

**Society of American Archivists
Council Meeting
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Hybrid Meeting (Chicago, IL)**

Title: Models of Collaboration Hui Final Report

**Prepared by: Brenda Gunn, Regine Heberlein, Kyna Herzinger, Jackie Price Osafo,
Helen Wong Smith, Melissa Stoner, Shelley Sweeney and Lydia Tang (chair)**

Executive Summary/Overview

The Models of Collaboration Hui was established in January 2024 and has met on a monthly basis to delve deeply into ways that SAA currently and potentially can expand collaboration activities between allied organizations. The Hui consisted of the following members:

- Regine Heberlein: SAA Standards representative
- Kyna Herzinger: Regional Archives Associations Consortia representative
- Brenda Gunn: International Council on Archives liaison
- Jackie Price Osafo: SAA CEO
- Helen Wong Smith: SAA Past-President
- Melissa Stoner: Native American Archives Section representative
- Shelley Sweeney: International Archival Affairs Section representative
- Lydia Tang: SAA Council representative

During the course of these meetings, we surveyed the existing collaborations, including their existing documentation. We also brainstormed ways that current and future potential collaborations could be strengthened. Specific actions we pursued include the following:

1. We documented all of the current SAA liaison roles/collaborations that we could think of in a Google sheet. This revealed that not all liaison roles are currently documented in the Governance Manual and that many existing collaborations needed to be updated to reflect current practices. Appendix A.
2. We suggested edits to the Governance Manual Section X: Official Representatives to External Groups to improve the documentation of existing collaborations and propose more robust ways that new collaborations could be proposed. We are passing our recommended edits to the SAA Council

- Governance Manual Review Subcommittee for review and possible inclusion in the latest round of edits.
3. We developed a Partnership Application/MOU template for proposing future SAA collaborations. Appendix B.
 4. We drafted an Institutional Memberships 2.0 which proposes some updates to the Institutional Membership category. The intent of these recommendations is to incentivize more enterprise institutional members by expanding the benefits to appeal not only to archival repositories, but archives-adjacent organizations such as vendors. These institutional members might be drawn to SAA's mission along with the associated discounts on individual memberships and discounts on job postings and sponsorship opportunities. The actual suggested percentage discounts and exact details on this revised membership model are flexible. Appendix C.
 5. We ideated on ways to strengthen the partnership with ATALM and developed a draft proposal that the SAA CEO and the current president of SAA can work towards beyond this Hui.
 6. We brainstormed a proposal for an International Standards Coordinating Subcommittee, which is intended to be a standing committee involving representatives of SAA's Technical Subcommittee on Encoded Archival Standards (TS-EAS), SAA's Technical Subcommittee on Describing Archives: A Content Standard (TS-DACS), and the International Council on Archives' Expert Group on Archival Description (ICA-EGAD). This draft proposal has been passed along to the Standards Committee for further consideration.

Contextual Information

A key mission of outgoing SAA Immediate Past President Helen Wong Smith has been to increase SAA's collaboration with allied organizations, particularly those that represent historically underrepresented groups within the archival profession.

Alignment with Strategic Priorities

This initiative aligns with all four of the Strategic Plan's core pillars:

Goal 1: Advocating for Archives and Archivists

Coalition building is crucial for archives and archivists. Whether it's joint representation of SAA and the Academy of Certified Archivists for legislative lobbying or international standards representation, coalition building supports strong inter-institutional relationships to advance on shared causes and to confront shared obstacles.

Goal 2: Enhancing Professional Growth

These liaison roles provide not only a benefit to SAA itself but also provide professional growth opportunities for the individual volunteers in these roles. Additionally, by pursuing jointly beneficial partnerships with allied organizations such as ATALM, NAGARA, and CoSA, it may open SAA membership to greater awareness of issues and innovations that they might not otherwise be exposed to.

Goal 3: Advancing the Field

Advancing the field cannot be done in a vacuum. Partnerships foster a diversity of thought and raise awareness of approaches that may be different from ours and that may enrich our understanding of the field. Partnerships can be key to working in sustainable ways across the field.

Goal 4: Meeting Members Needs

SAA needs to proactively build and support partnerships on behalf of its members. Many individuals are unable to hold multiple memberships with a variety of organizations due to cost. By building partnerships, which may include the mutual exchange of information and opportunities, SAA can empower members to be knowledgeable about current issues in the field and encourage additional volunteers across the partner organizations to help advance the profession.

Fiscal Impact

As a Society sustained primarily by volunteer member service, it is important that SAA acknowledge the hidden cost of professional service and to strive to support the individuals serving on behalf of its membership by negotiating discounted or waived fees with partner organizations and ensure that the financial barrier for service is as low as possible for the volunteer. Particularly having a seat at the table for international partnerships, which can be costly for registration and travel, requires a more intentional shift of budgeting for these costs to be managed by SAA going forward as opposed to expecting individual volunteers to cover the expenses out-of-pocket.

The Institutional Model 2.0 proposal is intended to be an attractive and inclusive membership tier for SAA which is expected to draw greater membership revenue.

Recommendation

That the SAA Council approve the Hui's actions in exploring in greater depth ways to craft impactful, and forward-looking modes of collaboration with allied organizations. We recognize that our efforts are preliminary in this area and that the suggestions that we have developed will require greater refinement and follow-through by the SAA CEO, President, Vice President, and staff. We encourage follow through with our draft deliverables and welcome questions and feedback on what we have prepared.

Appendix A: [SAA Partnerships Spreadsheet](#) (external working draft)

Appendix B: Society of American Archivists Partnership Application/MOU

This application/MOU is intended to articulate the terms of collaboration between the Society of American Archivists and partnering organizations. Partnerships are intended to be mutually beneficial collaborations between SAA and allied organizations. Partnerships are a special distinction compared to institutional and individual memberships, which have established benefits and fee structures. If an organization or individual simply wants access to SAA resources then they should apply for either an SAA Institutional Membership or an individual membership (which includes international affiliate membership) as appropriate.

To propose a partnership with SAA, both the partnering organization and an SAA representative need to collaborate on filling out this document. Once completed, the document will be routed to the SAA Executive Committee for initial review and feedback. Once the document has initial support from the SAA Executive Committee, it will be routed to the SAA Council for a formal vote of approval. If the application vote is successful, this document will be signed and filed as a formal MOU by representatives of both partnering organizations.

MEMORANDUM OF UNDERSTANDING (MOU)
between [PARTNER]
and Society of American Archivists (SAA)

[DESCRIPTIVE TITLE OF PROJECT]

Partner Information

External Institution/Group name:

Primary Contact Name:

Primary Contact Email:

Profit or Non-Profit:

Website:

SAA Sponsoring Stakeholder(s):

Primary stakeholder name:

Primary stakeholder email:

Insert list of relevant sections, committees, and other SAA groups that may be stakeholders for this partnership.

Mode(s) of Collaboration (select all that apply)

- Liaison
- Committee
- Communication (newsletter article/column, discounted advertisement, signal-boosting to membership, Key Contacts integration, etc)
- Programming (webinars, seminar, joint conferences, reciprocal conference sessions, etc)
- Other

Collaboration logistics (up to 800 words)

Please provide as much detail as possible. Details may include but are not limited to the number of representatives and length of terms; specific qualifications/areas of expertise that representative(s) should have for appointment; participation expectations; and reporting expectations.

Background and Rationale

Background and contextual information that led to this proposal, including work already accomplished by the partner and SAA. How does this partnership align with the SAA Strategic Plan?

Measurable Outcomes of Collaboration (up to 300 words)

Please describe the anticipated benefits for both organizations in this partnership.

Fiscal impact

Describe anticipated financial impacts of this partnership for both organizations, including anticipated revenue change, staff resources, travel expenses, membership fees, event registration, etc.

Duration

Define the time period for which this agreement will apply. Specify whether the agreement is continuing or of a specific duration. Partnerships will be evaluated once a year for two years and then re-evaluated up to three years at a time. This evaluation process will be conducted by the named SAA sponsoring stakeholders.

Responsibilities

PARTNER'S responsibilities under this MOU:

SAA's Responsibilities under this MOU:

Exit

Should either partner wish to exit this agreement they will give at least one month's notice.

Effective Date and Signature

This MOU shall be effective upon the signature of both partner's authorized officials. It shall be in force from DATE to DATE, no longer than 5 years.

[PARTNER] and SAA indicate agreement with this MOU by their signatures.

SAA CEO

Partner Name, Title

SAA President Administrative
representative, if applicable

Date Date

Appendix C: SAA Institutional Membership 2.0 Proposal

Existing Institutional Membership Description:

<https://www2.archivists.org/membership/institutional>

Proposed key benefits:

- Regular Institutional Members
 - Publications (physical publications getting mailed as an opt in, electronic access only by default)
 - 1 complimentary primary representative membership
 - 5% discount on memberships for all affiliated staff (someone with the organizational email)
 - Regular Institutional Membership: 5% discount on job postings in SAA's *Online Career Center*
- Enterprise Institutional Membership additional benefits:
 - 10% discount on conference-related sponsorship, booth, or other type of advertising
 - 10% discount for listing on the Directory of Archival Consultants

Rationale:

The Digital Library Federation, OCLC, Big 10, and other consortiums/membership organizations emphasize institutional membership over individual membership. By shifting the membership revenue to more robustly engage memberships on the institutional level, it enables greater revenue generation for SAA and hopefully would assuage the inclination of increasing individual membership dues. The goal of extending a percentage discount on individual memberships for affiliated staff incentivizes BOTH institutional and individual memberships. The discounts for sponsorships, advertising, etc are targeted towards vendors, LIS schools, and other organizations that seek to have visibility among the membership and which would diversify SAA's institutional membership base. Transitioning to electronic publications by default supports environmental sustainability and may allow SAA to save on printing/mailing costs.

Institutional Membership

Institutional membership is open to institutions who work with archives, archivists, and broader cultural heritage. Institutional members receive access to publications, have one “primary representative” that has all the benefits of individual membership (voting rights, eligibility to serve on committees and SAA leadership roles), and receive discounts on additional staff membership dues. Enterprise-level institutional membership unlocks additional discounts on sponsorship, job posting listings, and other benefits.

Annual dues for institutional members are:

- \$1,000 for enterprise institutional members
- \$800 for regular institutional members

Types of Institutional Membership

REGULAR INSTITUTIONAL MEMBERS receive:

- Full access to *Archival Outlook* and *American Archivist Online*, authenticated via your institution’s IP range*;
- One print copy of *Archival Outlook*, *American Archivist*, and every book published by SAA during the membership period (opt-in basis)
- 5% discount on individual membership dues for affiliated staff.
- 5% discount on job postings in SAA's *Online Career Center*
- One complimentary individual membership as the primary institution’s representative.

* Authentication via your institution’s IP range(s) means that any user connecting to *American Archivist Online* from your institution’s computer network will have access to the journal.

ENTERPRISE INSTITUTIONAL MEMBERS receive:

- Full access to *Archival Outlook* and *American Archivist Online*, authenticated via your institution's IP range*;
- Two print copies of *Archival Outlook*, *American Archivist*, and every book published by SAA during the membership period (inclusive of domestic and international memberships, opt-in basis)
- 5% discount on individual membership dues for affiliated staff.
- 5% discount on job postings in SAA's *Online Career Center*
- 10% discount on conference-related sponsorship, booth, or other type of advertising
- 10% discount for listing on the Directory of Archival Consultants
- One complimentary individual membership as the primary institution's representative.