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The biggest change has been the addition of an entirely new section, larger than the original rules, that contains guidelines for choosing and formulating headings. In this section the manual draws heavily on chapters 21-25 of AACR 2 dealing with choice of access points, personal and corporate names, geographic names, and uniform titles. It includes the rules most likely to be encountered by archivists and manuscript catalogers, incorporates relevant rule interpretations, and provides additional commentary and examples to reflect archival context. This manual, like the original, does not include rules or guidelines for subject indexing.

The APPM revision project was funded in part through a grant to SAA from the National Endowment for the Humanities.

Published by the Society of American Archivists, 1989;  
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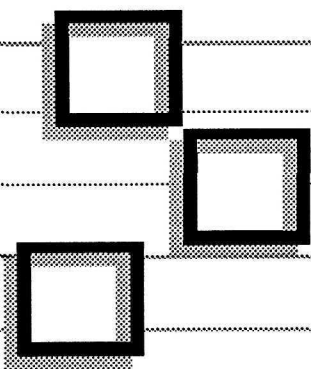
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Published by Gower Publishing Company, 1989;  
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American Library Association (1987) 212 pp., paper  
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## Society of American Archivists

DONN C. NEAL, editor

### Annual Report of the Executive Director 1989-90

DONN C. NEAL

Let me tell you about three things that happened to me soon after I accepted this position with SAA in 1986, but before I actually joined the staff. While in Washington, D.C. on some other business, I went down to Charlottesville to get acquainted with the then-chair of SAA's Editorial Board, Ned Berkeley. As I had never visited the site of the Battle of the Wilderness, I made a quick detour to see this impressive battlefield, which looks today much as it did in May 1864.

An interpretive panel there relates how, after a bloody and indecisive battle that inflicted over 28,000 casualties, the Union's new commander, U. S. Grant, made a fateful decision. Moving away from the scene of the battle, his troops reached a fork. Here they could either turn back north, as they had so many times before, letting the Confederate forces escape this war of attrition, or they could turn south, pursuing Lee and his army. Grant of course turned south, and the interpretive panel relates how his tired troops cheered this sign of his determination to press forward.

Not long thereafter, back at my old job in Pittsburgh, I thought it might be nice to get

acquainted with the SAA members in that city, and to learn about their concerns and their repositories. After all, I am not an archivist, and these visits—the first of more than I can count now—would help me to understand better my new position with SAA. One of the archivists I visited was Rev. Edward McSweeney of the Catholic Diocese of Pittsburgh. In this tidy repository are kept many of the records of this diocese—and some other treasures as well.

One such treasure, which Rev. McSweeney showed me, is the journal of a Pennsylvania soldier in the Civil War, Charles Seibert. Out of curiosity, I opened the journal to May 1864, to see what Sergeant Seibert was doing when the Battle of the Wilderness was being fought. Well, he was there, and his journal describes not only the occasional excitement and danger of Civil War battles but the routine of fatigue and boredom that accompanied the fighting.

A short time after I visited the diocese, I was talking with a professional colleague, director of a higher education consortium in New England. With as much flourish as I could muster, I told him about my recent visit to the Wilderness

Battlefield, and then about finding the Seibert journal, emphasizing the drama of Grant's decision to turn south. His face took on an odd look, and a wistful smile, and he said: "I know that story well: my grandfather was one of those cheering soldiers, and he told me all about it."

Historic events, historic sites, historic documents, historic memories—occasionally they come together, as they did for me in 1986, to remind us how powerful, and yet how fragile, our cultural record is. It is this dichotomy of value and vulnerability that gives your work as archivists such meaning, and that gives your association's work supporting you its own special importance. I knew then that I had made the correct decision by joining SAA, and I've never been sorry.

Occasionally in the life of an organization like SAA, similar important crossroads are reached, even if they do not seem as dramatic. During 1989-90, the Society made substantial progress in fulfilling its responsibilities to you its members, and to the entire archival profession that depends upon SAA for leadership and services. In many ways, SAA

itself has been at a critical turning point in its history, and I believe that the Society has now made the fateful turn and is in vigorous pursuit of its goals.

During 1989-90,

- SAA successfully completed the NHPRC and Mellon-funded continuing education project, which has given the Society a dozen outstanding new short courses and their curricular materials, along with a leadership role in developing and offering educational opportunities for practicing archivists.

- With this grant project ended, SAA's Education Office, initially funded by NHPRC and Mellon, has now become an integral part of the SAA staff—and General Fund.

- SAA also successfully completed the NEH-funded Automation and Preservation projects, which brought new knowledge, tools, and experience to many hundreds of archivists.

- Led by the Committee on Automated Records and Techniques, SAA submitted and received a grant from NHPRC to study and develop curricular and instructional materials in automated records and techniques.

- SAA has published Steve Hensen's authoritative second edition of *Archives, Personal Papers, and Manuscripts*, and this valuable resource book has already sold over 1,200 copies.

- SAA has also published the first volume in the new Archival Fundamentals Series, with the remaining ones close behind. This important series will serve as the foundation for archival knowledge and practice for years to come.

- SAA has reached agree-

ment with Scarecrow Press for a joint imprint series. The Society will provide suitable manuscripts, which Scarecrow will publish and help to distribute. This agreement should bring to SAA additional markets for its publications, additional revenues, and additional manuscripts.

- SAA has also reached agreement with the Organization of American States on terms of a license whereby OAS will translate our new manuals into Spanish and Portuguese, and distribute them for educational purposes throughout Latin America and Spain.

- With the help of new equipment, and new expertise in the office, SAA has considerably upgraded in appearance not only the *SAA Newsletter* but also all of the other publications (the redesigned annual meeting program, brochures, and so on) that it produces—and this at a considerable savings of both dollars and staff time. The newsletter also introduced a regular new column by the Archivist of the United States. We have recently produced a microfiche edition of the *SAA Newsletter* from its first issue in 1972 down to the present, along with an index.

- SAA recovered from the St. Louis meeting and, just ten months later, has organized yet another successful meeting. In this effort, we were assisted not only by outstanding Program and Host Committees but by generous gifts from Boeing, Weyerhaeuser, University Microfilms, Spacesaver, Laird Norton, Northwest Archivists, the Washington State Archives, the Seattle Municipal Archives, and Archivart. I would like to

express my personal appreciation for these most welcome forms of support. All of you who enjoyed the Presidential Reception last night will want to join me in thanking Boeing and Weyerhaeuser in particular for underwriting the food and drink that we enjoyed.

- SAA launched a new Task Force on Preservation, which has the responsibility for leading the Society into further efforts in archival preservation.

- SAA also created a new Committee on Institutional Evaluation and Development, which has already tackled the challenging tasks of systematically surveying archival repositories and of assisting them in improving their practice.

- SAA established a new Joint Committee on Records Management, which will help SAA and the Association of Records Managers and Administrators to find areas of potential cooperation.

- With the assistance of the Task Force on Standards, and the Working Group on Standards for Archival Description, SAA moved significantly toward a system that will enable it to evaluate, adopt, and refine standards of professional practice. Council recently created a new Standards Board to assist in this process.

- SAA turned responsibility for certification over to the Academy of Certified Archivists and assisted it during the Academy's first year of existence.

- The Society continued to expand its membership, in virtually every category, so that we have more members now than ever before.

- The SAA Council, as-

sisted by the Committee on Goals and Priorities, initiated a three-year planning process for all of the Society's reporting groups.

- Council studied, and introduced greater rationalization into, the Society's system of representatives to other organizations and bodies.

- SAA has virtually completed a long-awaited Council Handbook that should help to guide the Society's governing for many years to come.

- SAA launched its first annual giving campaign, which succeeded in bringing to the Society well over \$3,000 in gifts, and an anonymous challenge gift that enabled us to purchase a facsimile machine for the SAA office.

- Council also engaged in some serious and constructive financial analysis and planning, so that the Society will be on a firm footing in the future.

- The SAA Council further strengthened its ability to understand, and to control, the Society's financial condition.

- And Council developed a plan, which you will consider later in this meeting, for securing the additional resources that the Society needs for the next phase of its development.

I believe that SAA members can feel confident, therefore, that the Society is poised to move on successfully from this crossroads in its existence, as Grant's army did. With the programs established, the initiatives underway, and the experience gained, SAA is well positioned to continue its outstanding record of service to its members,

and to the entire archival profession.

This time is also a crossroads of another sort for SAA, for it will soon appoint its third executive director. Ann Morgan Campbell, my predecessor, did an enormous amount to nurture and shape the Society for twelve years. I have given four more years to bringing SAA to this next turning point. I know that Council will find us a Grant who can carry the Society on from here, and I wish my successor all the best. He or she will inherit generous and supportive members; an able and involved group of officers and Council members; and a loyal, talented, and hard-working staff.

There are too many of you to thank by name, but I would like to call the roll of former and present SAA staff members over the four years who have worked alongside of me, and who taught me a great deal. Among the former staff members are Bill Burck, Sylvia Burck, Lisa Weber, Patricia Palmer, Toni Pedroza, Tim Ericson, Jane Mohan, Deanna Christiansen, Paul Conway, Marion Matters, and Joyce Gianatasio (who was "office-sitting" this week while we enjoyed Seattle).

Let me say a special word of thanks to the present SAA staff members: Bernice Brack, Troy Sturdivant, Georgeann Palmer, Teresa Brinati, Jim Sauder, Nancy Van Wieren, and Jane Kenamore. I have been able to depend upon them 100 percent, and they did not let me down. More important, they did not let you down, and you owe them a large debt for their good work.

I urge the Society to address soon the need to raise the level of compensation for its staff members, so that SAA can continue to enjoy the quality of work that they bring to its office.

It has been a genuine privilege, and a great deal of fun besides, to serve the Society of American Archivists during these four years. I have enjoyed visiting archivists in their regional associations (twenty-three, by last count), in their classrooms, and in their repositories. I leave the Society's staff with fond memories of the people who were so helpful, the events that were so enjoyable, and the challenges that were so instructive. I feel satisfied with some accomplishments, and humbled by some failures. I look forward to continued association with SAA—and with all of you—in my new position at the National Archives and Records Administration. I intend to remain an SAA member—and to remain active in the Society's endeavors.

To my successor on this particular tower, whoever he or she may be, I echo these words, borrowed from the log of a departing lighthouse keeper, written in 1875:

As a keeper ceasing to exist  
I give to my successor a wish  
that he may have all the good  
luck possible one man to have  
as long as he keeps this station  
for he needs it especially  
in boating. And from his  
enemies Oh Lord deliver him  
for they are manifold.

Thanks for the opportunity to be a part of SAA during this important period in its history.

## Society of American Archivists Minutes Council Meeting Chicago, Illinois, 22-24 June 1990

Present were: President John A. Fleckner; Vice President Trudy H. Peterson; Treasurer Linda Henry; and Council members Nicholas C. Burckel, Maygene Daniels, James E. Fogerty, Linda Matthews, Archie Motley, James M. O'Toole, Mary Jo Pugh, and Robert Sink. Council member Terry Eastwood was unable to attend because of a family emergency. Also attending portions of the meeting were SAA staff members Donn C. Neal, Georgeann Palmer, Jim Sauder, Teresa Brinati, and Jane Kenamore. Attending portions of the meeting as guests were David Klaassen, editor of the *American Archivist*; William Joyce, Princeton University; and Arnita Jones, acting executive secretary of the Organization of American Historians.

### Call to Order and Adoption of the Agenda

Following an executive session, President Fleckner called the meeting to order at 11:15 A.M. on June 22. He reported that in the executive session Council had adopted a calendar for a search for executive director (Peterson motion, Motley seconding); a job announcement for the position (Pugh motion, Fogerty seconding); and creation of a screening committee, chaired by himself and consisting of a public member, a former member of Council, a representative of the staff, and another member of the Society selected to make the committee as representative as possible. (Burckel motion, Sink seconding). All of these motions had been approved unanimously, he added.

Then, on a motion by Henry, seconded by Daniels, the agenda for the Council meeting was approved unanimously.

### Approval of Minutes

Daniels moved that the draft minutes of the Council meeting of February 23-25, 1990 be approved as written. Henry seconded this motion, which was approved without dissent.

### Report of the Executive Committee

Daniels, reporting for the Executive Committee, said that it had reviewed the agenda and had discussed several other items in addition to those on it. She added that she would report specific recommendations of the Executive Committee at the appropriate points in the agenda.

### Report of the President

Fleckner announced that he had appointed Timothy Ericson, the leading vote-getter, as the chair of the 1990 Nominating Committee. Fleckner also reported a positive evaluation of the Executive Director's performance. Fleckner said that he would meet with Ann Gordon, director of a study being supported by the National Historical Publications and Records Commission, and that he would reappoint Anne Diffendal for an additional one-year appointment as the Society's representative to the Commission.

Vice President Peterson then assumed the chair so that Fleckner could participate in a discussion of the position paper that he had drafted on the leadership role of the National Ar-

chives and Records Administration. Daniels said that the Executive Committee had recommended that Council approve the paper in principle, with the understanding that it would be revised and then submitted to the Archivist of the United States during the summer of 1990, and that it be published in a future issue of the *SAA Newsletter*. In response to Fleckner's request for comments, Burckel suggested that the tone of the document be positive, and that it focus on what can be achieved under today's circumstances. Fleckner pointed out that this paper should be thought of as only one step in a continuing discussion. Burckel also said that the position paper seemed to tell NARA what to do without suggesting what SAA might do to help it. Motley and Daniels replied that the paper should express some expectations for NARA as a way of encouraging achievement of the goals. Daniels moved approval of the position paper in principle, with the understanding that comments should be sent to Fleckner. Motley seconded this motion, which was approved without dissent (but with Henry abstaining).

### Report of the Vice President

Fleckner resumed the chair, and Peterson noted that she had prepared some proposed rules for future SAA business meetings; these would be considered later in the meeting, she noted. Peterson expressed her desire to receive from chairs of Council committees any suggestions they might have about appointments to SAA commit-



tees, and about SAA representatives. Peterson also delivered an updated report from Page Putnam Miller and said that there would be two additional action items later in the meeting: resolutions on "fair use" under the copyright law and on the possible move of the New England Regional Branch of the National Archives.

### Report of the Treasurer

Treasurer Henry proposed a contribution of 4% of salaries to the Society's retirement program for employees for fiscal year 1989-90. Motley seconded her motion, which was approved on a unanimous vote.

Henry then reported on the Society's financial status through eleven months of the fiscal year. She noted that, after setting aside funds needed to publish late issues of the *American Archivist*, and after removing the repayment of advances made in support of certification, the General Fund would show a small deficit for 1989-90. Pugh suggested that Henry prepare a report for the business meeting depicting the Society's recent deficits, and how SAA was entirely repaid for its advances in support of certification.

### Report of the Executive Director

Neal and Palmer outlined options for the 1995 annual meeting and presented a recommendation that Council choose the Mayflower Hotel in Washington, D.C., which had offered very attractive guaranteed rates. Peterson moved acceptance of this recommendation, and Fogerty seconded the motion, which Council approved without dissent. Neal went on to say that he and Palmer were still exploring possible sites for 1996. Daniels noted that the Executive Committee

had decided that SAA should look carefully at Salt Lake City (which had invited SAA to meet there) along with other possible host cities to see which site would be best for the Society.

Joined by Kenamore, Neal presented for Council's deliberation a discussion paper on SAA's continuing education program. Fleckner said that he hoped some recommendations could be presented and acted upon following Council's consideration of the paper. During the discussion, Council focused on the relationship between the Society's education program and the educational efforts of the various regional organizations; on the type of educational opportunities the Society should concentrate on; on how to disseminate the materials produced during the NHPRC/Mellon project; on how the Society might recover all or most of the costs of conducting its continuing education program; and on how SAA might structure this program in the future, as it moves from an entrepreneurial to a more sophisticated program.

Council members suggested that the discussion paper be followed by a more detailed assessment of the scope and nature of the Society's educational effort. Among the issues to be addressed would be the proportion of members and non-members in workshops, and whether workshops generate new members; the relationship between expenses and revenues for workshops; a detailed budget for workshops for the coming year; a pricing formula for workshops, including fees for non-members; a three-year plan for the educational initiative that would examine the feasibility of prerequisites and a tiering approach, what new directions the program might take, and what gaps exist in developing a

comprehensive structure of continuing education for the profession; the role that the Committee on Education and Professional Development should play; and how the Society might serve as a host for an NHPRC fellow or for an intern from a higher education institution.

Kenamore agreed to continue work on such an assessment, but Burckel suggested that Council provide her some guidance by enumerating the points on which it had developed consensus. Further discussion revealed that there was consensus on: creating an advisory committee for the program, to be drawn from CEPD; attempting to establish a tiered approach to SAA's educational program; and adopting a pricing philosophy that educational offerings should fully recover costs, if possible.

There was also further discussion of how to disseminate curricular materials created during the NHPRC/Mellon project, and Peterson and Burckel offered to explore licensure of those materials once Kenamore had estimated how much effort it would take to develop all of the materials for each short course.

Neal then distributed sample copies of the draft Council handbook and asked for comments. He noted that several sections remain incomplete.

David Klaassen, editor of the *American Archivist*, then joined Council for a discussion of the editorial and production processes for the journal, and adjustments that might help to keep it on its publication schedule. Klaassen pointed out that timeliness is related to other issues: the adequacy and diversity of the material to be considered for publication and the quality of what is published. He stated that these factors seem to be satisfactory. Klaassen went on to describe



the present editorial and production processes, including the roles of the editorial assistant/copyeditor and the Society's managing editor. When Klaassen had finished, Council members asked about a number of points: where the delays occur, the editor's involvement when there is a special-issue editor, and whether expending additional resources would help to return the journal to its normal schedule. Klaassen mentioned several possibilities for accelerating some forthcoming issues into print, including employing a special copyeditor for the preservation issue, delegating responsibility for the bibliographic issue, and appointing departmental editors for research articles. Henry noted the embarrassment of falling further behind in publication and urged Klaassen to pursue some of these solutions, and others—for example, expanding the number of case studies and developing issues concurrently. Daniels emphasized that the Society's obligation to deliver the *American Archivist* to its members is a fundamental one. Peterson asked Klaassen how much of his time editing the journal occupied, and whether having additional time would mean producing it on schedule. Klaassen estimated that one-third to one-half of his time is spent editing and agreed that having more time might accelerate production. Burckel asked if SAA should move forward to select Klaassen's successor, who could begin work now rather than at the conclusion of Klaassen's term in mid-1991; this way, Burckel pointed out, several issues could be developed concurrently. Fleckner, thanking Klaassen for reviewing this subject with Council, said that it would make a formal response in the hopes that a solution could be found.

After Klaassen departed, Council discussed how to proceed. Burckel moved that Klaassen be asked to provide, for circulation no later than August 1, a projected calendar and explanation of steps that he would take during the remainder of his term as Editor in order to return the *American Archivist* to its normal schedule. O'Toole seconded this motion, which Council approved without opposition. Peterson then moved that the President appoint an ad hoc Council committee to explore alternative structures for the editorship of the *American Archivist*, beginning in 1991; these alternatives would include another three-year term for the current editor, a one-year extension for the current editor, bringing the editor of the journal onto the SAA staff on a part-time basis, creating a series of guest editors, and commencing a search for a new editor for a three-year period following the conclusion of the current editor's term. Pugh seconded this motion, which was also approved unanimously.

Neal reported on the comments of reviewers and panelists on several unsuccessful grant proposals. Fleckner agreed to rethink one proposal, on reference services, and make a recommendation to Council about whether the proposal should be modified and resubmitted. He said that he would ask Margaret Child to examine the other proposal, on preservation, and make a similar recommendation. There was a consensus that the Society should try to redesign and resubmit the latter proposal.

Neal also distributed current membership figures and reported on ongoing discussions regarding a partnership between SAA and a commercial publisher.

## Report of the Council Committee on Committees

Daniels presented final versions of charges for all SAA committees and moved their final adoption. Fogerty seconded this motion, which was approved without dissent.

By lot, Council selected Burckel and O'Toole as its representatives to the 1990 Nominating Committee.

Daniels reported that the SAA Committee on Goals and Priorities had made two requests. Recognizing that the transition to the new three-year planning process had been difficult, CGAP had simplified the document. Burckel suggested that the tone of the revision might be less directive. Peterson questioned the need for roundtables to be specific about their plans for action; she went on to say that representatives have little control over the activities of the organizations to which they serve as representatives, and so the emphasis for both might be on reporting what they had done. Pugh endorsed this idea, recommending that roundtables be asked for reports only unless they have plans to relate or financial requests to make. At Daniels' suggestion, Council commended CGAP's effort and urged it to minimize the reporting for roundtables, representatives, and certain standing committees (Host and Program, for example).

Daniels continued, saying that CGAP had recommended that Council not fund groups that failed to report. The Council Committee on Committees, Daniels added, had suggested that this step not be implemented, at least yet. A consensus among Council members supported delaying the implementation of CGAP's recommendation.

Daniels also stated that CGAP had continued to ponder a possible grant proposal, but that

further consideration would be called for.

Moving on to four recommendations received from the Awards Committee, Daniels said that it had asked, first, for a sense of Council about how active the Committee should be in soliciting nominations for awards and when issues related to awards should be referred to Council. There was a consensus that the Committee should be quite active in soliciting nominations, although it should be mindful of possible conflicts of interest. Council also expressed the consensus that the Awards Committee should refer any policy issues relating to awards to Council through normal channels; however, Council would not review specific award decisions unless a policy issue were involved.

The second matter raised by the Awards Committee, Daniels went on, was the eligibility for the Distinguished Service Award. Daniels said that the Awards Committee had recommended that regional archival organizations and educational programs should be considered eligible, and she moved new language for the award to allow this. Motley seconded the motion. Council discussed the wisdom of including educational programs and regional organizations as possible recipients, and Henry emphasized the need for a recipient to have made a truly distinguished contribution to the archival profession. During the discussion, the original motion was modified to authorize expanded eligibility in concept, with the precise language to be drafted later through consultation between the Awards Committee and the Council Committee on Committees. The modified motion was approved unanimously.

The next issue raised by the Awards Committee was an apparent difference of interpreta-

tion of the criteria for the Jameson Award, and of who determines these criteria. Daniels described the differing interpretations and relayed the Awards Committee's question about the role of Council in providing oversight of the Committee. She moved amendment of the guidelines to include persons active at the international, national, state, or local level, and O'Toole seconded her motion. Burckel stated that altering the criteria would change the focus of the Jameson Award from advocacy on the national level, where SAA ought to concentrate, to advocacy on a level that the award of a regional archival organization would recognize; he suggested that the Committee on Regional Archival Activity be consulted before this was done. Matthews suggested that the Jameson Award emphasize the national impact of advocacy, wherever the contributions are made, and there was a consensus that this was the correct interpretation. Daniels' motion was then approved unanimously.

Finally, Fleckner reported the Committee's suggestion that SAA recognize a police officer instrumental in a recent theft case by presenting him a special commendation at the Seattle meeting. Daniels made a motion to this effect, and Burckel provided a second. The motion was approved without dissent, and the matter was referred to the Awards Committee and the Committee on Public Information. Council then expressed its appreciation to the chair of the Awards Committee, Valerie Browne, for her work in bringing these matters to Council's attention.

#### **Report of the Council Committee on Sections and Roundtables**

Council discussed a report on the relationship between sec-

tions and roundtables and decided that this subject should be brought to the attention of interested groups for discussion in Seattle and should be given detailed attention at Council's Winter 1991 meeting.

Council approved petitions for the creation of two new roundtables. On a motion by O'Toole, Fogerty seconding, it voted unanimously to establish an Architectural Records Roundtable. On a motion by O'Toole, seconded by Peterson, Council approved without dissent creation of an Archivists of Women Religious Congregations Roundtable.

#### **Report of the Council Committee on Task Forces and Representatives**

Burckel reviewed a communication from the Task Force on Standards regarding the findings and recommendations of the Working Group on Standards for Archival Description. The Council Committee on Task Forces and Representatives, Burckel said, recommended (and he moved) that Council commend the Working Group for its work and commit the Society to implement its report to the extent that available resources permit. Matthews seconded this motion, which was approved unanimously. Burckel continued by moving the Committee's recommendation of creation of a Standards Board, with funding for a meeting and with the duties and composition outlined in the communication from the Task Force (but modified in the instance of the fourth point). Specifically, the duties of the Board would include:

- (1) preparing and disseminating information regarding procedures for standards governance within SAA;

- (2) reviewing proposals from SAA units (committees, task forces, sections, roundtables,

Council, and officers) for development of new or revised standards;

(3) identifying and involving appropriate SAA units in the development of specific proposals, ensuring that all affected constituencies are consulted;

(4) recommending to Council action on proposed standards;

(5) publicizing and promoting effective implementation of accepted standards;

(6) establishing a process for the periodic review of all standards; and

(7) promoting effective interaction with allied professions and standards organizations and overseeing SAA's participation in the cooperative development of standards.

Pugh seconded Burckel's motion. Peterson questioned the breadth of the Board's proposed charge, in view of the fact that other groups address certain issues—ethics, for instance. Council discussed at length the wisdom of having such a group to review all proposed standards and to make recommendations to it, after which it voted nine (Fleckner, Henry, Burckel, Fogerty, Matthews, Motley, O'Toole, Pugh, and Sink) to two (Peterson and Daniels) to create the Standards Board.

Motley reported on progress on guidelines for representatives, and Burckel distributed a summary of recommendations. Motley moved elimination of the Society's representative to the Association of Research Libraries; Matthews seconded his motion, which carried unanimously.

Council also discussed the report of the Society's representative to NHPRC.

### **Report of the Council Committee on Goals and Priorities**

Council elected to discuss together Council's Three-Year

Plan and its goals and priorities. Matthews described the amalgam she had created of several earlier documents, noting that some sections still needed action statements and that others might be changed as a result of the meeting. Pugh noted that the goal statements should be expanded to include Council's commitment to standards.

After discussion, Fleckner suggested that the plan be developed further, especially in light of other recent developments—especially the search for a new executive director. It was agreed that individual members would take responsibility, in advance of the Seattle meeting, to analyze the plan and make some recommendations regarding its elaboration, action statements, and how to extend the document into an additional year. Members and their assignments were as follows: standards, Pugh; education, O'Toole; publications, Pugh; preservation, Burckel; public information and development, Fogerty; Council efficiency and effectiveness, Motley; and financial abilities, Sink. Peterson reported that the Editorial Board might be able to recommend some criteria for certain publications and moved that they be asked for this assistance. O'Toole seconded her motion, which was unanimously approved. It was also agreed that the SAA Constitution must be modified to define what publications members receive as a benefit of membership, and that Eastwood would be asked to perform this task.

### **Old Business**

Henry introduced the draft of a by-law concerning payment of dues, pending passage of the proposed constitutional amendment by the 1990 Business Meeting. Matthews seconded her motion to approve this by-law, contingent upon passage of the

amendment, and it was adopted without dissent.

Discussion of a financial plan for the Society, and that of a proposed budget for the Society for 1990-91, was combined with consideration of a proposed dues increase. William Joyce, chair of an ad hoc Task Force on Dues Increase, joined Council for this discussion.

Fleckner thanked Joyce for the report of the Task Force, which Joyce then reviewed in detail. Council members asked about the implications for institutions of an increase in the dues for individuals, since the two rates are now linked; several members wondered if the institutional rates might be too high if the individual rates are raised along the lines of the Task Force's recommendation. Peterson asked about the Task Force's suggestion that SAA revive a life membership category, and a consensus opposed making this category available. Daniels asked if there were any alternatives to increasing membership rates at the lower end of the salary scale, and Joyce replied that the Task Force had attempted to make the range of dues more progressive than at present but that some increase would be needed in the lowest categories. Peterson inquired about the Task Force's recommendation that a retired category be created, and Joyce explained that members of the Task Force had argued that such a category afforded retired members a sense of dignity. There was considerable discussion of this point, including how to define "retired" and how to recognize the difference between salary and income. Peterson asked why the Task Force had used \$10,000 salary increments in its plan, and why there were six categories instead of the present three. Joyce explained that simplicity seemed

to dictate categories that fell into \$10,000 units and that six categories, a number the Task Force had inherited from previous discussions of a new dues structure, seemed to allow a greater spreading of members and for future growth in salaries. Daniels inquired if a new dues system could be phased in over at least two years, but Joyce said that the Task Force recommended against this because it would delay and complicate implementation of the plan. O'Toole wondered when the Society would have to raise dues again, and whether Council should seek some mechanism for addressing this issue on a regular basis. Discussion then turned to strategies for presenting the proposed dues increase. Joyce emphasized the need for education of the members, and Council talked about how to achieve this through a special mailing and other ways. Joyce finished his report by stating that it had been the Task Force's desire to devise a new dues structure that would establish the maximum equity at all levels.

Before acting on the recommended dues increase, Council turned to a budget for SAA for 1990-91. Henry presented a draft budget and drew Council's attention to several features. She explained that the draft budget included revenues from the proposed dues increase (less an increased attrition rate), adjusted for implementation after the annual business meeting. She also noted provision for a 1% surplus in order to rebuild the SAA reserves. Henry pointed out that substantial reductions in expenditures—from \$80,000 to \$85,000—would be required if the dues increase did not materialize. Fleckner suggested that future budgets include reinvesting some of the interest from the education endowment rather

than using those funds as current income. Daniels expressed concern about approving a budget that assumed an increase in revenues from the dues proposal, but Henry replied that the best course would be to approve the proposed budget and then to make revisions if necessary. Peterson suggested that Henry be prepared to show the impact of these substantial reductions, should they become necessary. Neal noted that the draft budget included an increase in the Society's dues to the National Coordinating Committee for the Promotion of History (from \$3,500 to \$4,000). Matthews moved acceptance of the budget, and O'Toole seconded this motion.

With the budget under discussion, Council considered requests from reporting units. Daniels suggested that in view of the Society's financial limitations Council reaffirm its policy of providing \$1,500 for each mid-year meeting, if needed, and this was done. Council then voted a total of \$11,321 to support these requests and asked the Executive Director to reduce other expenditures by \$1,821 in order to retain a 1% surplus. Council then voted unanimously to approve the draft budget.

Turning back to the dues proposal, Council members expressed their opinions on several issues: whether or not to attempt to phase any increase in over time; whether institutional dues should increase as much as the Task Force's proposal envisioned; and, finally, whether the proposed categories and rates were satisfactory. A consensus opposed trying to phase in an increase, but there was a divided opinion on the relationship between individual and institutional dues, and on whether the formula adopted by the 1989 annual business meeting of fixing the latter one-third higher than

the highest individual category should be maintained. (There was agreement that institutional dues ought to be set at least as high as the top individual category.) Discussion focused next on whether to increase the proposed rate for the highest individual level (salaries of \$60,000 and above) to \$155, so that it would be \$20 above the next-highest rate, or whether to top off the categories at \$135. A consensus supported keeping the proposed category of \$60,000 and above but raising its rate to \$155. Council then turned to the level for institutional dues, tentatively setting them at \$175 (\$350 for sustaining members). Other minor adjustments were also made. Sink moved adoption of the proposed new dues schedule, and Henry seconded this motion, which was approved unanimously.

Peterson then introduced discussion of a proposed new by-law by offering three possible ways in which a "trigger" would compel Council to consider raising dues. One mechanism, she said, would be requiring Council at least every third year, beginning in 1990, to review the dues and propose a revision. Another would be reconsideration if and when dues revenues fell below 30% of the Society's total revenues. A final method, Peterson said, would be requiring Council to review the dues structure whenever the cost of living had increased 20% since the time of the previous increase. Council expressed a preference for the first mechanism, which Peterson then put in the form of a motion. Burckel seconded her motion, which passed with a unanimous vote.

Since the Task Force had recommended that subscription rates for the *American Archivist* should be raised (to \$75 for North America and \$90 for all others) if dues for institutional members were raised, Council



next considered whether or not to take this step. Pending further examination and discussion, it tentatively decided not to increase the rates.

Henry then proposed that Fogerty chair an ad hoc Council committee to devise a strategy for securing support for the proposed increases at the 1990 annual business meeting, and Fogerty agreed to take on this responsibility. Henry also reported on the financial implications for the 1990-91 budget of not raising institutional dues and subscription rates as originally projected; Council would have to eliminate \$22,000 in expenditures because of lower revenues or else approve a budget with a substantial deficit, she said. She urged Council to reconsider its tentative decisions on these two matters, and Council voted unanimously (on a motion by Burckel, seconded by Motley) to revise the previously approved proposal to increase institutional dues to \$200 (\$400 for sustaining members) and to raise subscription rates to \$75 (North America) and \$90 (all others).

Peterson moved adoption a policy statement on the closing of archives and announcing in the *SAA Newsletter* that copies of the statement would be available by request from the SAA office. Henry seconded the motion, which was approved without dissent. (See page 516.)

At this point in the agenda, Council was joined by Arnita Jones, Acting Executive Secretary of the Organization of American Historians. Jones explained that she was representing the Joint Committee of Historians and Archivists, which had proposed a conference on the future of graduate education that Council had discussed at an earlier meeting. Jones cited some issues and concerns that might be discussed at such a

conference, including preparation of undergraduate majors, the curriculum in graduate training, the place of new programs (such as public history programs), educating new populations, the changing technology for research, and the "streamlining" going on within many higher education institutions. Jones emphasized the need for historians and archivists to work together—for the development of sufficient information, for communication, and for advocacy. In response to a question from Daniels about the funding for this kind of conference, Jones said that it might be held at a center like Wingspread, might be funded by a private foundation, or might be funded by the National Endowment for the Humanities or by the Fund for the Improvement of Post-Secondary Education. Daniels also asked Jones to speak to the possible results of such a conference. Jones said that it might produce, in addition to a published report, a consensus on the information needed for better planning, the kind of networks needed, and what graduate education ought to consist of. Peterson suggested that the Department of Education might also be explored as a source of funding. Jones underscored the viewpoint that historians ought not to be examining these topics alone, and that archivists could play a critical role in the discussions. Pugh drew a distinction between graduate and professional education, saying that archivists should be involved in an analysis of training for research but that they have a clear sense of what is needed for archival education itself; Pugh asked what questions the conference would try to resolve, and she recommended that librarians and information scientists be involved

in any conference. Jones replied that the agenda would be training for research, and that archivists certainly have a stake in that topic. Another theme of a conference, Jones went on, might be information; here, she said, most historians need to learn more about changes in the archival world. Jones concluded by saying that greater awareness is needed on both sides, and she noted that a conference that brought to the surface differences of opinion could help to build greater awareness. It was agreed that Jones would prepare a revised concept paper for the conference and that she and the executive director would explore possible funding sources.

Council discussed the White House Conference on Library and Information Services. Sink introduced the following motion:

SAA urges archivists to participate in state preconferences for the White House Conference and encourages use of CGAP reports as the basis of an archival agenda for the conference.

Peterson seconded the motion, which was unanimously approved. Council requested that the substance of the motion be communicated to SAA members through the July 1990 *SAA Newsletter*.

### New Business

Daniels moved and Henry seconded the following motion:

SAA endorses the position of the American Association of Museums in opposition to the proposal that museums should list collections, including archives, as assets on their financial balance sheets.

The motion carried unanimously.

Peterson moved that SAA go on record in support of H.R. 4263 to remove the distinction between published and unpublished works in the application of the fair use defense under

## Society of American Archivists

### Statement Concerning the Closing of Archives

The information contained in historical documents and records in all forms is a valuable property of the institution that created or received it and is part of the historical heritage of mankind. Archival materials are unique, permanently valuable, and largely irreplaceable.

Effective management of valuable property and corporate resources is a basic institutional responsibility. In the same way, proper care of archival materials is an institution's duty to its trustees, shareholders, members, and community. The hiring of an archivist signals a commitment to this duty by providing for the secure preservation and professional care of unique and permanently valuable historical materials.

Establishment and development of an archives is a major task that requires time, resources, and attention. It also is a commitment that carries with it an ongoing responsibility. For this reason, any decisions that may lead to closing an archives or curtailing its operations should be taken carefully and deliberately.

The institutional cost of temporary or permanent closing of an archives is substantial. In a closed archives, information needed to protect institutional or individual legal rights and interests or for day-to-day business is inaccessible. Information needed to meet legal, administrative, or financial requirements or to provide a balanced and ac-

curate picture of past events or actions is missing. Furthermore, information may be lost forever if the archival records are lost. The institution's reputation as a responsible citizen and its image within its community and beyond may be threatened.

Financial costs of closing an archives also are high. Outside the protective archival environment, valuable documents and files may be lost. If not, they are likely to deteriorate and, without a trained archivist, may lose their organization, integrity, and value as evidence. Electronic data and photographic materials suffer particularly without proper archival care. Reestablishment of archival controls is labor intensive and expensive.

The Society of American Archivists recognizes that many institutions face fiscal pressures that may from time to time lead them to consider closing an archives or curtailing its basic activities. Nonetheless, the Society believes that an institution must assess both short and long-term and direct and indirect costs of this action before making any decision in this regard. Archival experts should be consulted concerning the costs and consequences of any action. Deliberation should be particularly cautious if private or donated historical materials are involved or if the archives has been supported in any part by grants, public funding, or volunteer work. Such factors can create poten-

tial liability for the institution. A proposed closing also must be discussed with the users of the archives, both within and outside the institution.

After careful consideration, should it still seem necessary to close the archives or significantly curtail operations, it is imperative that adequate notice be given to archival staff to permit them to plan an orderly transition, to make arrangements for the safety of archival materials owned by the institution, and to find suitable employment elsewhere. Again consultation with outside archival experts is essential to ensure that the institution's interests are secure.

A plan must be in place for physical protection of historical materials upon closure of the archives. Access to the materials must be strictly regulated and unauthorized or unsupervised access prohibited. A preliminary agenda of steps needed to reinstitute the archives also should be in place.

Should circumstances so dictate, the institution may consider donating its archives to a suitable repository provided that adequate funding is available to provide for responsible care. Such a decision should result from a careful negotiation of both parties' rights and responsibilities.

The Society of American Archivists stands ready to provide information regarding these matters at any time.

Section 107 of the Copyright Act. Matthews seconded the motion, which was unanimously approved.

O'Toole introduced the following motion, which was seconded by Matthews and unanimously approved (Peterson and Henry abstaining):

Whereas, the regional branches of the National Archives provide important services both to federal government agencies and to the general public; and

Whereas, a proposal has been made to move the New England Regional Archives Branch from Waltham, Massachusetts, to Pittsfield, Massachusetts; and

Whereas, locating the archives branch in Pittsfield would remove it by a great distance from the offices it serves and from the vast majority of the researchers who draw on its resources;

Be it Resolved: That the Council of the Society of American Archivists opposes the proposed move of the New England Regional Archives Branch to Pittsfield, Massachusetts; and be it further resolved that the President of the Society be instructed to forward a copy of this resolution to the Archivist of the United States and to appropriate members of Congress.

Henry moved creation of a proposed Task Force on Development. This motion was seconded by Sink and unanimously approved. It was agreed that Henry would prepare the charge for the Task Force, and that Peterson would make appointments to it.

Peterson moved approval of a new bylaw setting forth the following rules and procedures for future SAA annual business meetings:

#### **Rules for SAA Annual Business Meeting**

1. Full members, associate members, student members, and honorarium members may vote at

the SAA annual business meeting. Institutional members cannot vote.

2. All members may participate in discussions at the business meeting. Nonmembers may speak by general consent of the membership; if a member calls into question the participation by a nonmember, the chair will ask for a vote by the members present. A simple majority will provide consent to speak.

3. Persons seeking recognition from the chair shall identify themselves for the record, giving their names, institutional or other affiliation, and whether they are members or nonmembers.

4. In any question of the membership status of an individual, the SAA office roster of members for the month in which the annual meeting begins will be definitive.

5. One hundred individual members constitute a quorum.

6. Debate shall be limited to five minutes for each speaker; no speaker may have the floor twice on the same question until all who wish to speak have spoken.

7. All resolutions brought before the business meeting for action shall be submitted to the Council Resolutions Committee no later than noon of the day preceding the business meeting. All resolutions shall be available to the members in writing at the meeting.

8. Changes to the bylaws of the Society may be adopted by a majority vote of those attending.

9. Amendments to the Constitution that have been approved by Council in advance of the business meeting may be adopted by a majority vote. Amendments to the Constitution that have not been approved by Council may be adopted by a two-thirds vote.

10. At the beginning of the meeting the president will announce the agenda and rule on

proposed additions. After the agenda has been adopted by the majority of the members present, it can be departed from only by the general consent or by a two-thirds vote if any member requests a vote.

11. Proxy votes are not permitted.

12. Aside from the rules above, *Robert's Rules of Order* (latest revised edition) will govern the business meeting.

Matthews seconded this motion. After some discussion, point 7 was amended to read as follows:

7. All resolutions brought before the business meeting for action and submitted to the Council Resolutions Committee no later than noon of the day preceding the business meeting shall be available to the members in writing at the meeting. Resolutions from the floor may be considered by majority vote of those present.

Motley expressed his opinion that it should not be necessary to obtain a majority vote of those present for a resolution from the floor to be considered by the membership. The vote on the revised rules statement was nine (Fleckner, Peterson, Henry, Burckel, Daniels, Matthews, O'Toole, Pugh, and Sink) to one (Motley). (Fogerty absent.)

#### **Announcement of Next Meeting**

Fleckner announced that the next regular Council meeting would be held in Seattle, Washington, on Wednesday, August 29, beginning at 9:00 A.M.

#### **Adjournment**

There being no further business, Fleckner adjourned the meeting at 12:30 P.M. on June 24.

DONN C. NEAL

*Executive Director*

Adopted by SAA Council: August 29, 1990





# The American Archivist

## EDITORIAL POLICY

The *American Archivist* is the quarterly journal of the Society of American Archivists. It seeks to reflect thinking about theoretical and practical developments in the archival profession, particularly in North America; about the relationships between archivists and the creators and users of archives; and about cultural, social, legal, and technological developments that affect the nature of recorded information and the need to create and maintain it.

### *Journal Format*

The *American Archivist* has several departments to accommodate a variety of types and lengths of articles. **Research Articles** are analytical and critical expositions based on original investigation or on systematic review of literature. Subjects of broad interest are preferred. Direct inquiries to David Klaassen at (612) 624-4377.

**Case Studies** are analytical reports of projects or activities in a specific setting that offer the basis for emulation or comparison in other settings. Direct inquiries to Susan E. Davis at (608) 833-0089.

**Perspectives** are commentaries, reflective or opinion pieces, and other relatively informal presentations addressing issues or practices that concern archivists and their constituents. Direct inquiries to Scott Cline at (206) 684-8353.

The **International Scene** may include elements of any of the above formats in covering archival developments outside the United States. Direct inquiries to Marjorie Barritt and Nancy Bartlett at (313) 764-3482.

**Surveys** are invited essays that review the developments (as opposed to the literature) in specified areas in a way that describes particular initiatives and places them in the context of broader trends. Direct inquiries to David Klaassen at (612) 624-4377.

The **Reviews** department evaluates books and other archival literature as well as the tools and products of archival activity such as finding aids, microfilm editions, audio-visual materials, exhibits, and computer software. On occasion it includes review essays to permit comparative analysis of related publications. Reviewers are selected by the Reviews editor. Direct inquiries to Anne R. Kenney at (607) 255-6875.

The **Forum** contains letters to the editor commenting on recently published articles or other topics of interest to the profession.

### *Manuscript Submission Requirements*

Manuscripts should be typed in English on white paper 8½-by-11 inches in size (computer-printed documents are preferred to be in near-letter-quality mode). Both text (including lengthy block quotations) and footnotes should be double-spaced with the notes following the text, not at the foot of each page. All pages should be numbered. The author's name and address should appear only on the title page, which should be separate from the main text of the manuscript. The preferred maximum length is 6,000 words for research articles and surveys and 3,000 words for case studies and perspectives. All articles should be accompanied by a 100-word abstract.

Four copies of the manuscript should be submitted for research articles, and two copies for all other types of articles.

Illustrations are welcome in all departments. Only photocopies of photographs need be included with the initial submission of an article. Glossy 8-by-10 inch originals will be

## EDITORIAL POLICY

required when and if the article is accepted for publication. Similarly, figures and charts can be submitted initially in rough form, but authors must be prepared to provide camera-ready artwork or illustrations if their articles are accepted.

Editors of the *American Archivist* use the *Chicago Manual of Style*, 13th edition (University of Chicago, 1982), as the standard of style and footnote format, and *Webster's Third New International Dictionary of the English Language*, (G. & C. Merriam Co., 1971) for spelling. Terms having special meanings for members of the profession should conform to the definitions in "A Basic Glossary for Archivists, Manuscript Curators, and Records Managers," *American Archivist* 37 (July 1974): 415-33. Authors' variations from these standards should be minimal and purposeful.

Manuscripts prepared on computers can dramatically improve the speed and accuracy of editorial text handling. Authors should indicate at the time of initial (hard copy) submission if their manuscripts are available in electronic form, identifying the type of computer, the word-processing program, and the diskette size. Upon acceptance, the editors will advise on whether to send a computer data file on diskette as well as a typescript copy.

The *American Archivist* will not consider a manuscript that is being reviewed by another journal at the same time, nor will it normally consider an article that has been published previously in a similar form.

The author is responsible for understanding and following the principles that govern the "fair use" of quotations and illustrations and for obtaining written permission to publish, where necessary. Accuracy in footnote citations is also the author's responsibility, although the editors may occasionally confirm the accuracy of selected citations. Authors are required to assign copyright of their work to the journal but can expect to receive permission for subsequent use of their own work without restriction.

Authors wanting to submit manuscripts or to obtain more detailed guidelines should contact Teresa Brinati, Managing Editor, Society of American Archivists, 600 S. Federal, Suite 504, Chicago, IL 60605. Telephone: (312) 922-0140.

### *Review and Production Procedures*

Research article manuscripts are submitted (without the author's name) to qualified readers to evaluate them and recommend acceptance, rejection, or revision. Submissions to the Case Studies, Perspectives, and International Scene departments are normally not sent out for peer review, although the department editors may seek an outside evaluation if they believe it appropriate. Author notification of a final decision normally takes a minimum of eight to ten weeks if a peer review is involved, and a shorter time for editorial review only. Acceptance for publication is usually on the condition that specified revisions be made. If an article is accepted, the author will be requested to prepare a brief biographical sketch to accompany the published article. Authors are given the opportunity to approve all editorial changes and to review galley or page proofs for correction of printers' errors. The minimum editorial and production cycle—which includes receipt of a manuscript, review, acceptance, revision, page makeup, printing, and distribution—is between six and nine months; various factors can extend that time period.

Authors will receive ten tear-sheets of their articles without charge; reviewers receive two tear-sheets. Additional reprints may be ordered with a form enclosed at the time galley proofs are sent to the author for review.

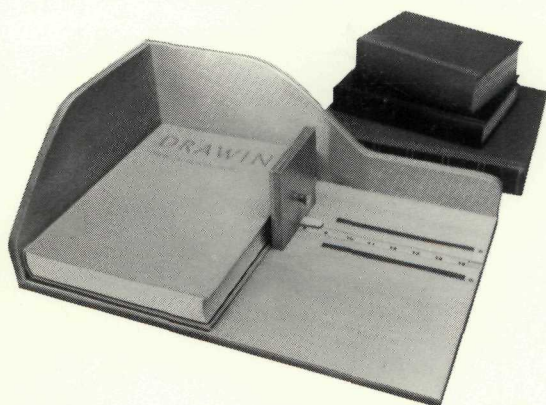
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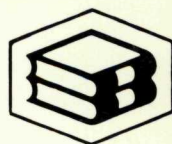
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