Society of American Archivists
Council Meeting
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Chicago, Illinois

Final Report: Annual Meeting Task Force
(Prepared by Co-Chairs Fynnette Eaton and Kathy Marquis)

The Annual Meeting Task Force is pleased to present the group's final report to the SAA Council. We were formed because of the apparent dissatisfaction, expressed by SAA members and echoed by the Council, that the Annual Meeting had not adapted to the changing landscape brought about by the greater use of technology and the needs of the diverse membership that is now SAA. Fynnette and Kathy would like to begin by saying that we owe a deep debt of gratitude to our hardworking Task Force members. They conducted the surveys, pulled together the results, and chose the top "scenarios" for us to present in this report.

Task Force Members
Co-chairs: Fynnette Eaton and Kathy Marquis
Member-at-large: Jennifer Sharp

Meeting Model Subgroup
Chair: Lynn Eaton
Members:Shari Chrisy, Ardys Kozbial, Berlin Loa, and Christie Peterson

Meeting Content Subgroup
Chair: Carl Van Ness
Members: Jacqueline Chapman, Courtney Chartier, Jelain Chubb, Jennifer Johnson, and Ben Primer

Social Responsibility Subgroup
Chair: Rachel Vagts
Members: Hillel Arnold, Lynda DeLoach, Jodi Koste, and Alan Lefever

Online Access Subgroup
Chair: Rebecca Bizonet
Members: Beverly Allen, Lisa Carter, Erin Lawrimore, and Wade Wyckoff

BACKGROUND

The Council created this Task Force for the purpose of "analyzing current practices related to the SAA Annual Meeting as well as possible future approaches." The charge (http://tinyurl.com/chtaz3m) specified that four topics should be considered: social responsibility, meeting content, online

accessibility, and meeting model, naming each topic as a subgroup. Although the entire group met once at the 2012 Annual Meeting in August, and the Ttask Force (including subgroup chairs) met once in February 2012, all other communications were by teleconferences and online interactions.

The Task Force actively sought input from a variety of sources. Our first task was collecting comments from SAA members. We were invited to suggest questions for the 2012 membership survey. We wrote articles for *Archival Outlook* and fourteen blog posts, promoted both on Twitter, attended regional archival meetings and invited comments about SAA's Annual Meeting, and held a forum at the 2012 SAA Annual Meeting in San Diego. But perhaps most usefully, we solicited member feedback on butcher block paper right next to the SAA registration desk in 2012, actively calling out to all who passed by to share their comments about the Annual Meeting. This proved to be a very popular activity, and we would encourage this practice at each Annual Meeting to get a sense of what the attendees like and dislike about it. A full set of the comments we received is here: http://tinyurl.com/d255t2n

We took note of the conclusions of two concurrent SAA projects, the Communications Task Force and the Communication Technology Working Group. Their recommendations on Wi-Fi, blogging, use of Twitter, and an Annual Meeting wiki were very encouraging and completely in sync with our own conclusions.

We are also very aware that the world (including SAA) did not stop while we completed our investigations. On the contrary, before our first meeting, we learned that the Council had already begun making changes affecting the Annual Meeting, including eliminating a plenary, discussing the length of roundtable and section meetings, and tweaking the conference schedule. In addition, we know that Nancy Beaumont has been investigating the possibility of meeting in second-tier cities, and the possibility of using convention centers rather than hotels. We know that SAA's commitment to meet every four years in Washington DC and Chicago is also on the table, and we encourage this reconsideration. The Program Committee's increasing use of lightning sessions, and members' very positive reactions to these, helped inform our discussions, as well. We were delighted to see this constant forward movement. It fully supports our fundamental recommendation that SAA continue to try new options – beginning even before this report is submitted!

Beyond membership comments, we surveyed past SAA Annual Meeting programs to learn what patterns and traditions had been established in the past, and we sought input on what other organizations were doing to meet the changing needs of their membership and to address the growing use of technology at annual meetings. Our subgroups conducted surveys, incorporating these findings into the final scenarios we are presenting to the Council.

GUIDING IMPRESSIONS

As we began the task of collecting information we had some general impressions: the cost of attending the meeting is a top priority for SAA members, though we would add the corollary that few members understand the realities of annual meeting costs. One immediate example is the overwhelming desire to have Wi-Fi at the annual meeting. The simple reality is that if SAA meets at a newly built hotel, the Wi-Fi will most likely be offered with little or no costs. If, on the other hand we meet at an older hotel, the cost can be up to $250,000, which is prohibitive given the size of SAA. We understand that contracts signed years before Wi-Fi became such a priority, with older hotel properties, must still be honored.

Many archival regionals and other similar professional organizations have been initiating or increasing the number of travel scholarships awarded to younger/newer members. We have received many comments requesting that SAA and/or its Foundation make this a priority, and the AMTF would like to second this recommendation. It would not only make a difference to the members who receive the awards, but be a gesture of support to this growing segment of our membership.

The membership of SAA, and of the profession, has evolved since the Annual Meeting began.   From a small handful of archives courses – and a lot more on-the-job training – we have seen a major growth in graduate education programs and in student membership in SAA. According to the recent membership survey, 37% of members have been SAA members for 5 years or less. The same percentage is age 34 or younger (21% are 29 and younger). The Society encourages these students and new professionals to participate in the Annual Meeting and has benefited greatly from this influx of new talent (and focused research.) We shouldn't, therefore, be surprised at the related growth in open dissatisfaction with the cost and technological sophistication of the meeting. On the one hand, there are basic aspects of group meetings, such as Wi-Fi, which are seen as non-negotiable and it behooves SAA to make them a top priority going forward. On the other hand, technological solutions proposed are often essentially DIY solutions that are unworkable or unreliable for as large and varied a group as SAA. There is much to be learned from both perspectives.

Nonetheless, we also recognize that SAA's major sources of non-dues revenue are the Annual Meeting, education offerings, and publications. The proportions that each segment contributes fluctuate over time, but what doesn't change is that revenue from the Annual Meeting has always underwritten other SAA services, such as professional advocacy, and communication methods like the website that members also expect.

And finally, it was made clear to us that networking opportunities are the highest on many members' list of meeting benefits, perhaps even above the educational sessions. This impression has been gleaned from both SAA member comments and current literature on professional conferences. By networking, we mean the connections, interactions, personal recommendations, and sense of professional camaraderie that is gained from attending the Annual Meeting. It also includes questions and comments from members attending the meeting via social media, as well as those in the meeting rooms. As you will see in the scenarios that we present, we think that additional networking opportunities and strong educational content are not mutually exclusive: the "speaker at the front of the room" model is only one way of receiving new ideas. As you read the recommendations that follow, keep this in mind. It underlies many of our thoughts about a shorter meeting, concurrent sessions and meetings, new interactive session formats, and online avenues for conducting component group business away from the Annual Meeting.

There were also some general principles that the Task Force had as it began its work. First and foremost, we were determined to develop new ideas. As we noted in our article in *Archival Outlook*, the Annual Meeting has evolved over time, and our goal was to retain what is viewed as still useful and to suggest new solutions, reflecting both the changes in SAA membership and the increasing role that technology can play at our Annual Meetings.

We want to stress, however, that by offering these changes we also recommend that the Council recognize that **with additions <u>must</u> come subtractions**. One tradeoff example: Recognizing that much of the business of sections and roundtables happens online now, we recommend shortening their meetings to 90 minutes. Member feedback suggests that two hours is too long for these meetings – and every extra half hour in the schedule allows aus more time for networking and other activities.

As we began our deliberations, we quickly assumed that SAA should start with "low-hanging fruit" and continue to experiment with new options at each meeting. Experimentation and revisiting should be constant – this is not the last word. We encourage the SAA office and the Council to continue ideas that seemed to work and abandon those that have proved not to be a good fit for our membership.

A note on implementation: We have surveyed, analyzed, compiled, and recommended, but we know that we will not be the ones to implement the changes in this report. Deciding on the changes will be the Council's charge. And implementing those decisions will fall to the SAA staff – and the volunteers who make up our Program and Host committees. As previous co-chairs of Program Committees, Fynnette and Kathy are aware that it is easy, in the crush of getting this large undertaking "out the door," to fall into known or familiar paths. If SAA is to pursue new options, it may be necessary to provide firmer guidelines for future committees, encouraging or even mandating that they try new methods and structures.

We received an amazing variety of suggestions; there were so many options to choose from as we investigated possibilities for our Annual Meeting. If the Council had all day, we could regale you with all of them…. However, we were encouraged to select a handful of examples of what could be done, rather than list every possibility. What follows are the main reports from each of the four subcommittees: Social Responsibility, Meeting Content, Online Accessibility, and Meeting Model, preceded by a grid for reference during your discussions that summarizes their recommendations.

The reports contain linked support documents from several subcommittees. They contain specifics on the features of four second-tier cities they examined, a survey of related organizations on their annual meetings, and data from our examination of trends in past SAA meetings.

We trust these suggestions will contribute to a more engaging and welcoming meeting for all attendees. If this report is accepted, we plan to post it on our blog and invite further input from the membership via social media, and at the Annual Meeting in New Orleans this year.

Annual Meeting Task Force Subcommittee Recommendations:

IDEA	RATIONALE AND PLAN	EXAMPLE	TRADEOFFS	OTHER COMMENTS
Meeting Model Subcommittee				
IDEA	RATIONALE AND PLAN	EXAMPLE	TRADEOFFS	OTHER COMMENTS
Conference center	Members believe conference center meeting allows for cheaper hotel costs and overall savings.		Registration costs higher (meeting rooms not comped as at hotel) vs. more freedom to choose hotel. Not clear if Wi-Fi options better.	Being investigated by Nancy Beaumont already.
Second-tier city	Potentially lower costs for hotels, transporta-tion, venue.	Portland, OR; Cleveland, OH; Salt Lake City, UT; and Ft. Lauderdale/ Miami, FL	Not as many attractions vs. potentially lower-cost housing alternatives, including university / dorms.	Being investigated by Nancy Beaumont already.
Shorter conference meeting	Transportation and registration haven't increased as much as lodging rates.	Reduce number of sessions; shorten session time; more sessions per day; no days "light on content"; refocus section meetings so that they're not just additional sessions.		
Maintain same model	Most organizations surveyed still used this model; central meeting and lodging encourages interaction.	Try simple tweaks to see what works rather than wholesale change.		

Meeting Content Subcommittee

Move Presidential Plenary to beginning of meeting	Two-speaker panel w/ contrasting viewpoints to set tone of meeting.		Presidential address at business meeting.	Recorded.
Structured sharing and unconferences	Increase networking potential; PC sets aside time in meeting, calls for proposals.	Pecha Kucha[1], debate sessions, speed networking, world cafes, fishbowl discussions, teachmeets, state-of-the-field sessions, tutorials, project briefings, hot topic sessions, and incubator sessions.	Set up requires additional work, possible training/ education for leaders but interaction and networking is a high membership priority.	Lightning sessions got favorable reviews in comments received by TF.
Focused debate and juried paper sessions	Adds to variety of session formats, helps insure quality of speakers; jury appointed by President.		Additional structure (jury) vs. enhanced quality and potential currency of topics.	
Concurrency: overlapping sessions and section/ roundtable meetings	Reverses assumption that no AM components overlap each other. Explores other ways that sections and roundtables might conduct their business.	Business Section and Congressional Papers colloquia (need not be all day, though).	More creative scheduling necessary; could result in stronger tracks for those with narrow interests (e.g. reference or digital records).	Could result in a shorter meeting – requested by many to address financial concerns.
Structured networking	"Free time" not the best way to encourage networking between newer and experienced. members.	"Converstations" – sessions with strong interactive components lead to impromptu gatherings on special topics.	Finding free spaces during program vs. encouraging unscheduled discussions among membership.	These are professional discussions, enhanced by a quiet meeting space – as opposed to those that happen over meals or in lobbies.

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[1] http://www.pechakucha.org/faq

Social Responsibility Subcommittee

IDEA	RATIONALE AND PLAN	EXAMPLE	TRADEOFFS	OTHER COMMENTS
Fair Labor Practice	Make sure that the annual meeting is not affected by labor action and that the employees in the hotels we book are being treated fairly.		Could make hotel costs higher?	Request for this in 2015 and 2016 RFPs to hotels.
Including contract language that requires hotels to address fair labor practice issues		See example in full report; at least one labor organization has many conditions cited.	Don't wish to tie hands, make hotel negotiation impossible; some orgs have more specific language.	
Staying aware of potential actions against hotels	Published lists of boycotted hotels - UNITE HERE's website[2] etc.		Inquire about current contracts, unions at possible hotels.	
Increasing transparency about SAA's due diligence during the hotel contract process	Work w/ Issues and Advocacy RT.			Stay in touch w/ regionals and other orgs: MAC dealing w/ Hyatt now.
Sustainability				
Paperless meeting.	Members opt in/out; mobile app.			
Donation of surplus food.	Already being done, make clear to members.			
Service Project(s)	Engage members, make impact on local archives/location.	2012 project in San Diego, organized by ARCS; other orgs (e.g. ALA) have done this for a while.	Extra work for Host Committee or other volunteers?	Social media can be helpful in crowdsourcing opportunities and gathering participants.

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[2] http://www.hotelworkersrising.org/HotelGuide/

Online Access Subcommittee

Activity	Difficulty to implement	Impact	Description
Wi-Fi in Meeting Rooms	Easy	Low-Moderate	Continue to offer Networking Café.
	Easy	Low	Sharing personal Mifi devices (personally owned hot spots, etc.).
	Easy	High	Negotiate and build Wi-Fi access into registration fee.
	Easy	High	Negotiate and offer "a la carte" Wi-Fi access (not more than $10 a day).
	Moderate	High Demand	Avoid venues that block cellular data signals.
	Hard	High	Build fee in registration, while eliminating or minimizing costs, by sponsorships.
	Hard	Very High	Select/negotiate with hotel/conference site for no or little additional fees.
Virtual Conferencing	Easy	Low/Moderate	Use sections and roundtables for pilots.
	Easy	High	Have official interactivity with both in-person and virtual participants by receiving questions from Twitter during Q&A.
	Hard	Moderate	"Best-of" fall VC with selections made by Program Committee.
	Hard	High	"Best-of" fall VC with selections made by members voting after the conference.
	Hard	High	Offer separate Virtual Conference just for online participants that runs at same time.
Recordings of Meeting Content			
• Making the Recordings	Easy	High	Mandatory for all plenaries and educational sessions to be recorded. (Note: Group not unanimous on this, but many member comments requested it.)
	Easy(expensive)	High	Hire vendor to record both plenaries and educational sessions.
	Hard	Low	Use a volunteer committee with support and logistics from SAA staff to record sessions.
• Providing	Easy	Low	Convert already recorded session recordings to digital format and make

Access to recordings			freely available on Internet Archive and links from SAA website.
	Easy	High	Make educational sessions downloadable as mp3s thru ITunes or via SAA's website
	Easy	Low	CD can continue to be offered.
	Moderate/Hard	Moderate/High	For all of the above, make sessions freely available.
	Moderate	High	For all of the above, provide searchable portal of conference material.
	Hard	High	Make educational sessions downloadable as mp3s through SAA website.
	Hard	High	For all of the above add closed captioning/transcripts.
	?	?	Begin pilot project to offer some combination of above recommendations.
Other meeting content	Easy	High	Require submission of slides and/or papers as condition of acceptance. Create virtual library.
	Easy/Moderate	High	Create portal for annual meeting.
Conference App	Easy	Low/Moderate	As pilot/stopgap, resurrect and improve mobile web conference schedule created in 2011.
	Easy	Moderate/High	Whether vendor or home grown, start simple and static and build greater complexity and interactivity gradually.
	Easy/Moderate	Moderate/High	Develop conference app in house.
	Moderate/Hard (expensive)	Moderate/High	Contract with vendor to develop conference app or modify existing app.
	Hard	Low/Moderate	Offer two apps: one simple that is free and one more robust for purchase.
	?	?	Seek sponsorships.

AMTF Meeting Model Subcommittee Final Report

Contents

Subcommittee Members
Lynn Eaton (Subcommittee Chair)
Shari Christy
Ardys Kozibal
Berlin Loa
Christie Peterson

Charge and Deliverables
The Meeting Model's charge by SAA includes:
- Reviewing rationale for current meeting model (i.e., conference events take place at one hotel).
- Considering alternative models that might meet SAA's needs, such as having meeting events split across two or more hotels or utilizing convention or university facilities.

The deliverables for this subcommittee include outlining the pros and cons, including costs to SAA and members, of possible meeting model scenarios, rating each, and recommending one or more models for future consideration if possible.

Survey and Research
This subcommittee reviewed options for obtaining information about other meetings and decided to create a survey which would be sent out to a limited number of organizations. The initial survey was open for response on June 18, 2012. The number of respondents to this survey was nine, and these are listed in Appendix B.[3] A second survey, with two additional questions from the Online Accessibility of Meeting Content Subcommittee was opened for response at the end of January 2013. The number of respondents to this was eight.
Appendix C[4] contains a copy of the survey.
Appendix C-2[5] contains a copy of the second survey.
Appendix D[6] contains the Meeting Model's Summary of the Survey. A few highlights:
- A wide majority of organizations use a single conference hotel
- A small minority of organizations provide a virtual conference stream or webinar during the conference. Half of respondents provide post-conference recordings.
- The Australian Society of Archivists noted the importance of face-to-face interactions at annual meetings. They had to cancel their 2011 conference (economy) and received backlash on this

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[3] http://www2.archivists.org/groups/annual-meeting-task-force/appendix-b-mmodelorganizations-contacted
[4] http://www2.archivists.org/groups/annual-meeting-task-force/appendix-c-meeting-model-survey-1
[5] http://www2.archivists.org/groups/annual-meeting-task-force/appendix-c-2-meeting-model-surveymarch2013
[6] http://www2.archivists.org/groups/annual-meeting-task-force/appendix-d-meeting-model-survey-1-summary

issue specifically. CoSA noted their members prefer interactive, open discussion sessions more than traditional panels.

[Appendix D-2](#)[7] contains the summary from the second survey.

In addition to these surveys, the subcommittee gathered information from other sources including:
- A survey sent out from the Meeting Content Subcommittee,
- Information gained from Nancy Beaumont's discussions with various organizations,
- Meeting evaluations after the August 2012 Annual Meeting in San Diego.

In working on alternative models, the subcommittee was limited in our knowledge of costs as we are not privy to the negotiation strategies nor did we want to enter into any discussion with a conference center or convention and visitor's bureau to eliminate or induce their follow-up with SAA staff in Chicago. Not having access to this information limited our ability to fully assess the opportunities and challenges of each model, as discussed below.

Findings and Recommendations
The Meeting Model Subcommittee's recommendations consist of a list of possible alternative models for SAA to consider for its Annual Meeting, as well as a list of functional requirements, which will be used to discuss and evaluate each of the possible models.

Alternative Scenarios and Ratings
- A Conference held at a conference center – low-ish hanging fruit
- B Conference held in a second-tier city – high priority
- C Shorter conference meeting – longer term project
- D Maintain same model

Discussion

A Conference held at a conference center.
- Generally, a conference center setting will mean that participants end up paying more for meeting registration costs than they would if it were held at a hotel, because the hotels subsidize or comp costs related to meeting rooms if a certain number of hotel rooms (the "block") are sold out. However, we don't know how much more this cost would be.
- Holding the annual meeting at a conference center may or may not address problems expressed in the 2012 meeting evaluations, such as having limited and expensive food options on-site. These costs would vary depending upon the location of conference centers in relation to city restaurants.
- We lack sufficient information about how food options would work at a conference center – would everything have to be catered through the conference center and prepaid, or would there be vendors already there that attendees could patronize if they chose? Again, this would likely vary depending upon the conference center.

B Conference held in a second-tier city.
- A second-tier city may offer most, if not all, of the same amenities as a larger city, including either a conference center or a conference hotel. In consultation with Nancy Beaumont and AMTF leadership, the Meeting Model Subcommittee identified four cities to investigate for the following information:

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[7] http://www2.archivists.org/groups/annual-meeting-task-force/appendix-d2-meeting-model-survey-summary-updated

  i Airport/transportation:
    1   Which airlines fly there
    2   Is it the hub for any airline? (e.g., Salt Lake City is a Delta hub.)
    3   Is there a train and/or bus station?
    4   Are there any major interstates running through city?
  ii Lodging: List 10 hotel chains in the downtown area, with various price points (Hilton – high; Comfort Inn – lower medium).
  iii Convention center:
    1   Is there one in the city?
    2   How large is it?
    3   Is there a catering option with the center?
  iv Food options: List 10 restaurants near convention center (if applicable). Give price variations when possible.

- The four cities chosen were Portland, OR; Cleveland, OH; Salt Lake City, UT; and, Ft. Lauderdale/Miami, FL. Information on these cities is included in Appendix A[8].

Holding the conference in a second-tier city may provide the option to offer alternative lodging in college or university dorms.

- As noted below, lodging costs for annual meeting attendees have risen significantly over the past few years and remain a significant impairment to the full participation of some members. Many conference attendees have long chosen to stay at hotels other than the conference hotel due to cost or other considerations. More recently, a self-organized group has created the "Crash Space for Archivists" list to share information about archivists willing to host their colleagues for meetings and educational events. (http://newarchivist.com/crash-space/) However, an opportunity still exists for SAA to formally acknowledge the challenges its members face with respect to finding affordable lodging and help them address that challenge by organizing or sponsoring alternative lodging. If the meeting moves away from being hosted by a single hotel, requiring a block of rooms be filled, this option becomes more viable.
- Several attendees at the 2012 meeting commented at the AMTF feedback table that they would like to see SAA adopt a model similar to that employed by the RBMS preconference at ALA, which organizes alternative lodging at a local college or university. While the Meeting Model Subcommittee was unable to explore the logistics of this option thoroughly, it appears to be something that SAA should seriously explore.
- It is important to emphasize that the RBMS model provides an *alternative* lodging option for meeting attendees. Dormitories would not replace a hotel as the primary lodging for most attendees, but would offer a lower-cost alternative to budget-constrained attendees who still wanted to experience the camaraderie of shared conference lodgings.
- At the 2011 RBMS preconference in Baton Rouge, for example, single rooms in 4-room dorm suites at LSU were offered to attendees at the rate of $50/night, which is half the pretax rate an attendee would have paid to share a room at the SAA conference hotel in Chicago that year. See Appendix E[9] for information about this alternative provided to attendees at the 2011 RBMS conference.
- In addition to addressing the need for lodging at multiple price points, the nature of campus life virtually guarantees that some form of moderate-cost transportation exists between regional transit hubs and the dormitories. This also increases the likelihood of low-cost

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[8] http://www2.archivists.org/groups/annual-meeting-task-force/appendixa-modelcityinformation
[9] http://www2.archivists.org/groups/annual-meeting-task-force/appendix-e-housing-information

food options being available, including the opportunity to store food and prepare breakfasts, sack lunches and other meals in dormitory kitchens or kitchenettes.

C Shorter conference meeting.

Limiting the cost to attendees of attending SAA's annual meeting was a primary concern to members we heard from in every forum. For many participants, one of the largest costs associated with attending the meeting is lodging. While SAA has not raised conference registration fees significantly in the past few years, as illustrated below, lodging costs to participants have risen significantly since 2007.

The figures below are taken from SAA's published programs for its meetings since 2007. Notably, hotel rates listed below do not include taxes and other fees, which can add 10-15% or more to lodging costs.

Year	Early Bird Member Registration	Conference Hotel Nightly Rate Single	Conference Hotel Nightly Rate Double
2012	$319	$199	$199
2011	$319	$199	$199
2010	$319	$185	$215
2009	$299	$153	$153
2008	$299	$149	$169
2007	$299	$129	$149

Between 2007 and 2012, registration costs have risen $20, or 6.7%. Over the same period, the pretax cost of a single room at the conference hotel has risen $70 per night, or 54.3%, while the shared pretax cost of a double room at the conference hotel has risen $25 per night, or 33.6%. (Between 2007 and 2010, when the double room cost peaked, the shared pretax cost of a double room has risen $33 per night, or 43%).

Unfortunately, this spike in lodging costs has occurred simultaneously with an overall downturn in the economy, which has affected many members' personal finances as well as their professional travel budgets. In order to maintain or even increase the level of member participation in the Annual Meeting, it is essential for SAA to reduce the burden of lodging costs on meeting participants.

The Meeting Model Subcommittee has identified two ways in which SAA can help attendees reduce lodging-related costs: sponsor alternative lodging (as discussed above) and/or reduce the number of nights of lodging needed in order to participate fully in the meeting. This means shortening the meeting length.

 While the Meeting Model Subcommittee recommends considering shortening the Annual Meeting length, advising on the best method for doing that fell under the responsibility of the Meeting Content Subcommittee. However, options which might serve this end include:
-    Reducing the total number of educational sessions,

- Shortening the time available for each educational session,
- Scheduling more sessions per day (e.g., multiple people noted that at SAA's 2012 annual meeting, Friday seemed particularly light on content),
- Refocusing and shortening section meetings to eliminate programmatic-type content. This was proposed by several people on the feedback from the 2012 Annual Meeting.

D Maintain same model.

The current meeting model for the SAA Annual Meeting has positive aspects, ranging from a central place for attending sessions and meeting-up with colleagues, to providing opportunities to discover new cities and new cultural institutions through tours and free time. This is also the model for the majority of organizations which responded to the survey.

Based on the reviews, many individuals suggested "simple" tweaks, including closer, better quality, and low cost food options; availability of coffee; more open areas for casual conversations and networking with colleagues; free or low-cost Wi-Fi in the meeting rooms, etc.

The primary issue driving many requests for change derives from reduced travel budgets, both personal and institution-related. The assumption is that holding the meeting in a second-tier city and/or at a conference center will alleviate some of the charges tied to lodging and the registration costs, and possibly travel costs.

Budgets may or may not rebound. Travel costs may or may not be reduced with the second-tier city option. Lodging costs may be reduced while registration costs may increase with the use of a conference center.

These variables are just that – variable. The Meeting Model Subcommittee feels strongly that these options are worth investigating through implementation. The trial and error of the next few years will allow for a more robust conversation by the membership and leadership about the merits of each of the alternate models in comparison with the current model.

Functional Requirements

This subcommittee recommends that the following functional requirements be taken into consideration when choosing any meeting site. For any meeting model, be it conference center or one conference hotel, it may be impossible to achieve all four functions. We include these in this report, however, to help keep in mind the major points that were reiterated throughout the evaluations, including the white sheets at the AMTF table in San Diego.

1 Availability of quick lunch and snack options nearby; how far are the majority of people willing to go for food and snacks during the day.

2 Hotels available nearby at multiple price points.

3 Wi-Fi available, whether that means free or available for purchase.

4 Ease of travel to the location (i.e., Is the city a travel hub?) so that attendees may choose from multiple transportation modes (e.g., air, bus, train, car).

This subcommittee understands that Wi-Fi is a major issue and which at this point we are somewhat subject to the vagaries of the hotels/conference center cost prices. However, this is a continued point of contention and we suggest that the desire for Wi-Fi access by the membership be taken into account whenever possible when choosing sites. [This subcommittee acknowledges that this functional requirement is already taken into consideration by SAA leadership when choosing a conference site.]

Concluding Thoughts and Suggestions

In reviewing all of the data, the Meeting Model Subcommittee believe that the four functional requirements (listed above) are the key underlining points to be taken into consideration when choosing a site for SAA's Annual Meeting. We applied these to the research for the four cities, and hope that this information is helpful in the future for both its content and in the points considered.

We also suggest that this Task Force be resurrected every 5 to 10 years to assess the members' suggestions for improving/changing the four areas covered in the AMTF. We believe that improvements and upgrades in technology will provide more flexibility in the future (hopefully!) for how the membership interacts with each other throughout the year and during the meeting. We also believe it is still essential to meet one's colleagues face to face in the same physical space, for networking as well as educational purposes.

Annual Meeting Task Force
Content Subcommittee, Final Report, March 26, 2013

Preface

The Content Subcommittee offers five scenarios for consideration by the Society. Data from two surveys conducted by the subcommittee influenced the development of the scenarios, as did the responses to recent polls and questionnaires collected by SAA. The subcommittee surveyed Annual Meeting programs over a 16 year period and program content from recent annual meetings of 30 professional organizations. The subcommittee also looked at responses gathered at last year's Annual Meeting as well as the membership survey conducted by SAA in 2012.

Surveys: Organizational comparison[10], SAA annual meeting data (sheet 1[11], sheet 2[12], narrative questions[13].)

A number of concepts and ideas emerged from the cumulative data. SAA members place a high value on networking opportunities and desire a diversity of viewpoints. There also seems to be dissatisfaction with SAA's traditional programming and a concomitant desire to experiment with new ways of sharing and delivering information. This trend is not restricted to SAA and shows up in the survey of other professional organizations. Not surprisingly, the need for social and professional interaction dovetails with many of these new concepts in the form of interactive sessions and opportunities for shared networking. Some of this dialog is fueled by the recent application of social media to meeting events. But, most of the discussion involving innovative programming stems from a larger criticism of traditional approaches to conference meetings.

New programming focuses on attendee involvement, relies on session leaders who are adept at eliciting discussion, and strives for group consensus. These sessions are often seen as incubators for new concepts and ideas. Most of these sessions have arisen in recent years, are experimental in nature, and sometimes pass into history before they catch on.   They have also been introduced into worksites, including academic libraries. By this time, many SAA members have been introduced to one or more session types in this genre and have formed an opinion of their relative merits and drawbacks.   They are not for everyone and are meant to supplement, not replace, the traditional panel session.   However, the subcommittee recognizes the essential fact that additions to the program will result in subtractions elsewhere.   The subtractions could result in fewer traditional sessions, but we also introduce the idea of concurrency with roundtable and section meetings and/or the possibility of revamping those meetings. Finally, it should be noted that the inspirations for new session formats will be far more likely to come from the roundtables and sections than the Program Committee.

While many SAA members voiced a need for innovative programming, others expressed dissatisfaction with both the content and quality of presentations in our traditional sessions. This dissatisfaction coincides with perennial requests for juried sessions by SAA members working in academic environments as well as the frequent criticism heard that panel speakers more often share a common perspective rather than conflicting viewpoints. With these concerns in mind, a scenario is proposed that would create new session formats for juried papers and focused debates.

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[10] http://www2.archivists.org/groups/annual-meeting-task-force/amtf-organizational-comparison

[11] http://www2.archivists.org/groups/annual-meeting-task-force/annual-meeting-data-sheet1

[12] http://www2.archivists.org/groups/annual-meeting-task-force/annual-meeting-data-sheet2

[13] http://www2.archivists.org/groups/annual-meeting-task-force/annualmeetingnarrativequestionsfinal

The subcommittee also examined ideas that encourage the development of meeting content outside the purview of the Program Committee. One scenario proposes that sections and roundtables have more of a voice in determining the program while another creates spaces and times for "on-the-fly" proposals in the form of so-called "unconference" events. The subcommittee also looked for ways to reshape the program schedule. One scenario suggests the society move away from its traditional framework to allow more concurrency in the program. Another looks at the plenary (another source of member dissatisfaction) and gives it a new purpose.

The scenarios are presented in no particular order. Each begins with a rationale, follows with a plan of action, and concludes with a list of anticipated outcomes, both positive and negative. Some of the scenarios will have only minimal effect on the program and could be implemented quickly. Other scenarios are more involved and could entail increased costs.

At all times, the subcommittee was guided by the idea that the Society needs to be adaptive and should experiment with new content models. We will consider it a success if only one or two of the scenarios we propose finds its way into the program on a sustained basis. In short, the Annual Meeting program should not be considered a static document as it has been at times. The subcommittee also recognizes that any proposed changes will please some, and annoy others. SAA is too diverse to have a one-size-fits-all approach to meeting content. We hope our scenarios respond to the concerns raised by the widest segments of our membership, and not simply the loudest voices.

Carl Van Ness, Chair
Courtney Chartier
Jennifer Johnson
Jelain Chubb
Ben Primer
Jacqueline Chapman

Scenario 1: Presidential Plenary

Rationale: One long-standing tradition at SAA meetings is the Presidential Plenary, a time for the current president to deliver an "address" to the membership that speaks to issues of concern and a vision for the future of the Society. During the plenary, all other activities are suspended and the exhibit hall is closed, with the idea that it will allow everyone to attend the plenary address. While many members do attend, others, especially younger and/or new members are opting to skip the address. The timing of the address is also closer to the end of the meeting, when things are winding down and the members, instead of being at their most engaged are thinking about the next work week. This proposal envisions a scenario that will make the Presidential Plenary a more relevant, inclusive and engaging event that will spark discussion and action throughout the annual meeting.

Plan of action: The president of SAA will organize a session on a topic of his/her choosing, related to the Society's strategic priorities or evolving issues and trends that are of broad interest to its members. In consultation with the Program Committee co-chairs and executive director, the president will select the format of the session and identify appropriate speakers. As a participant in the session, the president will provide commentary on the topic. It is recommended that the session be 60 minutes in length (90 if combined with Q&A, announcements, awards, etc.). This session will take the place of one of the current plenaries and should be scheduled early in the meeting.

In order to engage the largest possible audience of SAA members, the session should be broadcast live if possible, but certainly recorded for later streaming, YouTube, etc. It will be the prerogative of the president as to whether the session includes time for questions and answers. If so, and the broadcast is live, questions should be solicited from online viewers.

A presidential address will be scheduled as part of the annual business meeting.

Anticipated outcomes: The traditional presidential address would also become a regular part of the annual business meeting and might serve to attract more members to attend the meeting. The address would also give the president an opportunity to respond to comments and issues raised in reaction to the presidential session (from sections, roundtables, work groups, individuals, etc.).

Scenario 2: Structured Sharing Sessions and Unconference Events

Rationale: A survey of meetings of other professional organizations undertaken by the Content Subcommittee shows that there are many participant sharing session formats not used by SAA. Also, the results of the most recent SAA member survey indicate that networking is a key incentive for meeting attendance. In recent years, the Program Committee has encouraged new formats such as "lightning talks" that have increased the diversity of the program, allowed more speakers (covering more topics) to participate in the meeting, and received positive feedback from attendees. This practice could be extended to include participant sharing formats such as Pecha Kucha 20x20[14], debate sessions, speed networking, world cafés[15], fishbowl discussions[16], teachmeets[17], state of the field sessions, tutorials, project briefings, hot topic sessions, and incubator sessions (for example one from IMLS[18]), to further diversify the meeting. These sessions will provide new frameworks to discuss current issues facing the profession and will serve as a means for attendees to network with colleagues who share common experiences and interests.

Plan of action: The Program Committee will add structured sharing sessions in the annual Call for Proposals and briefly describe what those sessions might entail. Proposals must include a clear theme, purpose and moderator(s). Other participants might be listed, but there would also be an option allowing participants to sign up on the day of the session. Sessions with this format must be clearly described in the program so that attendees can sign up.

To promote participation and dialog, attendance for structured sharing sessions will be capped.

If no proposals are received for new session formats, the Program Committee can choose to set aside time for unconference sharing sessions. Themes and moderators may be selected and recruited ahead of time, or they may choose to let meeting attendees sign up for and create these sessions while at the meeting. Sessions may occur throughout the day, early morning, lunch, evening, or concurrent to other sessions. Space will need to be reserved for these opportunities. The challenge in this instance will be notifying meeting attendees who will be meeting where and when, but greater use can be made of the message board, Facebook, and Twitter.

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[14] http://www.pechakucha.org/faq

[15] http://www.theworldcafe.com/method.html

[16] http://en.wikipedia.org/wiki/Fishbowl_(conversation)

[17] http://en.wikipedia.org/wiki/TeachMeet

[18] http://imlswebwise.org/hatch-your-project-ideas-at-the-projectpartnership-incubator-session/

Anticipated outcomes: Attendees will be active rather than passive participants in shared sessions. Sessions will provide more opportunity to discuss issues of immediate importance. Shared sessions will provide a means for professional networking. Additionally, in areas where Wi-Fi is available, participants should be encouraged to share their content online either during the sessions or shortly thereafter, providing increased benefit to SAA members unable to attend the Annual Meeting.

Slight increase in work for the Program Committee, as sharing sessions would have to be explained and designated in the program. Or in the case of unconference events, someone will have to track and publicize on-the-fly sessions. There must be a clear way for participants to sign up in advance of the session, or for someone to monitor attendance and cap the number of participants at the door. The meeting venue will have to accommodate more and smaller rooms. Whether the responsibility falls to the Program Committee, SAA staff, or another group, management of rooms and communication will be an additional responsibility. A challenge will be incorporating these sessions without greatly adding to the length of the conference. The greatest burden may actually fall on session moderators who will have to curtail unproductive or heated conversations and encourage participation.

Scenario 3: Focused Debate and Juried Paper Sessions

Rationale: A comparison of SAA to other professional organizations shows that there are many conference session formats not used by SAA. In a survey of Annual Meeting attendees, respondents expressed concern at the lack of variety of sessions and low quality of some speakers. Calls for juried papers and focused debate sessions are frequently heard. Proposed debate sessions and papers would be vetted by the Program Committee and/or a jury to ensure the quality and timeliness of the sessions. These types of sessions would create the opportunity for members to address current topics of debate in the profession, read papers meant for publication, offer commentary to recent publications, and respond to criticisms of previous work.

Plan of action: The Program Committee will advertise both types of sessions in their annual Call for Proposals from the membership and create a session slot for each. Debate sessions should be centered around clear topics, and involve two participants and a moderator. In the case of juried papers, session proposals must include completed papers. The sessions themselves would include 15 minutes for the reading of each paper, and planned commentary, and then the floor would be open for discussion.

For the juried paper session, the SAA President appoints a Jury Chair, and members of the jury are recruited (one each) from the Program Committee, the Publications Board, and the Editorial Board of *The American Archivist*. This jury would be responsible for deciding the criteria by which papers will be judged. The jury is responsible for the quality of the session, notifying the Program Committee of their decisions, and providing a quality moderator who can provide commentary for the paper sessions. Accepted papers would be circulated 3 weeks prior to the meeting for pre-reading by attendees.

If no proposals are received for these types of sessions, the Program Committee could convert the slots for each into unconference sessions, including an unconference debate session, where participants could sign up at the meeting to serve as debaters or moderators.

Anticipated outcomes: Increased variety in the program format, and increased quality of speakers through the vetting process of juried papers. SAA members would be encouraged to produce publication-level formal papers. Topics of high interest in the profession will be presented in debate format with the opportunity for further discussion.

Scenario 4: Allowing More Concurrency in the Program

Rationale: As part of its preparation for this phase of the subcommittee's work, the subcommittee conducted a survey of SAA Annual Meetings from 1997 to the present. The subcommittee observed how the decision to move roundtable meetings to Wednesdays in 2005 impacted the meeting schedule. That single decision created spaces in the schedule that allowed more free time for networking and informal group meetings. This proposal envisions a scenario that will make the program more flexible and allow the Society to adapt to changing meeting dynamics.

Assumption: This scenario questions a basic assumption that has guided the Annual Meeting program since at least the 1970s. The SAA program is currently structured so that one type of event does not overlap with another. Section meetings occur on Thursday and Friday afternoons, roundtables on Wednesday, and educational sessions each morning and on Saturdays. The belief behind this arrangement is that attendees wish to attend everything or should at least have the opportunity to do so. This scenario tests that notion and contends that specialization has narrowed professional interests, and that there are many meeting attendees who only wish to focus on program events specific to those interests. Furthermore, there has always been a significant segment in SAA who do not actively participate in or attend section or roundtable meetings. This scenario looks at ways of balancing meeting content so that the needs of those with narrower interests are met while also accommodating the generalist who is active in his/her groups.

Plan of Action: To actualize this plan, the Society would allow for concurrency in the meeting program with education sessions occurring simultaneously with some section and roundtable events. To reduce concurrency, sections would be encouraged to move their meetings earlier in the conference to Wednesdays and Thursday mornings. Plenaries and education sessions would begin on Thursday afternoon and end either Friday afternoon or Saturday before noon. Sections that opt to move their meetings to Wednesday or to Thursday morning will avoid having their meetings conflict with other programming.

Sections and roundtables could also be given the option of either holding their traditional two hour meetings or forsaking the two hour slot for greater access to the meeting program. Sections and roundtables that elect to do the latter would develop educational sessions, forums, and new types of programming, such as hot topics and "ConverStations" specifically focused on their constituencies. These events would be organized and approved by the section and roundtable leaders and not the Program Committee. These sections and roundtables would hold shorter business meetings in the mornings and evenings.

There is precedent for this in the all-day Congressional Papers Roundtable meeting and the long-running Business Section Colloquium held on Wednesdays. Both have been well-attended and seem to have become fixtures on the program. Both, though, have occurred at the initiative of their respective groups with no apparent input from the Program Committee. It should also be noted that most sections and roundtables already incorporate some type of additional programming in their allotted times.

Anticipated outcomes:
A shorter meeting seems inevitable. How short will depend on how much concurrency is permitted and how the sections react to the proposed changes.

If the section meetings move to Wednesday and Thursdays, we may find that some attendees opt to leave earlier. This should not impact total registration.

If adopted, this scenario has the potential to create opportunities for new types of programming such as unconferences, hot topics, and Pecha Kucha that fall outside the traditional domain of the Program Committee.

The impact on the Program Committee is uncertain. It may have a major impact on scheduling, room availability and assignments, and may require changes in how the Committee conducts its business. It should not impact the Committee's review of session proposals and may even reduce the number of traditional education sessions.

Scenario 5: Structured Networking

Rationale: Surveys show that the opportunity to network is a primary motivation for meeting attendance. Over the years, the Program Committee has accommodated that need by creating more free time for informal, unstructured networking. New members, however, often feel isolated and unable to penetrate existing networks. Many veteran attendees have also expressed the desire for structured networking that would gather people with common interests.

Plan of action: The course of action requires physical space and minimal programming and scheduling. Areas would be set up for groups of 10-20 people. Possible times and venues would be the exhibitors' area, rooms set aside during lunch time, and the Network Café. Boxed lunches could be made available for purchase by the hotel. Each group would have organizers and leaders. To the greatest extent possible, topics and purposes would be publicized beforehand, with some tables could be set aside for impromptu gatherings. Attendees would be encouraged to register for tables either before or during the meeting.

The concept could be strengthened by the development of an interactive program that would allow participants to find relevant groups or create groups on short notice. Social media (e.g., Twitter) could also play an important function in bringing people together. This scenario could also be strengthened if combined with structured sharing formats such as "hot topics" and "ConverStations." (See the Task Force's blog post[19] on this topic) If a particular group elicits a response that exceeds the concept of structured networking it could be repurposed as a structured sharing session. Vendors could be encouraged to participate as sponsors and event organizers.

Anticipated Outcomes: This scenario should have minimal impact on the program as it would utilize existing free times and spaces. It could also occur concurrently with educational sessions. No costs are associated with this scenario. The Program Committee's involvement would be minimal. If successful, there is a possibility of conflicts over who does and does not get a table. In that case, a selection process would have to be created. To further limit the number of groups, a nominal "table" fee could be imposed.

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[19] http://www2.archivists.org/groups/annual-meeting-task-force/tawk-amongst-yourselves-the-converstation

SAA Annual Meeting Task Force
Social Responsibility Subcommittee Report

The Social Responsibility Subcommittee worked to look at three primary issues facing social responsibility and the Annual Meeting. The primary issue was Fair Labor Practices and how the Society can work to make sure that the Annual Meeting is not affected by labor action and that the employees in the hotels we book are being treated fairly.

In addition to labor practices, we also researched ways that we can make the Annual Meeting more sustainable and also how we might engage in service projects in the cities that we visit during our Annual Meeting.

For the Subcommittee,
Rachel Vagts
Chair

Members:
Hillel Arnold
Lynda DeLoach
Jodi Koste
Alan LeFever

Fair Labor Practice

The subcommittee has been examining ways that SAA might mitigate labor issues at future Annual Meetings. Our recommendations include the following elements:
- Including contract language that requires hotels to address fair labor practice issues. (A request for sites to address fair labor practices in their proposal is included in the 2015 RFP.)
    - One prominent organization used the following language and we would recommend something similar for SAA contracts:
        - Hotel warrants and represents that it has no unfair labor practice charge or complaint pending or threatened against it. Hotel further warrants and represents that at no time during the past ten years has there been, nor is there now existing or threatened, any walkout, strike, picketing, work stoppage, or any other similar occurrence.
- Gathering information about labor contracts and being aware of any potential actions planned against a hotel property. This includes consulting UNITE HERE's [website](http://www.hotelworkersrising.org/HotelGuide/)[20] and other related sources.
- Increasing transparency about SAA's due diligence during the hotel contract process and potentially coordinating with component groups like the SAA Issues and Advocacy Roundtable as a way of keeping on top of developing issues.
- Provide information about SAA's process to affiliated organizations (regionals and state archival organizations, etc.) as reference material for their own meeting planning efforts.

- *Background information and considerations:*
    - *Among the responses at the Annual Meeting Forum in August 2012 were comments that people wanted SAA to be aware of labor issues, that people were uncomfortable at the thought of crossing a picket line, and that they did not like being contacted by union representatives about attending the meeting. There were concerns that adding additional contract language could increase what, for some, is already an expensive Annual Meeting.*
    - *The subcommittee did express a concern that we not tie SAA's hands and make it difficult for the Society to successfully negotiate a hotel contract.*

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[20] http://www.hotelworkersrising.org/HotelGuide/

- ○ *We did look at examples of other organizations contracts, including one from the AFL-CIO. Their contract included many conditions beyond cancellation of the contract in case of a strike.   The other organizations included more specific language about labor actions than current SAA contracts have.*
- ○ *Questions that we asked included whether it was possible to inquire what the length of the current contract was for hotel workers when the contract is signed, if there have been any previous contract disputes, and what, if any, unions are represented at the property.*
- ○ *During the time that we were working on this Task Force, we were contacted by the leadership of the Midwest Archives Conference who is also working on a social responsibility statement in response to a hotel contract issue affecting their spring and fall 2013 meetings.*

Sustainability

A great deal has been done to create a more sustainable Annual Meeting and reduce the Society's carbon footprint. The subcommittee recommends the following items that may continue that progress:
- ○ Having participants opt-in or -out of a paperless meeting,
- ○ Using a mobile app for the conference schedule (available from our conference planner),
- ○ More visibly displaying information about where surplus food has been donated (this has been SAA practice).

- ● *Background information and considerations:*
- ○ *In researching this issue, we discovered that SAA is already doing or in the process of doing many of these things. The subcommittee wishes to highlight those efforts and encourages the Society to make it known to the members how we are supporting sustainability.*

Service Project

An inaugural service project was organized by the SAA Archivists of Religious Collections Section in San Diego in 2012. Service projects are also being planned for the New Orleans meeting.
- ○ The subcommittee supports these efforts and plans to investigate ways the concept can be sustained.

- ● *Background information and considerations:*
- ○ *This idea was first presented by subcommittee member Alan LeFever based on his experience with the Baptist Conference meetings. At approximately the same time, the ARC Section began planning a service project for the 2012 Annual Meeting. Based on reports from the Section, this subcommittee endorsed their efforts and recommended that the Society continue with these efforts. We also had information from ALA about their Service project efforts.*

Online Access to the SAA Annual Meeting: Scenarios

Submitted by the AMTF Online Access Subgroup: Rebecca Bizonet (chair), Beverly Allen, Lisa Carter, Erin Lawrimore, Wade Wyckoff.

These scenarios were prepared based on our research of vendors, peer organizations, or other associations; member feedback, both in-person at SAA (one-time forum and continually staffed table); and additional feedback collected online and through individual response to subgroup members.

Overarching issues affecting all scenarios include the following points:
- Member voice (e.g., vote, polls) is important in the selection of content made available, as well as in the way the content is delivered (e.g., the app).
- There needs to be more effective promotion/awareness of content, options.
- There should be mandatory sign-up for presenters.
- Online access is vital on multiple fronts:
    - Attendees cannot be in two places at once.
    - Members are unable to attend (financial, time, other constraints).
    - Content that was missed (or especially enjoyed) can be accessed post-conference.
- Greater online access expands our global reach and contribution to the profession; and to students, non-professionals, and also paraprofessionals.
- There are some differences between how education sessions and other sessions (roundtables, sections) can be treated/categorized.
- Related to the above, encourage and learn from the more DIY approaches already in use by roundtables, sections, and committees as a 'laboratory' for enhancing online access, and developing innovations to OA, for possible implementation in other areas of the conference. (Risk: RTs/sections/committees feel like they're getting the short end of the stick. It is a tradeoff between flexibility and official support.)

1. Wi-Fi in meeting rooms.

Rationale: This continues to be by far the highest priority for members. There is near-universal outcry for this option for a variety of reasons, including changing attendee expectations, changing uses of technology, and greater sharing of information. Live internet access is crucial for the use of social media (Twitter, live blogging, etc.), following concurrent sessions, and sharing content and exchanging commentary with non-attendees. It is also important for note taking via cloud services (e.g., Google Docs), a factor which may increase in importance as a rationale as operating systems evolve. Wi-Fi/internet access is also of use for extra-conference planning--e.g., restaurants, other nearby business, services, and sights.

Plan and Outcome: Attendees are, overall, willing to pay an extra fee, but the cost must be kept affordable. A range of options follows:

a   (Easy To Do/Low-Moderate Impact.) Baseline: Continue to offer the Networking Café for a minimum of wired access. This doesn't affect internet access in meeting rooms, however. It would be mainly useful for the extra-conference things and for networking.
b   (Hard To Do(?)/Very High Impact.) Select and/or negotiate with hotels/conference sites that offer Wi-Fi in meeting rooms for no additional fee to organization or members, or to such little cost to organization that the cost may be borne by organization without being passed along to members. The difficulty of implementing this option may be affected by newness of conference site, with newer sites more readily offering free Wi-Fi.
c   (Easy To Do/High Impact(?).) Negotiate as affordable a fee as possible with hotel/conference site and build Wi-Fi access fee in to registration fee (absolutely not more than $10 per day, or on the average $30-40 more for total registration fee).
d   (Moderate Implementation(?)/High Demand.) Related to (c), avoid venues that block (by policy or physical conformation) cellular data signals to mobile/Internet connected devices. Cellular data access is an

important alternative to Wi-Fi. Physical considerations of site, e.g. basement level meeting rooms with no cellular network access, are a major factor here.

e   (Easy To Do/High Impact(?).) Negotiate as affordable a fee as possible with hotel/conference site and allow users to opt to pay an additional "a la carte" Wi-Fi access fee (absolutely not more than $10 per day).

f   (Hard To Do/High Impact.) Build the fee in to the registration fee while eliminating or minimizing costs to attendees. Obtain sponsorships to absorb costs to organization. (Sponsorships would require additional research and planning.)

and for any of the above:

g   (Easy To Do/Low Impact.) Roundtables/sections/committees: individual solutions may still be options here (e.g. "stealth pilot"/more DIY approach of sharing of personal Mifi, as done by SAA/ALA/AAM Committee).* It remains to be seen what material support SAA can provide roundtables/sections/committees for being these 'living labs,' but recognition may count for something. (Possible issue: Compliance problems with meeting venue contract?)

A note on MiFi devices: In this scenario, members bring and share their own mobile broadband wireless devices, which they can share with up to four other users. Users' own carrier contracts and fees apply, so it is uncertain how well this could be expanded in an official or semi-official capacity.

2. Virtual conferencing. (Ranges from Easy To Do/High Impact, Hard To Do/High Impact, to Hard To Do/Low Impact, for more complex virtual conference, possibly.)

Rationale:
Members indicate willingness to pay a "small" additional fee, though we still don't have a good sense of what that fee might be. Some interesting feedback indicated that a real-time virtual conference is *less* useful to them than recordings and slides due to lack of work time and funds to attend even a virtual conference.

Plan and Outcome:
Streaming Video (free): Streaming video of select sessions: At least plenary sessions, and then a selection of educational sessions. (Note that this would also be recorded and made available at a later time.) Real-time captioning for the hearing impaired (also useful for a global, multilingual audience) has been suggested. Logistics and pricing must be more fully researched.

and

Virtual Conference (paid): A separate virtual conference, just for online participants. Attendee has live access to streaming audio and a WebEx portal for slides and chat. Group audiences are to be encouraged where possible, with differing pricing according to individual or group licenses. Thus, workplaces, regional and state archival associations, and student chapters or schools may serve as "pods" or venues for the virtual conference, with options for localized in-person networking at virtual conference site. A limited number of sessions from the Annual Meeting will be selected for the virtual conference based on session popularity or possibly by topical tracks. Each speaker re-presents at live virtual conference what they presented at the onsite conference. Speaker can have live Q&A with the virtual audience.

Implementation of Virtual Conference:
Either of the following, all of which would involve some vendor implementation:

a   (Hard To Do?/High Impact.) Following the model already in use by such associations as AAM, offer a separate virtual conference, just for online participants, that runs at the same time as the onsite conference: Speakers re-present their sessions, live, the day after their onsite presentations. Advantages to this approach are that it harnesses the energy of the live conference overall, and in terms of the speakers for each session being together in the same physical space during their presentation. Drawbacks: This would involve extra SAA staff and Program Committee logistical work in coordinating the speakers at the AM. Another possible

drawback would be that the presenters simply wouldn't have the time to do this. Maybe they leave after their presentation; maybe they have tons of other commitments. Details: The vendor that AAM uses for its virtual conference is Learning Times (http://www.learningtimes.com/).

b (Hard To Do?/High Impact.) "Best-of" fall virtual conference with selections made by member voting after the conference (whether they attended or not). A model similar to SAA's education webinars can be followed for the presentation. Speakers would be "corralled" remotely for the presentation. Advantages: Fewer logistical issues during the onsite Annual Meeting, a more democratic mode of selection (which would be riskier to try prior to the conference, but still possible). Drawbacks: Maybe less energy and coordination with the speakers not presenting together physically, but this may be a very minor, less likely consideration.

c (Hard To Do?/Moderate Impact.) "Best-of" fall virtual conference with selections made by the Program Committee, possibly in alignment with some overarching theme. A model similar to SAA's education webinars can be followed for the presentation. Impact is ranked lower than in option "b" because of lack of inclusivity for members' preferences. Advantages: Fewer logistical issues during the onsite Annual Meeting; easier, cheaper selection method than "b." Drawbacks: Less democratic selection approach than "b." Maybe less energy and coordination with the speakers not presenting together physically than "a," but this may be a very minor, less likely consideration.

and

d (Easy To Do/Low-To-Moderate Impact) Use sections and roundtables as a place to start with pilots (including experimentation with fees). Things like this are already being done, to a certain extent, and on a DIY basis, e.g. CALM Committee meeting, AMTF Forum (Google Hangouts), etc. Internet access is a precondition for such efforts. Again, we draw a distinction between education sessions and other sessions (roundtables, sections, committee meetings): roundtables and sections (and committees) generally operate on a more informal and more interactive basis. They can—and have—set up their own virtual conferences and be responsible for how much and what kind of remote access they want. We should check with them that they are satisfied with this approach, and see what ways we can help support, as well as learn from, their efforts.

e Gradually and/or on a pilot basis, build in some "official" interactivity between the in-person participants and the virtual participants. This can be as simple as receiving questions from Twitter during the Q&A period (Easy/High!), or more complex, such as some of the chat options that are available with virtual conferencing and webinar frameworks.

- Future Ideas/Challenge Ideas/Not Considered: Virtual vendor hall; interactive business meeting and voting; make *all* conference sessions available through a virtual conference; have a fully interactive (in person and remote) conference (cost and logistics factors, not to mention lower demand).
- Something we should have looked at more: Business Archives Colloquium could be a model for a sponsored virtual conference that could be scaled out. Look at vendors, feedback. It has a sponsorship.

3. **Recordings of meeting content**. (Easy To Do/High Impact to Hard To Do/High Impact, depending on level of complexity.)

Rationale: Session recordings, in some cases even more than virtual conferencing, offer members—and non-members (let's call them "users")—a chance to access and learn from the Annual Meeting content. The reason that the benefit may be greater is that some users would be equally challenged, due to workplace time and funding constraints, to attend a real-time virtual conference, but they could purchase recordings of some sessions. Moreover, SAA Annual Meeting participants cannot attend some sessions they would have liked to (the "I can't be in two places at one time" factor). Furthermore, there is an expressed desire to share content experienced in person at the meeting with colleagues later. Closed captioning/transcription would offer

powerful benefits to sometimes marginalized users and increase discoverability of SAA's content online. Recordings must be considered as part of a constellation with "Other Content," the sum of these being greater than their parts, with, for example, the audio and the slides (and paper, if available) of a session being accessed together for greater context and understanding. Session recordings have the advantage over real-time sessions in crossing the "time zone barrier" and thus, along with transcription, providing better access to a global audience.

Plan and Outcome:
Note: We didn't make as much of a distinction between audio and video recordings as we maybe ought to have. Most of this concerns audio, but much if not all of it could be applied to video recordings as well.

Making the Recordings
(Easy To Do/High impact) In all cases, make recording of plenaries and educational sessions mandatory, unless the presenters have compelling confidentiality or privacy reasons for opting out. Roundtable/section/committee sessions may even be considered for this approach (universal recording) as well, or they may be considered on a case-by-case basis. Since many roundtables/sections have programs now and are conducting more of their business meetings online, we may want to look at bringing them "into the recording booth," too. Feedback varies, but most of it focuses on the plenaries and educational sessions.

and

(Easy but potentially expensive To Do/High Impact) Hire a vendor to make recording of plenary and educational sessions. Make recordings available for purchase 2 weeks after conference and on a continuous basis from there. (A pilot project is slated for SAA 2013 for selected sessions. Nancy and SAA staff are conducting research and negotiations with vendors to do the recording.)

or

(Hard To Do/Low Impact) Take a DIY approach to providing video/audio recordings of plenaries and all or most educational sessions using a volunteer committee with support and logistics from SAA staff. (An example of this approach is Museum Computer Network). Post video content to YouTube. Drawbacks: Additional burden to SAA staff, reliance on (and need to organize) the volunteers, greater time lag for posting (e.g., 3-6 months for MCN), variable quality of recordings.

Providing Access to the Recordings
Range of options as follows:

a (Hard(?) To Do/High Impact.) Make educational sessions available as downloadable mp3s through SAA's website. This would require a homegrown ecommerce option or working with a vendor. Options to purchase recordings individually, by track (digitization, outreach, etc.), or in some other bulk bundle will be made available. Baseline of individual purchase option. A homegrown approach has the advantage of allowing the incorporation of a discount for those who registered for the conference (or for making recordings free to conference registrants).

b (Easy(?) To Do/High Impact.) Make educational sessions available as downloadable mp3s through iTunes (e.g. iTunes U, as institutions such as Arab American National Museum are doing) or Audible.com. Options to purchase recordings individually, by track (digitization, outreach, etc.), or in some other bulk bundle (e.g. discount for all recordings) may be made available. Provide linked access to the e-commerce option from SAA. Baseline of individual purchase option. A disadvantage to this approach over (a) is that it wouldn't be possible to provide a discount to those who registered for the conference, at least not with iTunes.

c (Hard To Do/High Impact.) For all of the preceding options, add closed captioning/transcripts, for better access to the hearing impaired and non-native English speakers. This would be especially appropriate for

video recordings in particular. (Logistics of this require further research and planning. This could be a crowdsourcing opportunity, or there may be automated solutions.) Transcripts also greatly expand discoverability of session content, as they can then be crawled and indexed by Google and other search engines. Presenter-submitted papers may in some cases substitute adequately for closed captioning.

d (Moderate-to-Hard Do Do(?)/Moderate-to-High Impact(?)) For all of the preceding options, make session recordings freely available, for example, on Internet Archive, when they are no longer current. (Two years or five years are some examples of cutoff times.)

e (Moderate To Do/High Impact.) For all of the preceding, provide a searchable and well-organized portal of conference material (as with "Other Content") for better discoverability and ease of use. Users currently experience existing content as "buried" within the SAA site. Links to content can be maintained from the existing program "tree" structure and from the new portal. Does require additional SAA staff resources to create this portal.

f (Easy To Do /Low Impact.) Convert already recorded session recordings to digital format and make freely available on Internet Archive and links from SAA website. SAA staff and SAA volunteers. Logistics would need to be determined.

g (Easy To Do/Low Impact.) CDs can continue to be offered, in addition to the above.

h (?/?) Begin a pilot project implanting some combination of the above, with plenary sessions and selected recordings. Sessions may be selected by member poll in advance or by the Program Committee. Vendor cost is still an important factor.

4. Other meeting content. (Easy To Do/High Impact)
Rationale: Textual components of sessions offer similar benefits as those listed above for recordings. Together with recordings, they offer a better understanding and documentation of the sessions. Work done in this area, building a content library, would be an expansion and refinement of what SAA is already doing.

Plan and Outcome:
(Easy To Do/High Impact.) Require the submission of slides and/or papers (whatever the presenter is presenting) as a condition of acceptance, unless there are compelling privacy/confidentiality reasons to allow speaker opt-out. Create a virtual library/content library of session slides and papers. Continue to provide access to content through the existing program "tree" model. Content will continue to be freely available. In addition, choose for (or implement over time) the options below.

a (Easy-to-Moderate To Do/High Impact) Create a portal for Annual Meeting content plus recordings (see Recordings, above), with simpler presentation and easier combined searching than currently exists. This will involve some SAA technical staff burden, though some of it may reasonably be shared with the Program Committee, particularly the task of rounding up the content from all the presenters and feeding it to the web page creator(s). Since SAA committees are empowered to create and manage websites within SAA's Drupal site framework, it would be possible for SAA staff to delegate the uploading duties to the Program Committee, too. This uploading might even be a good opportunity to involve a volunteer (student or otherwise), or it could be made part of the Program Committee duties.
b Increase publicity and promotion for the content, e.g. through social media as well as *In the Loop*, *Archival Outlook*, etc.
c Roundtables, sections, and committees will continue to be responsible for their own online content. (Monitor this, though, and seek feedback from roundtable/section constituencies to see if more consistency should be maintained between these and the educational sessions, especially for roundtables/sections that offer richer—i.e., beyond the business meeting—programs.)

5. **Conference app**. (Probably Hard To Do/Moderate-to-High Impact, depending on level of complexity; possibly Easy To Do/Low Impact, if continue with mobile web app only)

Rationale: As more and more attendees conduct their professional and personal business online, expectation has grown for an app to manage conference information and scheduling. A robust app may eventually take the place of or partially eliminate paper materials. Note that feedback indicates considerable interest, but not at the expense of omitting or deprioritizing other online access priorities. Drawbacks: Additional staff and/or vendor resources. Attendee buy-in: some are still quite happy with paper.

Plan and Outcome:
General considerations: Strongly desired is an app that works offline (at least portions of it, such as a saved/static schedule) and cross-platform utility (Apple and Android, and perhaps a mobile web option for other operating system users). After this, user expectations vary, from the simple and static (baseline of a conference schedule that is always accessible) to the complex and interactive (local arrangements information, a customizable calendar to which members can add their own appointments). Multiple responders in our user feedback requested an attendee directory built into the app, since paper directories are no longer included in packets. The complexity of this could vary, from a simple table/list/PDF to something more interactive, such as an attendee database that interacts with the calendar and email in order to contact and schedule things with other attendees. Our sense was that members would be pretty happy with a static list form of member directory, as long as it is text-searchable. We recommend that at least something like this be included. There were some mentions of the desirability of having frequent updates to the schedule. This would be more on the "complex" range of things, but it points out that we must bear in mind that something that doesn't meet user expectations (and definitely something that provide inaccurate information) is worse than nothing at all.

a   (Easy-to-Moderate To Do/Moderate-to-High Impact) Develop a conference app in-house using SAA expertise (Matt Black). Some free apps are available that may be adapted/further developed, such as Xomo's Eventbase. (Xomo Digital offers a premium product for conferences such as SXSW. Eventbase is a different product.)

b   (Moderate-to-Hard (expensive) To Do/Moderate-to-High Impact). Contract with a vendor to develop a conference app or modify an existing conference app (more likely) according to our specifications. One further pair of requirements here (per Matt) is having access to (i) use statistics/analytics and (ii) the assurance that we will be able to extract and migrate our data should we discontinue our relationship with the vendor. Some vendors to consider (among many) may include Xomo (SXSW), and those providing products for the New York International Auto Show, CES, and Sundance. Further research and planning is required here.

c   (Easy To Do/Low-to-Moderate Impact.) As a pilot/stopgap measure, resurrect and improve the mobile web conference schedule that was implemented in 2011. Matt Black wants to try this for 2013. Since we know that there will be Wi-Fi onsite, some of the complaints from before about access should be mitigated. SAA should, however, still stress that this is a pilot project/temporary solution, and not the be-all, end-all. Aggressively seek feedback on the user experience with the mobile website.

d   (Easy To Do/Moderate-to-High Impact.) Whether vendor-based or homegrown, start simple and static and build in greater complexity and interactivity gradually and based on continuing feedback and budget considerations. This would be a future development over the next one to two years or longer. User expectations must be managed (and feedback sought!) as build-out continues.

e   (Hard To Do?/Low-to-Moderate Impact?) Offer two apps: one simple, free one and one more robust, premium one for purchase. The premium app must meet user expectations or there is a risk of more

negative perceptions than if an app wasn't offered at all. This would be a future development over the next one to two years.

f As with recordings and virtual conference, there may be some possibility of acquiring partial or full vendor sponsorship. This option would need further investigation. One drawback is the sustainability factor, especially along with increased user expectations once something is implemented. It may be worth considering in the future/for future research.

Conclusion

In addition to our specific recommendations in the form of scenarios, we'd like to mention some other points, some of which echo or reinforce those made by the other subgroups. Running through all of our scenarios is the need for consideration of such factors as sustainability, the use of (and evolving uses and formats of) social media, and technological change in general. We also want to stress how important it is to communicate to our members/users the extent that we will be launching pilot programs as a way of experimenting to see what works and what doesn't. Tied to this is the idea of gradual, not instantaneous implementation. In order to execute these related approaches successfully, SAA must aggressively seek and gather the opinions, ideas, experiences, and feelings of members for feedback. There also needs to be a meaningful way to assess feedback.

Participants in our efforts to "take the member pulse" and gather feedback seem to have been appreciative of our efforts thus far. Responsiveness and two-way communication with members/users continues to be crucial here. In SAA's continuing efforts to improve the annual meeting, we recommend engagement and polling measures similar to those enacted by the Task Force thus far, before, during, and after the Annual Meeting, in person and online, formally and informally, even if on a scaled-back and/or less frequent basis. To this end, we recommend either a permanent body, or a regularly, periodically formed body to address the Annual Meeting on an ongoing basis.