

**Society of American Archivists
Council Meeting
November 9 – 12, 2014
Chicago, Illinois**

**Principles and Priorities for Planning Joint Meetings
with Other Professional Organizations
(Prepared by Michelle Light and Tanya Zanish-Belcher)**

BACKGROUND

Woven throughout SAA's Strategic Plan 2014-2018 is recognition of the importance of collaboration. SAA has joined forces with other organizations – notably the Council of State Archivists and the National Association of Government Archives and Records Administrators – on joint annual meetings during the past ten years. However, there may be other groups with which SAA might collaborate on conferences. In June 2012 SAA Council tasked several Council members with “drafting a prospectus on future joint meetings” to provide a “framework for considering and negotiating future joint meetings.”

A draft document was discussed at the Council's August 11-12, 2014, meeting and subsequently was posted for member comment. A final document incorporating comments received is presented below for adoption.

DISCUSSION

The draft “Principles and Priorities for Planning Joint Meetings with Other Professional Organizations” was made available for comment via the SAA website from August 26 to September 10, 2014. Five comments were received from four individuals. The majority were enthusiastic about the potential professional opportunities offered by meeting with other organizations. However, some concerns were expressed as well, including the fear that governance and traditions that currently are part of the SAA Annual Meeting would be discarded, and that the size of joint meetings would make it difficult for SAA members to identify the meeting as “SAA.” At least two individuals were interested in submitting the names of organizations with which SAA might meet.

The drafting group considered all the comments received and came to consensus on three minor revisions to the August 2014 document:

Line addition to bullet points: “Be consistent with SAA’s Governance Manual.” The Governance Manual ensures available open meetings and transparency for SAA governance.

Enshrining the other traditions as “permanent,” however, would conflict with SAA’s “Principles and Priorities for Continuously Improving the SAA Annual Meeting,” which was approved by the Council on August 12, 2013. SAA members have continuously communicated the desire for the Annual Meeting content and schedule to be flexible in response to member needs and wants.

Line addition in “consideration” section: From SAA’s perspective, what benefits does it bring to the other prospective associations that would encourage participation in a joint meeting?

Line addition at end of “Principles and Priorities”: Any SAA member interested in submitting an idea for a joint annual meeting, should direct them to Executive Director, Nancy Beaumont. She will, in turn, forward them along for discussion to the Executive Committee and SAA Council.

RECOMMENDATION

THAT “Principles and Priorities for Planning Joint Meetings with Other Professional Organizations” as presented below be adopted.

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.”ⁱ
- Be consistent with SAA’s Governance Manual.
- 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 (i.e., 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?
- From SAA's perspective, what benefits does it bring to the other prospective associations that would encourage participation in a joint meeting?

Any SAA member who is interested in submitting an idea for a joint annual meeting should contact the SAA Executive Director, who will forward ideas to the SAA Executive Committee and Council for discussion.

Support Statement: These “Principles and Priorities” support SAA’s efforts to collaborate with other organizations and to offer expanded educational and networking opportunities for its membership. It has become clear that the *ad hoc* way in which SAA has considered and negotiated joint meetings in the past is not sustainable in the future. A more structured framework is needed to help define SAA’s goals for holding joint annual meetings, to evaluate potential annual meeting partners, and to guide negotiations with other organizations.

Impact on Strategic Priorities: These “Principles and Priorities” assist in achieving:

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: As stated in the draft “Principles and Priorities,” 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; a proposal for a joint meeting with a new partner organization raises that level of risk, while also providing the potential for increased revenues. Indirect impact is inevitable, given the considerable staff time involved in getting to know a potential partner’s leaders and negotiating a new set of

meeting requirements. Future Councils will need to weigh the risk with the potential benefits to the organization and the profession.

ⁱ 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.