

**Society of American Archivists  
Council Conference Call  
January 17, 2018**

**Criteria for Section Project Funding Pilot Test  
(Prepared by Courtney Chartier)**

**BACKGROUND**

At the November 2017 SAA Council meeting, Treasurer Cheryl Stadel-Bevans presented proposed revisions to the Component Funding Request Form. Although the revisions were accepted, Council discussion led to the proposal to pilot in FY2019 a small annual budget available to all Sections. An informal group consisting of Courtney Chartier, Erin Lawrimore, Cheryl Stadel-Bevans, and Audra Yun was charged with developing simple criteria to guide the use of such funds by Sections.

**DISCUSSION**

The group recommends approval of the following guidelines and criteria to be used for a pilot test in FY2019 for all possible avenues of funding available for SAA Sections. This information will be available as a part of the Leader Resources webpage, with links to needed forms/fuller guidelines for each funding opportunity.

**Funding Availability for SAA Sections**

All Society of American Archivists Sections are eligible for annual funding, and eligible to apply for funding for larger projects that facilitate innovation in their area of the archives profession.

**Annual Funding**

All SAA sections have \$X designated for their use each fiscal year. This funding exists to support the ongoing work of Sections. Annual funding may be used at the discretion of the Section Steering Committee for a wide variety of purposes, including printing; postage; mid-year meetings; surveys and assessments; travel expenses for non-archivists to travel to the Annual Meeting for Section-endorsed programs; and other activities that support the strategic goals and mission of SAA. Annual funding may not be used for 1) items or activities that are already a part of the SAA annual budget; 2) refreshments or social events; or 3) travel funds for SAA members or other United States-based archivists.

Annual funding is distributed via reimbursement. Receipts and a reimbursement form [link] must be submitted to the SAA Office within 30 days after the expense is incurred.

Funding for one fiscal year will not carry over into the next fiscal year.

### **Special Project Funding**

Additionally, all SAA Sections are eligible to apply to SAA for special funding to be used for critical and innovative Section projects. Projects should support critical needs, explore new and leading ideas, build on previous work, and/or demonstrate a measureable impact. Project funding is evaluated on a case-by-case basis by the SAA Council. Projects that involve collaboration across multiple Sections are strongly encouraged.

Project funding requests can be submitted at any time. However, Sections are strongly encouraged to submit requests by March 1 for consideration as part of the SAA annual budget cycle. Please see the [Component Group Funding Request Form](#) for more details.

### **SAA Foundation Grants**

SAA Sections are also eligible to apply for grants from the SAA Foundation for projects ranging from \$500 to \$5,000. Letters of inquiry are due each year on December 1. For more information, see the Foundation's [Grant Application Process and Guidelines](#).

## **QUESTIONS FOR DISCUSSION**

- Do these guidelines/criteria accurately reflect the Council's desire to create an annual funding stream for Sections?
- Do these guidelines/criteria clearly explain the available sources of funding to Sections?
- What amount of annual funding should be made available to each Section?
- How will the adoption of these guidelines/criteria affect SAA staff?