

Models and Resources Committee Handbook



Archivists of
Religious Collections
Section

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Models and Resources Committee

Purpose

The purpose of the Models and Resources Committee is to provide information to section members on all aspects of archival work relating to the administration of religious collections.

Objectives

- To recommend standards and guidelines to archivists of religious collections so that they may improve the quality of their collections.
- To provide samples of policies, forms, publications, manuals, and finding aids for religious collections to section members.
- To identify and provide information on resources pertinent to religious archives.

Description of Responsibilities

- Chair of Models and Resources Committee to attend annual ARCS steering committee meeting
- Chair to prepare and give report at annual ARCS general meeting
- Chair to participate in general business matters of the steering committee, including discussions on meeting agendas and session proposals.
- Committee to develop models and resources on archival practice for membership reference to post on the website and share with ARCS members at annual meeting
- Committee to periodically update Resources section of website with new resources and make sure links are still active.

Attendance

Motion passed at August 2022 Models and Resources Committee meeting:

- If someone misses three meetings in a row without communicating that to the chair, they will be removed from the committee as an inactive member.

Furthermore, if someone misses more than six meetings per year, regardless of communicating with the chair, that person will be removed from the committee.

- Reasons:
 1. Members may forget or get involved in something else and miss a meeting.
 2. Three meetings in a row is too high a level of inactivity--one-fourth of a year.
 3. No communication for either forgiveness or permission is a clear indication of lack of serious participation.
 4. The chair should not have to initiate any communication about this. They may, but it is not required.

Organizing educational outreach

Religious archives are often under-resourced and not always staffed by trained archivists. Therefore, the goal of the SAA ARCS Models and Resources Committee is to deliver training webinars that can be recorded and accessed via our YouTube channel. Through a member survey in July 2021, we identified training that was most needed by religious archivists:

Core: Archival Processing; Archival Description; Introduction to Records Management; Reference Services; Environment and Storage; Outreach; Oral History; Introduction to AtoM; Introduction to CONTENTdm; Introduction to ArchivesSpace; Importance of Religious Archives

Advanced: Appraisal; Preservation of Paper and Photographs; Electronic Records Management; Legislation: Privacy and Access; Copyright; Cleaning and Storing Artifacts and Textiles; Outreach Lesson Planning; Flattening Rolled Items; Accessibility

Digital: Digital Preservation; Image Digitization; Audio Digitization; Preserving film and outsourcing digitization

We developed two types of training formats: Lunch and Learn sessions and Archival Chat sessions.

Lunch and Learn

These 60-minute Zoom webinars will improve competencies and build archival capacity thus better equipping religious archivists to preserve heritage. The webinars will also build capacity for larger organizations because experts in the field will deliver training which will be accessible as a recording on our YouTube channel.

These are one-hour sessions using the Zoom webinar format with a 40-minute presentation followed by 10-minute question period facilitated by the support person who introduces the presenter.

Questions should be put in the Q & A feature and read by the support person since attendees will not be able to use video or microphones. The support person should not read chat messages out loud. The host will also be present to assist with technical issues.

Archival Chat

These 60-minute Zoom meetings will strengthen networks of religious institutions and support remote and under-resourced organizations which may have limited funds for travel. These sessions will provide a channel for sharing knowledge. As informal “safe spaces,” the sessions will not be recorded, but summaries of the key learnings will be provided afterward in the *Archival Spirit* newsletter. The summaries are to be prepared by the support person.

These one-hour sessions use the normal Zoom meeting format.

The support person introduces the presenter who then gives a brief 15-30-minute presentation. The presenter/support person should have several questions prepared to prompt discussion. The remaining 20-35-minutes is for open discussion, facilitated by the presenter and support person.

Attendees take turns by using the raise hands feature. The support person can assist in supplying discussion questions and taking notes of key points to be posted on the SAA ARCS site afterward. The support person should not read chat messages out loud. The host should remove any attendee who behaves inappropriately.

Inviting presenters

Sample text for invitation for Lunch and Learn session

Copy and paste this text into an email:

We would like to invite you to instruct a “Lunch and Learn” session for the Society of American Archivists – Archivists of Religious Collections section. We are interested in a presentation on the topic GIVE TOPIC.

The presentation will be in a Zoom webinar format. You will have 40 minutes to present, and then 10 minutes will be allocated for questions from attendees, via the Zoom Q & A feature.

The webinar will be recorded and available for viewing after your presentation. You can see examples of other webinars we have hosted here:

<https://www.youtube.com/channel/UCpWzzChlhR-8O7CrKmiL2rw/videos>

If you are willing to accept this invitation, we will be most grateful. Please let us know what date and time works best for you, as well as a title for your presentation. We will follow up with more detailed instructions once we hear back from you.

Sample text for invitation for Archival Chat session

Copy and paste this text into an email:

We would like to invite you to moderate an “Archival Chat” session for the Society of American Archivists – Archivists of Religious Collections section. We are interested in hosting a conversation on the topic GIVE TOPIC. Your role would be to briefly present the topic and provide some guiding discussion questions, with the view to encouraging an open discussion by attendees.

The presentation will be in a Zoom meeting format. You will have 15-20 minutes to present, and then 30-35 minutes will be given over to giving attendees an opportunity to share their thoughts, taking turns via the Zoom raised hands feature.

As an informal “safe space,” the session will not be recorded, but summaries of the key learnings may be provided afterward in the *Archival Spirit* newsletter by the support person.

If you are willing to accept this invitation, we will be most grateful. Please let us know what date and time works best for you. We will follow up with more detailed instructions once we hear back from you.

Following up with presenters

Lunch and Learn confirmation

Copy and paste this text into an email:

Thank you for agreeing to instruct a “Lunch and Learn” session for Society of American Archivists – Archivists of Religious Collections section.

Your session will be moderated by SUPPORT PERSON. The title is “TITLE.”

The webinar is scheduled for DATE AND TIME.

As indicated, earlier, the webinar will be recorded and available for viewing after the session.

I am copying SUPPORT PERSON on this email. Please contact your support person directly to provide a short bio, and if you have any questions. A Zoom link with further instructions will be sent out closer to the date.

Please contact us if you have any poll questions you would like us to build for you.

Lunch and Learn instructions

Copy and paste this text into an email:

Thank you for confirming the date and title for your presentation. You have been sent your special panellist link for the “Lunch and Learn” webinar on DATE AND TIME.

Please join the Zoom webinar at TIME, so that we can have a practice session to make sure everything is working correctly.

NOTE: Panelists joining the webinar practice session must use the unique panelists join link sent to them by the host or be signed-in to their Zoom account on the desktop or mobile app with the email matching the panelist assignment.

If not signed-in or signed-in with a different Zoom account, they will be directed to join as an attendee and will not be able to join the practice session.

If you have any discussion questions you would like us to create polls for (single choice, multiple choice, Likert scale, short answer), please send us the questions in advance.

You will be able to share your screen. Here are some Zoom tips:

Seeing your notes

With PowerPoint

In PowerPoint, under Set up Slide Show, choose Presented by a speaker (full screen) and click the Use Presenter View box.

In Zoom, choose Share Screen and then click on Advanced. Then choose Portion of Screen.

On the PowerPoint slide, click From Beginning, and on the bottom left of your slide, click on the three dots, and choose Show Presenter View.

Now in Zoom, drag the green box around your slide. You can hide the floating meeting controls. When you are done, hit ESC to stop screen sharing.

With Keynote (thanks to George Oates)

Go to the Play menu and choose In Window.

Then, when you hit Play Slideshow, it will appear in a separate floating window, and you should still be able to see the Keynote menu items.

Return to the PLAY menu, and you'll see an option to Show Presenter Display in Window.

This will open another window that you can see your notes/timer/next slide in.

You can share the first window that just shows your slides when you share screen in Zoom.

Sharing a video

If you are showing a video, you will need to make sure that you have checked the **Share sound** and **Optimize for video clip** boxes once you click on Share Screen.

Audio

If you have an external microphone, this will improve your sound quality significantly, so we encourage you to use one.

Archival Chat confirmation

Copy and paste this text into an email:

Thank you for agreeing to moderate an “Archival Chat” session for Society of American Archivists – Archivists of Religious Collections section.

Your session will be moderated by SUPPORT PERSON. The title is “TITLE.”

The meeting is scheduled for DATE AND TIME.

It would be helpful if you could prepare a few discussion questions to move the discussion forward if needed.

The session will not be recorded, but SUPPORT PERSON will take some notes summarizing the key learnings of the session which may be shared in the *Archival Spirit* newsletter.

I am copying SUPPORT PERSON on this email. Please contact your support person directly to provide a short bio, and if you have any questions. A Zoom link with further instructions will be sent out closer to the date.

Please contact us if you have any poll questions you would like us to build for you.

Archival Chat instructions

Copy and paste this text into an email:

Here is the link for the DATE “Archival Chat” at 3:00 pm ESTEDT.

PLEASE NOTE: Both the presenter and support person MUST register in advance for this session.

If you could please log in 30 minutes before the meeting start time, this would be very good as it would give us time to ensure everything is working correctly.

If you have any discussion questions you would like us to create polls for (single choice, multiple choice, Likert scale, short answer), please send us the questions in advance.

You will be able to share your screen. Here are some Zoom tips:

Seeing your notes

With PowerPoint

In PowerPoint, under Set up Slide Show, choose Presented by a speaker (full screen) and click the Use Presenter View box.

In Zoom, choose Share Screen and then click on Advanced. Then choose Portion of Screen.

On the PowerPoint slide, click From Beginning, and on the bottom left of your slide, click on the three dots, and choose Show Presenter View.

Now in Zoom, drag the green box around your slide. You can hide the floating meeting controls. When you are done, hit ESC to stop screen sharing.

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You can share the first window that just shows your slides when you share screen in Zoom.

Sharing a video

If you are showing a video, you will need to make sure that you have checked the **Share sound** and **Optimize for video clip** boxes once you click on Share Screen.

Audio

If you have an external microphone, this will improve your sound quality significantly, so we encourage you to use one.

Roles and responsibilities – Support Person for Lunch and Learn

Models and Resources Committee (MRC) members will serve as support persons. The role of the support person is to ensure the Zoom session runs smoothly. To do this, the support person will:

- Contact the presenter to get their biography.
- You will be sent a special Zoom link to use. Do not register in advance. Use only the special link you are sent.
- Arrive **30 minutes early** to ensure the presenter can share his/her screen.
- Ensure the session starts **promptly** on the hour. Do not wait for stragglers because we may run over time if we do so.
- Give the land acknowledgement at the end of this manual.
- Explain that people can click on the closed captioning button at the bottom of their screen, and under “Live Transcript” click “Enable Auto Transcription” so they can get closed captioning.
- Explain that people should **only** use the Q & A feature to make comments or ask questions (not the chat).
- Introduce the presenter at the beginning of the Zoom session.
- Altogether, the initial housekeeping/land acknowledgment/biography should not take more than 10 minutes.
- Monitor the Q & As and read any questions to the presenter at the end. Don't worry if all questions cannot be answered, and **don't offer to have presenter follow up afterward.**
- Keep track of time and alert presenter if necessary.
- Thank presenter at end of Zoom session.
- Remind people of our next upcoming session.
- Send thank you note to presenter.

Script for Lunch and Learn session

Welcome to this training session brought to you by the Society of American Archivists, Archivists of Religious Collections Section. My name is _____ and (give land acknowledgement).

Today's topic is _____. Before I introduce our presenter, let's review the disclaimer (show first slide):

- The content in these presentations is for information only and is not legal advice.
- Our views do not represent the organizations where we work.
- We do not make any endorsements or guarantees.
- We are not liable for any loss or damage caused by your use of the content we provide.
- It is your responsibility to critically evaluate the content provided in the presentation or any accompanying materials.

Also, please remember the points shown on this slide (show second slide):

- You will not be able to use your microphone or video during this session.
- You can click on the closed captioning button at the bottom of your screen, and under "Live Transcript" click "Enable Auto Transcription" to get closed captioning.
- There will be a question period after the presentation concludes. You should use the Q & A feature to ask your questions. We will not answer questions in the chat, or unmute attendees, due to time constraints.
- Please be respectful in your interactions. We expect you to follow the SAA Code of Conduct: <https://www2.archivists.org/statements/saa-code-of-conduct>

This session will be recorded. Please fill out the short survey after the session ends.

We encourage you to join the Society of American Archivists if you are not a member. We thank the Congregation of the Sisters of St. Joseph in Canada for hosting this webinar.

And now, I would like to introduce our presenter _____ (give bio).

Roles and responsibilities – Support Person for Archival Chat

Models and Resources Committee (MRC) members will serve as support persons. The role of the support person is to ensure the Zoom session runs smoothly. To do this, the support person will:

- Contact the presenter to get their biography.
- Register in advance to get the Zoom link.
- Arrive **30 minutes early** to ensure the presenter can share his/her screen.
- Ensure the session starts **promptly** on the hour. Do not wait for stragglers because we may run over time if we do so.
- Give the land acknowledgement at the end of this manual.
- Explain that people can click on the closed captioning button at the bottom of their screen, and under “Live Transcript” click “Enable Auto Transcription” so they can get closed captioning.
- Explain that people should use the raised hand feature to take a turn to speak.
- Explain that people should keep their comments brief to give others a turn to talk (about 1-2 minutes but no longer.)
- Introduce the presenter at the beginning of the Zoom session.
- Altogether, the initial housekeeping/land acknowledgment/biography should not take more than 10 minutes.

- When the presenter has completed his/her introduction of the topic, explain that attendees should now share their thoughts. Emphasize that the remaining time is to have an open conversation, not to address questions to the presenter.
- Prepare some discussion questions in advance so that if people don't talk, these questions can prompt sharing. It is very important that this session is seen as a chance for open discussion, not a chance to fire questions at the presenter.
- Check the raised hands feature and invite attendee to speak. Do not read chat messages out loud.
- Take notes of key learnings for inclusion in *Archival Spirit*. The host will send you the chat transcript.
- Keep track of time and alert presenter/attendees if necessary.
- Thank presenter at end of Zoom session.
- Remind people of our next upcoming session.
- Send thank you note to presenter.

Script for Archival Chat

Welcome to this training session brought to you by the Society of American Archivists, Archivists of Religious Collections Section. My name is _____ (give land acknowledgment).

Today's topic is _____. Before I introduce our presenter, let's review the disclaimer (show first slide):

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- We are not liable for any loss or damage caused by your use of the content we provide.
- It is your responsibility to critically evaluate the content provided in the presentation or any accompanying materials.

Also, please remember the points shown on this slide (show second slide):

- You will be able to use your microphone or video during this session.
- You can click on the closed captioning button at the bottom of your screen, and under "Live Transcript" click "Enable Auto Transcription" to get closed captioning.
- There will be a discussion period after the presentation. Please use the Raise Hands feature under Reactions at the bottom of the screen if you wish to talk. Please keep your comments brief to allow others a chance to talk.
- Please be respectful in your interactions. We expect you to follow the SAA Code of Conduct: <https://www2.archivists.org/statements/saa-code-of-conduct>

This session will not be recorded. A short recap which will not include names of participants may be provided in the *Archival Spirit* newsletter. Please fill out the short survey after the session ends.

We encourage you to join the Society of American Archivists if you are not a member. We thank the Congregation of the Sisters of St. Joseph in Canada for hosting this webinar.

And now, I would like to introduce our moderator _____ (give bio).

Roles and responsibilities – Host

Models and Resources Committee (MRC) members will serve as hosts. The role of the host is to handle the technical aspects of Zoom sessions. To do this, the host will:

- Set up Zoom meeting or webinar. Make sure presenter and support person are registered for “Archival Chat” sessions before publicizing the event, because registration is capped at 100. (For “Lunch and Learn” sessions, registration is capped at 500.)
- Publicize event.
- Send registration links to person responsible for adding to microsite.
- During practice session, ensure presenter can share screen and click through their slides if any, and that their audio is clear.
- Share PowerPoint with disclaimer, SAA Code of Conduct, and other housekeeping rules at beginning of session.
- Monitor the session and ensure attendees have their microphones muted while presenter is speaking during an Archival Chat session by muting them if necessary.
- Lower raised hands after attendee speaks.
- Monitor the session and remove any attendee who is exhibiting inappropriate behaviour in any session by sending them a private chat message explaining their behaviour is

inappropriate under the SAA Code of Conduct, and they may be removed. If the behavior continues, click on Participant and then on More and then on Remove.

- If attendee is taking up too much time during an Archival Chat, send a gentle reminder via private chat message that others need a turn to speak, or that the session is nearly over. If the attendee does not respect this, the host may mute them.
- Send Zoom chat text file to support person after Archival Chat session to use in preparing synopsis.
- Download survey report CSV spreadsheet after a session and share with presenter and support person.
- Download attendance report CSV spreadsheet and save.
- Follow up by checking on cloud recording of webinar and doing any necessary edits within two days after event.
- In Zoom, edit follow-up emails to attendees and absentees to include link to YouTube channel for recordings Use this language in the follow-up email:
 - *Here is the link to the YouTube channel where you will find a recording of this session in approximately one month:*
<https://www.youtube.com/channel/UCpWzzChlhR-8O7CrKmiL2rw/videos>
- Follow-up emails will be sent to all registrants (whether they attended or not) 3 days after the event.
- Download the recording and transcript and send to person responsible for uploading to YouTube. After one month, delete recording from Zoom server.

Survey questions for Zoom

The survey can be built in Zoom and set to open in the browser when the meeting ends. Survey results can be downloaded as a CSV spreadsheet and shared with the presenter.

Sample survey questions:

1. Did you find this webinar/chat informative?

2. On a scale of 1 to 4, with 1 being FAIR, 2 being GOOD, 3 being VERY GOOD, and 4 being EXCELLENT, how would you rate this webinar?

3. Will you attend more SAA ARCS webinars/chats in the future?

 yes, if the topic interests me

 no

4. Would you like an advanced session on this topic?

5. Do you have any comments or suggestions?

Inviting models submissions

Sample text for posting on listservs and discussion boards:

The Society of American Archivists - Archivists of Religious Collections (ARCS) Models and Resources Committee is seeking the following resources to share with other archivists, to provide models and templates for use in archival administration. We welcome contributions from all archivists, not just religious archivists. The microsite is open to all Society of American Archivists members.

We are specifically seeking:

- Archive processing manuals (manuals relating to archival processing, digitization, digital preservation, use of databases, etc.)
- Mission statements
- Archive policies (e.g., collection policy, donation policy, privacy policy, reference services policy, digital preservation policy, disaster policy, etc.)
- Archive forms relating to any aspect of archival administration (e.g., deed of gift, separation sheet, withdrawal sheet, condition report, etc.)

Anyone willing to share such materials should be willing to apply a CC BY-NC-SA 4.0 license which allows materials to be shared and adapted with attribution for non-commercial use: <https://creativecommons.org/licenses/by-nc-sa/4.0/?ref=chooser-v1>

Please contact NAME AT EMAIL if you have materials you are willing to share on the ARCS microsite.

Any materials received will be reviewed by the Models and Resources Committee for inclusion on the microsite.

Slides

Disclaimer

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Our views do not represent the organizations where we work.

We do not make any endorsements or guarantees.

We are not liable for any loss or damage caused by your use of the content we provide.

It is your responsibility to critically evaluate the content provided in the presentation or any accompanying materials.

~ Adapted from Los Angeles Preservation Network and Original Order



Welcome to our “Archival Chat”

You should mute your microphone until you have been called upon to speak.

You can click on the closed captioning button at the bottom of your screen, and under “Live Transcript” click “Enable Auto Transcription” to get closed captioning.

We will have an open discussion after a brief presentation by our presenter. You can use the raised hand feature (under Reactions on bottom of screen) to take a turn to speak. We will monitor this and call on you to take your turn.

You can also use the chat feature anytime. **Please do not start talking until you are called upon.**

Please be respectful in your interactions. We expect you to follow the SAA Code of Conduct: <https://www2.archivists.org/statements/saa-code-of-conduct>

This session will not be recorded.

Please fill out the short survey after the session ends.

We encourage you to join the Society of American Archivists if you are not a member. We thank the Congregation of the Sisters of St. Joseph in Canada for hosting this webinar.



Welcome to our “Lunch and Learn”

You will not be able to use your microphone or video during this session.

You can click on the closed captioning button at the bottom of your screen, and under “Live Transcript” click “Enable Auto Transcription” to get closed captioning.

There will be a question period after the presentation concludes. You should use the Q & A feature to ask your questions. We will not answer questions in the chat, or unmute attendees, due to time constraints.

Please be respectful in your interactions. We expect you to follow the SAA Code of Conduct: <https://www2.archivists.org/statements/saa-code-of-conduct>

This session will be recorded.

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We encourage you to join the Society of American Archivists if you are not a member. We thank the Congregation of the Sisters of St. Joseph in Canada for hosting this webinar.



Archivists of Religious Collections Section

Land acknowledgement

We acknowledge that we live and work on the traditional lands of many Indigenous nations. We know that Indigenous peoples have suffered from historical and ongoing injustices and understand as an archival organization that we must work toward sharing historical truths and renew respectful relationships with Indigenous communities. We respect the longstanding relationships that Indigenous Nations have to this land as the original caretakers. We are grateful for their stewardship and protection of the water and earth. We pay our respects to Elders past and present.