

**Society of American Archivists
Council Meeting
May 16–17, 2017
Chicago, Illinois**

**Staff Report: Annual Meeting
(Prepared by Executive Director Nancy Beaumont)**

“Principles and Priorities for Continuously Improving the SAA Annual Meeting”

For an update on progress made toward the Council-adopted “Principles and Priorities for Continuously Improving the SAA Annual Meeting,” see the Appendix. **Updates since November 2016 appear in red type.**

***ARCHIVES 2017: alike/different* in Portland, Oregon**

As its theme implies, *ARCHIVES 2017: alike/different* has provided a wonderful opportunity to “shake things up” a bit. The schedule has been revamped (and is even tighter) and *The Liberated Archive: A Forum for Envisioning and Implementing a Community-Based Approach to Archives* is a grand experiment that is proving to, well, “liberate” our thinking and approaches to the conference.

Program Development

See “[ARCHIVES 2017: alike/different](#)” by 2017 Program Committee Chair Terry Baxter for an overview of the work of that committee. (A final report will be submitted to the Council after the conference.) As noted in Terry’s article, “The intended result of all this work—by the committee members, SAA staff, the folks who proposed sessions and posters, and community members in Portland—is an education program that will have something useful for as many attendees as possible. *alike/different* will have an arc. The sessions on Thursday and Friday provide practical, theoretical, and social knowledge that will build toward direct engagement with communities and their archives’ needs on Saturday.”

The submission and review schedule adopted in 2016 was continued in 2017. A total of 153 session proposals and 43 poster proposals (compared with 141 session and poster proposals in 2016) were evaluated. Since January, the SAA staff has been in regular communication with speakers to ensure that we have the most up-to-date information for posting on the conference website and that the speakers have the information and materials they need to plan for their presentations. (See “[Resources](#)” for information for speakers, first-timers and students, and those who want to “make the case” to attend.)

In addition to the 50 education sessions accepted by the Program Committee, the meeting will feature 32 Professional Poster presentations (up from 15 in 2016), 29 Graduate Student Poster presentations (two shy of 2016), and up to four slots for “Pop-Up Sessions” for which proposals will be submitted by the deadline of May 24 and then put to SAA members for a vote. This procedure for Pop-Ups was tried for the first time in 2016 and received very positive feedback.

A variety of noon-time forums are scheduled for Thursday, July 27, including those sponsored by the SAA Diversity Committee; the Committee on Advocacy and Public Policy, Committee on Public Awareness, and Issues and Advocacy Section; CALM; and the Technical Subcommittee on Archival Facilities Guidelines. In addition, the schedule includes a “Town Hall Conversation with SAA Leaders” that will feature SAA President Nance McGovern, Vice President/President-Elect Tanya Zanish-Belcher, and (we hope) leaders from several allied organizations whom Nance has invited to attend the conference.

Use of Social Media Before, During, and After the Conference

See “Use of Social Media at 2012 Annual Meeting”¹ for background on initiatives to incorporate social media more effectively into all aspects of the Annual Meeting. We plan to continue to build on lessons learned since then to enhance use of social media before, during, and after the 2017 conference.

- The [Host Committee blog](#) went live on April 19. The notion of an active Host Committee blog, now in its ninth year, is (appropriately) institutionalized.
- We will have free wireless access throughout the Oregon Convention Center space, which will make it easy to support...
- ... Use of Twitter and Facebook before, during, and after the conference. The hashtag #saa2017 has been in active use for several months, and the feed for this hashtag is aggregated on the conference home page.
- Matt Black has enhanced the conference web page(s) to integrate social media more seamlessly. Each page on the conference site features share buttons, and analytics demonstrate that users are consistently sharing pages via these buttons.
- The online schedule (via Sched.org) uses best-practice share features, allowing individual session descriptions to be shared and promoted. The platform also encourages users to connect their social media accounts, which enhances attendees’ ability to connect more directly via social media.

Conference Promotion

Promotion of the Annual Meeting began in the early fall via the conference website and in the January/February issue of *Archival Outlook* with the Terry’s article. Host Committee articles appear in each issue leading up to the conference, beginning in March/April, supplemented by my column. The Host Committee is in the process of

¹ <http://www2.archivists.org/sites/all/files/0612-V-L-AnnMtgSocialMedia.pdf>

developing a robust list of food and drink options, must-see destinations, and repository open houses and tours to experience on Tuesday and Wednesday of the conference week.

We did not develop a full Preliminary Program in PDF this year, but instead focused on creating a 16-page downloadable flyer that lives on the conference site and that supplements the Sched.org website, which allows for quick searching and filtering and also allows users to create a personalized schedule.

We continue to use *In the Loop* to refresh our promotional messages about the program, affiliated events, and the host city, and to remind members and other prospective registrants of important deadlines (like **July 6, the Early-Bird registration deadline!**).

Registration

Registration “went live” on the conference website on Monday, April 3. As of close of business on Monday, May 1 (i.e., 12 weeks out), we have registered 333 “full paid” attendees, of whom 31 are students. This compares with 79 “full paid” attendees (including 5 students) at 12 weeks out from the 2016 conference and 208 full-paid attendees (including 19 students) at 12 weeks out from the 2015 joint conference.

Per the suggestion of the Annual Meeting Task Force’s Social Responsibility subcommittee, the registration form includes an opportunity to “help us reduce our footprint” by opting out of receiving the print Onsite Program. In response to suggestions from the Women Archivists Section, we have once again asked registrants to indicate if they are interested in learning more about child care options in Portland, which we are currently investigating.

Exhibit, Sponsorship, and Advertising Support

As in recent years we have relied primarily on email communication and website postings to promote exhibiting and sponsorships, but also made a more concerted effort to personally contact prospects—and it’s paid off! Exhibits revenue to date totals \$82,900 (compared with \$66,000 in 2016 and \$87,700 in 2015), sponsorship revenue totals \$24,200 (compared with \$23,100 in 2016 and \$37,200 in 2015), and advertising revenue for the preliminary flyer, onsite program, and website totals \$5,600 (compared with \$7,530 in 2016 and \$13,700 in 2015). Special thanks to our five confirmed sponsors (Atlas Systems, Hewlett Packard Enterprise [**NEW!**], Preservica, Preservation Technologies, and Hollinger Metal Edge) for their support of SAA and the Annual Meeting.

Seventeen booths are still available in the ARCHIVES 2017 Expo Hall! We welcome your suggestions for potential exhibitors.

And as always, I welcome your comments and questions.

Principles and Priorities for Continuously Improving the SAA Annual Meeting

**(Adopted by the SAA Council, August 12, 2013, with
Updates as of May 2017)**

This document presents a summary of the Council's principles and priorities for ensuring the continued development of the Annual Meeting, based on the work of the 2011-2013 Annual Meeting Task Force. Going forward, the Council expects that there will be ongoing reporting on the extent to which these Principles and Priorities are put into play for the Annual Meeting. [See "Progress on Priorities as of May 2017" beginning on page 2, as well as Agenda Item 0813-1-VI-E-5-AnnMtg at <http://www2.archivists.org/sites/all/files/0813-1-VI-E-5-AnnMtg.pdf>.]

Guiding Principles

- We will make every meeting as useful, affordable, accessible, and enjoyable as possible for all attendees.
- We will explore new locations, structure, and content for the Annual Meeting on an ongoing basis.
- We will embrace a culture of experimentation and will be willing to take calculated risks with respect to the Annual Meeting. No aspect of the meeting will be off limits based on "tradition."
- We will encourage diversity among the people attending the meeting, contributing to its content, and benefiting from its results.
- We will actively pursue ways of making meeting content available online.
- We will integrate a commitment to social responsibility and sustainability into all aspects of meeting planning and execution.
- We will continuously seek feedback from both attendees and non-attendees on all aspects of the meeting.

Priorities for Site Selection and Contract Requirements

- We will experiment with meeting in cities of varying sizes, using a combination of a convention center and room blocks in several hotels at varying price points.
- We will reevaluate site selection criteria based on member input.
- We will facilitate inexpensive alternative housing (such as dormitories) whenever feasible.
- We will stipulate in all Requests for Proposals (RFPs) that free wireless access in meeting spaces is a key component of our needs.
- We will stipulate in all RFPs the importance of fair labor practices, sustainable ("green") practices, and donation of excess food and beverage to worthy causes.
- Staff will actively monitor and report to the Council information about labor contracts and potential labor actions affecting the hotel sector.

Priorities for Delivery of Meeting Content

- We will deploy a mobile conference app for access to program information via smart phones and tablets.

- We will ensure that each year’s conference website includes effective functionality and navigation.
- We will seek to provide free and easy access to session content from past conferences.
- We will investigate and incrementally implement online access to meeting content by various means as technology and resources permit.
- We will implement sustainable practices in our production of conference materials.

Priorities for New Approaches to Meeting Content and Structure

- We will experiment with new approaches to plenary sessions.
- We will identify and implement new approaches to structured and unstructured networking.
- We will experiment with new formats and content for education sessions.
- The Program Committee charge will be revised to encourage innovation.
- We will actively publicize to members all efforts to consider, implement, and evaluate the effectiveness of new approaches.

Progress on Priorities as of May 2016

Site Selection and Contract Requirements

- **We will experiment with meeting in cities of varying sizes using a combination of a convention center and room blocks in several hotels at varying price points.**
Progress: Conducted very successful conference in Cleveland using the Cleveland Convention Center plus three hotels for 2015. We reverted to a more traditional approach in one hotel (the Hilton Atlanta) for 2016. The 2017 conference will be held at the Oregon Convention Center plus two hotels in Portland, and the 2018 conference will take us back to the Marriott Wardman Park in Washington, DC. Going forward, we will consider alternatives to quadrennial meetings in Washington, DC.
- **We will offer inexpensive alternative housing (such as dormitories) whenever feasible.**
Progress: Staff actively pursued options for the 2014, 2015, 2016, and 2017 conferences, but found that all local colleges, universities, and other institutions with dorm space discontinue availability of dorms beginning in early August. **Given the July dates of the 2017 meeting, we pursued options with four Portland-based colleges and universities. Only Portland State University rents dormitory rooms to conference groups, but it required a \$16,000 (non-negotiable) guarantee that was not feasible for SAA. We will continue to explore options in 2018 and beyond.**
- **We will stipulate in all Requests for Proposals (RFP) that free wireless access in meeting spaces is a key component of our needs.**
Progress: This stipulation is covered in all current contracts (2016-2020) and will be included in all future RFPs and contracts.
- **We will stipulate in all RFPs the importance of fair labor practices, sustainable (“green”) practices, and donation of excess food and beverage to worthy causes.**
Progress: This stipulation is covered in all current contracts (2016-2020) and will be included in all future RFPs and contracts. **The Oregon Convention Center prides itself on its LEED**

certification and stringent “green” policies and practices, which SAA has committed to follow in 2017.

- **Staff will actively monitor information about labor contracts and potential labor actions affecting the hotel sector.**

Progress: This is being done on an ongoing basis.

Priorities for Delivery of Meeting Content

- **We will deploy a mobile conference app for access to program information via smart phones and tablets.**

Progress: The app launched in 2013 was refined for 2014, 2015, 2016, and 2017 based on user feedback. We will continue to refine going forward, with an emphasis on solving the problem of being able to create a full personal schedule on the app. Several staff members have been trained to work in Sched, which has expanded our capacity to enhance the mobile app.

- **We will ensure that each year’s conference website includes effective functionality and navigation.**

Progress: The conference website was retooled for 2013 and refined in 2014, 2015, 2016, and 2017. The websites for the 2015 and 2016 conferences were launched in November, much earlier than in the past, and the 2017 conference website was launched in late October.

- **We will seek to provide free access to recordings made of important sessions from past conferences.**

Progress: All recordings from 2006 to 2014 are freely available via the SAA website. We expect that the 2015 recordings will join this list by September 2017.

- **We will investigate and incrementally implement online access to meeting content by various means as technology and resources permit.**

Progress: We have moved to inexpensive access to the current year’s recordings by contracting for MP3 production and selling via the conference app and website. For the 2014 conference, MP3s were made available for \$29.99 members / \$39.99 nonmembers and SAA broke even on the sales. For the 2015 conference, MP3s were made available for \$19.99 members / \$29.99 nonmembers. We did not break even on that project. For 2016 and 2017, we increased registration rates slightly and included free access to the complete set of MP3s.

- **We will implement sustainable practices in our production of conference materials.**

Progress: As of 2013, registrants may opt out from receiving the onsite program in paper. Approximately 10% of attendees selected this option in advance for the 2013-2016 conferences. We are using recycled and recyclable materials for name badges and badge holders. The Oregon Convention Center, site of our 2017 annual meeting, requires compliance with a rigorous “green” policy for all conference materials.

Priorities for New Approaches to Meeting Content and Structure

- **We will experiment with new approaches to plenary sessions.**

Progress: In 2013, the opening plenary featured a panel of two speakers moderated by the SAA president. The Vice-President/President-Elect presented her inaugural address at the Business Meeting on Saturday. The 2014 opening plenary featured the sponsoring

organizations' awards and a panel discussion about open access to government records. Plenary 2 featured a presentation by National History Day Executive Director Cathy Gorn; the presidential address was presented to a private group and videotaped for distribution via the SAA website. Those attendees who completed evaluations of the 2014 conference generally did not favor this approach to the plenaries. In 2015 the opening plenary featured awards and two speakers who addressed one aspect of SAA's Goal 1: Advocacy. Plenary 2 featured the presidential address as well as the Vice President's incoming remarks and a presentation by a Council member on another of the Society's strategic priorities. In 2016 we reverted to a more "traditional" approach, with a keynote speaker during Plenary 1, the Presidential Address and awards during Plenary 2, and the incoming President's remarks at the Annual Membership Meeting. **In 2017, we are maintaining a "traditional" approach to Plenaries 1 and 2 but moving Plenary 1 to Wednesday evening. All awards will be made during the two plenaries, with no Awards Ceremony. And we will have two plenary sessions associated with *The Liberated Archive Forum* on Saturday.**

- **We will identify and implement new approaches to structured and unstructured networking.**

Progress: Per the request of the Annual Meeting Task Force, from 2012 to 2015 we set aside a room of round tables that small groups could reserve for informal meetings on an ad hoc basis. The rooms generally have been undersubscribed and we did not offer this option in 2016. Special attention has been paid to promoting the benefits of networking ("connections") in all promotional materials.

- **We will experiment with new formats and content for education sessions.**

Progress: The 2014 Call for Proposals invited individuals to propose new session formats of any kind. Sessions were 60 or 75 minutes long rather than the "traditional" 90-minute time blocks in the hope that this would open up time for other possible conference activities. For 2015, the Program Committee continued the notion of "alternative" formats as well as 60- or 75-minute sessions. They also initiated the idea of "Pop-Up Sessions" with a much later proposal deadline – including the possibility of requesting a "Pop-Up Session" onsite at the conference. In 2016 we tweaked the Pop-Up Session selection process by inviting all proposals in advance of the conference and then inviting members to vote for their top five sessions; the "winners" were slated during regular programming hours. **In 2017, we are repeating the very successful approach to submitting and selecting Pop-Up Sessions used in 2016 and are experimenting with several new approaches to programming with full-day *Liberated Archive Forum* on Saturday.**

- **The Program Committee charge will be revised to encourage Program Committees to innovate in additional ways.**

Progress: The Council adopted a revised charge at its August 2013 meeting. (See 0813-1-III-A-2-ProgComm.)

- **We will actively publicize to members all efforts to consider, implement, and evaluate the effectiveness of new approaches.**

Progress: This document – with updates – will be provided on an ongoing basis as a component of the Annual Meeting staff report. In addition, Program Committee and Host Committee reports will address the "Principles and Priorities" as appropriate.