, which would establish in law procedures to ensure timely release of these records. On that same day, a White House memorandum to heads of federal executive departments and agencies admonished that “the **Freedom of Information Act** should be administered with a clear presumption: In the face of doubt, openness prevails” and that “The presumption of disclosure also means that agencies should take affirmative steps to make information public.”

Now in its fourth year and continuing to gain momentum is the grassroots initiative dubbed **MayDay**, which



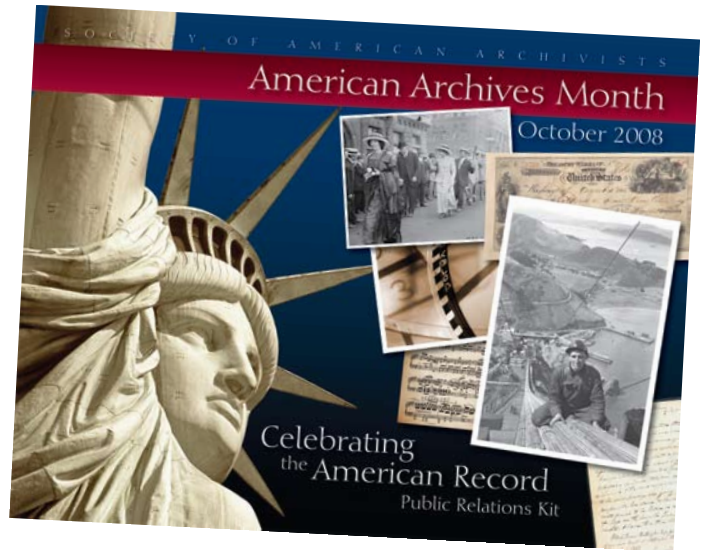
encourages members to do *something*—even if it's something small—on May 1 to prepare your staff and your repository to respond to an emergency and help save our archives.

# PUBLIC AWARENESS

The **American Archives Month Public Relations Kit** and poster were distributed in the spring and we're starting to see increased levels of participation and adoption of the materials that reside on the SAA and CoSA websites. Several members and their repositories participated in our 2008 Picture This! Contest. The winners were:

- For "Best Successfully Implemented Campaign":  
Indiana University Libraries
- For "Best Astonishing Idea for Archives Month":  
University of Wyoming, American Heritage Center
- For "Best Archives Month Poster":  
University of New Mexico Health Sciences Library

Janet Ceja and Harrison Inefuku are the first two recipients of SAA's **Mosaic Scholarship**, which provides financial and mentoring support to students pursuing graduate education in archival science, encourages students to pursue a career as an archivist, and promotes the diversification of the American archives profession. Funded by the Council out of operations in FY 2009, SAA's goal is to fund 10 Mosaic Scholarships out of the Foundation by 2013.



The Council took on an important change in governance procedures in May 2009 when it voted to make **all Council meeting materials open to all members**—with the exception of those materials considered by the Executive Committee to be private or confidential. Now posted to the SAA website are all Council action and discussion items and reports three days after those materials are available to Council members in preparation for a meeting.

**Web 2.0 and Away we go!** SAA has a Facebook page, a Twitter account, and a LinkedIn group.

 <http://facebook.com/archivists>  [http://twitter.com/archivists\\_org](http://twitter.com/archivists_org)  <http://www.linkedin.com/groups?gid=52874>



## THE SAA COUNCIL, 2008/2009

*From left, seated:* Vice President Peter Gottlieb, Wisconsin Historical Society; President Frank Boles, Central Michigan University; and Treasurer Ann Russell, Northeast Document Conservation Center. *From left, standing:* Margery Sly, Presbyterian Church USA; Rebecca Hankins, Texas A&M University; Rosalye Settles, U.S. Department of the Treasury; Leon Miller, Tulane University; Sara Hodson, Huntington Library; Bruce Ambacher, University of Maryland; Diane Vogt-O'Connor, Library of Congress; Tom Hyry, Yale University; and Nancy Lenoil, California State Archives.

# FY 2009 FINANCIAL SUMMARY

## General Fund Balance Sheet

Society of American Archivists • June 30

ASSETS	Fiscal Year ending...	2008	2009
Cash & Investments		\$1,411,120	\$1,462,641
Accounts Receivable		26,929	26,102
Property, Plant & Equipment		143,600	108,331
Cash Advances & Deposits		8,929	14,602
Inventory		121,459	139,360
Prepaid Expenses		207,552	182,297
Due from Special Funds		31,356	18,025
<b>Total Assets</b>		<b>\$1,950,945</b>	<b>\$1,951,358</b>
<b>LIABILITIES &amp; NET ASSETS</b>		<b>2008</b>	<b>2009</b>
Accounts Payable		\$6,436	\$17,500
Salaries and Wages Payable		31,976	44,390
Deferred Revenues		779,851	746,437
Deferred Rent		30,930	33,535
Due to Special Funds		514,904	522,713
<b>Total Liabilities</b>		<b>1,364,097</b>	<b>1,364,574</b>
<b>Total Fund Balance</b>		<b>586,848</b>	<b>586,783</b>
<b>Total Liabilities &amp; Fund Balance</b>		<b>\$1,950,945</b>	<b>\$1,951,358</b>

## General Fund Income and Expense Statement

Society of American Archivists • June 30

INCOME	Fiscal Year ending...	2007	2008	2009
Dues		\$571,634	\$619,887	\$691,572
Subscriptions & Advertising		129,645	104,433	90,165
Education		391,340	318,755	389,130
Annual Meeting		612,414	586,744	578,875
Publications		440,211	482,032	439,926
Online Job Advertising		1,614	50,583	32,855
Contributions		81	760	1,904
Investments		58,876	(22,038)	3,271
Other		73,603	89,184	91,391
<b>Total Income</b>		<b>\$2,279,418</b>	<b>\$2,230,340</b>	<b>\$2,319,089</b>
<b>EXPENSES</b>		<b>2007</b>	<b>2008</b>	<b>2009</b>
Personnel		\$655,519	\$793,944	\$869,413
Office Occupancy & Utilities		79,097	79,344	89,207
Services		819,982	1,051,876	969,916
Supplies		36,631	47,169	27,736
Travel		129,161	171,424	153,919
Leases, Rentals & Licenses		251,504	42,639	29,416
Taxes, Dues & Subscriptions		12,194	22,817	19,049
Depreciation, Cost of Goods Sold & Other		244,532	36,833	124,236
<b>Total Expenses</b>		<b>\$2,228,620</b>	<b>\$2,246,046</b>	<b>\$2,282,893</b>
<b>Net Gain / (Loss)</b>		<b>\$157,525</b>	<b>(15,706)</b>	<b>\$36,196</b>

## FY 2009 Schedule of Program Income and Expenditures

