

Field Services Alliance Procedures Manual

(September 2013)

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PURPOSE OF FSA PROCEDURES MANUAL

The Field Services Alliance (FSA) is an organized group of individuals, offices, and agencies that provide training opportunities, guidance, technical services, and other forms of assistance to local historical societies, archives, libraries, and museums in their respective states or regions.

This procedures manual is designed to educate new and current board members about the administrative processes of FSA. This document lists key FSA projects and provides guidelines for how these projects are typically completed. The manual is intentionally brief, with the understanding that these processes may change over time as board members find new and innovative ways to complete the mission of the Field Services Alliance.

NOTE: because the FSA vice-chair ultimately becomes chair of the organization, it is advised that the FSA chair involve the vice-chair in all aspects of FSA planning.

September 2013

FSA DIRECTORY UPDATES

What is it: the FSA Directory lists FSA members and interested colleagues from across the nation. A coordinator is needed to update the directory at least once a year.

Purpose: the directory provides FSA members with a network of colleagues and can be used by local historical societies to find field services personnel in their respective states. In order to ensure that the directory is current, it must be updated at least once a year.

Ideal Workflow:

- Each September, at the FSA meeting held during the AASLH Annual Meeting, the FSA chairman calls for a volunteer coordinator to update the directory.
- The coordinator's responsibility is to recruit volunteers and to move the process of updating the directory forward. This coordinator must also recruit six to eight FSA members who will contact members listed on the directory and potential members in order to ensure that their contact information is correct.
- The coordinator and the AASLH liaison (Bethany Hawkins, hawkins@aaslh.org) work together to create a template to record the members' contact information. This template is needed in order to ensure that the information gathered by multiple volunteers is consistent.
- When contacting potential members, the volunteers must have a brief description of FSA, what it does, and the requirements to join. The coordinator should work with the AASLH liaison to write the description, to ensure that it is up to date.
- In February, volunteers begin contacting current and potential members for inclusion in the directory. Also that month, the coordinator will post to the FS-List, asking members to review their entries or submit information to be included.
- Each volunteer is responsible for contacting (via email and/or phone and/or at FSA Mid-winter meeting) approximately fifteen to twenty names in the directory and updating or removing entries from the list by no later than March 30 of each year.
- Updates may be:
 - Printouts of the FSA Directory web page with handwritten corrections mailed or scanned and e-mailed to the AASLH liaison.
 - E-mail word document – a copy and pasted version of the current directory – using track changes or other forms of highlighting to indicate updates.
 - All updates are sent by e-mail to the AASLH liaison.
- In September, copies of the updated directory are circulated at the Field Services meeting held during the AASLH annual meeting. They are also circulated at the FSA Mid-Winter Retreat to check for additional updates. Following those meetings, all changes are submitted to the AASLH liaison.

ASK FSA COLUMN

What is it: quarterly article for AASLH *Dispatch* that provides useful tips aimed at small organizations.

Purpose: to market FSA as a useful source of information to the general AASLH membership.

Ideal planning timeline:

- At the FSA meeting held during the AASLH annual meeting, the FSA chair calls for a volunteer to coordinate articles.
- Four authors needed (deadlines listed below). Articles should be on diverse topics that do not replicate past articles.
- If necessary, after the annual meeting, the volunteer coordinator can use the FS-List or personal contacts to recruit additional authors.
- Also after the annual meeting, the volunteer coordinator needs to share the article parameters with each author (article parameters listed below).
- Authors should send their article to the volunteer coordinator and the AASLH FSA liaison (Bethany Hawkins, hawkins@aslh.org).
- One month in advance of each deadline, the volunteer coordinator should remind the author about the deadline.
- One week in advance of each deadline, the volunteer coordinator should remind the author about the deadline.
- Two to three days after the deadline has passed, the volunteer coordinator should check with the AASLH liaison to see if the author has submitted the article.

Deadlines for articles due to AASLH FSA liaison:

- January 10, to appear in February issue
- April 10, to appear in May issue
- July 10, to appear in August issue
- October 10, to appear in November issue

Article parameters:

- Length: 300-400 words.
- Article should include links to other online resources, ideally offered by an FSA member.
- Includes byline or one sentence about the FSA author.

Past Topics: (contact AASLH liaison for an update)

Topics	Appeared	By
2012		
Earthquake Disaster Planning	May 2012	Heather Widener, VA
Advocacy	Feb. 2012	Jennifer Thomas, VA
2011		

Insects in Collections	Nov 2011	Scott Carrlee, AK
Transition Planning	Aug 2011	Susan Barger, NM
Grants	Feb 2011	Carlyn Hammons, TX

2010

Social Media	Aug 2010	Laura Casey, Texas
Recruiting Volunteers	May 2010	Mary Canon, Ohio
Demographic Crisis Museum Solutions	Feb 2010	

2009

Filming at your Historic Site
Your Regional Conservation Center
Developing a Living History Program
Digital Access to Collections

2008

Historic Marker Materials
Invisible Ink and Theft
Deadly Fire Extinguishers
Measuring Environmental Conditions

FSA BOARD QUARTERLY CONFERENCE CALLS

When held: board conference calls are held quarterly at 3:00 p.m. Eastern Standard Time. Calls are usually made on Wednesdays, but are scheduled when most convenient to the board.

Purpose: to conduct FSA business with the FSA board.

Ideal planning timeline:

- First of calendar year: FSA chair schedules quarterly conference calls via e-mail with the FSA Board of Directors and the AASLH liaison (Bethany Hawkins, hawkins@aaslh.org).
- Four weeks before the conference call: AASLH liaison e-mails a reminder about the conference call, including the phone number to call.
- Two weeks before the conference call: FSA chair sends agenda to board members, asks for their comments, and makes any changes to agenda.
- One day before the conference call: AASLH liaison e-mails a reminder about the conference call with phone number to call and the agenda attached.

Typical agenda:

Agenda typically includes the following items, but may be changed to meet current needs:

- Call to Order
- Updates
- Discussion of Current Projects
- New Business
- Reminder of Next Conference Call

Follow up:

- By e-mail, as needed.

Additional information: because board members are scattered across the nation, the 3 p.m. EST call has been the most convenient time for the call.

WEBSITE UPDATES

Because AASLH is making changes to their own website (September 2013), the procedures for the website will change. Therefore, procedures for the website/online community will be added once the online community has been launched.

FSA MID-WINTER RETREAT PLANNING

When held: the Mid-Winter Retreat is generally held the last Monday and Tuesday in February, with an optional Sunday evening get-together

Purpose: to network and learn from each other and conduct FSA business, as required.

Ideal planning timeline:

- One year prior to the Retreat (at the previous Mid-Winter Retreat and on the FS-List), the FSA chair announces the date and location of the coming year's meeting.
- In September/October (at the FSA meeting held during the AASLH annual meeting and on the FS-List), FSA chair/host site distribute a basic information sheet that includes information about the host site, hotel with costs and reservation information, basic agenda items, FS host contacts, and any additional information needed for FS offices to plan.
- In December, host site posts information on the FS-List, including a detailed agenda, host site and hotel information, contacts, how to register, how to get there (including land transport from the airport), restaurants, and any additional information needed.
- In January, host site organizes typical event planning items, including name tags or table tents, maps or directions, snacks, brochures for area sites, list of attendees with contact info for attendees, etc.

Typical agenda:

Sunday evening – casual get-together with attendees who have arrived early, often at an area restaurant

Monday	8:30 a.m.	Welcome – FSA Chair
	8:40 a.m.	Introductions and updates from field service offices
	9:30 a.m.	Break
	9:45 a.m.	Training of some kind
	Noon	Lunch - typically sponsored by AASLH
	1:15 p.m.	More training
	2:30 p.m.	Break
	4:00 p.m.	Typically a tour of the host site or nearby site
Tuesday	6:00 p.m.	Dinner (typically at an area restaurant)
	8:30 a.m.	Updates from AASLH – AASLH staff
	9:00 a.m.	FSA business, as required
	9:30 a.m.	Break
	9:45 a.m.	Discussion about how FSA can best assist Field Services offices or other FSA business/planning or additional training
	Noon	Lunch at area restaurant for FS folks leaving later

Follow up: Post news to FS list as required

Additional info: Host FS office coordinates local arrangements with FSA chair

FSA TIPS SESSION FOR AASLH PLANNING

Deadlines: AASLH proposals are currently due in mid-November with presentations given in the fall of the next year.

Purpose: to market FSA to AASLH annual meeting attendees as an organization that can help them find the assistance they need. This has been the “FSA protected” session since 2008, so it is guaranteed to be included on the program. However, the AASLH program committee can offer feedback to improve it.

Ideal Planning:

- At the FSA meeting held during the AASLH annual meeting, the FSA chair asks for a volunteer to coordinate the proposal.
- The coordinator recruits presenters on a variety of topics during the meeting. Four is the ideal number of presenters in case one presenter has to drop. Then, the coordinator can either step in or the other presenters can lengthen their presentations.
- If necessary, the coordinator can use the FS-List or personal contacts to recruit additional authors upon return from annual meeting.
- November 1—coordinator should complete the session proposal and share it with presenters for corrections.
- November 15—coordinator e-mails session proposal to AASLH.
- Coordinator should then continue with standard AASLH presenter calendar, including receiving feedback from the program committee, reporting AV/IT and room layout needs, and preparing PowerPoint and/or handouts.

Information for Session Proposal:

Title: Field Services Alliance Presents: Museum Tips

Format: Panel (but could be adapted for other formats)

Session Description: (fill in blanks with topics)

Basic helpful hints about museum best practices and procedures by field services providers. This no-nonsense session will provide practical ways of approaching _____, _____, _____, and _____.

There will be four presentations of fifteen minutes each.

(For example: disaster planning, working with living history groups, exhibiting of photos and documents, and conducting visitor research.)

Primary Goals for the Session:

- Provide practical information for small organizations that can be implemented immediately
- Give audience a chance to ask questions on the pertinent topics
- Make large, overwhelming topics more manageable for organizations with small staffs

Target Audience: Small museum/historical society staff and volunteers

Central Issues: (fill in blanks with a little more detail about topics)

The Field Services Alliance will present a tip session on best practices in museums. There will be four presentations lasting fifteen minutes each and a five minute question and answer period per session. The topic areas: _____, _____, _____, and _____. This is a practical session geared towards small museums and staff members looking for ways to improve museum procedures.

The audience will leave with four definite plans of action that can be pursued upon return – a nice break from the theoretical sessions. FSA Tips session is a protected session that FSA has been offering since 2008.

FSA MEETING AT AASLH ANNUAL MEETING

When held: the FSA meeting is held at the AASLH Annual Meeting (September/October)

Purpose: to conduct FSA business with the broader membership.

Ideal planning timeline:

- In May/June, AASLH sets the time and date that FSA meets during the AASLH annual meeting.
- The FSA chair creates the agenda for the meeting. The AASLH liaison (Bethany Hawkins, hawkins@aaslh.org) and the FSA vice-chair also review the agenda. When the agenda is finalized, the AASLH liaison posts the agenda to the FS-List.
- On the day of the meeting, the FSA chair runs the meeting.

Typical agenda:

Agenda typically includes the following items, but may be changed to meet current needs.

Sample agenda:

- 1:30— Call to Order, FSA Chair
- 1:35— Approval of mid-winter meeting minutes/notes
- 1:40 - 2:20— Special Sessions (how-to advice, etc.) on issues that help FSA members
- 2:20— Brief Agency Reports, include trends & concerns in your state
- 3:30— Break
- 3:45— Update from AASLH (AASLH staff liaison)
- 4:15— FSA business updates, including:
 - Current FSA projects
 - Ask FSA articles for upcoming year (3 articles)
 - FSA Tips session for next year's AASLH annual meeting
 - FSA directory updating (pass around copy so members can review contact information and make changes)
 - Update on FSA executive committee (new members, board changes)
- 4:45— New Business
- 4:55— Update on Mid-winter meeting, FSA vice-chair (location for next Mid-winter meeting, suggestions for future ones)
- 5:00— Adjourn

Follow up:

- By e-mail, as needed.

Additional info:

Because the FSA meeting is usually held between other sessions or at the same time as other AASLH affinity groups, the agenda must be moved through fairly quickly.

The FSA meeting is usually held on the Wednesday before the AASLH annual meeting.