A Guide for SAA Leaders

2019-2020

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Dear SAA Leader:

SAA is a vibrant, dynamic organization because of the involvement of members like you who "step up" to leadership. More than 60 boards, committees, task forces, working groups, and sections serve the interests of more than 6,000 members! Your service on one or more of these component groups helps the Society to meet important strategic challenges and advance the archives profession. (If you haven't had a chance to look through SAA's Strategic Plan, we encourage you to do so at: http://www2.archivists.org/governance/strategic-plan.)

This manual has been designed to assist you in your role as a volunteer leader. In it you'll find practical information about the administration of SAA's component groups. Our goal is help you spend less time worrying about how to manage your group and more time focusing on your group's goals and communicating with your members! Rather than being an exhaustive policy guide, this document provides an introduction to common questions that you may encounter and tips on where to find additional information and 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 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 any information is unclear, if you can't find the information you need, or if you have recommendations, please let us know. (See page 17 for contact information.)

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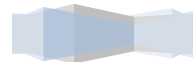
Best regards,

Dr. Meredith Evans
SAA President, 2018-2020
president@archivists.org

Nancy P. Beaumont
Executive Director
nbeaumont@archivists.org

Introduction

Any member who serves in a named position on an SAA board, committee, task force, or working group, or any member of a section steering committee, is considered an SAA leader. Some leaders are appointed (e.g., committee member) and some are elected – by the entire membership (e.g., Council member) or by smaller interest groups (e.g., section vice chair). *All leaders*, whether they are elected or appointed, represent the needs and interests of the membership while participating in and directing the efforts of SAA as an organization.

Official rosters for all component groups are available on SAA's website by clicking on the "Groups" tab, or by visiting https://mysaa.archivists.org/publiccommitteeroster. SAA members have access to contact information for individual leaders, so be sure to log in first if you are looking for an email address.

In response to requests from many leaders for a discussion list, the existing "SAA Leader List" (now on SAA Connect) was expanded to be used for discussion among leaders as well as for announcements from SAA Headquarters. All elected and appointed leaders –about 550 people – are subscribed automatically to the SAA Leader List each year. If you have just been appointed or elected, consider the SAA Leader List as a tool to discuss items that are relevant for SAA leaders, to exchange leadership tips, to ask for advice and experiences, etc.

Your Responsibilities as a Component Group Leader

Know SAA policy…or at least know where to look for it. The very best source of information about component group leader responsibilities is the SAA Governance Manual, available online at: www2.archivists.org/governance. Section VII (Committees and Boards), Section VIII (Task Forces), Section IX (Sections), and Section XIII (Working Groups) provide general information about each of these types of component groups, as well as links to individual component group pages.

Communicate! A critical element of leadership is communicating with your group—it's one of the important ways in which we can ensure that members feel connected to and a part of SAA. Whether your group makes use of your microsite, your discussion list, a blog, a Twitter account, or some combination of tools, it matters to members that they hear from and are able to communicate with their colleagues with common interests. Our component groups are also an invaluable resource for SAA's Council, officers, and staff to hear from members about issues, concerns, and ideas for future directions. Your role in facilitating the flow of information in all directions is crucial to supporting and sustaining SAA's organizational health. So please – talk to your members and talk to the SAA officers, Council members, and staff!

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Contribute to SAA's Strategic Plan. Beyond being responsive to members and understanding and executing the "mechanics" of governance, SAA component group leaders also have an important responsibility to become familiar with the organization's Strategic Plan and to determine ways in which component groups might supplement SAA's efforts to achieve its strategic goals. See SAA's current Strategic Plan at www2.archivists.org/governance/strategic-plan.

Appointed Group Reporting. As part of understanding the activity going on within SAA, all boards, committees, and working groups are required to submit an annual report in time for review by the Council at its Fall/Winter meeting. (Task Force reporting schedules vary.) A "Council Report Template" is available at http://www2.archivists.org/governance/leaderresources (under Templates and Forms). Note that the form includes a requirement for reporting out on any group activities that may address SAA's Strategic Plan goals.

Section Reporting. Outgoing Chairs are required to submit election results **within 14 days of the Annual Meeting** (so that discussion lists may be updated) to fowens@archivists.org. In addition, section leaders have three annual reporting requirements:

- An annual report, prepared by the outgoing Chair, is due **by September 1,** and should be submitted via the "Section Annual Report" survey link available at http://www2.archivists.org/governance/leaderresources (under Templates and Forms).
- Details and logistics for your section's annual meeting are due by **March 1**. A survey link will be sent to the Leader List in February to collect this information.
- Information for sections' annual elections are due by email to Governance Manager Felicia Owens by **June 1**. See the Section Elections Guide at https://www2.archivists.org/governance/leaderresources/section-election-guide for important deadlines and guidance.

Important Dates and Deadlines (2019–2020)

Following are some key deadlines to keep in mind as you plan your group's work for the coming year:

September 1, 2019 **Section Annual Reports and Roster Updates**
The outgoing Chair submits the group's annual report through this survey form. Include election results and leader roster updates. If your group would like the Council to consider a funding request for group activities in 2019/2020, include that request in your annual report if possible. See March 1 below for more budget information.

September 16, 2019 **Agenda Items for Fall Council Conference Call**
Submit to your Council liaison any recommendations you may have for Council action or discussion at the fall 2019 conference call (October

14). *Agenda items* *are due to your liaison 4 weeks before the meeting; materials must be submitted 3 weeks before the meeting.*

November 5, 2019   **Agenda Items for Winter Council Meeting**
Submit to your Council liaison any recommendations you may have for Council action or discussion at the winter 2019 meeting (December 3-5). *Agenda items* *are due to your liaison 4 weeks before the meeting; materials must be submitted 3 weeks before the meeting*.

November 2019   **2020 Annual Meeting Session Proposals**
Session proposals due to the 2020 Program Committee. Learn more and submit your proposal.

December 1, 2019   **SAA Foundation Grants: Letter of Inquiry Due**
The initial Letter of Inquiry should be a brief introductory exchange. It is designed to reduce the work for an applicant by providing a quick answer to the question: Is my proposal something that fits the funding priorities of the SAA Foundation? See the Application Guidelines for more information.

December 1, 2019   *Archival Outlook* **Submission Deadline**
Submit your article in time for the January/February issue of Archival Outlook, SAA's bimonthly magazine. Articles are typically 700 words (one page in layout) to 1,200 words (two pages in layout) in length. They should include some kernel of information that will enlighten the reader professionally. Photographs are encouraged. Please contact SAA's Editorial and Production Coordinator, Abigail Christian, with queries and ideas.

February 1, 2020   **SAA Foundation Grants: Applications Due**
The Grant Application is a refinement of the initial letter of inquiry. It includes a narrative proposal and budget statement and answers a number of questions. See the Application Guidelines for more information.

February 1, 2020   *Archival Outlook* **Submission Deadline**
Submit your article in time for the March/April issue of Archival Outlook, SAA's bimonthly magazine. Articles are typically 700 words (one page in layout) to 1,200 words (two pages in layout) in length. They should include some kernel of information that will enlighten the reader professionally. Photographs are encouraged. Please contact SAA's Editorial and Production Coordinator, Abigail Christian, with queries and ideas.

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February 28, 2020   **SAA Awards and Scholarship Nominations Due**
Nominate your colleagues for SAA's Awards and Scholarships - click on the

link to a specific award to see the nomination guidelines.
Email achristian@archivists.org with any questions.

March 1, 2020	**Section Annual Meeting Details** Submit your section's annual meeting details for inclusion in the 2020 Annual Meeting schedule via Survey Monkey (*link forthcoming)*. Include agenda, description, preference for onsite/offsite location, AV needs, duration, and indication of whether it is a solo or joint meeting. Appointed group leaders will receive an email from Governance Manager Felicia Owens to schedule and confirm your meeting needs.
March 1, 2020	**FY 2021 Funding Requests** Deadline for submitting to your Council liaison any funding requests for consideration as part of the draft FY 2021 budget (July 1, 2020 – June 30, 2021).
April 1, 2020	***Archival Outlook* Submission Deadline** Submit your article in time for the May/June issue of Archival Outlook, SAA's bimonthly magazine. Articles are typically 700 words (one page in layout) to 1,200 words (two pages in layout) in length. They should include some kernel of information that will enlighten the reader professionally. Photographs are encouraged. Please contact SAA's Editorial and Production Coordinator, Abigail Christian, with queries and ideas.
April 2020	**Agenda Items for Spring Council Meeting** Submit to your Council liaison any recommendations you may have for Council action or discussion at the spring meeting (*dates TBD*). *Agenda items are due to your liaison 4 weeks before the meeting; materials must be submitted 3 weeks before the meeting.*
May 15, 2020	**Section Elections: Call for Nominations** Deadline to issue calls for nominations for section elections to your section discussion list. See Communication Strategy: Tools and Tips.
June 1, 2020	**Section Elections: Ballot Information** Sections submit basic ballot information (message to voters, list of offices, candidate names, links to supplementary information, etc.) to the Governance Manager at fowens@archivists.org. Supplementary ballot information (bios, statements, photos, etc.) is optional, and should be posted to your group's microsite at this time.
June 1, 2020	***Archival Outlook* Submission Deadline** Submit your article in time for the July/August issue of Archival
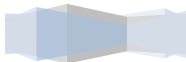
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Outlook, SAA's bimonthly magazine. Articles are typically 700 words (one page in layout) to 1,200 words (two pages in layout) in length. They should include some kernel of information that will enlighten the reader professionally. Photographs are encouraged. Please contact SAA's Editorial and Production Coordinator, Abigail Christian, with queries and ideas.

June 22-26, 2020   **Section Elections: Ballots Open**
SAA staff facilitates online elections. Eligible members are sent unique links to the ballots via Survey Monkey. Ballots remain open for two weeks. Within a week of the ballot closing, staff notifies group leaders of the results (interpretation of results, notifications, and reporting is the responsibility of the group leaders). Group leaders notify staff, via their annual reports, of the new roster by September 1.

July 1, 2020   **Agenda Items for Chicago Council Meetings**
Submit to your Council liaison any recommendations you may have for Council action or discussion at the August 3 or August 8 Council meetings. *Agenda items are due to your liaison 4 weeks before the meeting; materials must be submitted 3 weeks before the meeting.*

August 2020   **Leadership Orientation and Forum**
All leaders attend the 2020 Leadership Orientation and Forum at the 2020 Annual Meeting in Chicago. (*Date TBD*.)

August 1, 2020   ***Archival Outlook* Submission Deadline**
Submit your article in time for the September/October issue of Archival Outlook, SAA's bimonthly magazine. Articles are typically 700 words (one page in layout) to 1,200 words (two pages in layout) in length. They should include some kernel of information that will enlighten the reader professionally. Photographs are encouraged. Please contact SAA's Editorial and Production Coordinator, Abigail Christian, with queries and ideas.

September 1, 2020   **Section Annual Reports and Roster Updates**
The outgoing Chair submits the group's annual report via Survey Monkey (*link forthcoming).* Include section election results. If your group would like the Council to consider a funding request for group activities in 2020/2021, include that request in your annual report if possible. See March 1 for more budget information.

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Working with the SAA Council

The SAA Council meets periodically throughout the year. In 2019-2020, meetings are scheduled for:

- October 14, 2019, via conference call;
- December 3-5, 2019, in Chicago;
- May in Chicago (*dates TBD*); and
- August 3 and August 8 in conjunction with the 2020 Annual Meeting in Chicago.

Reminders about upcoming Council meetings – and associated deadlines – are sent to the SAA Leader List and to all members via the website and SAA's bi-weekly e-bulletin, *In The Loop*, several times before each meeting.

If you have recommendations for the Council's consideration, following is a general schedule. ***Just remember 4-3-2-1….***

- **(4) Four weeks before the meeting:** Recommendations for Council action or discussion should be submitted 4 weeks in advance of the meeting start date. This is the point at which agenda items are being gathered and the agenda takes 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. The SAA President, as the presiding officer at Council meetings, approves all agenda items.
- **(3) Three weeks before the meeting:** Materials are due. To simplify the preparation of materials – and to ensure that the Council has adequate background to understand the purpose of the agenda item – SAA uses a template for action and discussion items and reports. *Check out SAA's Leader Resources page (http://www2.archivists.org/governance/leaderresources), under "Templates and Forms," to download a template that will help you prepare a recommendation for action, a discussion item, or a report for the Council.*
- **(2) Two weeks before the meeting:** The agenda is set and all materials that are ready for Council members' review (i.e., the first batch of Council materials) are posted to the Council's website (http://www2.archivists.org/groups/saa-council). The materials are available to all members at the same time that they are available to the Council.
- **(1) One week before the meeting:** The second and final batch of Council materials is posted to the website (http://www2.archivists.org/groups/saa-council) and is publicly available.
- **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.

Within a week of the end of each Council meeting, the SAA office releases via the website and/or *In The Loop* a summary of actions taken at the meeting. If your component group had an item on the Council agenda, you should also expect to hear from your Council liaison, via phone or email, during or soon after the Council meeting with the results of the Council discussion of your item. (Council meeting minutes since January 1994 are available via the website at

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www2.archivists.org/governance; previous minutes are available via *The American Archivist*.)

Some items can't wait! If you have an action or discussion item that is time sensitive, please contact your Council liaison, 2018-2020 SAA President Meredith Evans (president@archivists.org), or Executive Director Nancy Beaumont (nbeaumont@archivists.org) to discuss placing it before the Executive Committee or Council for online discussion and vote. Frequently 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!

How Are Leader Rosters Updated?

Official rosters for all component groups are maintained by the SAA staff via the member database. When individuals are added or removed from rosters, they are also added or removed from group discussion lists. 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, steering committee member, web liaison, etc.) in that group; and
- The *beginning* and *ending dates* for the term of service.

Note: Official leadership turnover coincides with SAA's Annual Membership (Business) Meeting, held during the SAA Annual Meeting, at which all new elected and appointed leaders, including the SAA President-Elect, assume new roles and offices. Since the SAA database automatically updates roster and listserv permissions based on term dates, all start dates will be set to August 1 and term end dates will be set to September 1, to ensure proper turnover and onboard communication can happen.

All contact information (institution, address, email, etc.) used to populate the leader rosters is pulled from a person's member record, which simplifies the process of updating multiple rosters and ensures that just one (correct) record exists per person. To update your contact information, notify the SAA Service Center at servicecenter@archivists.org.

Leader rosters must be generated by the SAA staff; to ensure consistency, they should not be duplicated by individual members or component group leaders.

For appointed groups, the staff works closely with the Vice President/President-Elect to ensure that rosters are complete and correct based on her or his appointments. If you are a new or ongoing appointee on a board, committee, task force, or working group and you discover incorrect or incomplete information in the official roster for your group, please contact SAA Governance Manager Felicia Owens (fowens@archivists.org) for assistance.

For section leaders, including all steering committee members, the staff is entirely dependent on each section to provide its election (or selection) results, even when the staff has conducted the online election on behalf of the section. Within 14 days of your section's annual meeting, please provide the following information to fowens@archivists.org:

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

Individuals may review their past and current roles (i.e., those that have been designated via the SAA database) logging in to their main SAA profile and visiting the My Groups page.

Section Membership

The SAA staff tracks section membership via the member database, based on specific information provided by members as they complete the membership application or renewal form or make changes to their membership preferences during the year. These data are used to publish official section membership directories to the SAA website. (As noted above, *leader roles* in these component groups are distinct in that they must be designated manually by staff.)
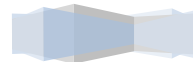
Following are some important policy reminders regarding membership and participation in SAA sections:

- SAA members may join an unlimited number of sections by indicating their selections on the membership application and/or renewal form(s) or by visiting the sections' websites at www2.archivists.org/groups/sections.
- Participation in sections is open to nonmembers, who may join/subscribe as *list participants* by visiting the sections' websites. However, nonmembers may only join up to three sections, and SAA membership is required to vote for and/or serve as a section leader.

Group Email Lists

Nearly all SAA component groups have official email discussion lists. Subscriptions to most lists are automated via leader or section roles – all of which must be assigned manually by the SAA staff. Integration of the list server with SAA's member database enables automatic updates to all list subscriptions if and when a member's email address changes.

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Any person who is listed in SAA's member database (including nonmembers) may change their delivery notifications by visiting:

https://connect.archivists.org/network/members/profile/myaccount/my-settings?section=subscriptions.

User can change their section memberships on the following page: https://mysaa.archivists.org/mygroups.

Users can also view and send messages from the website at https://connect.archivists.org.

The SAA "Leader List"

All active SAA leaders automatically are subscribed to a separate unmoderated discussion list called the "SAA Leader List." If you have important information to share with the entire leadership, send your message to archivists-saaleaders@ConnectedCommunity.org or visit the SAA Connect page. Please make sure your announcement or discussion topic is appropriate for this list.

Communication Strategy: Tools and Tips

Tool #1: Section Discussion Lists

Every SAA section has two dedicated email lists, one for use by the section *steering committee members* and one for use by all section *members* and *list participants.* Discussion lists have been configured to serve two purposes:

- To provide leaders with a method of sending official announcements (e.g., election news, availability of newsletters, etc.) to *all* group members and list participants; and

- To provide members and list participants with a discussion forum.

Section members are automatically subscribed to group discussion lists and by default receive posts by email in a daily digest. Subscribers can change their delivery notifications by visiting: https://connect.archivists.org/network/members/profile/myaccount/my-settings?section=subscriptions.

User can change their section memberships on the following page: https://mysaa.archivists.org/mygroups.

Users can also view and send messages from the website at https://connect.archivists.org.

Tool #2: Group Websites and Online Communications

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Every component group has an official "microsite" on the SAA website. Basic information populated on every SAA microsite includes:

- The group's official charge;
- The group's official leader and/or member roster(s);
- The group's social medial site(s), if applicable; and
- The group's basic description.

Microsites may be administered by authorized group leaders via SAA's content management system (Drupal). Instructions for using this application, "Drupal Manual," may be downloaded at http://www.archivists.org/governance/leaderresources. If you have questions or problems with your group's microsite, contact Matt Black (mblack@archivists.org).

Tool #3: Auxiliary Group Websites, Wikis, Email Lists, Etc.

Component groups need not obtain prior approval to establish an auxiliary website or start a social media account. Note, however, that **all auxiliary sites must be linked from the group's official Drupal microsite.** See SAA's *Uniform Guidelines for SAA Websites and Online Communications:*

SAA Governance Manual: Uniform Guidelines for SAA Websites and Online Communications

E. SAA Component Group Use of Social Media and External Websites (Auxiliary Sites)

SAA component groups may create accounts on social networks (such as Facebook and Twitter) and use social media tools (such as wikis, blogs, and document-sharing sites). When considering establishing a new resource, component groups should be aware of the alternatives available to them and the associated roles and responsibilities. SAA's goals in establishing component group microsites within the Drupal content management system were as follows:

- To provide component groups with a standardized and easily maintained system that would ensure continuity of the record through leadership changes, and
- To provide SAA members with a highly informative, easy-to-use, and comprehensive website for the Society as a whole.

SAA recognizes, however, that component groups may have needs that cannot be met within the Drupal microsite environment. When this is the case, a component group may make use of other social media tools to accomplish its communication objectives.

Component groups wishing to create or populate an external web resource (including a social media account), must adhere to the following guidelines:

1. Notify the group's Council liaison of each social media account or external resource that it creates.
2. Have a clear understanding of the group's purpose in establishing the resource and develop a plan for how the resource will be used and what types of material will be shared via the resource.

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3. Maintain on the group's SAA microsite active links to all external resources used by the group.
4. On the microsite list of links to external social media and website resources, identify the active group member serving as the administrator of each account.
5. Ensure that access privileges (user accounts and passwords) are transferred to new leaders in a timely manner.
6. Be aware that SAA staff cannot provide support (such as maintenance, training, permissions, or archiving) for resources published on a third-party server.
7. Maintain key group governance information (such as bylaws and minutes) on its SAA microsite, where it can be maintained and preserved by SAA.
8. Be aware that content published on external sites or using social media accounts may be subject to the records retention provisions outlined in Article VII of the SAA Constitution.
9. Display on external sites a prominent link to the component group's SAA microsite.
10. Display on external sites an appropriate disclaimer stating that SAA does not assume responsibility for the opinions and views published on the external site or social media account.

Component group must display the uniform logo on all social media sites and external websites, in accordance with the policies articulated in *Guidelines for Use of the SAA Logo.*

These guidelines apply to both new and existing social media accounts and external websites. Component groups should review all existing accounts and websites and discuss them with their Council liaisons to ensure that they comply with these guidelines.

Communication Task Force Tips

In August 2013, the SAA Communications Task Force presented a final report to the Council that included recommendations for section and roundtable communications. (See the entire final report and recommendations at http://www2.archivists.org/groups/saa-council/communications-task-force-final-report-and-recommendations-0813-1-iii-b.)

Given your role as a section leader, you may be particularly interested in Appendix E (pages 13 and 14, below) in which the task force presents "Communication Strategy Recommendations for Sections and Roundtables." The Council did not choose to pursue development of communications best practices for sections and roundtables at this time, but the appendix reproduced below provides a wealth of information and ideas about how individual groups may wish to enhance their communication efforts.

APPENDIX E:
COMMUNICATION STRATEGY RECOMMENDATIONS FOR SECTIONS AND ROUNDTABLES

General Communication Strategy Recommendation for Sections and Roundtables

The SAA Communications Task Force suggests that SAA work toward establishing a set of "best practices" for all SAA Sections and Roundtables. This document is the CTF's contribution to that process. Now that all Sections and Roundtables are required to have (and will, at the time of the August 2013 Council meeting, have voted on) by-laws, the CTF would like to present these communication strategy recommendations for Sections and Roundtables. It is the CTF's hope that these recommendations will serve as the first step toward the creation of Communications Best Practices for Sections and Roundtables.

There are four main areas where Section and Roundtable communications fall within the scope of the CTF's mandate: Section and Roundtable website on SAA, listserv use, newsletters, and social media presence.

Best practices for Section and Roundtable use of the SAA-based website should include providing updated documents such as the by-laws, lists of members, Annual Reports (if they are produced), newsletters (if produced), and minutes from meetings. No SAA-based website should be more than one year behind schedule for updating these core documents on the SAA site. Maintenance of the SAA-based website for the Section or Roundtable is a key responsibility of the Section/Roundtable leadership.

The CTF's yearlong review of SAA's communication channels has shown that listserv use varies widely among the component groups. Some Roundtables and Sections have very active listserv communities, while others rarely use their listservs. The CTF recommends that each Section and Roundtable assess their listserv usage to determine ways to improve participation, if increased participation is desired. In the case of some Sections and Roundtables, it is understood that listserv participation is not a marker of the Section or Roundtable's activity and active membership. For those Sections and Roundtables where listserv participation is active, it would be recommended to spend some time and energy to find ways, including FAQ postings or "top questions" to ensure that the same conversation is not repeated within a six month window. While the pace of technological change means that some discussions will happen over and over, the Section or Roundtable leadership should pay attention to how the listserv is being used efficiently as well as effectively.

More and more Roundtables and Sections are publishing newsletters, and are increasingly choosing to publish in an online-only format. In addition, Section and Roundtables are adding blogs as a way to communicate and interact with their members. The CTF applauds this step toward greater communication by Sections and Roundtables with their membership. For Sections and Roundtable that no longer, or choose not to, produce newsletters, the CTF recommends moving old newsletters to an "archived" page within the microsite rather than keeping them on the main microsite page. The CTF also applauds the use of electronic-only newsletters as a cost-effective tool.

Recommendations for Use of Social Media by Sections and Roundtables

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Considering the vast array of social media tools and platforms available, each Section and Roundtable (leadership and membership) should consider tool selection, resource allocation, and time management. Different social media tools require different time investments along the spectrum of participation. If your Roundtable or Section has less direct interaction, a social media option like a blog post or RSS feed that requires little interaction from your membership may be the best choice. If you have a very active membership that is less tech savvy, participating in some well-established social media forums such as LinkedIn, Facebook, and Twitter along with a blog might be the best choice. If your membership is very active and/or very tech savvy, experimenting with newer social media platforms such as Tumblr, Branch or Thumb may hold great appeal. Once a social media channel is selected, remember that it must be maintained. Most social media, with some exceptions, has a life cycle of 1-3 years. Social media channels, once chosen, should be reviewed and audited for use every 3 years, at minimum. Worse than having no social media is having a long string of inactive or rarely used social media accounts. Best practice should be to focus on one, or possibly two, social media tools that can be easily maintained, updated, audited, and reviewed by Section/Roundtable leadership at regular intervals.

This document should be considered in conjunction with the [Uniform Guidelines for SAA Websites and Online Communications](#).

Resources for Social Media Use in Associations:
Social Media for Associations—Status Report 2013 by Kellen Company, May 6, 2013
http://www.kellencompany.com/blog/2013/05/06/social-media-associations-status-report-2013

Nah, Seungahn, and Gregory D. Saxon. "Modeling the adoption and use of social media by nonprofit organizations." *New Media & Society*. March 2013 vol. 15 no. 2 294-313
http://nms.sagepub.com/content/15/2/294.short

Treem, Jeffrey W. and Leonardi, Paul M., Social Media Use in Organizations: Exploring the Affordances of Visibility, Editability, Persistence, and Association (2012). Communication Yearbook, Vol. 36, pp. 143-189, 2012.
http://ssrn.com/abstract=2129853 or http://dx.doi.org/10.2139/ssrn.2129853

Roscoe, Andrew and Andrea Knotts Bona. Social Media Use by US Associations: Benchmarks and Practices by One Orange Feather, Inc., 2010
http://www.oneorangefeather.com/documents/Social%20Media%20Use%20by%20Associations%20Final.pdf

American Bar Association (ABA), website, "Social Media Resources for Bar Associations,"
http://www.americanbar.org/groups/bar_services/resources/socialmedia.html

Resources for Social Media Use Best Practices
Brunetto, Steve. "Social Media Best Practices for Organizations." *Marketing Daily.* Commentary, June 7, 2013.
http://www.mediapost.com/publications/article/200911/social-media-best-practices-for-organizations.html#axzz2YSxctxPR

"Social Media Best Practices," Social Media at Colorado State University. No date for when last updated.
http://socialmedia.colostate.edu/best-practices/

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CDC Best practices for Facebook:
http://www.cdc.gov/socialmedia/tools/guidelines/pdf/facebookguidelines.pdf
(substitute "SAA" or "Roundtable/Section name" wherever you see CDC)

Records Management for SAA Component Groups

In 2001, the Society of American Archivists (SAA) designated the University of Wisconsin - Milwaukee (UWM) as its official archival home, and named the head of its Archives Department as SAA Archivist. SAA's archives dating from the Society's founding in 1936 are described in an online finding aid[1] and open to researchers in the UWM Archives' reading room. Recognizing that a significant portion of SAA's current records are now shared via the Society's website, in 2014 the UWM Archives, with Council's approval, initiated a web crawling program, still in its early experimental phase, to capture, preserve and provide access to SAA current born-digital permanent records. At the same time, SAA's Records Retention Policy was overhauled to establish a framework for more transparent and more intentional records management at SAA. A new suite of tools and processes will enable more systematic identification, capture, and long-term preservation of permanent SAA records in all formats to create a continuum of rich organizational and historical content that bridges the paper based, the digitized, and the born digital.

Records from committees, boards, working groups, and task forces and from sections that are scheduled for transfer to the SAA archives will be captured by web crawls of their SAA-supplied microsites. These microsites should be used, in the interests of transparency and good communication to members and others, for posting all records of importance to these groups and to the broader membership of SAA.

Questions about records retention for SAA groups should be directed to Executive Director Nancy Beaumont (nbeaumont@archivists.org).

General Policy Statement for Records Retention

(Read the full policy here:
http://www2.archivists.org/governance/handbook/appendices/app_a/Records_Retention_Policy.)

Scope: The RRP contains records schedules that identify official SAA records of permanent value and provides direction for their retention and disposition either by the SAA Office or by the SAA Archives. It also identifies non-permanent records that can be kept as long as administratively useful or legally necessary and then destroyed. It applies to records in the existing SAA Archives as well as to current records, and to SAA staff, elected and appointed leaders, component groups, and members.

Retention Period: The RRP in most cases deliberately avoids suggesting specific retention periods for temporary records, as SAA records creators are in the best position to determine how long to keep materials before discarding them. For records scheduled for permanent retention, the SAA Office staff and SAA leaders should work out the best arrangements in collaboration with both the

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[1] http://digital.library.wisc.edu/1711.dl/wiarchives.uw-mil-uwmmss0172

designated records liaison in the SAA Office and the SAA Archivist.

Disposition: The RRP avoids identifying the manner in which records identified for permanent retention will be transferred to the SAA archives. Most permanent records will be harvested by UWM during an annual crawl of the SAA website. In other cases, transfer may be accomplished by shipment of physical records or delivery of electronic records to a file-sharing site, the details of which will be worked out between the SAA Archives and the designated records liaison in the SAA Office.

Revisions, Additions, and Review: The Council delegates to the Executive Committee ongoing authority to review and approve retention and disposition schedules for SAA records on behalf of the Council. Changes to this RRP--discussed by the appropriate SAA leaders, the designated records liaison in the SAA Office, and the SAA Archivist--may be recommended to and approved by the Executive Committee at any time. If ten years have passed from the most recent RRP revision date, or if a determination is made that the general policy statement contained in this RRP requires revision, the Executive Committee will initiate a review of the RRP, to be undertaken, at minimum, by the SAA Archivist, the SAA Office's designated records liaison, and representative members of the Council.

Roles and Responsibilities

SAA Archivist: Develops records schedules in consultation with the records creators including staff, officers, and component group leaders; works primarily with the SAA Office's designated records liaison. The responsibilities and authority of the SAA Archivist are defined in the 2001 agreement between SAA and UWM and include appraisal, processing, preservation and outreach.
Designated Records Liaison: A member of the SAA staff who serves as the point person for managing the records of the SAA Office, communicating with the SAA Archivist, referring questions to the Archives, and facilitating transfer of records to the SAA Archives as indicated by the records schedule.

(Download all schedules: http://www2.archivists.org/governance/handbook/appendices/app_a/Records_Retention_Policy)

Society of American Archivists Records Schedules

- Annual Meeting
- Council-Appointed Component Groups and External Representatives
- Member-Affiliation Component Groups
- Council, Executive Committee, Elected Officers and Nominating Committee
- Education
- Executive Director
- Finance
- General SAA Office
- Member Services
- Publications and Communications

Society of American Archivists Foundation Schedule

- SAA Foundation General Records

How to Suggest SAA Advocacy Action

Because archival records ensure the protection of citizens' rights, the accountability of organizations and governments, and the accessibility of historical information, SAA believes that archivists must take an active role in advocating for the public policies and resources necessary to ensure that these records are preserved and made accessible. The SAA Council and its Committee on Public Policy rely on SAA members to bring forward issues and point out situations affecting the archival record that may require or benefit from SAA input. If you or your component group would like to suggest that SAA consider taking a position (or advocating in some way) on an archival issue, please follow the process outlined in "Procedures for Suggesting SAA Advocacy Action."

Contact List for Additional Assistance

For assistance with orders, billing issues, address updates, and login difficulties, please contact:

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

For assistance with leader role updates, governance, group reports, and elections, please contact:

Felicia Owens, Governance Manager	fowens@archivists.org

For assistance with group discussion lists and microsites, please contact:

Matt Black, Web/IT Services Administrator	mblack@archivists.org

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

Your group's Council Liaison (if applicable). See your official roster or see:
http://www2.archivists.org/governance/SAA-Council-Liaisons-to-Component-Groups.

Nancy Beaumont, Executive Director	nbeaumont@archivists.org
Felicia Owens, Governance Manager	fowens@archivists.org
Dr. Meredith Evans, SAA President (2018-2020)	president@archivists.org

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