

Appendix H: GUIDELINES AND PROCEDURES

Procedures for Selection—"Messages from MARS" Editor/MARS-L Moderator

The MARS Publications Committee serves in an advisory capacity to the "Messages from MARS" Editor/MARS-L Moderator. Because of that role, it is responsible for conducting the search and screening of candidates and proposing at least one name to the MARS Executive Committee for approval at the Annual Meeting twelve months before the editor/moderator's term ends, following the procedures outlined below. The MARS Publications Committee, in conjunction with the Executive Committee, may appoint an Interim Editor in the event of an editor's vacating the position. The Interim Editor will serve until the official search procedure is concluded and the transition to the new editor takes place.

Search Committee: Appointment, Membership and Responsibilities

1. The chair of the Publications Committee will appoint the Search Committee.
2. The Search Committee, at the discretion of the MARS Publications Committee Chair, may include the committee of the whole or a minimum of three voting members.
3. The MARS Chair, MARS Vice Chair/Chair-elect, MARS Immediate Past Chair and outgoing "Messages from MARS" Editor/MARS-L Moderator will serve on the Search Committee in an ex-officio capacity.
4. Upon appointment, the Search Committee will prepare an advertisement of the position for *RUSA Update*. The advertisement will also be posted on MARS-L and other LISTSERVs as appropriate.
5. Following the deadline for applicants, the Search Committee will duplicate all application documents and forward them to the members for review.
6. The Search Committee Chair will poll the committee members to determine which applicants will be interviewed.
7. The Search Committee Chair will contact the selected applicants and schedule interviews with the full Search Committee at the next conference.
8. Following the interview, the committee may select the candidate to be recommended to the MARS Executive Committee for appointment as "Messages from MARS" Editor/MARS-L Moderator.
9. Should the Search Committee be unable to select an editor/moderator from competing candidates, more than one name may be posed to the MARS Executive Committee which will make the selection.
10. Final authority for approval of the appointment rests with the MARS Executive Committee.

11. When the appointment is approved by the Executive Committee, the Search Committee Chair will notify the candidate selected.

Timeline

The "Messages from MARS" Editor/MARS-L Moderator will serve a one-year term as an intern upon appointment followed by one three-year term as editor/moderator. The search shall begin prior to the final year of the editor/moderator's term. The following timeline will guide the process:

1. Search Committee appointed: twelve - fourteen months prior to the conclusion of the editor/moderator's term or immediately if the position is otherwise vacated.
2. Position advertised: The advertisement should appear in the *RUSA Update* issue immediately following the appointment of the Search Committee. Additional advertisements on MARS-L and other appropriate listservs shall be posted immediately.
3. Deadline for position applicants: Approximately two months before Midwinter Meeting or Annual Conference.
4. Interviews scheduled: One month before Conference.
5. Interviews conducted and editor selected, approved and appointed: During Midwinter or Conference.
6. Training and orientation: During one-year internship.
7. The July-September issue of *RUSA-Update* will be considered the transition issue and will be jointly prepared by the outgoing and incoming editors.
8. The October-December issue will be the sole responsibility of the new editor.
9. Assumption of duties as moderator of MARS-L will be negotiated between outgoing editor/moderator and incoming editor/moderator.

Qualifications for Editorship

1. The candidate must hold membership in MARS and RUSA.
2. The candidate must be able to attend both the ALA Annual Conference and the ALA Midwinter Meeting.
3. The candidate should have previous editorial experience and/or an undergraduate degree in journalism, communications, English or another related field.
4. The candidate should have demonstrated ability to meet deadlines.
5. The candidate should have familiarity with and access to the Internet and electronic mail.

Procedures for Selection—MARS Web Coordinator

The MARS Publications Committee serves in an advisory capacity to MARS Web Coordinator. Because of that role, it is responsible for conducting the search, screening of candidates and proposing at least one name to the MARS Executive Committee for approval. The following material describes the procedures to follow:

Search Committee: Appointment, Membership and Responsibilities

1. The Chair of the Publications Committee will appoint the Search Committee. The Search Committee should be appointed twelve - fourteen months prior to the conclusion of the Coordinator's term, or immediately if the position is otherwise vacated (see Timeline #7).
2. The Search Committee, at the discretion of the MARS Publications Committee Chair, may include the committee of the whole or a minimum of three voting members.
3. The MARS Chair, MARS Vice Chair/Chair-elect, MARS Immediate Past Chair and outgoing MARS Web Coordinator will serve on the Search Committee in an ex-officio capacity.
4. Upon appointment, the Search Committee will prepare an advertisement of the position for *RUSA Update*. The advertisement will also be posted on MARS-L and other discussion lists as appropriate.
5. Following the deadline for applicants, the Search Committee will duplicate all application documents and forward them to the members for review.
6. The Search Committee Chair will poll the Search Committee members to determine which applicants will be interviewed.
7. The Search Committee Chair will contact the selected applicants and schedule interviews with the full Publications and Search Committee to take place at the next conference.
8. Following the interview, the committee may select the candidate to be recommended to the MARS Executive Committee for appointment as MARS Web Coordinator. Should the Search Committee be unable to select a Coordinator from competing candidates, more than one name may be posed to the MARS Executive Committee, which will make the selection.
9. Final authority for approval of the appointment rests with the MARS Executive Committee.

10. When the Executive Committee approves the appointment, the Search Committee Chair will notify the candidate selected. Once agreement to serve is secured, the Chair will also notify the other candidates that a selection has been made.

Timeline

The MARS Web Coordinator will serve a one-year term as an intern upon appointment, followed by a three-year term as Coordinator. The search shall begin prior to the final year of the editor/moderator's term. The following timeline will guide the process:

1. Search Committee appointed: twelve - fourteen months prior to the conclusion of the Coordinator's term or immediately if the position is otherwise vacated (see #7).
2. Position advertised: The advertisement should appear in the *RUSA Update* issue immediately following the appointment of the Search Committee. Additional advertisements on MARS-L and other appropriate discussion lists shall be posted immediately.
3. Deadline for position applicants: Approximately two months before Midwinter Meeting or Annual Conference.
4. Interviews scheduled: One month before Conference.
5. Interviews conducted and Coordinator selected, approved and appointed: During Midwinter or Annual Conference.
6. Training and orientation: During one-year internship.
7. If the position is vacated, the MARS Publications Committee, in conjunction with the Executive Board, may appoint an Interim Coordinator. The Interim Coordinator will serve until the official search procedure is concluded and the transition to the replacement takes place.

Qualifications

1. The candidate must hold membership in MARS and RUSA.
2. The candidate must be able to attend both the ALA Annual Conference and the ALA Midwinter Meeting.
3. The candidate should have experience creating and editing HTML documents and loading them to a Web server.
4. The candidate should have familiarity with and access to the Internet and electronic mail.
5. The candidate should have good communication skills.
6. The candidate should have demonstrated ability to meet deadlines.

MARS Archives Procedures

PRINCIPLES:

1. Working files go from one committee Chairperson to the next; ephemeral material should be discarded; completed projects and "dead" files are sent to RUSA headquarters to be deposited in the Archives.
2. The committee Chair is normally responsible for maintaining committee files, and thus sending material to the Archives. The Secretary of the Executive Committee holds this responsibility for the Executive Committee, and for sectional documents such as the Handbook and roster. MARS editors hold this responsibility for the publications they edit.
3. The Secretary of the Executive Committee shall coordinate the deposit of materials in the Archives, soliciting files from committee Chairs, and depositing materials for the Executive Committee and the Section as a whole. Normally, this will be in mid-July of each year. The Secretary will send the materials collected directly to RUSA Headquarters. At this time, current files should be sent from the outgoing to the incoming committee Chairs, and from the outgoing to the incoming Secretary.
4. Archivists use the principle of "respect des fonds"--keep the material in the order it was as it was created. Correct obvious misfilings, but don't try to re-file in a "more logical order" than the material was in. (Removing staples and rubber bands is a help.) Print copies of electronic documents, if created simply for the purpose of depositing with Archives, may be filed chronologically or interfiled with other documents according to the order of that file. It is essential that all folders be clearly labeled: for example, "MARS User Access to Services Committee, 1995-1996."
5. The MARS Historian shall maintain a reference copy of the MARS Handbook. This shall consist of the latest printed copy with copies of all sections that have been changed. The printed copy will be annotated to indicate which sections have been revised. The Chair of the Planning Committee shall notify the Historian when changes are made to the Handbook, and the MARS Web Coordinator shall notify the Historian when changes are posted on the Web site. A complete copy of each new edition shall be sent to the archives.

TYPES OF MATERIAL:

Official Documents

Progress reports and meeting reports are already sent to RUSA; but a copy should also be included with the materials sent to Archives to assist anyone making use of the committee's archives. A copy should also be sent to the new Chair. Agendas of meetings and minutes of meetings (if not included in the above) should be retained, one copy to Archives, one to the new Chair.

Routine memos setting agendas, announcing meetings, etc.: one copy to Archives.

Membership rosters: a copy of the official MARS roster to Archives. If you do more than one during the year, keep a copy of each, unless the changes are trivial (e.g. typo corrections).

Appointment letters and forms: Do not retain; do not send to Archives.

Formal reports to committees, by a committee Chair to the Executive Committee: a copy to Archives.

Projects: Retain copies for Archives in the order in which you made them.

Retain one copy of each major draft of a project or report. Avoid keeping drafts that involve primarily typo corrections or rearranging.

Keep a copy of the final report, etc. and send to Archives.

Publications: One, or better, two copies of every publication to Archives (one if it is very long).

Also, don't forget to send handouts, and the like. Copies of these should also be included in the materials sent from the outgoing to the new committee Chair.

As noted above, the Editors of "Messages from MARS," a MARS series, etc. are responsible for sending final copies to the Secretary to deposit in the Archives. They, of course, also send other types of documents, in the same manner as committee Chairs, in the materials forwarded to the Secretary.

Correspondence: Keep all correspondence of significance.

If connected with a project, normally this will be kept with the project.

Attach replies to original sent; send both to Archives.

Retain the working file order; don't try to "tidy up."

Retain correspondence logs, if you use them, and send to Archives.

Electronic Mail: Keep a paper copy of significant messages.

Use the same rules as for regular correspondence: don't keep routine memos, "me to messages" etc.; do keep anything significant.

The ORIGINATOR OF THE MESSAGE KEEPS THE MESSAGE and any replies to it. For example, BW sends to all Committee Chairs for comments. AA, BB, XY reply. BW keeps a copy of the original, and the copy of the replies. BW then sends to Archives.

Web Pages: Keep a paper copy of the old version of any Web pages when any changes are made (other than minor corrections).

Keep a paper copy of any Web page that is being taken down.

At this point in time, there is no reliable mechanism to deposit this (or any) material electronically.

Other: If in doubt, keep it and send to Archives.

Don't forget realia: buttons, balloons, flags, etc. Send a copy to Archives. (If they come in several colors, keep one of each color).

NOTE: Materials identified in these guidelines to be sent to Archives should not be sent directly to the ALA Archives. As noted above, committee Chairs will send their materials to the MARS Secretary, who will forward these materials, along with those for the Executive Committee and Section, to RUSA headquarters, with clear indication they have been collection for deposit in the Archives.

Originally prepared by James H. Sweetland, MARS Chair 1982/83, with the advice and consent of the 1983-84 Executive Committee and Andrew M. Hansen.

Approved: July 1988

Revised in 1999-2000 by William McHugh and Patricia Riesenman. Approved by MARS Executive Committee: July 2000

Procedures for Publication of MARS Committee Documents

The MARS Publications Committee seeks to facilitate the publication of section documents by providing assistance to MARS committees in order to:

- seek publication of the document in a timely manner;
- expedite the approval process; and
- determine the appropriate medium for publication and distribution.

In order to meet these objectives, the committee has established the following procedures for publication:

1. When a MARS committee first decides to create a document, the committee chair completes the "RUSA Publication Proposal" (this [Handbook](#)) and submits to the MARS Publication Committee Chair. The MARS Publications Committee Chair will assign a member of the MARS Publications Committee as liaison to provide assistance and guidance to the originating committee during the publication approval process.

Endorsement of the publication proposal is the first step. Every effort will be made to provide a response to the committee submitting the proposal within 8-10 weeks. Proposals have to be reviewed at several levels – MARS Publications, MARS Executive Committee, and RUSA Publications.

2. The final version of the document must be approved. When the committee has finalized the draft of the document, it should be sent to the liaison and/or Chair of the MARS Publications Committee for distribution so that the review process may commence.

The MARS Publications Committee meets once or twice at every conference. Drafts received eight weeks or more prior to a given conference will be acted on at the first Publications Committee meeting at that conference. Drafts received by the start of the first Publications Committee meeting at a conference will be acted on before the end of the second meeting, which will always be scheduled prior to the last MARS Executive Committee meeting of the conference. Drafts received within three months after a conference will be reviewed through long-distance communication and, if possible, acted on prior to the next conference.

The draft should be submitted to the MARS Publications Committee in the format specifications for the medium or vehicle in which it is intended to be published. (e.g., RUSQ, "Messages From MARS"). These specifications are available from the publication editor or the MARS Publications Committee. All graphics should be included and all pages numbered. Pages should be numbered if appropriate.

3. The review process will include a peer review of the final draft manuscript by the three Members-at-Large of the MARS Executive Committee followed by a final review of the manuscript by the members of the MARS Publications Committee, the MARS Executive Committee, and the RUSA Publications Committee, when necessary.

Members reviewing the final draft manuscript will be asked to direct their comments and suggestions to the chair of the originating committee and/or editor of the proposed publication as well as to the MARS Publications Committee chair, who will summarize all comments for the benefit of the committee but without associating names of reviewers with specific comments.

Comments from members may cover appropriateness for publication, market considerations, content of document, format and structure, clarity, length as well as general editing and proofreading.

4. The outcome of the review by the MARS Publications Committee takes one of two forms:

- a. Recommendation to the MARS Executive Committee and, when necessary, to the RUSA Publications Committee that the document be approved for publication, along with a recommendation as to the desired medium or vehicle for publication.
- b. Recommendation to the MARS Executive Committee the document be referred back to the originating committee for revision and re-submittal.

5. Once a document receives approval for release from the MARS Executive Committee and, when necessary, the RUSA Publications Committee, the MARS Publications Committee will advise the originating committee or the contact person of the required procedures for the next step in the publication process.

See the "RUSA Publications Process Summary of Publishing Stages" Flowchart (this *Handbook*) for an overview of the publications process within RUSA.

Approved: January 1986

Revised: June 1995; June 2003

Procedures for Developing Guidelines

The procedures for developing guidelines are outlined in the RUSA Guide to Policies and Procedures at

<http://www.ala.org/ala/rusa/rusaourassoc/guidetopoliciesandproced/rusadevguide/4developingguidelines.htm>

These procedures were developed to ensure adequate review of Guidelines before they are officially adopted by RUSA. While the procedures may at first appear daunting, the RUSA Standards and Guidelines Committee, and in particular the MARS representative to that committee, are available as resources to help you through the process. Guidelines do officially represent the best practices of the profession, and therefore have a much greater impact than a checklist developed by the committee and posted on its Web site.

Guidelines must be reviewed every seven years by the committee that originally developed them. This procedure is less elaborate than the procedures for initially developing guidelines, and is also outlined in the RUSA Guide to Policies and Procedures. The committee having jurisdiction over a set of guidelines may decide to withdraw the guidelines rather than revise them, with the approval of RUSA Board, if they feel that the guidelines no longer serve any viable purpose.

Approved: June 2005

MARS Publications Committee Web Document Style Guidelines

MARS Committees should keep some general design considerations in mind when publishing Web documents. The proposed Web document should feature a user-friendly organization and arrangement, appropriate for the content. The use of bandwidth-eating graphics should be minimal, unless they add significant and meaningful information. In addition, images should include ALT tags, which describe the images. The document

should be in proper HTML format (or in other formats, such as .PPT, .DOC, .TXT, .XLS, etc., if appropriate), following currently accepted formatting standards. Web document authors should be aware of creating Web documents that are ADA-compliant (that is, provide a text-only version).

Some specific style guidelines

1. The proposed Web document should indicate when the content was created and the last time it was revised. Committees should commit to a schedule of frequent updates, dependent upon the content, and should indicate that frequency. (For example, the page could state that the producing committee will review the document quarterly for currency/accuracy.) If there is an intended expiration date or if the information content is static, that should be indicated in the document.
2. The proposed Web document should provide some indication about where the archival information will be located when the committee has ceased to maintain the document. If the Web document is also available in print, information on how to obtain that print version should be included.
3. The proposed Web document should include contact information. There must be a name or a link which will indicate who has responsibility for answering questions and responding to feedback about the document. Committees should commit explicitly to transferring that responsibility as committee membership changes.
4. The proposed document must include the MARS name and logo, the MARS unit name (the committee name), the RUSA name and logo, and the ALA name and logo at the top of all pages. The proposed document should include a link to the MARS unit's main or home page, and a link to the MARS home page. It is recommended that committees use the RUSA/MARS Web site template, at the very least.
5. The proposed document should include a statement about the purpose of the document, why it was developed and by whom. This could be in the form of an introductory paragraph, or a link to an "About This Document" page, indicating the scope and coverage of the information provided.
6. The proposed document should attempt to provide some metadata fields in order to enhance indexing for search engines. Some metadata fields that could be added are: author/creator; keywords; subject or description; resource type; creation date; revision date; expiration date; title; and version. The current version of the RUSA/MARS Web site template does not have metadata fields.
7. If the proposed document includes non-textual content which requires a special viewer or helper application/plugin, there should be concise guidance on how to obtain the software.

Comments about the guidelines should be directed to the Chair, MARS Publications.

Drafted and approved May 1998 MARS Publications Committee presented June 1998 to MARS Executive Committee. Revised July 1998 MARS Publications Committee Approved fall 1998 MARS Executive Committee.
Rev. MARS Publications, June 2003.

Instructions to Contributors: "Messages from MARS"

Scope: "Messages from MARS" is the official newsletter column of the Machine-Assisted Reference Section of the American Library Association's Reference and User Services Association. It is published quarterly on the RUSA Web site. The purpose of the column is to disseminate news of the section and committee activities to those concerned with computer-based reference and information services in libraries.

Please follow these procedures when preparing items to be submitted for the column:

1. Write the article in a grammatically correct, simple, readable style. Remember that the author is responsible for the article's accuracy.
2. Give the article a brief title.
3. Include the author's name and MARS affiliation with the article.
4. Consult *Merriam-Webster's New Collegiate Dictionary*, 9th ed., supplemented by *Webster's Third International*, as the authority for spelling and usage; prefer the first spelling if there is a choice.
5. Verify the spelling and accuracy of all names included in submitted items.
6. The current edition of the *Chicago Manual of Style* is the authority for punctuation, capitalization, abbreviations, etc.
7. Send the article via electronic mail to the "Messages" editor, preferable as an attachment.
8. Articles may be edited to improve the effectiveness of communications between author and reader.

"Messages from MARS" complies with the *Guidelines for Authors, Editors, and Publishers of Literature in the Library and Information Field*, passed as Council 1982-83 Document no. 38. Copies may be obtained by writing ALA Executive Office, 50 E. Huron Street, Chicago, IL 60611.

Approved: July 1988 Revised: July 2005

Procedures for "Messages from MARS" Column and MARS-L LISTSERV

"Messages" Procedures

1. Prepare the deadline schedule according to RUSA Update deadline schedule as soon as possible. The "Messages from MARS" deadline should be set two weeks before copy is due to *RUSA Update* Editor.
2. Notify MARS Chair, Vice Chair/Chair-Elect, Secretary, and all committee chairs of deadline schedule for the year when possible.

3. Forward copies of "Instructions to Contributors" (this *Handbook*) to officers and chairs with the deadline schedule.
4. Send the officers and chairs a reminder of the due date two weeks before each "Messages" deadline or about one month before the *RUSA Update* deadlines. This notification can be sent via electronic mail.
5. Prepare copy. Copy is generally due in mid-July (after Annual), mid-September, mid-January or February (after Midwinter), and mid-March.

6. In addition to general MARS news, the four issues generally include:

July-September: Comments from the new MARS Chair
 Executive Committee Annual Conference Summary
 Annual Conference Committee Reports

October-December: Comments from MARS Chair
 MARS Nominating Committee Report
 Midwinter Meeting Plans
 Roster of MARS Midwinter meetings

January-March: Comments from MARS Chair
 Midwinter Executive Committee Summary
 Midwinter Committee Reports
 Preliminary Annual Conference Plans

April-June: Statement from outgoing MARS Chair
 Annual Conference MARS program announcement
 Roster of MARS Annual Conference meetings

7. Send review copy of each "Messages" column to the current MARS Chair for his/her review prior to forwarding to the *RUSA Update* editor. Comments can be exchanged via telephone or electronic mail.

8. Forward final copy, after approved by MARS Chair, to the *RUSA Update* editor by mail or via electronic mail according to the *RUSA Update* deadline.

MARS-L Procedures

1. Serve as moderator of MARS-L posting messages as appropriate and managing operation of the LISTSERV as necessary.
2. Post calls for news and messages on MARS-L on a regular basis.
- 3 Post "Messages from MARS" column items within one week after forwarding to the *RUSA Update* Editor.
4. Publicize MARS-L in ALA publications and other vehicles as appropriate.
5. Monitor activity on MARS-L and keep MARS Publications Committee and MARS Executive Committee apprised of activity and make recommendations as appropriate.

Approved: July 1988

Revised: February 1995; July 2005