Society of American Archivists
Council Meeting
November 2-3, 2018
Chicago, Illinois

Staff Report: Annual Meeting
(Prepared by Nancy Beaumont)

"Principles and Priorities for Continuously Improving the SAA Annual Meeting"

Find the updated Principles here. Newly added language regarding the expectation that panels will be diverse and inclusive has been incorporated into the proposal submission form. See the Appendix (beginning on page 3) for an update on progress made toward addressing the Principles and Priorities.

2018 Joint Annual Meeting in Washington, DC

For previous reports on the 2018 Joint Annual Meeting, see 0818-1-VI-E-5, 0518-VI-E-5, and 1117-VI-E-5. Total paid attendance at the conference was 2,671, making it the largest conference in SAA's history.

Staff spent significant time from mid-August through late September reviewing and reconciling the master bills for the conference, applying charges internally, and billing affiliate organizations appropriately.

Participation in the evaluation of *ARCHIVES*RECORDS 2018* was fair, with approximately 18% of total attendees responding to the survey (compared with 25% in 2017, 23% in 2016, 41% in 2015, and 18% for the 2014 Joint Annual Meeting). These survey results have a margin of error of 4%. Following is a general overview.

- Overall feedback was very positive. Eighty-eight percent (88%) of respondents reported being "Extremely Satisfied" or "Moderately Satisfied" with the event overall (compared to 82% for AM2017, 87% for AM2016, and 91% for AM2015).

- Education Sessions, the Mobile App, and Poster Presentations stand out as getting particularly good reviews—and, at long last, the Plenary Sessions received positive reviews.

- The All-Attendee reception scored relatively low again this year. Although more than half of attendees (55%) rated it "Excellent," "Very Good," or "Good," 13% rated it "Fair" or "Poor" and more than 31% did not attend.

- For the question "What was the most important reason for your decision to attend the Joint Annual Meeting?" the top answer by far (60.85%) was "Professional development," as it has been consistently for years. "Connect with colleagues/meet new people" and "To get inspired/get new ideas" were virtually tied at 37% each. (Clearly, respondents indicated more than one reason, rather than "most important reason.")

- The most common suggestions for improvement related to crowded conditions, scheduling conflicts/flow, costs, and food and beverage (more [free] coffee).

A summary of survey results was made available on the conference website on October 4. In the interest of continuous improvement, staff will be conducting a thorough analysis of the survey results—including extensive verbatim comments—and sharing them with various groups and individuals.

2019 Joint Annual Meeting in Austin

- The Call for Proposals was posted on the SAA website on September 5 and has been announced continuously via various media since then. The 2019 Program Committee has adopted the 2016-2018 schedule for program proposal submissions and review, with proposals due on November 16 to allow ample time for collaboration and proposal development. The Committee will meet in Chicago from January 14 to 16. As in the past few years, proposers are encouraged to use an informal spreadsheet to connect with others when developing proposals. (The spreadsheet has already gained a lot of traction!)

- Audra Yun and I learned in a mid-September call with Society of California Archivists President Teresa Mora that SCA has abandoned an earlier plan to hold its Annual General Meeting in two locations (northern and southern California) at the same time as SAA's 2019 Annual Meeting. Instead, the AGM will be held in April. This means that we will not need to plan for live broadcasts from Austin to two California sites. Instead, we are focusing our exploration of "virtual conferencing" options on livestreaming some Austin sessions and video-recording others for access by archivists around the country. Audra and Teresa are promoting the idea of inviting groups to gather at institutional locations to view and discuss live-streamed and/or recorded sessions. This is a great idea that we will promote more generally—once we know the details of our "virtual conferencing" experiment.

- I will be conducting a site visit of the JW Marriott Hotel in Austin with our logistics consultant on December 5 and 6. Our visit will include meeting with Convention and Visitors Bureau staff regarding potential reception sites and options for advocacy activities while in Austin.

- We plan no increase in conference registration fees in 2019. Fees associated with remote participation will be determined once we know more about expenses associated with virtual conferencing.

We will report out as progress is made on the draft schedule, exhibit/sponsor sales, plenary development, and other aspects of the conference planning.

Future Conferences

The [dates and locations of SAA annual conferences](#) through 2023 are posted on the website. As a reminder, they are: Chicago (Hilton) in 2020, Anaheim (Hilton) in 2021, Boston (Sheraton) in 2022, and Washington, DC (Hilton), in 2023. All contracts have been executed and are in compliance with the Principles and Priorities for Continuously Improving the SAA Annual Meeting.

As a result of connections made at Tanya Zanish-Belcher's invitational forum in Washington, DC, with representatives of allied organizations, I participated in an October 8 conference call with Mary Ellen Davis (executive director of the Association of College and Research Libraries) and Elizabeth Haven Hawley, a leader within ACRL/RBMS and an SAA member, to discuss ways in which SAA might collaborate with ACRL/RBMS, with a focus on holding a joint conference. (Shannon Supple, who attended the forum, was not able to attend the conference call.) We had a good call and agreed to follow up in late October. Given the fact that RBMS attendees work in academic environments, we agreed that the first conference at which we might reasonably consider meeting together is SAA's 2020 Annual Meeting in Chicago, which occurs August 2–8. An even better option may be Anaheim in 2021, which begins on July 31. More to come as we continue to explore options for collaboration.

As always, I welcome your questions, comments, and suggestions.

Appendix

Principles and Priorities for Continuously Improving the SAA Annual Meeting
(Adopted by the SAA Council, August 12, 2013; Revised August 2018; Updates as of November 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. 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. *Updates since May 2018 appear in red.*

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.
- We will strive to meet in locations governed by laws, regulations, and practices that support the values and ethics of SAA. (Added in August 2018.)

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 will be encouraged to foster innovation. (Updated in August 2018.)
- We will actively publicize to members all efforts to consider, implement, and evaluate the effectiveness of new approaches.
- We will assess and review our meeting content and structure in order to constantly improve. (Added in August 2018)

- We expect panels to be diverse and inclusive. This includes bringing balance to the panels, such as *individual* diversity (gender, race, age, length of time in profession, ability, access to financial resources), *institutional* diversity (academic, business/corporate, government, non-profit, large, small), and *geographic* diversity. (Added in August 2018.)

Progress on Priorities as of November 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 took us back to the Marriott Wardman Park in Washington, DC. The 2019 conference in Austin, the 2020 conference in Chicago, the 2021 conference in Anaheim, the 2022 conference in Boston, and the 2023 conference in Washington, DC, will be held entirely in hotels as the environment for booking convention centers plus hotels has shifted significantly since we last booked in a convention center (2017). Going forward, SAA must look at third-tier cities if convention centers are to be considered. However, this becomes increasingly more challenging when the principles of pricing, accessibility, and fair state laws and regulations are also to be considered.

- **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 early August. 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 (2018-2023) and will be included in all future RFPs and contracts. Ongoing.

- **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 (2018-2023) and will be included in all future RFPs and contracts. Ongoing.

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

- **We will strive to meet in locations governed by laws, regulations, and practices that support the values and ethics of SAA.** (Added in August 2018.)

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. Ongoing.

- **We will ensure that each year's conference website includes effective functionality and navigation.**
  Progress: The conference website was retooled for 2013 and refined each year since then. Ongoing.

- **We will seek to provide free access to recordings made of important sessions from past conferences.**
  Progress: All recordings from 2006 to 2017 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 within one month of the conference and have sold the downloads at a very reasonable price to non-registrants ($19.99 for members and $29.99 for nonmembers). We are actively seeking bids for virtual conferencing and video-streaming options for the 2019 Joint 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 2013-2018 conferences. We are using recycled and recyclable materials for name badges. The Oregon Convention Center, site of our 2017 annual meeting, required compliance with a rigorous "green" policy for all conference materials. The 2018 conference hotel did not make recycling bins available on a reliable basis; we will ensure that there are reliable recycling options in 2019 and beyond.

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 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 were 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. 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 2019 Program Committee is considering options for community-based programming.

- **The Program Committee will be encouraged to foster innovation.** (Revised in August 2018.) *Progress:* Ongoing.

- **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.

- **We will assess and review our meeting content and structure in order to constantly improve.** (Added in August 2018)
  Progress: Post-meeting surveys solicit input on content and structure. Results are shared with current and future program committees.

- **We expect panels to be diverse and inclusive. This includes bringing balance to the panels, such as *individual* diversity (gender, race, age, length of time in profession, ability, access to financial resources), *institutional* diversity (academic, business/corporate, government, non-profit, large, small), and *geographic* diversity.** (Added in August 2018.)
  Progress: This principle was stressed with the 2019 Program Committee and staff. The concepts and language were incorporated into the 2019 Call for Proposals and 2019 Session Proposal form.