

**Society of American Archivists
Council Meeting
December 3-5, 2019
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. Note that we have signed contracts with the Chicago Hilton for 2020, the Anaheim Hilton for 2021, the Sheraton Boston for 2022, and the Washington Hilton for 2023 (a lapse of five years rather than the typical four between Washington, DC, conferences). We have a signed MOU with CoSA for a joint meeting in 2020; CoSA will meet with NAGARA in 2021.

2019 Joint Annual Meeting in Austin

For previous reports on the 2019 Joint Annual Meeting, see [0819-1-VI-D-5-AnnMtg](#), [0519-VI-D-5-AnnMtg](#), and [1118-VI-E-5-AnnMtg](#). Total paid attendance at the conference was 1,701, which was 78 paid registrants short of budget.

Staff spent significant time from mid-August to early October reviewing and reconciling the master bills for the conference, applying charges internally, and billing affiliate organizations appropriately. The hotel bill was received unusually late.

Participation in our post-conference evaluation of *ARCHIVES*RECORDS 2019* was on par with recent years, with approximately 24% of total attendees responding to the survey (compared with 18% in 2018, 25% in 2017, 23% in 2016, and 41% in 2015). These survey results have a margin of error of 4%. Following is a general overview.

- Overall feedback was very positive, with 36.5% of respondents indicating that they were “extremely satisfied” and 48.4% of respondents indicating that they were “moderately satisfied” with the Joint Annual Meeting. A total of 25 respondents were either “moderately dissatisfied” (24) or “very dissatisfied” (1) with the conference.
- When asked to respond to “How useful to your job was the information presented at the conference,” 22.3% indicated “extremely useful,” 39.3% indicated “very useful,” and 31.6% indicated “moderately useful.”
- When asked to respond to “How useful was the conference as a networking opportunity,” 34.2% indicated “extremely useful,” 33.3% indicated “very useful,” and 23.4% indicated “moderately

useful.” This reinforces our long-standing conviction that providing time and space for hallway conversations is critically important.

- Education sessions, the mobile app/online schedule, the SAA bookstore, and the all-attendee reception stand out as getting particularly good reviews when participants were invited to respond to “How would you rate the quality of each of the following aspects of the Joint Annual Meeting?” Note, however, that 45.5% of respondents indicated “not applicable” for the reception, which indicates that they did not attend.
- For the question “What was the most important reason for your decision to attend,” 60% indicated “professional development,” 37.6% indicated “connect with colleagues/meet new people,” 34.3% indicated “to get inspired/to get new ideas,” 22% indicated “presenting,” 10.5% indicated “CoSA/SAA business or leadership,” and 9.3% indicated “host city.”

A summary of survey results—including 255 verbatim comments that ranged from very positive to very negative about various aspects of the conference—was made available to the Program Committee co-chairs in early November. Summary results will be published on the website as Matt has time available. In the interest of continuous improvement, staff has begun a thorough analysis of the survey results—including the extensive verbatim comments—and shared them with various groups and individuals as appropriate.

Audiovisual Coverage of the 2019 Joint Annual Meeting

As previously discussed by the Council and staff, we enhanced audiovisual coverage of the 2019 conference in two ways.

1. We expanded capture of the audio-recordings of the education sessions by 1) contracting with an AV provider (Conference Media) to capture slide presentations, synchronize them with the audio, and provide them via MP4s and 2) applying this process to all section meetings. We believe that this real-time capture and quick-turn synching made for a richer product for both attendees (included in their registration fee) and non-attendees (available for \$99 as part of a [package](#) that included live streaming and online access to the live stream after the fact). In the past we have relied on speakers to upload their slide presentations to the conference website, with limited results.
2. We contracted with the in-house AV company, Markey’s, at a favorable rate to produce the live stream of 19 sessions (including the plenaries), and publicized access to the package that included the live stream, post-conference online access to the live-streamed videos, and audio + synched slides for all sessions. Some statistics:
 - A total of 35 individuals subscribed to the live stream. Live stream viewing times ranged from 10 minutes to 672 minutes across the 19 sessions that were live streamed.
 - In addition to the 35 who subscribed prior to the event and thus had access to the live stream, another 52 individuals purchased the live streamed videos and audio recordings on demand.
 - Of the 87 purchasers, 63 were members, 4 were employees of member institutions, 3 were student members, and 17 were non-members.

- Session 601, Rarely Pure and Never Simple: Archivists, Journalists, and the Search for Truth (which occurred on Monday at 10:30 am CT) drew the largest number of live stream participants, with 20. Plenary 1 drew 11; Plenary 2 drew 10; and the archival salaries forum, which we thought would be well attended, drew 3. (Of course, it did occur on a Sunday.)
- We conducted a simple 7-question survey of the 35 real-time subscribers to get their evaluations of their experience. Of 15 respondents:
 - o Eleven watched in real time, four did not.
 - o For all four, the reason that they didn't watch was that the timing didn't work for them.
 - o Seven respondents indicated that they watched for three hours or more and four indicated that they watched for one to two hours.
 - o Three individuals rated the quality of the programming as "excellent," six rated it "good," and two rated it "average."
 - o When asked to rate the experience of watching the livestream, two indicated "excellent," eight indicated "good," and one indicated "average."
 - o No one responded to the question "If SAA were to continue offering live-streaming, how might we improve the experience?"
 - o All fifteen respondents indicated that they plan to access the on-demand videos and audio recordings that were part of the package that they purchased.
- Sales of the full package to date total \$9,413.
- Expenses for the live streaming portion totaled just shy of \$33,000. (Recall that the Council had approved expenditures of up to \$44,000 for the live streaming, to be expensed to the Technology Fund.)
- Expenses for the audio + slide capture portion totaled \$13,000. (In previous years, we have paid \$3,500 for capture of just the audio for just the education sessions.)

We recommend that SAA not pursue live streaming in 2020, but continue to offer the audio recordings + synched slides as value-added for registrants and for a separate fee for non-attendees. The Council will have an opportunity to discuss this recommendation as part of the FY 2021 budget process.

Exhibit, Sponsorship, and Advertising Support

Exhibits revenue totaled \$113,000 (compared with \$131,120 in 2018, \$95,700 in 2017, \$88,160 in 2016, and \$103,900 in 2015) and sponsorship revenue totaled \$19,800 (compared with \$52,200 in 2018, \$25,700 in 2017, \$24,600 in 2016, and \$37,180 in 2015), and advertising revenue for the onsite program and website totaled \$5,700 (compared with \$7,800 in 2018, \$8,700 in 2017, \$7,580 in 2016, and \$14,300 in 2015). Special thanks to our four generous sponsors in 2019—Arkivum, Atlas Systems, Preservation Technologies, and Preservica!

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 December 2019)

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 December 2019

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 and the 2020 conference in Chicago will be held entirely in hotels. As of May 2019, we have signed contracts with the Anaheim Hilton in 2021, the Sheraton Boston in 2022, and the Washington Hilton in 2023—all hotels without convention centers. 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 2014-2019 conferences, but found that all local colleges, universities, and other institutions with dorm space discontinued 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 has been covered in all contracts since 2013 and will be 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 (2019-2023) and will be 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.

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 2018 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 in 2019 implemented audio+synched slides for all education sessions and section meetings as well as live streaming of 19 sessions. See "Audiovisual Coverage" on page 2 of this report for more information about the 2019 Joint Annual Meeting.
- **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 and 15% for the 2018 conference. 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. We hope this is a practice that more hotels will be adopting. We plan to reduce the 2020 onsite program to 12-16 pages, with greater reliance on the app for session descriptions.

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. In 2019, we will have a "traditional" keynote speaker during Plenary 1 and a less formal "conversation" between Meredith Evans and Archivist of the United States David Ferriero during Plenary 2. (Evans will not present her presidential address until the 2020 conference in Chicago.) Both Plenary 1 and Plenary 2 will feature award presentations, but we hope

to streamline them. Based on conference evaluations, we will seek ways in which to remove some or most of the awards presentations from the plenaries in 2020.

- **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, 2017, and 2018 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 conference included both Pop-Up and Working Group sessions and had a strong focus on “positionality.”
- **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 articles in our periodicals and Council 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, and 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 and 2020 Program Committees and staff. The concepts and language were incorporated into the calls for proposals and session proposal forms for both years.