



**SOCIETY OF
American
Archivists**

Leader Manual

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SOCIETY OF AMERICAN ARCHIVISTS

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Introduction from SAA's Executive Director

Dear SAA Leader:

You already know that SAA is a vibrant, dynamic organization. More than 60 boards, committees, task forces, working groups, sections, and roundtables serve the interests of an ever-growing membership — now more than 5,300 strong! Your service on one or more of these component groups helps the Society to meet important strategic challenges and advance the archives profession.

This manual has been designed to assist you in those efforts. In its pages you'll find practical information on the administration of SAA's component groups. Our goal is help you spend less time worrying about how to manage your group(s) and more time focusing on your goals. Rather than being an exhaustive policy guide, this document is offered as an introduction to common questions that you may encounter and tips on where to find additional resources.

Tracking and supporting the work of so many component groups can also be a challenge for the SAA Council and staff. We view this manual as the first "edition" of an evolving document—one that we will continue to refine and revise as needed. As always, we encourage you to bring any questions or concerns to the attention of the SAA Council and staff. If issues are unclear, if you can't find the information you seek, or if you have recommendations, please let us know.

Most of all, *thank you* for your commitment to SAA and to the archives profession!

Best regards,



Nancy P. Beaumont
Executive Director

Who Are SAA's Leaders?

Any member who serves in a named position on an SAA board, committee, task force, working group, section, or roundtable is considered an SAA *leader*, which is different than being an *officer* (i.e., chair, vice-chair, etc.) of a component group. Leaders are those members who participate in strategic and/or governance activities, while officers typically direct such efforts. SAA's Leadership Directory contains official rosters for all component groups and may be accessed online at <http://www.archivists.org/leaders/>.

How Are Leader Rosters Updated?

Official rosters (i.e., online directories) for all component groups are maintained by the SAA staff via the member database. People in the database may be assigned an unlimited number of group roles that specify:

- The *group* on which the person is serving;
- The person's *role* (i.e. chair, vice-chair, committee member, etc.) in that group; and
- The *beginning* and *ending dates* for the term of service.

Note: Because dates must be entered in full MM/DD/YYYY format, for most group roles, terms are set to coincide with SAA's Annual Membership Meetings, at which the President-Elect assumes office.

All contact information (e.g., company, address, email, etc.) is pulled from the person's member record, which simplifies the process of updating multiple rosters. Individuals who wish to update their contact information should contact the SAA Service Center at servicecenter@archivists.org.

SAA section and roundtable officers may send updated roster information to SAA Director of Member & Technical Services Brian Doyle (bdoyle@archivists.org). Please include:

- The *name of your group*;
- The *names of your leaders* along with:
 - Each person's *group role*;
 - The *beginning date** for each person's term of service;
 - The *ending date** for each person's term of service; and
 - Each person's *institutional affiliation* (Note: This is to ensure that we assign the right person to your group, especially if the member's name is common.)

* For most groups, specification of the year is sufficient. If the terms of service begin or end on dates other than that of the Annual Membership Meeting(s), please indicate the specific dates.

Individuals may also review their past and current roles (i.e., those that have been designated via the SAA database) by logging in at <http://www.archivists.org/login.asp>, clicking on "My SAA Profile," and choosing the appropriate options in the drop-menu at the top of the screen.

Appointments to committees, task forces, and working groups are made by SAA's Vice-President. If you discover incorrect or incomplete information in the official rosters for these groups, please contact the SAA staff for assistance.

Section and Roundtable Membership

The SAA staff tracks section and roundtable membership via the member database. These data are then used to publish official section and roundtable directories to the SAA website. *Leader roles* in these component groups are distinct from *membership roles*. Whereas the former are designated manually by staff, section and roundtable membership is typically designated via SAA's membership application and/or renewal form(s).

Official section membership rosters are accessible only to SAA members and may be accessed online by visiting: <http://www.archivists.org/saagroups/sections.asp>

Roundtable Members and List Participants

In accordance with policy, SAA staff began tracking roundtable *membership* in 2007. As with sections, SAA members may officially join up to two roundtables by indicating their selections on the membership application and/or renewal form(s) or by contacting the SAA staff at servicecenter@archivists.org.

Participation in electronic discussion lists remains open to nonmembers of the Society. In addition, nonmember *list participants* may choose to list themselves in official roundtable rosters by visiting the desired roster Web page(s) and clicking the link, "Join as Non-Member Participant."

Roundtable rosters may be accessed online at:
<http://www.archivists.org/saagroups/roundtables.asp>.

Group Email Lists

Nearly all SAA component groups have official email discussion lists. Subscriptions to most lists are automated via leader and/or section member roles. (Roundtable discussion lists, however, are *not* automated.) Integration of the list server with SAA's database enables automatic updates to all list subscriptions if and when a member's email address changes.

Any person listed in SAA's database (including nonmembers) may review, update, add, and cancel list subscriptions by logging into the SAA website at:
<http://www.archivists.org/listservs/change.asp>.

This page also displays links to each list's web-based archives, which typically are restricted to active list subscribers.

Subscriptions to Section Discussion Lists

Every SAA section has two dedicated email lists, one for the use of section *leaders* and one for use by all section *members*. Lists of the second type (i.e., section discussion lists) have been specially configured in order to serve two purposes:

1. To provide section leaders with a method of sending official announcements (e.g., election news, availability of section newsletters, etc.) to *all* section members; and
2. To provide section members with an *opt-in* discussion forum.

Upon joining or renewing, active section members are subscribed automatically to section discussion lists in “NO MAIL” mode, meaning that two-way correspondence among section *members* is not delivered to the subscriber by email. However, in NO MAIL mode:

- The member *will* receive broadcast announcements that are sent by the section’s leaders, using a special by-pass code provided by SAA staff; and
- The member *retains* access to the Web-based list archives as well as authorization to post messages to the list.

Section members have the option of modifying their subscription mode in order to opt in to two-way discussions among section members. This can be done by visiting: <http://www.archivists.org/listservs/change.asp>.

SAA staff provides section leaders with a by-pass code for electronic announcements of official section business. For more information, please contact SAA Director of Member & Technical Services Brian Doyle (bdoyle@archivists.org).

Subscriptions to Roundtable Discussion Lists

Every SAA roundtable has two dedicated email lists, one for the use of roundtable leaders and one for use by roundtable members and list participants. Unlike section lists, subscriptions to roundtable discussion lists are *not* automated. Furthermore, roundtable rosters and roundtable discussion lists are *not* synchronized in any way. (The accessibility of roundtable lists to nonmembers prohibits creation of database rules to automate integration.)

Any individual, including roundtable members, who wishes to subscribe should visit the following link to subscribe: <http://www.archivists.org/listservs/change.asp>

The SAA “Leader List”

All active SAA leaders are automatically subscribed to a special, moderated announcement list called the “SAA Leader List.” Messages distributed to this list must be approved by SAA’s Executive Director, Nancy Beaumont.

If you have important information that you wish to share with the entire leadership, you may submit announcements to: saaleaders@forums.archivists.org.

Group Home Pages

SAA's overall "Web presence" is made up of a number of sites:

1. The SAA "Intranet" (<http://saa.archivists.org>), comprising information drawn from SAA's internal database or *association management system* (AMS);
2. The SAA "Extranet" (<http://www.archivists.org>);
3. *American Archivist Online* (<http://archivists.metapress.com>); and
4. The SAA list server (<http://forums.archivists.org/read/>), which features a Web-based archives function.

The terms "Intranet" and "Extranet" are simply working terms meant for ease of reference. It should be noted that many Intranet pages are accessible to nonmembers and to the public in general. However, access to personal contact information always requires a user login. (Nonmembers listed in the AMS have such a login, also called an "SAA profile," but access to certain online information is restricted to SAA members.)

Every component group listed in SAA's Leadership Directory has an official "home page" on the Intranet site. These pages contain:

- The group's official charge, if applicable;
- A basic description of the group; and
- Links to:
 - The group's leader and/or member roster(s);
 - The group's official email list;
 - The group's auxiliary website, if applicable;
 - Reference documents on SAA policies, procedures, and guidelines.

Auxiliary Group Websites

Many SAA groups have long maintained their own websites, hosted either on the SAA Extranet or on third-party servers. This manual refers to such sites as *auxiliary*, meaning that they provide additional value beyond the scope of official information maintained on the Intranet site. Content posted to auxiliary websites typically includes group minutes, reports, newsletters, and announcements.

Groups are strongly encouraged to link back to information provided on the Intranet pages rather than duplicate leader and member rosters in static format. This helps ensure that member information is kept up to date and that SAA's Privacy and Confidentiality Policy (<http://www.archivists.org/privacy>) is upheld.

SAA is currently in the process of selecting a new *content management system* (CMS) to enhance the administration of content on the Extranet. Configuration and deployment of this new system has been planned for 2009. In the meantime, guidelines for building auxiliary group websites using SAA's existing Web resources are available online at: <http://www.archivists.org/saagroups/WebManual2008.pdf>.

Working with the SAA Council

The SAA Council typically meets three times per year. In 2008-2009, meetings will occur:

- In January or February in Washington, DC (overlapping for a portion of the meeting with the Council of State Archivists board);
- In late May in Chicago; and
- In August in conjunction with “Sustainable Archives/Austin 2009.”

The full schedule will be made available to all members via the SAA website and *Online News* as soon as the dates are confirmed.

If you have recommendations for the Council’s consideration, here’s a general schedule to keep in mind:

- **Four weeks before the meeting:** Recommendations for Council action or discussion should be submitted four weeks in advance of the meeting start date. This is the point at which agenda items are being gathered and the agenda begins to take shape. Share your recommendation(s) with your Council liaison, who may be able to help you craft language and who will ensure that your item is considered for the agenda.

Visit your group’s page in the Leadership Directory to download a template / guide that will help you prepare a report or recommendation for Council consideration. (See: <http://www.archivists.org/leaders/>.)

- **Two weeks before the meeting:** The agenda is pretty well set and all materials that are ready for Council members’ review are sent to them.
- **Also two weeks before the meeting:** By vote of the Council, the SAA office will post to the website for member information a copy of the meeting agenda. Of course, it’s always possible that the agenda may be amended after it’s been posted.
- **One week before the meeting:** The second and final batch of Council materials is sent to Council members.
- **Two months after the meeting:** By vote of the Council, minutes of Council meetings are made available to members via a website post within 60 days after each meeting.

Some items can’t wait! If you have an item that is time sensitive, please contact your Council liaison, SAA President Frank Boles (boles1Fj@cmich.edu), or Executive Director Nancy Beaumont (nbeaumont@archivists.org) to discuss placing it before the Executive Committee or Council for online discussion and vote. In many cases, the Council is able to take action between face-to-face meetings.

And remember: Council meetings are open to all members. We encourage you to attend!

Contact List for Additional Assistance

For member assistance with orders, billing issues, address updates, login difficulties, and changes to section/roundtable membership, please contact:

The SAA Service Center..... servicecenter@archivists.org
Carlos Salgado, Service Center Manager csalgado@archivists.org

For assistance with leader assignment updates and list subscriptions, please contact:

René Mueller, Project Assistant..... rmueller@archivists.org
Carlos Salgado, Service Center Manager csalgado@archivists.org
Brian Doyle, Director of Member & Technical Services bdoyle@archivists.org

For questions and concerns regarding SAA policy, group reports, and governance, please contact:

Your group's Council Liaison (if applicable).....Consult your official roster for the name and contact information of your designated Council Liaison:
<http://www.archivists.org/leaders/>
Nancy Beaumont, Executive Director nbeaumont@archivists.org
Frank Boles, SAA President (2008-2009)boles1Fj@cmich.edu

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