

**Society of American Archivists
Council Meeting
January 25 - 27, 2012
Chicago, Illinois**

**Discussion: Provision of Conference Attendee
Email Addresses to Exhibitors
(Prepared by Nancy Beaumont)**

BACKGROUND

Item A27 on the Council's August 2011 "To Do" List instructed the staff to include on the January 2012 agenda discussion about the provision of 2011 Annual Meeting attendee email addresses to exhibitors.

After reviewing SAA's privacy policy, I made a business decision last summer to provide our 2011 exhibitors with one-time access to the email addresses of registrants who had not opted out of receiving mailed promotional offers from external archival organizations and/or vendors. Several attendees complained, via posts on Facebook or Twitter or email messages to me, that they found the vendor solicitations to be annoying.

Following are tweets on this issue that are known to us because they mentioned SAA's Twitter account (i.e., @archivists_org):

- [CyclinArchivist Sep 21, 2011, 7:20am via TweetDeck](#)
Just got an email about audio transcription. Thinking not all #SAA11 vendors are heeding the 1 time only rule. @archivists_org
- [hindu_litera Aug 18, 2011, 6:43pm via Twitter for Android](#)
@anarchivist @archivists_org no kidding. My work email's spam folder is full to bursting with ads.
- [LeaOsborne Aug 18, 2011, 11:59am via Echofon](#)
Just wrote a slightly angry email to @archivists_org about my virtual and physical vendor spam. Thanks SAA!
- [anarchivist: Wow, @archivists_org really sold the heck out of that attendees list.](#)
- [iwantamonkey Aug 18, 2011, 3:29am via Twitter for iPhone](#)
TRUE. "@archivesnext: Re vendor mails for #saa11...contact Carlos at @archivists_org & he'll take your name off list."
- [archivesnext Aug 17, 2011, 6:51am via Web](#)
Re vendor mails for #saa11 per @Salticidae if you want to opt out, contact Carlos at @archivists_org & he'll take your name off the list.
- [archivesnext Aug 17, 2011, 6:41am via Web](#)
@jwax55 re: tweet to @archivists_org you mean all these emails from vendors?

- [jwax55 Aug 17, 2011, 6:01am via Silver Bird](#)
Hey @archivists_org, when did I agree to your sharing my information with your sponsors? This should require consent. #saa11
- [Salticidae Aug 5, 2011, 8:30am via Twidroyd for Android](#)
@archivists_org Whom may I contact re misuse or possible breach of member contact info for vendor solicitation?

Following are the three email messages that I received, all on August 23, 2011 (the day after the Council discussion of this issue):

Message 1: Over the past several weeks I have been receiving emails from a variety of vendors who will be at this year's annual meeting, normally the type of mail that I would consider basic spam. X asked me yesterday if I found this situation annoying and I told him most definitely.

While I understand the importance of having vendors contact potential attendees, I'm finding the added email a significant burden to the already heavy load of email I get every day. I would like to request that SAA seriously consider setting up an "opt out" option for future meeting registrations so I can avoid getting this type of marketing spam in the future. I confess that if I and others like me do not have an option to avoid getting these unsolicited email aids in the future, I may consider not attending future annual meetings. I suspect others may be feeling the same way and I hope that you and Council will take seriously this gentle but firm request.

Message 2: I know you're swamped with a zillion things. This is VERY low on your list of priorities. At the same time, I do want to raise the issue.

I have been getting lots of email from exhibitors who will be at the Annual Meeting. I don't remember authorizing SAA to give out my email to vendors. In fact, the vendors may be members who have found some way to mine the membership directory.

No response necessary. You have better things to do with your time. Look forward to seeing you.

Message 3: Sorry to have provoked X into being grumpy, but my patience was long since past being tried. It seems that I have been receiving vendor notices for a couple of months now, and given priorities of hundreds of other e-mails in any given day, and other responsibilities, the only satisfaction these provide is the opportunity for a quick delete before reading. Certainly, there must be a better way for vendors to reach archivists other than this "death by a thousand cuts."

My August 23 response(s) to the email messages sent to me:

Thanks for contacting me about this.

For many years we have provided to our exhibitors (as part of their exhibit "package") the benefit of one-time use of our registrant mailing list (i.e., postal addresses). This is a very common and long-standing industry practice. What has become even more common in recent years is to include registrants' email addresses so that the exhibitors have an economical way of reaching registrants quickly. This, too, is subject to the "one-time-use" rule. Carlos and I are having increasing challenges in selling exhibits at all. And so when a number of exhibitors mentioned to us the current "industry standard" regarding email use, I reviewed SAA's privacy policy and determined that release of the Annual Meeting registrant list (including email addresses) for one-time use by exhibitors falls within the policy. And so this year I allowed it.

Members can opt out of "promotional messages." To do so, change your member profile settings at www.archivists.org/login. Unfortunately, currently we have just one "opt out" option, the selection of which also "opts you out" of such SAA "promotional" messages as upcoming workshops and *In the Loop* (our biweekly online newsletter). As a result of a Council discussion of this issue yesterday, Brian will be looking at changing our system to allow two levels of opt out, one for vendor promotions and one for SAA promotions - along with language that would explain to the member exactly what each option means. He is not able to do that research with our database developer during the Annual Meeting, but will do so as soon as possible after the meeting.

And I will find a way to make sure that members are reminded of the opt-out option periodically so that they are not inconvenienced by this issue in the future. Like so many aspects of what we do, there's a trade-off here. We will simply have to add this to the mix of questions regarding how to sustain annual meeting revenue from our industry partners.

Please know that I "hear" you, that the Council is informed, and that we are exploring alternatives for informing members and/or expanding our system capabilities.

Two paragraphs within SAA's Privacy Policy (at <http://www2.archivists.org/privacy>) are particularly relevant:

In addition to choosing one's personal information that will be displayed in the directory, an SAA member may elect or decline to receive e-mail announcements from SAA. SAA members may also elect or decline to receive news, announcements, and promotional offers from external archival organizations and/or vendors. By declining, SAA members' names and contact information will not be provided to outside vendors. SAA members should contact the SAA Member Services Coordinator to select which address is available in the directory, to exclude one's name from mailing lists sold to authorized vendors, or to update one's Membership Directory information.

SAA will share (either by purchase or professional courtesy exchange) membership information (i.e., "mailing list") for specific and one-time-use purposes. All external organizations that receive personal information of members must have an appropriate privacy and confidentiality policy in place and agree to neither repurpose nor sell members' personal information. Furthermore, all external organizations must agree to destroy all copies of this personal information after the limited, one-time use or contract with the SAA has expired or been terminated. SAA members may choose to not participate in mailing list exchanges. (See: Participating in the Membership Directory and Mailing List Exchange).

I chose to expand the benefits of exhibiting at the 2011 Annual Meeting for the following reasons:

- Most professional and trade associations provide complete attendee contact information for (at least) one-time exhibitor contact. Given that most communication now occurs via electronic means rather than by "snail mail," I responded to exhibitors' requests to provide email addresses in addition to mailing addresses.
- Exhibit revenue is declining. I viewed this as one small step that SAA might take to add value to the exhibitor package and preserve our relationships.

SAA members now have two choices when setting up their preferences for opting out of messages: 1) they may decline to receive *email* announcements from SAA and 2) they may decline to receive *mailed* promotional offers from external archival organizations and/or vendors. (SAA rents its postal mailing list to external organizations and vendors. We have not rented our email list.) Note that these options co-mingle two variables: message *medium* (i.e., email and postal mail) and message *source* (i.e., SAA and others).

SAA's member database currently is limited to two opt-out preferences (internally labeled "no email" and "no list") that we have used to track options 1 and 2 above. In theory, there are (at least) four opt-out preferences that we might want to control: 1) promotional *mail from SAA*; 2) promotional *email from SAA*; 3) promotional *mail from vendors*; 4) promotional *email from vendors*.

According to Brian Doyle, we have the following options for reconfiguring the database:

- A. Pay the database developer an unknown amount to support all four opt-out preferences above.
- B. Redefine the two current preferences to: 1) allow members to opt out of promotional email messages from SAA; and 2) allow members to opt out of promotional mail and email from external organizations and vendors.
- C. Redefine the two current preferences to: 1) allow members to opt out of promotional email *and mail* from SAA; and 2) allow members to opt out of promotional mail and email from external organizations and vendors.

Note: The staff will override a member's opt-out preference(s) for SAA promotional messages when governance matters (e.g., proposed constitutional amendments) mandate that we communicate with all members.

We favor Option B. However, we would point out that the very minor adjustment provided for in this option would not necessarily have reconciled the concerns expressed by members and attendees had that option been in effect in August 2011.

DISCUSSION QUESTIONS:

- Does the Council wish to change the Privacy and Confidentiality Policy by modifying the opt-out options?
- If not, does the Council wish to establish a policy restricting the release of attendee email addresses for one-time use by Annual Meeting exhibitors and sponsors?