Society of American Archivists  
Council Meeting  
May 26 – 28, 2010  
Chicago, Illinois

Action Item: Name and Structure of Online “Council Handbook”  
(Prepared by Nancy Beaumont and Brian Doyle)

BACKGROUND

In August 2009, the Council approved a four-part approach recommended by Ambacher, Sly, and Vogt-O’Connor for conducting a comprehensive review of the Council Handbook (i.e., SAA’s governance manual):

1. Address obvious and immediate editing needs.
2. Rename, reorganize, and re-master into one complete, searchable document that would facilitate use and revision.
3. Address the need for a more detailed and comprehensive review (e.g., comparing content with Council minutes and/or asking existing units to check their own sections) through commitment of additional resources (e.g., a dedicated staff member or a hired editor).
4. Schedule regular reviews.

DISCUSSION AND RECOMMENDATIONS

The launch of Drupal in April 2010 presents a practical need and an opportunity to resolve some of the issues outlined above, particularly Item #2 regarding the name and internal structure of the Council Handbook. Migration of content into Drupal entails placing the document(s) into an organizational framework, which can be based on the existing model or on a modified version. Obvious and immediate editing needs would be addressed most efficiently after modifying the organizational framework and in the course of content migration.

Recommendations are presented below according to specific suggestions outlined in the August 2009 Council report.

A. “Possible new names: This may wait for reorganization, but suggestions include breaking the Handbook into: 1. SAA Operational Procedures and 2. SAA Constitution, Bylaws and Procedures.”

**RECOMMENDATION 1**

THAT the Council Handbook be renamed “SAA Governance Manual.”

Support Statement: The “governance manual” applies not only to the Council but to all
SAA component groups. It contains the SAA Constitution and Bylaws as well as policies, guidelines, and procedures that are germane to the governance of the organization.

B. “A plain language rewrite: Rewrite in plain business English style (i.e., place the most important topics first). Use a question and answer format wherever possible. Use active voice. Keep sentences and paragraphs relatively short. Use the Word editing readability statistics features to identify problems such as inactive voice, long sentences, and writing at too high a grade level.”

Discussion: Staff recommends that this task be conducted with caution, particularly if the work is to be delegated to a staff lead. Distinguishing style from substance can be a delicate matter, especially when certain terms or phrases (e.g., “hold office”) have a precise meaning that affects governance. No recommendation is offered at this time.

C. “Thorough indexing and linking of text sections of the online manuscript so that key data can be found easily throughout the Handbook.”

RECOMMENDATION 2

THAT taxonomies and/or indexes of the Council Handbook [Governance Manual] be considered supplemental materials that are not subject to Council approval; and

THAT the SAA staff be charged to devise and implement appropriate technical methods to enhance information retrieval within the Handbook [Manual].

Support Statement: SAA’s content management system (i.e., Drupal) features tools to create taxonomies. This device has been implemented successfully for portions of the Guidelines for a Graduate Program in Archival Studies (GPAS). These tools can and should be used by the staff to enhance information retrieval and conform to technical best practices.

D. “Linking of all citations of other sections within the document to the text of the actual sections cited.”

Discussion: Staff will add such links upon content review and migration.

E. “More intuitive Chapters, Sections, and Breaks.”

Discussion: Although the SAA Bylaws (Section 8) state that “the Council is authorized and directed to prepare, adopt, or amend such administrative guidelines, policies, and procedures as may be desirable to regularize the functions and operations of the Society,” the Constitution and Bylaws do not draw clear distinctions among those terms. We propose to prepare for Council consideration operational definitions of governance policies (generally requirements or mandates), governance guidelines (generally models or preferences), and governance procedures (generally standardized and approved steps or tasks), together with draft revisions to the table of contents and chapter names that reflect a reorganization

1 e.g., http://www2.archivists.org/gpas/curriculum/appraisal-acquisition
according to governance policies, governance guidelines, and governance procedures.

F. “Definitions for acronyms, initialisms, and technical language used throughout that can be linked or found easily.”

**Discussion:** Where such acronyms, initialisms, and technical language are defined in the *Glossary of Archival and Records Terminology*, staff will apply a hyperlink to that headword during the course of content review and migration.

G. “Appendices: Better integration of the appendices into the document. They are largely orphaned in the current Handbook structure.”


**RECOMMENDATION 3**

**THAT** the following changes in the Council Handbook [Governance Manual] be adopted:

i. **Remove Appendix A, “SAA Staff & Membership Charts,” and incorporate this information into the site “Contact Us” form.**

   **Support Statement:** The staff directory is not a governing document, but rather a reference document that changes frequently. Maintaining this information in one location helps to ensure its accuracy.

ii. **Remove Appendix D, “Major Guidelines and Standards Adopted by SAA,” and incorporate the following pages into a new “Professional Standards and Guidelines” section on the website:**

   - Describing Archives: A Content Standard
   - Standards for Archival Description: A Handbook
   - Archival and Special Collections Facilities: Guidelines for Archivists, Librarians, Architects, and Engineers
   - Guidelines for Archival Continuing Education (ACE)
   - Guidelines for College and University Archives
   - Guidelines for the Evaluation of Archival Institutions
   - Guidelines for a Graduate Program in Archival Studies (GPAS)
   - Museum Archives Guidelines
• Orphan Works: Statement of Best Practices

And incorporate the “SAA Response to the Draft Guidelines for Digital Images Developed by the Conference on Fair Use” into the “Statements and Resolutions” section of the website.

Support Statement: These pages are not governing documents for the Society, but rather guidelines and statements on professional practice.

iii. Remove Appendix E, “Key Reports Sponsored by SAA,” and incorporate the content into the “Reports and Meeting Minutes” section of the website.

Support Statement: These are not governing documents for the Society.

iv. Remove the following appendices and incorporate the content into a revised “History of SAA” page and/or website section:

- Appendix F, “SAA Leadership History”
- Appendix G, “Annual Meetings”
- Appendix H, “SAA Fellows and Honorary Members”
- Appendix I, “Description and Brief History of SAA”

Support Statement: These pages are not governing documents for the Society.

v. Remove Appendix J, “Major Position Statements.”

Support Statement: This reference already links – appropriately – to the “Position Statements and Resolutions” section of the website.


Support Statement: The Code of Ethics is not a governing document for the Society, but rather a set of standards and/or guidelines on professional practice.

H. “Improved format: Treat this as EAD, or at least have a Table of Contents that scrolls down on the left for ease of navigation.”

Discussion: Drupal’s “Book” feature provides a useful device for creating hierarchies of related documents and displaying automatic links that help the user navigate those relationships. As described in Item C / Recommendation 2 above, taxonomies can also be employed to enhance information retrieval. Books also feature a print-friendly utility that will output multiple chapters or the entire Council Handbook [Governance Manual]. Staff recommends that we use these tools to conform to best practices.
I. “Appearance: Improve the graphic design of the piece and add some images as well. Redesign the cover and the page layout.”

**Discussion:** The new “theme” (i.e. graphic design template) in Drupal enhances the user interface by establishing an attractive and functional layout. The presentation features a wider body column that is more appropriate for text documents containing hierarchical outlines with extensive indentation.

J. “Historical Content: Some sections of this document would respond to creative redesign because existing content belongs elsewhere rather than in this volume. The SAA Leadership History, for example, could be a jazzy online exhibit with links to the presidential addresses, visuals, lists of accomplishments, and links to actual Facebook page interviews with the presidents. Portions of the Student Chapters material also could go elsewhere in much the same way.”

**Discussion:** Per Recommendation 3, staff agrees that various sections, particularly the appendices, do not constitute governance documents and do not belong in this volume. SAA’s 75th Anniversary Task Force has recommended Web development strategies to create more dynamic “online exhibits” of leadership history, etc., via a timeline and/or other means. See Agenda Item V.K.