Society of American Archivists
Council Meeting
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Chicago, Illinois

Committee on Education: Guidelines for
Vendor-Sponsored Tools and Services Courses
(Prepared by Solveig De Sutter on Behalf of the Committee on Education)

BACKGROUND

At its May 2008 meeting, the SAA Council adopted the following policy:

> **Policy on Use of Specific Products in SAA Workshops**
>
> The SAA Education Department will include the following disclaimer statement on any workshop materials, including announcements and correspondence, that include the product name and/or logo of a product provided by any entity other than SAA: "The instructor utilizes [product] to facilitate teaching the content of this workshop. The use of [product] does not represent or imply SAA endorsement of this product."

The Committee on Education (COE) has accepted proposals for courses/workshops in which the instructors use open-source software and tools, beginning with the "Implementing DACS in Integrated Content Management Systems: Using the Archivists' Toolkit^{TM}" workshop. In every case the disclaimer as adopted by the Council has been used.

One submission in response to the 2011 Call for Pre-conference Proposals proposed a half-day demonstration of why and how a specific (proprietary) software product could be used, supplemented with exercises. Although for a variety of reasons that proposal was withdrawn, the COE and staff are aware that provision of such programming is becoming more prevalent. SAA should be prepared to respond to such proposals and/or to seek them out.

Anecdotal information gleaned from SAA course evaluations indicates that our registrants would like to see more "Tools and Services" courses offered throughout SAA's catalog (i.e., not just in the Digital Archives Specialist courses) and that they do not differentiate between open-source and proprietary software and tools. The recent Member Needs and Satisfaction Survey confirms the need for more "Tools and Services" courses as well.

DISCUSSION

The COE believes that there is a need among archivists for instruction about specific software products that might also be proprietary, and that the SAA education program can and should

deliver such education as long as proprietary courses/workshops are managed differently. The Committee believes that creating a new category within the "Tools and Services" tier of SAA courses—specifically labeled "Vendor-Sponsored Tools and Services"—will ensure that registrants and prospective registrants perceive such offerings correctly. Further, the COE believes that appropriate guidelines will help to avoid the perception that SAA is selling or endorsing a product.

The Committee proposes that the current course proposal submission form be modified to include a question about the proposer's relationship to the product. If the proposer is the developer of or vendor for the product, s/he would be directed to a course proposal submission form specifically for vendors. SAA would require the vendor to pay an extra fee or make concessions (e.g., no honorarium or expense reimbursement) as a means of lowering the registration fee and in acknowledgment of the marketing opportunity that the course provides for the vendor. If the proposer is a non-vendor who uses the proprietary product that is being demonstrated or that is linked with the archival processes being taught or described, this category would not apply.

RECOMMENDATION

THAT a new course/workshop category labeled "Vendor-Sponsored Tools and Services" be added to SAA's continuing education catalog; and

THAT course/workshop proposals in that category be subject to the following guidelines:
- **Vendor/developer instructors do not receive compensation;**
- **Vendors/developers are responsible for the direct costs of course/workshop development;**
- **Vendors/developers offer a product discount to all attendees of the course/workshop; and**
- **Registration fees for vendor-sponsored tools and services courses/workshops are based on indirect costs (SAA staff time and associated overhead) only.**

Support Statement: Course evaluations and SAA's recent membership survey results demonstrate an articulated need for software training. Adjusting SAA's continuing education program policy to include a "Vendor-Sponsored Tools and Services" course/workshop category would provide members and others with needed training at low cost.

Impact on Strategic Priorities: Supports Strategic Priority #1, Technology, Desired Outcome #1: SAA will provide education and training to its members to ensure that they are aware of relevant standards and adopt appropriate practices for appraising, capturing, preserving, and providing access to electronic records.

Fiscal Impact: No direct impact. The addition of course topics for which members have indicated a need presumably would result in increased attendance and thus engagement with SAA. The process of creating new forms and vetting proposals will not create a significant burden on volunteer or staff time.