

Revised Policies and Procedures for SAA Sections and Roundtables May 2007

Section IX: Sections

Guidelines for SAA Sections

I. MISSION STATEMENT

1. Serve as Advocate for Interest Around Which the Section Is Formed

Sections focus attention on and give voice to the concerns that form the Section's particular areas of interest. Sections focus expertise and interest in the professional functions and responsibilities to carry out the archival profession's mission to identify, administer, and promote the use of records of enduring value.

2. Encourage and Provide Communication

Sections provide a forum for members to discuss matters of interest within the Society. They also provide channels of communication from the Section to the membership of the Society and to the Council on matters of concern to the Section.

3. Perform Work

Sections are responsible for advancing the work of the profession within their field of practice. They provide mechanisms for members to initiate activities of common interest and also review material referred to them by the Council for comment or action.

Sections can formulate specific projects, for which task forces would be created to execute the projects. Sections give an institutionalized opportunity for members to focus on a longer term basis and in a national forum on specific matters of practical interest.

4. Integrate New Members

Sections provide a vital mechanism for new members to become active in the work of the Society and to meet members with common interests. Sections provide new members with a chance to participate and to contribute to the work of the group and the Society.

- a. Membership in Sections requires the individual to be a member of the Society.
- b. Society members are limited to two Section memberships and must formally sign up with the Society's Executive Office for Section membership.

c. The SAA Executive Office maintains lists of Section members.

5. Develop Leadership

The Sections, as well as their various subgroups (if any), offer opportunities to their members to take leadership in working with and for their colleagues. Through the years a considerable number of the elected and appointed positions within SAA have been filled by persons who began their leadership role within Sections.

II. STATEMENT OF GOALS AND OBJECTIVES

Each Section shall adopt and maintain a statement of goals and objectives indicating the general concerns and intended areas of work of the Section. Section goals should be clearly articulated with reference to implementation strategies and activities. Sections should be specific about their objectives and activities and periodically examine their mission and goal statements for currency. The statement of goals and objectives may be changed as the Section sees fit; information on any changes should be included in the annual report submitted to the Council. Sections should make explicit reference to their annual goals in their annual reports.

As governing units of the Society, Sections are expected to contribute to the professional discourse and advance the Society's priorities as identified by the Council. Sections have an obligation to respond to requests or tasks assigned to them by the Council.

III. AREAS OF ACTIVITY

Recognizing their responsibility to professional development, and to advance the work of the profession in their field of practice, Sections are charged to be active in four areas:

- They identify and consider issues in which a significant number of members have an interest. Members may investigate different facets of the issues, then report and discuss their findings during Section meetings and through Section communications.
- They recommend to the Council through memoranda or formal papers an action or a position the Section believes appropriate for SAA. The Council remains the policy-setting body for SAA, and only it can promulgate a formal position for SAA or any of its constituent bodies.
- They suggest program sessions for the SAA Annual Meeting and, with the advice of the Executive Director, plan Section functions for the SAA Annual Meeting (eg, the Finding Aids Fair of the Description Section). Representatives of the Program Committee will visit Section meetings to present their early plans for the next meeting; to explain the program-building process, the pre-conference workshop possibilities, and the Section endorsement process; and to advise Sections on how to submit well-crafted program proposals in collaboration with other SAA units.

- They communicate their activities to the Society at large by publishing information about their work on their websites and on SAA's main website.

IV. RECOGNITION AND STANDING

1. The Council will establish SAA Sections for groups organized to advance professional practice within broad areas of common archival interest and affiliation, such as institutional settings, archival functional categories, record formats, or programmatic activities. The Council will consider the merits of each application in light of existing SAA groups and the accompanying statement of intent and goals.
2. New applications for recognition as a Section will be submitted no later than January 1 for Council action before the next Annual Meeting.
3. Application by petition will include signatures of at least 300 members of SAA, a publishable statement of purpose and goals of the Section, and a statement about why a separate Section would be advantageous to the Society.
4. Sections that do not maintain an official membership level of at least 300 members for two consecutive years may be dissolved after due notice and an opportunity for Section officers to appeal. The Council will offer to designate such groups as Roundtables without re-application.
5. Should a Section decide that the more informal status of Roundtable would better suit its ends, it may petition the Council for a change in status.

V. SUBGROUPS OF SECTIONS

1. Where possible and appropriate Sections should divide themselves into committees so that members will have the maximum opportunity to participate in meaningful work and so that each Section may work in more than one area at once. Forming into committees may be done at the discretion of the Section. Section committees have been formed to propose Annual Meeting sessions, to plan Section meetings, to study particular archival concerns, to gather data on recent literature distribution to Section members, to follow legislative and national policy issues relating to the interests of the Section, and to coordinate work with other Sections whose fields of interest overlap. These committees may be established to perform specific tasks or on a long-term basis to deal with ongoing concerns.
2. The term "task force" is recognized specifically within the SAA structure as a group constituted by the Council with a clear mission to accomplish a definite goal within a specified time. Usually task forces require a budget, which can be granted only by the Council. The Council will make every effort, when a Section suggests an activity requiring a task force, to constitute that task force from the members of that Section so that the Section thrives on the energy it generates.

VI. MEMBERSHIP, MEETINGS, AND OTHER PRIVILEGES

1. SAA members are eligible for membership in any two Sections. The SAA office maintains the official list of Section members.
2. Each Section is guaranteed space and support at the SAA Annual Meeting for a two-hour annual membership meeting. A portion of this time may be used for meetings of constituent groups, as deemed appropriate by the Section. Sections will be supplied with basic equipment to support their membership meetings.
3. Sections will receive priority support from the Society's budget for special projects approved by the Council. Sections will also receive electronic communication support in the form of website hosting and electronic lists.
4. Sections may communicate to the Council through liaisons.

VII. ANNUAL REPORTING REQUIREMENTS

1. Leadership Report: The chair of each Section will convey to the executive director or designee an electronic list of the names of Section officers and steering committee members within 14 days of the close of the Annual Meeting. The chair will include in that list all individuals who should be subscribed to the SAA leader announcement list ("saaleaderlist").
2. Section Annual Report: Each Section, like all SAA groups, is required to present an annual report for review by the Council. Section annual reports must be filed with the SAA executive director within 90 days of the close of the annual meeting. (Download the [report form](#).) The annual report should be a brief summary that includes the following:
 - An accurate list of Section leaders and contact information,
 - A verified count of Annual Meeting attendees,
 - A summary of work accomplished,
 - Goals and plans for the coming year, and
 - Other pertinent information on Section activities.
3. Section annual reports will be posted on the SAA's main website.
4. The Section may be placed on probationary status or lose Section privileges if it fails to complete and file an annual report within six months of an Annual Meeting. Failure to file an annual report within one year of the close of the Annual Meeting will result in a notice from the president of the Section's dissolution. Sections receiving such notice may file an appeal with the Council.

VIII. GOVERNANCE

1. Internal Leadership

Sections are required to have a minimum of two officer positions and two steering committee members. Sections may create additional positions or extend terms of service in order to effectively achieve continuity while ensuring recruitment and development of new leaders.

a. Every Section will have a chair, a vice-chair/chair-elect, and a minimum of two steering committee members. The officers and steering committee members of every Section must be chosen by election.

b. Section officers and steering committee members must be SAA members in good standing.

c. Sections may elect or appoint additional officers and members to the steering committee. Sections are encouraged to retain continuity and recruit leadership by designating other positions of responsibility (eg, web coordinators, committee chairs, etc), to carry out the program and work of the Section.

d. The chair and vice-chair/chair-elect serve consecutively. The vice-chair/chair-elect succeeds the chair at the conclusion of the Annual Meeting that coincides with the term of office. All officers and committee members begin their terms at the close of the SAA Annual Meeting.

e. The term of office and the number of consecutive terms that a person may serve in one Section office or on the steering committee will be set in the Section's bylaws.

f. Section bylaws are subject to review and comment by the Council.

g. Sections are encouraged to create special or standing subcommittees in order to execute the goals of the Section, develop leaders, and recruit members into the of the Society.

2. Consultation

Sections are incubators for developing leaders who go on to take leadership positions within SAA at other levels of responsibility. Leadership development is a more productive process in an organizational environment that nurtures consultation and participation.

a. Section leaders are to be appropriately consulted in the decision-making and deliberative processes of the Society. Whenever possible, Section leaders should be included in appointments to committees and task forces, when such appointments are appropriate to inform the subject or achieve a diversity of opinion.

b. The president or designee will report at the annual Leadership Forum and to the SAA membership on steps taken to achieve the goal of leadership consultation at the annual leadership forum.

c. Section leaders may submit their concerns and requests to the Council through designated Council liaisons, who are eligible to address Section annual membership meetings, attend the Section's leadership meetings, and participate in all Section electronic discussion groups.

3. Professional Leadership

Section officers will be asked to acknowledge annually that they understand and will comply with the responsibilities of their position.

a. The president or designee will contact Section chairs and vice-chairs/chairs-elect annually by e-mail to request that they read those Sections of the SAA Council Handbook and Section handbooks that relate to Sections and particularly to their duties and responsibilities. The annual notice will include a reminder to leaders of their responsibilities to create a welcoming, professional environment. The annual notice should include reference to guidelines on:

- Timely and regular communication with Section members, Council liaisons, and the SAA office;
- Compliance with reporting requirements;
- Review and update of SAA's main website;
- Notification of inability to perform duties of office to which elected;
- Broad participation of the Section membership and recruitment of new leaders;
- Understanding of and support for the Society's objectives and policies; and
- Attendance at the annual Leadership Forum meetings.

b. Section officers will be required to acknowledge by e-mail reply that they have read and understood these policies and guidelines and that they will comply with the expectations of their office.

IX. ANNUAL LEADERSHIP FORUM

The SAA Annual Meeting will include in its schedule a block of time for a Leadership Forum of Section officers, committee chairs, Council members, and those Roundtable conveners who request to attend. The purpose of the forum is to exchange information on issues that have impact on the wider profession and to discuss strategic responses to these concerns.

1. Section chairs and chairs-elect or their representatives are expected to attend the forum. If unable to attend, a Section chair or chair-elect may designate another member

of the Section leadership to attend in his or her place. Failure to send representatives to the Leadership Forum may result in loss of Section meeting privileges.

2. SAA officers, the executive director, and Council members will attend the forum.
3. The agenda of the annual forum will be decided by the Council in consultation with Section and committee chairs.
4. The president or designee will report on the involvement of Section leaders in the activities and appointments of the Council in the past year, and remind leaders of their ongoing responsibilities and any duties assigned by Council.
5. The format of the forum may vary, but a substantial amount of the block of time will be allocated for dialogue in which leaders may describe new initiatives, seek collaborations with others, and exchange views on the direction and performance of the Society's program and work.
6. The results of the annual Leadership Forum will be circulated for review and comment by Section leaders, and subsequently reported to the general membership on the SAA's website.

X. COMMUNICATIONS

1. Electronic Lists

- a. All official electronic lists of SAA Sections will be centrally hosted and managed by the SAA office.
- b. All Sections will be supported with separate electronic discussion and e-mail lists for members and for Section leaders. An annual report on the number of subscribers will be provided by the SAA office.
- c. Section electronic list subscriptions will be limited to SAA members only. SAA members who are not members of a particular Section may subscribe annually to that Section's electronic lists with the permission of the Section chair.
- d. All Section chairs and designee(s) will have access to a Section announcement list for their members. These will be hosted and maintained by the SAA office staff.
- e. All Section officers and steering committee members will be subscribed automatically to the SAA leader announcement list ("saaleaderlist"). The chair will forward appropriate leader list announcements to Section members.
- f. Electronic lists maintained by Sections remotely will not be considered a replacement for official SAA communication services.

2. Section Websites and the SAA Website

a. Sections may create their own websites provided that they follow all SAA policies, register these publications with the SAA office, use the uniform SAA logo, and establish links to the SAA website. Section leaders are encouraged, however, to work with SAA staff to develop websites hosted by SAA servers for purposes of continuity and retention of official SAA records.

b. Upon request, the SAA office will host a Section's website, the content and design of which will be the responsibility of the Section's steering committee and website coordinator. SAA staff will assist Sections in developing standard websites and templates hosted by SAA servers.

c. Sections will make available on the main SAA website, as well as the Section website, key leadership information identified as the "Section Handbook." The Section Handbook, which will be posted by the SAA office, is reviewed annually by the Section steering committee and used to orient officers and steering committee members. The Section Handbook should contain, at a minimum, up-to-date versions of the following:

- A statement of purpose and current goals,
- The Section bylaws,
- Specific duties of the officers, including their reporting requirements, and
- Information on officers and activities from the Section's annual reports.

d. Announcements of employment opportunities shall appear only in SAA's *Archival Outlook* and the online Employment Bulletin, and not in any other SAA Section website or other communication. In this way the Society is able to fulfill its legal and fiscal responsibilities to 1) review and, if necessary, edit or refuse announcements that include discriminatory statements inconsistent with principles of intellectual freedom or the provisions of the Civil Rights Act of 1964 and its subsequent amendments; and 2) provide the services contracted for by the institutions and organizations that place ads and announcements in SAA publications.

e. Any mailings or electronic communications from Section leaders to their members will also be distributed to the Council and the Executive Office.

f. The SAA office will contact Section chairs, in time for publication in the Annual Meeting program book, to request information on plans for the Section meeting at the Annual Meeting.

XII. FUNDING FOR SECTION ACTIVITIES

1. Sections will receive priority support from the Society's budget for special projects approved by the Council.

2. SAA's fiscal year extends from July 1 to June 30. Budget requests from Sections will be submitted as part of the annual report due to the Council within 90 days of the close of the Annual Meeting.
3. Funds allocated to a Section during one fiscal year are not automatically carried over to the next fiscal year. If an allocation needs to be deferred to the next year, the Section must formally request the carryover in its annual report.
4. A Section must receive authorization from the Council to spend any monies or commit any monies to be spent. Although exceptions can be made, the Council expects to appropriate monies for Section activities through the regular budget process.
5. If a Section wishes to seek resources (in cash or in kind) from any source outside of SAA, Executive Committee approval must be obtained in every instance before approaching the source. Proposals should be routed through the executive director with sufficient time for consideration by the Executive Committee, which will respond within 30 days.

XIII. USE OF SAA NAME, LOGO, AND AUSPICES

The use of SAA's name, logo, and auspices for publications, meetings, mailings, websites, electronic communications, and other activity is available only through specific provision of the Council. Although sections are within the SAA structure, they are not empowered to take action in the name of SAA, or request money in the name of SAA or the Section itself without specific prior authorization from the Council. This firm rule is required to protect SAA and its members from potential legal complications.

Approved by the SAA Council: September 1989

Revised: January 1991, February 1992, January 1993, March 2007

Section X: Roundtables

Guidelines for SAA Roundtables

I. MISSION STATEMENT

1. Serve as Advocate for Interest Around Which the Roundtable Is Formed

Roundtables focus attention on and give voice to the concerns that form the Roundtable's particular areas of interest. Roundtables function as communities of interest engaged in generating ideas and meeting the intellectual interests of the membership in areas of topical interest. They focus expertise and interest in the professional functions and responsibilities to carry out the archival profession's mission to identify, administer, and promote the use of records of enduring value.

2. Encourage and Provide Communication

Roundtables provide a forum for members to discuss matters of interest within the body. They also provide channels of communication from the Roundtable to the membership of the Society and to the Council on matters of concern to the Roundtable. As Roundtables may exist as online communities, communication may take place in the form of Roundtable electronic discussion groups.

3. Perform Work

Roundtables provide mechanisms for members to initiate activities of common interest and also review material referred to them by the Council for comment or action. Roundtables can formulate specific projects, for which task forces would be created to execute the projects. Roundtables give and institutionalize opportunity for members to focus, on a longer term basis and in a national forum, on specific matters of practical interest.

4. Integrate New Members

Roundtables provide a vital mechanism for new and prospective SAA members to become active in the work of the Society and for meeting members with common interests. Roundtables provide new members a chance to participate and to contribute to the work of the group and the Society.

Although it is expected that the core of a Roundtable is composed of Individual members of SAA, anyone may belong to a Roundtable. Because of this, Roundtables play a unique and significant role in recruiting new members to the Society. Roundtables are therefore required to compile records of attendance at the Annual Meeting on forms provided by the SAA Executive Office; these will be used by the SAA Executive Office for outreach purposes and to monitor the overall effectiveness of Roundtables in attracting new members to the Society.

5. Develop Leadership

The Roundtables offer opportunities to their members to take leadership in working with and for their colleagues. Through the years, a considerable number of the elected and appointed positions within SAA have been filled by persons who began their leadership roles in Roundtables.

II. GOALS AND AREAS OF ACTIVITY

Roundtables are charged to be active in four areas.

- They identify and consider issues in which a significant number of members have an interest. Members may investigate different facets of the issues, then report and

discuss their findings during Roundtable meetings and through Roundtable mailings or electronic communications.

- They recommend to the Council, through memoranda or formal papers, an action or a position the Roundtable believes appropriate for SAA. The Council remains the policy-setting body for SAA, and only it can promulgate a formal position for SAA or any of its constituent bodies.
- They suggest program sessions for the SAA Annual Meeting and, with the advice of the executive director, plan Roundtable meetings for the SAA Annual Meeting. Representatives of the Program Committee will visit Roundtable meetings to present their early plans for the next meeting; to explain the program-building process, the pre-conference workshop possibilities, and the Roundtable endorsement process; and to advise Roundtables on how to submit well-crafted program proposals in collaboration with other SAA units.
- They communicate Roundtable activity within the Roundtable and to the Society at large.

III. RECOGNITION AND STANDING

1. The Council may establish Roundtables upon submission of a group's application. The Council will consider the merits of each request in light of existing SAA groups and the specific statement of intent and goals of the applicant group.
2. New applications for recognition shall be submitted no later than January 1 for Council action before the next Annual Meeting.
3. Application shall be made by petition to include signatures of at least 50 SAA members, a publishable statement of purpose and goals of the Roundtable, and a statement indicating why a separate Roundtable would be advantageous to the Society.
4. Roundtables that do not maintain an official membership level of at least 50 members and meet annual reporting requirements may be dissolved as an official SAA Roundtable after due notice and an opportunity for Roundtable officers to appeal.
5. Should a Roundtable decide that a more formal structure and greater degree of activity are necessary to carry forward its work, it may petition the Council to become a Section. Such petitions should indicate a plan of work for specific projects that can be carried out more effectively through the Section structure.

IV. MEMBERSHIP

SAA members may join up to two Roundtables in order to establish an official list of Roundtable members. The SAA office will maintain and report on the official list of Roundtable members as an aid in allocating resources and tracking member services. Participation in electronic discussion lists is open to nonmembers of the Society.

V. GOVERNANCE

1. Roundtables will annually elect an SAA member as the convener, who may also be known as the chair. This person must be a member of SAA. No person may serve as convener of a Roundtable for more than three successive years. Only SAA members are eligible to vote for Roundtable conveners or other officers.
2. The leaders of the Roundtable are expected to notify the SAA Executive Office promptly of newly appointed or elected leaders so that the official SAA leadership list (“saaleaderlist”) can be updated and mailings can be circulated properly.
3. Roundtable conveners will take office at the close of the SAA Annual Meeting.
4. It was never the desire in creating Roundtables to establish bodies that spend more time on the structure of doing business than on the discussion of archival issues within their fields of activity. Roundtables may operate as formally or informally as suits their needs; they are not required to draw up bylaws.

VI. ANNUAL REPORTING REQUIREMENTS

1. Roundtable conveners are required to report the name(s) of their convener(s) for the coming year to the SAA office within 14 days of the close of the Annual Meeting. Conveners are required to complete and file SAA’s standard annual report form within 90 days of the close of the Annual Meeting, regardless of whether the Roundtable convenes in conjunction with the Annual Meeting. (Download the [report form](#).)
2. Failure to complete and file an annual report within six months of an Annual Meeting places the Roundtable in a probationary status and may result in a loss of Roundtable privileges. Failure to file an annual report within one year of the close of the Annual Meeting will result in a notice from the president of the Roundtable’s dissolution. Roundtables receiving such notice may file an appeal with the Council.
3. Roundtable annual reports, including the update of purpose and activity statements, will be published by the SAA office on the main SAA website.
4. Roundtable conveners will be asked to acknowledge annually that they understand and will comply with the responsibilities of their position. The president or designee will contact Roundtable conveners annually by e-mail to request a response that they have read pertinent sections of the Council Handbook regarding their duties. The convener is responsible for acknowledging receipt and compliance with the annual notice of leadership responsibilities and for contacting the Council regarding all other issues of concern to the Roundtable’s members.

VII. ROUNDTABLE MEETINGS

The Society invites Roundtable leaders to work collaboratively and creatively with the Council and staff to allocate limited meeting space by suggesting alternative ways of gathering within and outside of the conference hotel. All Roundtables will be guaranteed either shared or dedicated meeting space at the Annual Meeting. Roundtables may be required to meet certain conditions in order to secure dedicated rooms and other resources, especially equipment, that may be available during the Annual Meeting.

1. Conveners will receive an annual notice from the SAA office on the availability of meeting rooms for Roundtables, with deadlines for responding. Roundtables that request a meeting room may be allocated shared meeting space at the Annual Meeting. The following criteria, among others, may be used to determine the allocation of shared space.

a. The SAA office receives a request for space by the deadline established by the executive director.

b. All reporting requirements for the previous year have been met.

2. Roundtable requests for a dedicated meeting room and/or equipment at an SAA Annual Meeting will be evaluated and determined by the executive director, in consultation with the SAA president as appropriate, from among the following criteria:

- The convener submits a timely request before deadlines published by the SAA office,
- The Roundtable has organized a special presentation or program that advances the Society's strategic priorities,
- The Roundtable is engaged in a collaborative exercise with another Roundtable or Section,
- The historical and expected attendance are large enough to warrant dedicated space in order to accommodate members, and/or
- All annual reporting requirements for the previous year have been met, including the convener's acknowledgment of leadership responsibilities.

3. New Roundtables are eligible for a dedicated meeting room at the SAA Annual Meeting for their first organizational meeting after approval by the Council.

4. Roundtables that are allocated dedicated meeting space at one Annual Meeting will not receive priority over other Roundtables requesting dedicated space at the next Annual Meeting.

5. Roundtables that do not meet at one Annual Meeting but that wish to reserve space at a subsequent meeting may request allocation of space without penalty.

6. SAA staff will report annually to the Council on Roundtable meeting attendance, the allocation of space and other resources at the SAA Annual Meeting, the official membership numbers of the Roundtables, electronic list subscribers and activity,

compliance with annual reporting requirements, and other activity that will assist the Council in regularly assessing the status of Roundtables.

VIII. CONSULTATION WITH THE COUNCIL

1. The president will extend an invitation to Roundtable conveners to attend the annual Leadership Forum. Attendance for Roundtable conveners will not be mandatory.
2. Roundtables may submit requests directly to the Council through the SAA executive director. The Council is responsible for addressing Roundtable matters, making recommendations about Roundtable matters, and communicating actions concerning Roundtables to the conveners.

IX. COMMUNICATIONS

1. Electronic Lists

The Society will support Roundtables with multiple electronic lists, websites, and other communication vehicles as they become available.

- a. The SAA office will host and manage electronic discussion and announcement lists for all Roundtables.
- b. Roundtable conveners will coordinate communication with the SAA office and the Council and will forward appropriate messages from the SAA leader announcement list (“saaleaderlist”) to members.
- c. Although members may join only two Roundtables officially, they may subscribe to an unlimited number of Roundtable electronic discussion lists. The SAA staff and Council liaisons will monitor lists to identify issues of wider importance and to assess the unit’s effectiveness. The number of subscribers will be maintained and reported by SAA staff.
- d. Participation in an unlimited number of Roundtable electronic discussion groups will be open to nonmembers of the Society.

2. Roundtable Websites

SAA staff will maintain on the Society’s main website (<http://archivists.org>) broad information on the goals, leadership, and activities of SAA Roundtables.

- a. Conveners are responsible for updating information maintained on the main SAA website (<http://archivists.org>).
- b. Although SAA staff will host Roundtable websites and create templates for posting data, the content and design of the websites will be the responsibility of the Roundtable and its convener.

c. Roundtables may create websites and additional electronic lists on file servers that are not located within SAA, provided that they follow all SAA policies, register these publications with the SAA office, use the uniform SAA logo, and establish links to the SAA website. Roundtable leaders should be aware that data maintained outside of the SAA servers cannot be easily archived or validated.

3. Other Communications

a. Any mailings or electronic communications from Roundtable leaders to their members should also be distributed to the Council and the SAA Executive Office.

b. Announcements of employment opportunities shall appear only in SAA's *Archival Outlook* and the online *Employment Bulletin*, not in any other Roundtable publication or electronic communication. In this way the Society is able to fulfill its legal and fiscal responsibilities to 1) review and, if necessary, edit or refuse announcements that include discriminatory statements inconsistent with principles of intellectual freedom or the provisions of the Civil Rights Act of 1964 and its subsequent amendments; and 2) provide the services contracted for by the institutions and organizations that place ads and announcements in SAA publications.

c. The SAA office will contact conveners, in time for publication in the Annual Meeting program book, to request information on plans for the Roundtable meeting at the Annual Meeting.

X. FUNDING FOR ROUNDTABLE ACTIVITIES

1. SAA's fiscal year extends from July 1 to June 30. Budget requests from Roundtables will be submitted as part of the annual report due to the Council within 90 days of the close of the Annual Meeting. A form is provided on which the Roundtable leadership describes the activity planned for the Roundtable and proposes a budget sufficient to accomplish it. The deadline will be strictly adhered to; budget requests received after the deadline will not be considered.

2. Funds allocated to a Roundtable during one fiscal year are not automatically carried over to the next fiscal year. If an allocation needs to be deferred to the next fiscal year, the Roundtable must formally request the carryover in its annual report.

3. Otherwise, in pursuing its work, a Roundtable (with the exception of its limited appropriation) is not authorized to spend any monies or commit any monies to be spent without specific authorization from the Council. Although exceptions can be made, the Council expects to appropriate money for activities of Roundtables through the regular budget process.

4. Roundtable conveners may submit special funding requests directly to the Council through the executive director.

5. If a Roundtable wishes to seek resources (whether in cash or in kind) from any source outside SAA, Executive Committee approval must be obtained in every instance before approaching the source. Proposals should be routed through the executive director, with sufficient time for consideration by the Executive Committee, which will respond within 30 days.

XI. USE OF SAA NAME, LOGO, AND AUSPICES

The use of SAA's name, logo, and auspices for publications, meetings, mailings, and other activity is available only through specific provision of the Council. Roundtables, although they are within the SAA structure, are not empowered to take action in the name of SAA, or request money in the name of SAA or the Roundtable itself, without specific prior authorization of the Council. This firm rule is required to protect SAA and its members from potential legal complications.

Revised: March 2007

Frequently Asked Questions About Sections and Roundtables

I'm a new chair and I don't really know how things work or what I'm supposed to do. What are my responsibilities?

In a nutshell, when you are the chair of a Section or the convener of a Roundtable, SAA and the members of the Section or Roundtable are counting on you to lead in building an energetic, focused, and vibrant unit.

Normally your first task is to fill out the one-page Leadership Form (available through the SAA office or your Council liaison) that asks you to provide the names and contact information for the Section or Roundtable chair, the vice chair, other elected and appointed officers, and Steering Committee members. This information is needed in the SAA Office by September 30 so that you may be added to the SAA Leadership Listserv. This information is also vital to the functioning of your Section or Roundtable, and it should be compiled at the Annual Meeting immediately after your election. The form is simple and requests addresses, phone and fax numbers, and e-mail addresses. A copy is mailed to the current chair shortly before the Annual Meeting and is also available at the meeting from your Council liaison or SAA staff. If you are unable to turn it in at the Annual Meeting, please e-mail it to the SAA office before the deadline or phone the information directly to the office.

Section chairs should consult the Section Handbook, which should be available on your Section website. Similar information is also posted on the Section's pages on the SAA main website. Roundtables may also have developed a handbook or something similar. In addition, Section and Roundtable leaders should review the [SAA Constitution and Bylaws](#) and Guidelines for [Sections](#) and [Roundtables](#). These guidelines outline responsibilities such as reporting, organizing a meeting at the SAA Annual Conference,

serving as an advocate, encouraging communications, advising the Council, integrating new members, developing leadership, proposing and planning activities and projects, and other matters. Consider activities, projects, or other goals that you think the Section or Roundtable should undertake. Chairs and conveners will be asked to acknowledge that they have read and will honor their responsibilities as elected officers.

Also review SAA's current policies and procedures. This information is available in [Appendix B of the Council Handbook](#) or you may request printed copies from the SAA office.

Policies and procedures you may specifically want to review are:

- [Fundraising Policy](#)
- [Equal Opportunity/Non-Discrimination Policy](#)
- [Position Statement on Diversity](#)
- [Guidelines and Procedures for SAA Fundraising and Grant Proposals](#)
- [Function Space and Staff Support for Groups that Meet at the SAA Annual Meeting](#)
- [Liquor Liability Policy](#)
- [Policy on Unit Directories](#)
- [Guidelines for SAA Websites](#)
- [Guidelines for the Establishment of Listservs by Organizational Units](#)
- [Standards Development and Review in SAA](#) and [Procedures for Review and Approval of an SAA-Developed Standard](#)

Consult with previous chairs of your Section or Roundtable about recent activities, projects, structure, and practices.

Review your Section or Roundtable mission statement and any recent publications, minutes and reports, especially the most recent annual report. Note that Sections and Roundtables are required to submit an annual current activity report to the SAA executive director within 90 days of the end of the Annual Meeting.

Attend the SAA Annual Meeting, special forums about SAA issues, and the SAA Leadership Forum. Chairs are notified in advance by the SAA office about leadership meetings. Section chairs are required to attend Leadership Forums; roundtable conveners are invited to attend.

Consult your Council liaison and the SAA executive director about your questions, concerns, and ideas.

Stay abreast of SAA activities, projects, issues, and concerns through the *Archival Outlook* (now available to members online as a PDF prior to mailing), SAA Leadership Listserv, strategic priorities, and other reports and mailings issued by SAA.

What are some activities that our Section or Roundtable could do?

Among the things your group may wish to do are the following:

- Work with your Steering Committee (if you have one) to form a vision of what your Section or Roundtable should be doing to meet today's challenges relative to your unit. Be sure to review the SAA Strategic Priorities Radar Screen to determine how your group might contribute to the highest priorities of the national organization.
- Schedule and plan your Steering Committee meeting before the entire Section or Roundtable meets at the Annual Meeting, if applicable.
- If you are directing a Roundtable and it does not have a Steering Committee, consider creating one. Select individuals who customarily come to SAA Annual Meetings. This will become the training ground for future leadership. Even the informal structure of a Roundtable may benefit from a Steering Committee.
- Be sure to understand the cutting-edge work taking place in your functional area.
- Assess the members' knowledge about that cutting-edge work. This will provide material for Section or Roundtable meetings, newsletter articles, Annual Meeting programs, and *Archival Outlook* articles from your Section or Roundtable.
- Mentor new members of your Section or Roundtable. Facilitate the growth and development of less-experienced members of your Section or Roundtable. This may even be a senior member of the profession, but someone who is new to this particular subject area.
- Create a bibliography of work relative to your Section's or Roundtable's area.
- Consider whether there are small publications, such as brochures, relative to your Section or Roundtable work that might be of broad interest to archivists or the public (for example, see the brochures created by the Manuscripts Repository, Business Archives, and Acquisition and Appraisal sections at <http://www.archivists.org/publications/free.asp>).
- Sponsor and/or strong, complete, and well-organized program proposals for the SAA Annual Meeting.
- Write articles and updates for all SAA members about your Section's or Roundtable's key issue(s) for *Archival Outlook*.
- Create a Section, Roundtable, or repository directory if members are interested.
- Work with SAA staff to develop a web page, hosted by SAA servers, to post relevant information for your members.
- Meet with leaders of other Sections or Roundtables to discuss shared issues of concern and discuss how your units might work together to address the issue(s).
- Study and assess any pending standards, policies, regulations, or litigation relative to your functional area and be sure to communicate your unit's archival issues to the SAA Council. Recommend to the Council, through memoranda or formal papers, an action or position that the unit believes would be appropriate for SAA to adopt. Remember that only the SAA Council can promulgate a formal position for the Society.
- Investigate what a [comparable international unit](#) might be addressing, such as the International Congress on Archives, the Association of Canadian Archivists, or the Australian Archivists.
- If there are any administrative issues or concerns among your members, take an active role in resolving them by getting your Council liaison and the SAA executive director involved.

- In consultation with the Standards Committee, develop and/or recommend to the Council standards, conventions, best practices, or guidelines that would be of value to unit members – and perhaps to others.

What organizational structure is required for a Section or Roundtable?

Sections: The organizational structure of the Section is left up to the Section. There are three rules to follow. *First*, as stated in the Constitution, all members must be current Individual members or the designated representative of current Institutional members of SAA. *Second*, the Council Guidelines for Sections stipulate that each Section must have a chair, vice-chair/chair-elect, and a minimum of two steering committee members. The officers and steering committee members of every Section must be chosen by election. *Third*, the Bylaws of the Society of American Archivists require that: “Each Section shall adopt bylaws defining its own governance provided that no Section bylaw may be in conflict with the constitution, bylaws, or guidelines of the Society.” When you become chairperson of a Section, be sure to obtain a copy of your most recent bylaws. If your Section does not have bylaws, you should propose bylaws for the Section to adopt at the next Annual Meeting. If your Section has a web page, a copy of the bylaws should be made available there. If the Section should change its bylaws, revised bylaws should be sent to the SAA executive director for review to ensure that there is nothing in the Section bylaws that is incompatible with SAA policy.

Roundtables: The organization of Roundtables is left to the Roundtables, although the informality of a Roundtable argues against an elaborate organizational structure. Roundtables are required annually to elect a convener, also known as the chair. No person may serve as convener for a Roundtable for more than three successive years. The convener must be a member in good standing of SAA. Although non-SAA members may participate in Roundtable activities and electronic discussion groups, they may not stand for election for, or be appointed to, any leadership position within the Roundtable. Bylaws for Roundtables are discouraged. Roundtables are intended to be informal, and there is no need to weigh them down with bureaucratic structure. Roundtables may wish to adopt guidelines, however, if for no other reason than to assist incoming officers.

What calendar dates should I be aware of for my SAA responsibilities regarding Sections or Roundtables?

- Always submit items that are to be presented for Council consideration to your Council liaison and to the executive director 30 days before a Council meeting. The Council customarily meets three times per year: 1) one day before the Annual Meeting (typically in mid- to late August), 2) in late January or early February, and 3) in late May or early June. Materials arriving after the deadline set by the Council may not be acted upon until a subsequent meeting.
- Leadership List (unit chair, vice-chair, newsletter editor, and standards liaison): Must be completed and to the executive director within 14 days following the Annual Meeting.

- Annual reports of Section and Roundtable goals, activities, and plans are due within 90 days of the end of the SAA Annual Meeting.
- Budget requests: Must be received by the executive director by March 1.
- Meeting room requests for the Annual Meeting: Due by the deadline established by the executive director in a notice sent to all organizational units, usually by February 1.
- Program proposals for the Annual Meeting: Customarily on or about October 1. This date is published in the Program Committee's call for proposals.

We want to build our web page. What are the guidelines?

Check the [official guidelines in the Council Handbook](#). SAA encourages the development of unit websites, but they must be registered with the SAA office, use the uniform SAA logo, contain links to the SAA website, and have the appropriate disclaimers to minimize the liability faced by the Society. Consider using an SAA server to host your site for purposes of continuity and retention of official SAA records.

We want to start a Section/Roundtable listserv. What are SAA's guidelines on this?

SAA encourages the various units of the Society to establish electronic mailing lists to enhance the ability of those units to meet their organizational and professional objectives. A few rules do apply, however. They can be found in the [Council Handbook](#). In short, units must register their electronic mailing list with SAA, regularly display some disclaimers absolving SAA of responsibility, and have someone who assumes responsibility for the management the list. SAA headquarters staff will be responsible for managing list software, troubleshooting member subscriptions, and working with officers to maintain accurate subscription lists and policy compliance.

We want to raise our own Section or Roundtable funds. What legal restrictions apply to us?

The SAA Council and the executive director understand that the good initiatives of Sections and Roundtables are hampered by the shortage of funds. However, according to SAA's legal counsel, it is critical that each Section and Roundtable chair understand that when Sections and Roundtables raise their own funds, it can put SAA's 501(c)(6) tax status in jeopardy. Furthermore, donations to SAA or its units are deductible by the donor only as business deductions and not as charitable deductions, unless the donation is made to a special project fund. To protect SAA, its members, and the donors, the procedures outlined in the Fundraising Policy should be followed whenever a Section or Roundtable anticipates soliciting support either in funds or in-kind. Note that Sections and Roundtables are required to secure the approval of the Executive Committee before initiating any solicitation of funds.

Can we produce a directory for our Section or Roundtable?

Yes, as stated in SAA's "[Policy on Unit Directories](#)," Sections and Roundtables may produce directories. However, SAA is not able to pay the costs associated with producing and distributing directories in hard copy. Furthermore, Sections and Roundtables cannot sell or redistribute their mailing lists without specific approval from the executive director.

The SAA office maintains membership lists for Sections and Roundtables, and Section membership is include in SAA's online membership directory.

What communication tools are available for our Section or Roundtable?

The advance of modern communication technology has changed the way that Sections and Roundtables reach their members. Electronic lists and websites have become routine for making announcements, planning meetings, soliciting comment, publishing statements, providing member profiles, and building a visible presence within the Society. The SAA office will provide support for electronic communication services for Sections and Roundtables.

What is the role of my Council liaison? When do I ask questions of her or him and when do I go to the executive director? How can I ensure effective communication with my Council liaison?

Council liaisons to Sections focus their attention on meeting and becoming familiar with the concerns of the Sections to which they have been assigned. Section liaisons remain affiliated with the Sections to which they are assigned at the beginning of their three-year terms in order to foster continuity of knowledge and communication. Section liaisons will:

- Be the chief point of contact between the Council and the Section membership,
- Make contact with chairs for input before each Council meeting,
- Attend a portion of the annual meeting of the Section,
- Report to the Council observations on the progress, ongoing activities, and concerns of the Section,
- Convey actions taken at Council meetings,
- Monitor and participate in Section electronic list discussions, and
- Alert Section leaders of areas of unmet responsibility.

The Council assigns liaisons to Roundtables to promote the work of the Roundtables and communication with the Council. Council member attendance at annual Roundtable meetings occurs on an as-needed basis. Roundtable liaisons will:

- Monitor electronic lists for key discussions, ongoing activities, and pending issues,
- Convey requests from the Council for advice or input on an issue,
- Alert conveners of Council schedules and annual deadlines,
- Represent the Council at Roundtable meetings when strategic issues may be discussed, and
- Contact conveners for input before each Council meeting.

As to whom you should turn to first with a question – your liaison or the SAA executive director – please use your discretion and know that the one will, in all likelihood, contact the other to ensure that we are working closely together. In any event, never hesitate to contact your Council liaison.

As to communications – please know that your Council liaison will come to you at least three times a year, approximately four to six weeks before an upcoming Council meeting. Council liaisons often ask some variation of the following questions:

- What initiatives is your Section or Roundtable working on?
- What points of information, issues, concerns, or recommendations, if any, would you like me to convey to the Council?
- What can the Council and the SAA office do to help you in your role as chair?
- Do you feel adequately informed about SAA and Council activities? If not, how can we assist you?

The information you provide is discussed at the following Council meeting. If there is a particular issue that your liaison is to get back to you about after the Council meeting, your liaison will call you.

For the general outcome of Council meetings, please see the Leadership Listserv and *Archival Outlook*. Through these mediums all Section, Roundtable, committee, board, and task force leaders are informed about what transpired at Council meeting so that everyone sees and hears the same information at the same time. To ensure rich and meaningful communication, please contact your Council liaison and obtain his or her assistance on issues or concerns related to your Section or Roundtable.

When the Council is considering a policy stand on an issue related to my Section or Roundtable, will the Council consult me and my Steering Committee?

The SAA Council frequently assesses and takes a stand on national issues that are relevant to the archival profession. The Council appreciates it when the chairs of Sections and Roundtables alert the Council about policy matters on which the Society should take a stand. If such a matter arises, call, e-mail, or fax a message to your Council liaison and/or the executive director. The Council liaison will discuss what Council knows of the matter, share appropriate documents, and ask the chair to work with the Section or Roundtable Steering Committee to make a formal assessment and then report to the Council liaison. The form of the response and the deadline for the response will be discussed. Units should understand – and we all should be reminded – that effective advocacy requires a prompt turnaround that often means decision-making by one or two leaders rather than broad consultation.

How can I, and other active members of SAA, gain a greater voice in SAA?

- Remember that SAA is a voluntary membership organization that requires your participation to grow and succeed.
- Convey your enthusiasm for SAA to your Section or Roundtable.

- Stay abreast of SAA activities, projects, issues, and concerns through *Archival Outlook*, the SAA website, and other SAA publications, reports, and mailings.
- Encourage and assist your members to stay abreast of SAA activities, projects, issues, and concerns.
- Attend and participate in SAA annual business meetings, special forums, and leadership meetings.
- Volunteer and accept invitations to serve on committees and task forces.
- Volunteer for and accept invitations to run for office within a Section or Roundtable or within SAA.
- Initiate and participate in discussions about projects, issues, and concerns. Talk with other SAA members, groups, Council members, officers, and staff to determine appropriate approaches and actions to move your ideas forward.

I want to form a Section or Roundtable. How do I go about doing it, and what is required?

The policies on forming each vary slightly, and will be considered in turn.

Sections: The desire for a new Section is most likely to come from a Roundtable that feels that the level of activity it wishes to undertake can best be conducted within the organizational structure of a Section. In that case, the Roundtable may petition the Council to be declared a Section. Because a Section must have a minimum of 300 members, it is unlikely that a petition to become a Section would be considered with any fewer names. In considering the petition, the Council would weigh how closely the proposed area of interest overlaps with other Sections of the Society as well as the economic impact on the Society of the proposed organizational change. New applications for recognition as a Section must be submitted no later than January 1 for Council action before the next Annual Meeting.

Roundtables: The current formal requirements to form a Roundtable are minor, as befits the informal nature of a Roundtable. The first step in forming a Roundtable is to prepare a petition stating the need for the Roundtable. Someone who is willing to run the first meeting of the Roundtable (usually the person preparing the petition) must also be identified. The petition must be signed by at least 50 SAA members in good standing. The petition is then sent to the executive director, whose staff checks the names against the current membership roster. After the petition is certified, the document is forwarded to the Council for consideration. In considering the petition, the Council will consider the merits of each request in light of existing SAA groups and the specific statement of intent and goals of the applicant group. New applications for recognition must be submitted no later than January 1 for Council action before the next Annual Meeting.

May non-SAA members belong to a Section/Roundtable? Can they hold office?

As stated in the Constitution and Bylaws and/or in the Guidelines for Sections and Roundtables:

Membership in Sections requires that the individual be a current member of SAA.

Although the core of a Roundtable is composed of members of SAA, anyone may participate in the activities of a Roundtable. However the convener (ie, the chair) of the Roundtable must be a current member of SAA, and only SAA members are eligible to vote for Roundtable conveners or other officers.

Interest in my Section has fallen off. How do I cease operations?

A decision to disband should be made in discussion with members of the Section, after which a proposal requesting that the Section be disbanded should be submitted to the Council. The proposal should state succinctly the justification for the action, and indicate what measures were taken to discuss and inform the Section membership about this decision. A Section may also decide that the more informal status of a Roundtable would better serve its ends, and may choose to petition the Council for a change in status. Alternatively, Sections that do not maintain an official membership level of at least 300 members for two consecutive years may be dissolved after due notice and an opportunity for section officers to appeal. The Council will offer to designate such groups as Roundtables without re-application.

What structural changes are in the future for Sections and Roundtables?

In response to the Council's adoption in March 2007 of a series of recommendations by the Task Force on Sections and Roundtables, the SAA Council will conduct a review of policies regarding Sections and Roundtables no less than once every three years.

Revised: May 2007

Guidelines for the Society of American Archivists Websites

Overview

The explosive growth of electronic publishing on the web presents SAA with the opportunity to better serve our members and to communicate with and support our organizational units. SAA establishes these guidelines for websites as a means to encourage their development for disseminating and sharing resources throughout the Society. These guidelines apply both to the central or main website maintained by the Chicago office, and to sites maintained by SAA's operational units (Sections and Roundtables). The guidelines are intended to strengthen the Society's identity on the Internet and to ensure the most effective use of the sites.

Definitions

SAA website: The collection of web pages sponsored and maintained by the Society of American Archivists and its subsidiary units.

SAA main website: The central location for the collection of web documents maintained by the SAA offices and resident on its web server(s).

SAA home page: The entry point to the SAA website. The URL (uniform resource locator) of the SAA home page is <http://www.archivists.org>.

Guidelines

A. General Guidelines

The SAA home page and subsidiary SAA unit websites are an official publication of the Society of American Archivists.

The content of all pages on the SAA website shall be related to the functions and mission of the Society of American Archivists, namely to serve the education and information needs of our members and provide leadership to help ensure the identification, preservation, and use of the nation's historic record.

B. SAA Home Page (www.archivists.org)

All documents placed on the SAA home page must have prior approval from the executive director. All submissions and/or suggestions for additions to the SAA website shall be forwarded for consideration to the executive director or the executive director's designated staff representative.

The executive director or designee is responsible for the overall design, coding, formatting, and maintenance of the contents of the SAA home page. The executive director or designee should follow an appropriate style manual, such as that developed by the Yale Center for Advanced Instructional Media (<http://info.med.yale.edu/computing/web/publish/>).

Links should be made from the SAA home page to SAA organizational units, to other professional associations of archivists or allied professions, and to the local hosts of upcoming SAA Annual Meetings. Links to external sites comprising directories of archival websites, non-SAA web publications of archival interest, and such also are desirable. Links will not be made to websites describing individual archival repositories or their holdings.

SAA will maintain links to all SAA student chapter websites.

C. SAA Organizational Unit Websites

SAA organizational units, including both Sections and Roundtables, may create their own websites provided that they follow all SAA policies, register these publications with the SAA office, use the uniform SAA logo, and establish links to the SAA website. Organizational units are encouraged, however, to work with the SAA staff to develop websites hosted by SAA servers in order to maintain an official SAA record.

SAA staff will maintain on the Society's main website (<http://www.archivists.org>) broad information on the goals, leadership, and activities of SAA's organizational units. Unit leaders are responsible for updating information maintained on the main SAA website (<http://archivists.org>). SAA will offer to host individual Section and Roundtable websites, the content and design of which shall be the responsibility of these units. Sections and Roundtables may create websites and additional electronic lists on file servers that are not owned by SAA, provided that they follow all SAA policies, register these publications with the SAA office, use the uniform SAA logo, and establish links to the SAA website.

Section and Roundtable leaders should be aware that data maintained outside of the SAA servers cannot be easily archived or validated.

We also encourage SAA organizational units to establish websites for publications whenever such publications enhance a unit's ability to meet organizational and professional objectives. In order for an SAA unit to mount a website, it must first be registered with the Executive Office. Such registration will be dependent on:

- The unit's articulation of a clear statement of purpose for the website that is directly germane to the responsibilities and concerns of that unit;
- The unit's obtaining space on an Internet-linked computer, or the SAA web server, to host its website;
- The unit's agreement to include and regularly display an appropriate disclaimer provided by SAA regarding the responsibilities of SAA and other sponsoring institutions or organizations for the opinions and views expressed in the documents displayed on the website.
- The unit's naming a member of the unit as a web liaison and that individual's willingness to conduct responsibilities appropriate to that role;
- The unit's agreement to follow an appropriate style manual for design of its site;
- A statement on the page that references to commercial interests (such as vendor listings or advertisements) does not imply any endorsement by SAA; and
- A statement on the page that SAA does not assume liability or responsibility for the conduct, content, or currency of any site linked or pointed to from the SAA website.

Once a unit's website has been registered with the Executive Office, its purpose and address will be published in *Archival Outlook*, and a link to the site will be made from the SAA home page. Subsidiary governing units of the Society will have primary creative control over the design and content of their websites regardless of where they are hosted, provided that no unit website may conflict with the SAA main website or with SAA policies and practices relating to publication, privacy and confidentiality, and ethical conduct.

We strongly encourage units without the capacity to mount their own websites to submit items for inclusion on the SAA home page, subject to editorial policy.

Adopted by the SAA Council: June 8, 1997; Revised: March 2007

SAA Policy on Unit Directories

The SAA office will host and maintain membership lists for Sections and Roundtables. Section membership is included in SAA's online membership directory.

Approved by the SAA Council: August 31, 1996

Revised: March 2007

Guidelines for the Establishment of Listservs by Organizational Units of the Society of American Archivists

The establishment of Internet-accessible open discussion lists can be an effective means for facilitating discussion on specific topics or among professionals working in related areas and facing common issues. These listservs can also be an effective device for fostering dialogue among different professionals regarding mutual concerns.

The SAA office will utilize features of its association management software to support multiple lists and discussion forums for SAA Sections and Roundtables.

- The SAA Leader List ("saaleaderlist") will be open to all current Section officers and steering committee members and Roundtable conveners.
- Each Section and Roundtable will be supplied with an announcement (or broadcast) list. Section chairs and Roundtable conveners will be eligible to post to the list, and members will be subscribed automatically.
- To reduce administrative tracking by the SAA office, authorized posters to the Section announcement lists will be a subset of those authorized as part of the SAA Leader List ("saaleaderlist").
- Each Section and Roundtable will be supplied with an electronic discussion list. SAA members will be allowed to subscribe voluntarily to two Section discussion lists and an unlimited number of Roundtable lists as a member benefit.
- Each Section will be supplied with a leaders' discussion list upon request.
- SAA headquarters staff will be responsible for managing list software, troubleshooting member subscriptions, and working with officers to maintain accurate subscription lists and policy compliance. As subscriptions to electronic lists will be one of several criteria for evaluating the effectiveness of Sections and Roundtables, headquarters staff will report annually on the number of electronic list subscribers, including those subscribers to Roundtable lists who are not members of SAA.

Approved by the SAA Council: June 1995

Revised: March 2007

Policies Regarding Function Space and SAA Staff Support for Groups that Meet at the SAA Annual Meeting

Policies That Apply to SAA's Constituent Bodies: Sections, Roundtables, Committees, Boards, Task Forces, Representatives

A. Regular Meetings

Shared or dedicated space (see Section and Roundtable guidelines for details of how space is allocated) for the regular annual meetings of these groups is provided by SAA in or near the conference hotel. This space and time is assigned by the SAA staff according to the general schedule of the meeting and information received in response to a call for meeting space requests.

The meetings are listed in the Annual Meeting program.

Room set-ups are arranged by the SAA staff.

Hotel contracts invariably require that all food and beverages consumed in meeting room space must be provided by the hotel. To do otherwise places the Society in violation of its contract. SAA does not pay for food or beverage breaks for these group meetings.

Should an SAA body want food service or a coffee break in its meeting, the SAA office will send hotel menus and ordering information. An individual member of the group will be billed directly by the hotel.

B. Office Hours in the Exhibit Hall

SAA offers booth space in the Exhibit Hall for up to two hours of "Office Hours" for its own constituent groups who wish to meet with meeting attendees.

The Society arranges for the set up and pays the decorator fees and any booth fees assessed by the conference facility.

Space and time slots are filled as available on a first-come, first-served basis, as Office Hours Request Forms are received in the office.

C. Any Other Function or Activity

The Society is legally and financially responsible for the activities of its constituent bodies. Any SAA group that wishes to hold a function other than its regular meeting and Office Hours is governed by the following:

- Because Annual Meetings are scheduled far in advance, requests submitted less than a year before the anticipated event may not be able to be considered.

- Requests for additional meeting room space will be considered on a first-come, first-served basis after all of the other requirements for space have been fulfilled and before the date specified in the hotel contract for release of unassigned space.
- All activities of SAA bodies, whether in the conference facility or off-site, will be fully announced in the Annual Meeting Program.
- All functions of SAA bodies at the Annual Meeting are open to all meeting registrants.
- For food functions (such as receptions and meals) the SAA office will enter into all contractual agreements and price the function to cover expenses. Tickets will be sold as part of the meeting registration procedure.
- For functions held off the conference facility site, the group desiring such a function will work through the SAA office, which works with and through the Host Committee in arranging local, off-site activities. The SAA office will enter into all contractual agreements for sites, food, and transportation. Functions will be priced to cover expenses.
- The SAA Council does not consider the solicitation of resources to support social events at the Annual Meeting to be a priority activity for SAA groups. SAA groups will not enter into direct competition with the Society as a whole in soliciting funds or other resources. SAA groups will follow guidelines regarding seeking outside resources and using the SAA name and logo. Any income generated to support particular activities will become part of the general Annual Meeting revenues.

Policies That Apply to Regional, State, and Metropolitan Archival Associations

A. Office Hours

The Society offers a limited amount of booth space in the Exhibit Hall for up to two hours of “Office Hours” to regional, state, and metropolitan archival associations that wish to meet with meeting attendees.

The Society arranges for the set up and pays the decorator fees and any booth fee assessed by the hotel.

Space and time slots are filled as available on a first-come, first-served basis, as request are received in the SAA Office.

B. Other Events

A number of associations traditionally hold social events at SAA’s Annual Meeting. SAA is not able to offer space to hold such events.

Upon request, the Society will note such events as “Other Events” in the final program that is distributed to meeting registrants. The date, time, and location will appear in print; space will be available on a bulletin board to post further details.

Policies That Apply to Associations of Archivists Other Than Regional, State, or Metropolitan Associations

A. Complimentary Space

Some SAA Annual Meeting attendees are members of other associations of archivists that wish to use this occasion to hold their own gatherings. Because of the demands upon limited space, SAA is unable to offer complimentary space for meetings or social functions to anyone other than its own constituent bodies and grant-funding agencies or organizations.

B. Events as Part of the SAA Annual Meeting

Groups that wish to have a reception or a meal at the conference facility as part of the SAA meeting can be accommodated as follows:

- Because Annual Meetings are scheduled far in advance, requests submitted less than a year before the anticipated event may not be able to be considered.
- Requests for space will be considered on a first-come, first-served basis after the other requirements for space have been fulfilled and before the date specified in the hotel contract for release of unassigned space.
- All such functions will be planned through the SAA office, announced as part of the Annual Meeting, and be open to all meeting registrants.
- The SAA office will arrange for food and beverage service with the hotel, price the event to cover expenses, and sell tickets as part of the meeting registration procedure.

C. Other Events

Other groups are free to make their own arrangements for activities or functions at their own expense. Upon request, the Society will note such activities as “Other Events” in the final program that is distributed to meeting registrants. The date, time, and location will appear in print; space will be available on a bulletin board to post further details.

Policies That Apply to Agencies or Organizations That Offer Grant Funding to Archivists or Archival Repositories

A. Office Hours

The Society offers a limited amount of complimentary booth space in the Exhibit Hall for up to two hours of “Office Hours” to grant-funding agencies.

Space and time slots are filled as available on a first-come, first-served basis, as requests are received in the SAA Office.

Such agencies or organizations may choose to pay the non-profit rate for exhibitors and secure a separate booth for the entire exhibit time.

B. Space for Other Functions

Such agencies or organizations may request complimentary space in meeting rooms. Such requests will be honored on a first-come, first-served basis after all of SAA’s own requirements for meeting room space have been fulfilled, provided that such requests are made before the date specified in the hotel contract for release of unassigned space.

Hotel contracts invariably require that all food and beverages consumed in meeting room space must be provided by the hotel. To do otherwise places the Society in violation of its contract. Should a grant-funding agency wish food or beverage service, the SAA office will provide menus and ordering information. The organization will be billed directly by the hotel.

Annual Meeting Firms or Organizations That Provide Goods and Services for Fees or Sale

Such groups are welcome to meet with meeting attendees by becoming exhibitors and paying the appropriate rates.

Any other functions that such groups wish to hold will be arranged entirely by them at their own expense. SAA does not print listings for such events in the Annual Meeting Program, although it will be happy to accept paid advertisements for the Program.

Adopted by the SAA Council: January 1992

Revised: March 2007