Society of American Archivists
Council Meeting
May 7–9, 2018
Chicago, Illinois

Staff Report: Annual Meeting
(Prepared by 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. As noted there, we have signed contracts with the JW Marriott in Austin for 2019 and the Chicago Hilton for 2020. Per the Council's discussion in November 2017, we are pursuing venues in Boston in 2021, Anaheim in 2022, and Washington, DC, in 2023 (a lapse of five years rather than the typical four between Washington, DC, conferences).

2018 Joint Annual Meeting in Washington, DC

The 2018 Program Committee adopted the 2016 and 2017 schedule for program proposal submission and review, with proposals due on November 15 to allow ample time for collaboration and proposal development. The Committee met in Chicago from January 8 to 10. As in the past few years, proposers were encouraged to use an informal spreadsheet to connect with others when developing proposals.

Program Development

See "*ARCHIVES*RECORDS 2018: Promoting Transparency*," by 2018 co-chairs Debbie Bahn (NAGARA), Lisa Speer (CoSA), and Meg Tuomala (SAA) in the January/February issue of *Archival Outlook*, which provides an overview of the work of the Program Committee. (A final report will be submitted to the Council after the conference.) As noted in the article, "Since [our] first meeting last July in Portland, we've been working to ensure that the program content will be diverse, inspiring, informative, creative, and innovative."

The submission and review schedule adopted in 2016 was continued in 2018. A total of 185 session proposals and 20 poster proposals (compared with 153 session and 43 poster proposals in 2017) 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 72 education sessions accepted by the Program Committee, the meeting will feature 14 Professional Poster presentations (down from 33 in 2017), 21 Graduate Student Poster presentations (down from 27 in 2017), and up to five slots for "Pop-Up Sessions" for which proposals will be submitted by the deadline of May 24 and then put to CoSA, NAGARA, and SAA members for a vote. This procedure for Pop-Ups was tried for the first time in 2016 and has received very positive feedback.

A variety of noon-time forums are scheduled for Thursday, August 16, including those sponsored by the SAA Diversity Committee and the Technical Subcommittee on Archival Facilities Guidelines. We were excited by the prospect of featuring a conversation between Librarian of Congress Dr. Carla Hayden and Archivist of the United States David Ferriero (a reprise of a presentation they did together at Harvard in the fall), but learned of Dr. Hayden's change of plans in mid-April. We are currently working with NARA to try to schedule an "Open Government" discussion between Ferriero and perhaps long-time FOIA supporter Senator Patrick Leahy.

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 2018 conference.

- The Host Committee blog went live on April 17. The notion of an active Host Committee blog, now in its eleventh year, is (appropriately) institutionalized.
- We will have free wireless access throughout the Marriott Wardman Park space, which will make it easy to support….
- … Use of Twitter and Facebook before, during, and after the conference. The hashtag #saa2018 has been in active use for several months, and the feed for this hashtag is aggregated on the conference home page. We encourage our partners to adopt #cosa18 and #nagara18.
- 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 Joint Annual Meeting began in the early fall via the conference website and in the January/February issue of *Archival Outlook* with the co-chairs' article. Host Committee articles appear in each issue leading up to the conference, beginning in March/April. The Host Committee is in the process of 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.

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

As in 2017, we did not develop a full Preliminary Program in PDF this year, but instead focused on creating a 12-page downloadable flyer 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 Friday, April 13, and was announced on Tuesday, April 17. I will provide the Council with periodic updates on registration.

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 Washington, which we are currently investigating. We will have at least one gender-neutral restroom available to our attendees.

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 to make use of the connections of our NAGARA and CoSA partners. Traditionally the Joint Annual Meeting in Washington, DC, yields 75 booths and healthy sponsorship. Exhibits revenue to date totals $98,320 (compared with $82,900 in 2017, $66,000 in 2016, and $87,700 in 2015), sponsorship revenue totals $42,600 (compared with $24,200 in 2017, $23,100 in 2016, and $37,200 in 2015), and advertising revenue for the preliminary flyer, onsite program, and website totals $2,900 (compared with $5,600 in 2017, $7,530 in 2016, and $13,700 in 2015). Special thanks to our six confirmed sponsors (Ancestry, Atlas Systems, Feith [new!], Preservation Technologies, Preservica, and University Products) for their support of the Joint Annual Meeting.

Twenty-one booths are still available in the *ARCHIVES*RECORDS 2018* Expo Hall! We welcome your suggestions for potential exhibitors.

SAA Foundation Travel Awards

At the suggestion of SAA President Tanya Zanish-Belcher, the SAA Foundation Board approved expenditure of $10,000 to support 10 travel awards to the 2018 Joint Annual Meeting. We are very grateful to the Foundation for this gift and look forward to receiving feedback (read "testimonials") from the travel award recipients.

As always, I welcome your comments and questions on any and all aspects of the Annual Meeting.

Principles and Priorities for Continuously Improving the SAA Annual Meeting
(Adopted by the SAA Council, August 12, 2013, with Updates as of May 2018)

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.

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 2018

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 was 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. The 2019 conference in Austin and the 2020 conference in Chicago will be held entirely in hotels. As of May 2018, we are negotiating with two hotels in Boston (for 2021) that would involve use of a convention center for the exhibit hall. For 2022 in Anaheim and 2023 in Washington, DC, we are looking at use of hotels only. The post-recession environment that made it possible for us to negotiate hotel/convention center packages with convention and visitors bureaus in Cleveland (2015) and Portland (2017) no longer exists, and we are looking at other potential models for placement of the conference.

- **We will offer inexpensive alternative housing (such as dormitories) whenever feasible.**
  Progress: Staff actively pursued options for the 2014-2018 conferences, but found that all local colleges, universities, and other institutions with dorm space discontinue availability of dorms beginning in late July or early August. We will continue to pursue this option in the future.

- **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 (2018-2020) and 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 (2018-2020) and included in all future RFPs and contracts.

- **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 is refined annually based on user feedback and new releases. 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.

- **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 each year since then.

- **We will seek to provide free access to recordings made of important sessions from past conferences.**
  Progress: All recordings from 2006 to 2016 are freely available via the [SAA website](#).

- **We will investigate and incrementally implement online access to meeting content by various means as technology and resources permit.**
  Progress: Beginning in 2016, we have provided free MP3 downloads of all recorded sessions to all registrants and have sold the [downloads](#) at a very reasonable price to non-registrants. We have continued to monitor the industry regarding virtual conferencing and streaming options and will be recommending options for the 2019 Annual Meeting in Austin.

- **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 2013-2017 conferences. We are using recycled and recyclable materials for the onsite program, name badges, and badge holders. The Oregon Convention Center, site of our 2017 annual meeting, required compliance with a rigorous "green" policy for all conference materials, including all signage.

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. This format was repeated in 2017 and will be used again in 2018.

- **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 discontinued this option in 2016. Special attention has been paid to promoting the benefits of networking in all collateral 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. Pop-Up Sessions were invited in 2016 and 2017 as well. And the 2017 conference featured "The Liberated Archive Forum: A Forum for Envisioning and Implementing a Community-Based Approach to Archives," which invited members of the Portland community to interact with archivists. The 2018 Joint Annual Meeting will include Pop-Up Sessions.

- **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 articles in our periodicals and Council reports will address the "Principles and Priorities" as appropriate.