

**Society of American Archivists  
Council Meeting  
August 11-12, 2014  
Washington, D.C.**

**Principles and Priorities for Planning Future Joint Meetings (Prepared  
by Terry Baxter, Elisabeth Kaplan, and Tanya Zanish-Belcher)**

In June 2012 the SAA Council tasked the three of us with “drafting a prospectus on future joint annual meetings” to provide a “framework for considering and negotiating future joint meetings.” We also were asked to propose a “plan for soliciting feedback from SAA component groups and selected other professional organizations.” The draft principles (see below) and proposed outreach plan are the outcome of our activity.

**BACKGROUND**

In June 2012 the Council received a proposal from the National Association of Government Archives and Records Administrators (NAGARA) for a joint meeting of SAA, NAGARA, and the Council of State Archivists (COSA) in 2014. During discussion of the proposal, Council members noted that recommendations of the Annual Meeting Task Force (AMTF) were expected soon, and the concern was voiced that the 2014 meeting should be consistent with those recommendations of the AMTF that the Council adopts. Further, Council members felt that SAA’s somewhat *ad hoc* process of developing joint meetings would be improved by the availability of an explicit set of SAA principles for joint meetings, so that each Council to review a proposal or respond to suggestions for joint meetings would not be starting from scratch. The Council tasked the three of us with drafting such a document for its consideration. The draft framework guidelines included here are based on that discussion.

**DISCUSSION**

The proposed “Principles and Priorities” document is intended as a framework for planning, to allow future Councils as much flexibility as possible while clearly articulating and codifying the factors that the organization will consider in evaluating or making proposals for joint meetings.

**DISCUSSION QUESTIONS**

1. Is the proposed framework substantial enough to guide Council decisions about proposed joint meetings?
2. Is a more detailed framework needed?
3. Are other tools/structures needed?

**RECOMMENDATIONS**

- SAA Council adopt the draft “Principles and Priorities for Planning Joint Meetings with Other Professional Organizations.”
- Solicit comment from component groups via Leader List.
- SAA-appointed liaisons share with potentially affected organizations, such as AHA, ARMA, CoSA, NAGARA, and RBMS, for comment.
- Post “Principles and Priorities” for comments from SAA membership.

**DRAFT**  
**Principles and Priorities for Planning Joint Meetings  
with Other Professional Organizations**

Joint meetings of SAA with other professional organizations should aspire to:

- Be consistent with SAA’s “Principles and Priorities for Continuously Improving the SAA Annual Meeting.”<sup>i</sup>
- Be consistent with SAA’s commitment to social responsibility in all aspects of meeting planning and execution.
- Attract new and more diverse attendees.
- Enhance SAA’s relations with other organizations.
- Explore partnerships with non-traditional (ie, non-records-focused) organizations.
- Result in an improved program.
- Not have an unreasonable impact on SAA staff workload.
- Result in increased revenue from new members and vendors.
- Experiment with new program features and formats.

When considering a joint meeting, the SAA Council and staff should consider the following in their discussions:

- What does SAA hope to gain from a joint annual meeting?
- What are the benefits to SAA's membership (in total, and from the perspective of component groups) from a joint annual meeting?
- What types of programming would best leverage a joint annual meeting for SAA's members?
- What collaborative assets does the other organization bring to planning and holding a joint annual meeting?
- What is the mission of the proposed partner and how can learning about it enhance the work of SAA’s members?
- What financial bottom lines (in terms of both expenditures and profits) would help determine the feasibility of a joint annual meeting?
- What are the top two things that would make a joint annual meeting a success from the perspective of SAA and its members?
- What one or two things would make a joint annual meeting less than successful from the perspective of SAA and its members?

**Support Statement:** It has become clear that the *ad hoc* way in which SAA has considered and negotiated joint annual meetings in the past is not sustainable in the future. A more structured framework is needed for the future to help define SAA’s goals for holding joint annual meetings, to evaluate potential annual meeting partners, and to guide negotiations with other organizations

that might co-sponsor joint meetings. The “Principles and Priorities for Planning Joint Meetings with Other Professional Organizations” are intended to support and guide planning and decision-making around potential joint meetings. Joint meetings have great potential to increase the possibilities of professional relationship building, networking, and revenue for SAA. Joint meetings may also have other intangible benefits, which should not be discounted.

**Impact on Strategic Priorities:** Holding joint meetings would assist in successfully achieving goals outlined in SAA’s Strategic Plan:

**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 content, via education and publications, which reflects the latest thinking and best practices in the field.

**Goal 3: Advancing the Field—Professional knowledge expands to keep pace with an increasingly diverse archival record.** 3.2. Foster and disseminate research in and about the field. 3.3. Participate actively in relevant partnerships and collaborations to enhance professional knowledge.

**Fiscal Impact:** We can expect that there will be a direct fiscal impact, but it is difficult to assess what that would be. Every annual meeting entails a certain level of financial risk to the organization; a proposed joint meeting with a new partner organization raises that level of risk. It may also provide potential for increased revenues. Indirect impact is inevitable given that an entirely new investment of staff time in getting to know a potential partner organization’s leadership and negotiating a whole new set of requirements will take considerable time. Future Councils will need to weigh the risk with the potential benefits to the organization and the profession.

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<sup>i</sup> See “Principles and Priorities for Continuously Improving the SAA Annual Meeting” (as adopted by the SAA Council, August 12, 2013):

- 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 strive to make every meeting as useful, affordable, accessible, and enjoyable as possible for all attendees,
- We will find ways to enable a highly diverse population of registrants.
- We will actively pursue ways of making meeting content available online.
- We will integrate a commitment to social responsibility into all aspects of meeting planning and execution.
- We will continuously seek feedback from both attendees and non-attendees on various aspects of the meeting, including site selection, content, options for online access, and affordability.