

Society of American Archivists Council Meeting
May 22 – 24, 2014
Chicago, Illinois

FY15 Proposed Budget: General Overview of Operations
(Prepared by Peter Carlson and Nancy Beaumont)

The FY 2015 budget projects a net gain of \$58,610. This is \$25,556 (77.31%) greater than the FY 2014 budgeted net gain and \$75,986 (56.45%) less than the FY 2014 projected net gain. The proposed budget projects a 6.02% increase in revenues and a 4.90% increase in expenses as compared to the FY 2014 budget. For detailed information, see the individual program income statements and planners.

Under Revenues:

- FY 2014 was the third and final year of the stepped dues increase approved by the membership in August 2010. The proposed budget reflects a modest 2.64% increase in dues revenue, which is on trend with our current experience. (Program 120)
- Education's Digital Archives Specialist (DAS) program is projected to continue to be the major contributor to the budgeted 27.98% increase in workshop revenues. This revenue line also includes examination fees. (Program 105)
- Given that the Joint Annual Meetings in Washington, DC, traditionally have drawn our largest attendance, we have based the proposed budget on 1,800 paid attendees. That said, the proposed budget reflects an increase of just 5.98% over the 2014 actual revenue. Expenses for the Washington, DC, meeting will be considerably higher (projected at 16.05%) than for the New Orleans meeting and will include a payment to NAGARA per a Council-approved agreement. (Program 194)
- Based on experience year to date, we expect a continued decline in Publications sales and have budgeted for a net loss of nearly \$29,000 in this program. FY 2015 activities will focus on strengthening the *Trends* series and rebuilding the *Fundamentals* series. (Program 104)

Under Expenses:

- The proposed increase in the Personnel expense reflects 1) addition in mid-2014 of one full-time employee to provide support in the flourishing Education area (bringing our total to 12 FTEs), 2) a projected increase of 7.23% in benefits costs, and 3) inclusion of a

3% placeholder in the salary budget for staff merit increases. (Program 100)

- MetaPress, the service that has hosted *The American Archivist Online*, notified SAA in March that it will be discontinuing its hosting service for SAA. The proposed budget includes \$40,000 (included in the Services expense) for migration to a new service. (Program 102)
- In keeping with Goal 1 of SAA's Strategic Plan, we anticipate an increase of 74.26% in SAA's investment in advocacy and public awareness efforts. This is reflected primarily in the Services and Travel expenses on the Operations income statement. (Program 107)

The documents that follow provide detailed descriptions of the assumptions made and trends anticipated during FY 2015.

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
Budget Master - Operations

Revenues

	Projected FY '14			FY '15 Budget v. FY '14 Budget		FY '15 Budget v. FY '14 Actuals	
	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ 882,531.64	\$ 859,852.37	\$ 861,812.53	\$ 22,679.27	2.64%	\$ 20,719.11	2.40%
Subscriptions & Advertising	205,435.00	224,220.00	219,468.63	(18,785.00)	(8.38%)	(14,033.63)	(6.39%)
Workshops	610,262.00	476,850.00	517,469.18	133,412.00	27.98%	92,792.82	17.93%
Annual Meeting	677,881.03	564,610.04	639,606.41	113,271.00	20.06%	38,274.62	5.98%
Publications	226,579.93	312,812.93	259,306.29	(86,233.01)	(27.57%)	(32,726.36)	(12.62%)
Contributions	-	-	-	-	N/A	-	N/A
Investments	3,355.50	2,730.00	2,752.06	625.50	22.91%	603.44	21.93%
Other	46,064.19	60,403.46	46,192.83	(14,339.28)	(23.74%)	(128.64)	(0.28%)
Total Revenues	\$ 2,652,109.28	\$ 2,501,478.80	\$ 2,546,607.93	\$ 150,630.48	6.02%	\$ 105,501.35	4.14%

Expenses

	Projected FY '14			FY '15 Budget v. FY '14 Budget		FY '15 Budget v. FY '14 Actuals	
	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 1,004,192.93	\$ 965,876.83	\$ 951,249.35	\$ 38,316.10	3.97%	\$ 52,943.58	5.57%
Office Occupancy & Utilities	97,110.69	94,936.18	97,005.37	2,174.51	2.29%	105.32	0.11%
Services	1,062,868.93	936,639.78	913,674.29	126,229.15	13.48%	149,194.64	16.33%
Supplies	14,230.37	14,771.73	17,512.49	(541.36)	(3.66%)	(3,282.12)	(18.74%)
Travel	223,269.00	194,068.00	179,985.48	29,201.00	15.05%	43,283.52	24.05%
Leases, Rentals & Licenses	48,665.92	38,842.98	25,618.38	9,822.94	25.29%	23,047.54	89.96%
Taxes, Dues and Subscriptions	28,654.00	15,857.00	28,463.80	12,797.00	80.70%	190.20	0.67%
Depreciation, COGS, and Other	114,507.15	207,431.89	198,502.96	(92,924.74)	(44.80%)	(83,995.81)	(42.31%)
Total Expenses	\$ 2,593,498.98	\$ 2,468,424.39	\$ 2,412,012.12	\$ 125,074.59	5.07%	\$ 181,486.86	7.52%
Gain / (Loss) from Operations	\$ 58,610.30	\$ 33,054.41	\$ 134,595.81	\$ 25,555.89	77.31%	\$ (75,985.51)	(56.45%)

Replenishment of Council-Directed Funds

Net Gain / (Loss)

-	-	
\$ 58,610.30	\$ 33,054.41	\$ 134,595.81

**Society of American Archivists Council Meeting
May 22 – 24, 2014
Chicago, Illinois**

**FY15 Proposed Budget Narrative:
General and Administrative (Program 100)
(Prepared by Thomas Jurczak and Peter Carlson)**

The projected net loss in this area for FY 2015 is \$462,970. This is \$61,813 (11.78%) less than the FY 2014 budgeted net loss and \$57,038 (8.83%) greater than the FY 2014 projected net loss.

Effort of all staff members is allocated across the budget based on adjusted FY 2014 patterns. Personnel costs for G&A reflect 2.66 FTEs or 22.15% of total salaries, taxes, and benefits. The cost of benefits is expected to increase by 7.23% as of January 1, 2015. A 3% placeholder has been included in the salary budget for staff merit increases.

Significant points of interest in the proposed budget are as follows:

- Matt Black's effort as Web and IT Services Administrator has been spread across multiple cost centers based on FY14 experience and anticipated need for his services in those areas in the coming year.
- Based on feedback received during the staff performance evaluation process, \$6,000 has been added to this budget to allow for staff professional development across all programs, an activity that has been on hold for several years. (Activity 2.c.)
- We rent 3,807 square feet at a per-foot cost of \$23.00 per year (or approximately \$7,000 per month). Annual increases of \$.50 per square foot take effect each February 1. We also rent two storage spaces at a monthly cost of \$335. (Activity 2.d.)
- Most of SAA's equipment will be fully depreciated as of June 30, 2014. FY 2015 depreciation expenses are projected to be half of those in FY 2014. (Activity 2.h.)
- Interest on CD balances is currently 0.39%. We are projecting the average CD balance to be maintained at the current level of \$850,000.
- Staff effort and associated expenses applied to the Foundation are refunded to the Foundation on a monthly basis as an in-kind donation. For FY 2015, this is calculated to amount to \$19,697. (Activity 7)

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
General & Administrative

Revenues

	Projected FY '14			FY '15 Budget v. FY '14 Budget		FY '15 Budget v. FY '14 Actuals	
	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	-	-	-	-	N/A	-	N/A
Workshops	-	-	-	-	N/A	-	N/A
Annual Meeting	-	-	-	-	N/A	-	N/A
Publications	-	-	-	-	N/A	-	N/A
Contributions	-	-	-	-	N/A	-	N/A
Investments	3,355.50	2,730.00	2,752.06	625.50	22.91%	603.44	21.93%
Other	-	-	801.01	-	N/A	(801.01)	(100.00%)
Total Revenues	\$ 3,355.50	\$ 2,730.00	\$ 3,553.07	\$ 625.50	22.91%	\$ (197.57)	(5.56%)

Expenses

	Projected FY '14			FY '15 Budget v. FY '14 Budget		FY '15 Budget v. FY '14 Actuals	
	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 224,913.59	\$ 270,835.25	\$ 248,463.20	\$ (45,921.65)	(16.96%)	\$ (23,549.61)	(9.48%)
Office Occupancy & Utilities	21,901.05	26,449.70	25,409.87	(4,548.64)	(17.20%)	(3,508.82)	(13.81%)
Services	133,340.10	130,687.61	136,008.96	2,652.49	2.03%	(2,668.86)	(1.96%)
Supplies	2,602.15	2,529.65	3,423.36	72.49	2.87%	(821.21)	(23.99%)
Travel	15,259.00	6,240.00	6,349.64	9,019.00	144.54%	8,909.36	140.31%
Leases, Rentals & Licenses	4,708.75	5,582.17	5,846.27	(873.43)	(15.65%)	(1,137.52)	(19.46%)
Taxes, Dues and Subscriptions	11,769.00	1,342.00	11,535.58	10,427.00	776.97%	233.42	2.02%
Depreciation, COGS, and Other	51,832.18	83,847.19	86,524.38	(32,015.01)	(38.18%)	(34,692.20)	(40.10%)
Total Expenses	\$ 466,325.82	\$ 527,513.57	\$ 523,561.26	\$ (61,187.75)	(11.60%)	\$ (57,235.44)	(10.93%)
Gain / (Loss) from Operations	\$ (462,970.32)	\$ (524,783.57)	\$ (520,008.19)	\$ 61,813.25	(11.78%)	\$ 57,037.87	(10.97%)

Transferred to Funds

- - -

Net Gain / (Loss)

\$ (462,970.32) \$ (524,783.57) \$ (520,008.19)

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: General & Administrative
Program Number: 100**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	1	Staff an effective and efficient headquarters office.				\$ 234,316		\$ 273,672
	a. Personnel	Amounts in this document are those allocated specifically to the General & Administrative (G&A) cost center. The program planners for other individual cost centers include appropriate G&A allocations based on staffing. Based on "anticipated effort" allocations, 22.15% of G&A expenses are allocated to the General & Administrative cost center.	5000	Salaries & Wages	\$ 181,642		\$ 218,696	
			5000	Decrease in Vacation Liability	(1,800)		-	
			5010	Insurance Coverage	14,785		17,102	
			5020	Employer Payroll Taxes	14,938		17,542	
			5030	Retirement Benefit	15,349		17,496	
			5040	Bonuses	-		-	
	b. Staff memberships in professional organizations		5820	ASAE (NPB @ \$345) Association Foundation Group (NPB @ \$95) Association Forum (NPB @ \$325)	765		730	
	c. Registration/travel for professional development offerings		5640	ASAE and Association Forum	8,019		1,325	
	d. Business meals and local transportation		5290	Various Occasions and Meetings @ \$150/m (G&A share) - Holiday Luncheon: \$900 - Staff Acknowledgments (included in monthly amount)	619		781	
	2	Overhead costs of SAA headquarters office.				86,800		115,316
	a. Electricity		5120	Electricity: Avg of \$350/m @ 22.15%	930		1,324	
	b. Postage		5300	Postage: Avg of \$700/m @ 22.15%	1,861		2,316	
			5310	Express Mail Services: Avg of \$83/m	1,000		1,000	
	c. Insurance		5260	Insurance (combined @ approx \$960/m) - Workers Compensation - Office Package - Professional Liability	11,520		11,650	
	d. Rent		5100	7/14 - 1/15: (\$7,138+185 + 150-325.58) x 7m @ 22.15% 2/15 - 6/15: (\$7,297+185 + 150-325.58) x 5m @ 22.15%	18,925		23,339	
	- Current 10-year lease expires 1/31/18.							
	e. Supplies		5500	Office Supplies: Avg \$642/m @ 22.15%	1,702		1,820	
			5570	Miscellaneous Supplies	-		-	

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: General & Administrative
Program Number: 100**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
		f. Telephone	5110	Telephone/Internet: \$9,236 annually @ 22.15%	2,046		1,787	
		g. Printing and duplication	5400	Check Printing (2 @ \$235)	968		1,255	
			5400	Excess Usage of Ricoh (\$2,200 @ 22.15%)				
		h. Equipment and depreciation	5250	Maintenance and Repairs	-		-	
			5700	Equipment Lease, Site Licenses	4,709		5,582	
				- Phone System: Avg \$712/m @ 22.15%				
				- Copier / Scanner / Fax / Printer: Avg \$597/m @ 22.15%				
				- Accounting Software License: \$1,025				
				- Pitney Bowes: Avg \$230/qtr @ 22.15%				
			5900	Depreciation: \$2,677.92/m	32,135		64,631	
		i. Tax payments (property and UBIT)	5800	3,807 sq ft @ 17 North State (\$42/m), UBIT @ \$10,500	11,004		612	
3		Use outsource services as required to ensure that SAA's goals are met.				102,670		99,740
		a. Accounting	5240	Payroll Processing: \$300/m	3,600		3,380	
			5210	Audit and Tax Preparation	34,000		35,000	
		b. Bank charges	5230	Investment Fees: \$3,525/qtr allocated to Foundation	-		-	
			5233	Service Charges: Merrill Lynch Annual Fee	150		150	
			5236	Credit Card Processing Fees: Avg \$5,033/m	60,400		56,900	
		c. Legal services (general)	5280	Legal Services: \$1,000/qtr. placeholder	4,000		4,000	

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: General & Administrative
Program Number: 100**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
		d. 1099 software and processing	5500	Software	400		210	
			5335	Processing/Postage/Mailing	120		100	
	4	Miscellaneous Income				3,356		(2,730)
		a. Return on Merrill Lynch General Fund	4700	Interest / Dividends: Assumes \$279.63/m	3,356		(2,730)	
	5	Attendance at Annual Meeting	5600	Bags / Ground Transport	500	7,240	500	4,915
		(Black, Carlson, Gonzalez, Salgado, Spears)	5600	Lodging @ Annual Meeting (JS, CS, LG, MB, PC)	3,900		675	
			5600	Per Diem @ \$35 x 6 (PC, CS), x 5 (LG, MB), x 4 (JS)	1,040		1,240	
			5600	Airfare @ \$360 x 5	1,800		2,500	
	6	Information Technology Expenses				15,602		14,655
		- Hardware, software, hosting, programming support (allocated across the budget)	5226	Computer Support	13,602		12,655	
				- Commonplaces: \$9,500 @ 22.15%				
				- General support: \$43,135 @ 22.15%				
				- Impact Solutions: \$8,764 @ 22.15%				
		- Archives and Archivists List Coordinator (annual contract)	5200	A&A List Consultant	1,500		1,500	
		Software and associated supplies	5500	Supplies	500		500	
	7	Administrative support of SAA Foundation	5915	In-kind Donations from SAA to SAA Foundation	19,697	19,697		19,216
				Total Income		3,356		(2,730)
				Total Expenses		466,326		527,514
				Gain / (Loss) From Operations		\$ (462,970)		\$ 524,784

Society of American Archivists Council Meeting
May 22 – 24, 2014
Chicago, Illinois

FY15 Proposed Budget Narrative:
***The American Archivist* (Program 102)**
(Prepared by Teresa Brinati)

The proposed FY 2015 budget projects a net loss of \$79,710 in this program area. This is \$40,948 (105.64%) more than the FY 2014 budgeted net loss and \$37,611 (89.34%) more than the FY 2014 projected net loss. The major reason for this shift is the termination of web hosting services for *The American Archivist Online* by MetaPress and the subsequent need to transition to a new service provider.

Effort of all staff members is allocated across the budget based on adjusted FY14 patterns. Personnel costs for *The American Archivist* reflect 0.45 FTEs or 3.71% of total salaries, taxes, and benefits. The cost of benefits is expected to increase by 7.23% as of January 1, 2015. A 3% placeholder has been included in the salary budget for staff merit increases.

The proposed budget assumes the following:

- No winter 2015 meeting of the Editorial Board in Chicago as an offset for the additional expenses incurred by the migration to a new web hosting service. (Activity 1.b.)
- Purchase of project management software to piggyback on book publishing program solution. (Activity 2.b.)
- Migration of 270+ issues (approximately 36,000 pages) of *The American Archivist* content from MetaPress to a new web hosting service. (Activity 3.d.)
- Suspension of travel funding for the Editor as one small offset for the additional expenses incurred by the migration to a new web hosting service. (Activity 5.a.)

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
American Archivist

Revenues

	Projected FY '14			FY '15 Budget v. FY '14 Budget		FY '15 Budget v. FY '14 Actuals	
	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	109,835.00	123,420.00	118,783.75	(13,585.00)	(11.01%)	(8,948.75)	(7.53%)
Workshops	-	-	-	-	N/A	-	N/A
Annual Meeting	-	-	-	-	N/A	-	N/A
Publications	-	-	-	-	N/A	-	N/A
Contributions	-	-	-	-	N/A	-	N/A
Investments	-	-	-	-	N/A	-	N/A
Other	6,150.00	6,250.00	6,288.83	(100.00)	(1.60%)	(138.83)	(2.21%)
Total Revenues	\$ 115,985.00	\$ 129,670.00	\$ 125,072.58	\$ (13,685.00)	(10.55%)	\$ (9,087.58)	(7.27%)

Expenses

	Projected FY '14			FY '15 Budget v. FY '14 Budget		FY '15 Budget v. FY '14 Actuals	
	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 37,580.62	\$ 35,063.65	\$ 35,720.80	\$ 2,516.96	7.18%	\$ 1,859.82	5.21%
Office Occupancy & Utilities	3,559.86	3,429.47	3,509.94	130.38	3.80%	49.92	1.42%
Services	157,308.30	118,957.99	117,981.15	38,350.31	32.24%	39,327.15	33.33%
Supplies	234.04	1,229.58	381.30	(995.54)	(80.97%)	(147.26)	(38.62%)
Travel	-	8,775.00	8,870.00	(8,775.00)	(100.00%)	(8,870.00)	(100.00%)
Leases, Rentals and Licenses	1,011.88	976.50	707.72	35.39	3.62%	304.16	42.98%
Taxes, Dues and Subscriptions	-	-	-	-	N/A	-	N/A
Depreciation, COGS, and Other	-	-	-	-	N/A	-	N/A
Total Expenses	\$ 199,694.70	\$ 168,432.20	\$ 167,170.91	\$ 31,262.50	18.56%	\$ 32,523.79	19.46%
Gain / (Loss) from Operations	\$ (83,709.70)	\$ (38,762.20)	\$ (42,098.33)	\$ (44,947.50)	115.96%	\$ (41,611.37)	98.84%

Transferred to Funds

Net Gain / (Loss)

-	-	-
\$ (83,709.70)	\$ (38,762.20)	\$ (42,098.33)

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: American Archivist
Program Number: 102**

Goal 2&3	Activity <u>No.</u>	<u>Narrative</u>	Account <u>No.</u>	<u>Account Description</u>	Proposed FY15 Budget		FY14 Budget	
					<u>Line Amount</u>	<u>Activity Total</u>	<u>Line Amount</u>	<u>Activity Total</u>
	1	Management & Administration				\$0		\$0
		Administer activities of <i>The American Archivist</i> ; develop and monitor budget; organize annual meeting and mid-year meeting (latter if needed) of Editorial Board; prepare reports and resource materials; consult with editor regarding visual materials for cover presentation; obtain professional literature for reviews editor; facilitate copyright and permissions; monitor subscriptions and claims; interact with persons within and outside the profession regarding association management and periodical publishing-related issues; respond to feedback on the journal; participate in editor's performance review.				\$1,608		\$8,095
		a. "Write Away" Morning Forum during Annual Meeting (split 50/50 with Pubs)	5290	F&B--Continental (75p x \$32 x 1.34 svc/tax) @ 50%	\$1,608		\$700	
		b. Winter meeting of Editorial Board in Chicago (10 members + 1 Council liaison = 11)	5610	Member Travel (6x\$300 + 4x\$550 + 1x\$800 air/ground)	\$0		\$4,600	
			5620	(11p x \$150 x 1n lodging)	\$0		\$1,650	
			5630	(11p x \$45 x 1d per diem)	\$0		\$495	
			5290	Business Meals	\$0		\$650	
	2	Print Production				\$2,200		(\$2,200)
		Vol. 77, No. 2 (Fall/Winter 2014) @ 300 pp				\$112,000		\$115,240
		Vol. 78, No. 1 (Spring/Summer 2015) @ 300 pp						
		a. Editorial services	5370	Editor Honorarium	\$44,000		\$40,000	
			5370	Copyeditor	\$4,000		\$4,500	
			5370	Indexer	\$2,400		\$2,240	
		b. Project management software	5500	Project Management Software	\$0		\$1,000	

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: American Archivist
Program Number: 102**

Goal 2&3	Activity <u>No.</u>	<u>Narrative</u>	Account <u>No.</u>	<u>Account Description</u>	Proposed FY15 Budget		FY14 Budget	
					<u>Line Amount</u>	<u>Activity Total</u>	<u>Line Amount</u>	<u>Activity Total</u>
		c. Print production and distribution ~5,400 copies x 2 issues [Student members do not receive print edition.]	5350	Layout (\$4,000 x 2)	\$7,600		\$9,000	
			5400	Printing (\$20,000 x 2 issues)	\$35,000		\$40,000	
			5300	Postage				
			5300	Domestic	\$14,800		\$14,500	
			5300	International	\$4,200		\$4,000	
		d. Support advertising sales for semi-annual journal (assumes 2 full-page ads)	4150	Display Ads (\$550 x 2 ads x 2 issues)	\$2,200		(\$2,200)	
	3	e-Publishing				\$150		(\$250)
						\$41,422		\$1,692
		a. MetaPress: Hosting/licensing fees through Jan. 2015	5226	Hosting @ \$25/m + Licensing @ \$20/m	\$270		\$540	
		b. MetaPress: Electronic content management and delivery of 1 issue (Fall/Winter)	5335	Content Management Service Charge (\$48/chunk x 12 chunks x 2 issues)	\$1,152		\$1,152	
		c. MetaPress: Commercial sale of online articles - nonmember/nonsubscriber sales of embargoed content	4900	Sale of Online Articles (10 articles x \$18 - \$3 transaction fee)	\$150		(\$250)	
		d. Transition to new service provider by Jan. 2015	5335	Migration, Publication of New Issue(s)	\$40,000		\$0	
	4	Subscriptions						
		a. Subscriptions Assumes 515 subscriptions @ \$209	4100	Subscriptions	\$107,635	\$113,635	(\$121,220)	(\$127,220)
		- Institutional Subscribers \$209 for print edition only \$209 for online edition only \$259 for "premium" subscription (print and online)						

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: American Archivist
Program Number: 102**

Goal 2&3	Activity <u>No.</u>	<u>Narrative</u>	Account <u>No.</u>	<u>Account Description</u>	Proposed FY15 Budget		FY14 Budget	
					<u>Line Amount</u>	<u>Activity Total</u>	<u>Line Amount</u>	<u>Activity Total</u>
		- Individual Subscribers \$169 for print edition only \$169 for online edition only \$199 for "premium" subscription (print and online)						
		b. JSTOR (digital library)	4860	Royalties	\$6,000		4 (\$6,000)	
	5	Outreach				\$0		\$2,030
		a. Editor's attendance at conferences.		Editor Travel (Regional Meeting)				
			5610	(1p x \$550 airfare/ground)	\$0		5 \$550	
			5620	(1p x \$180 x 2d lodging)	\$0		5 \$360	
			5630	(1p x \$45 x 3d per diem)	\$0		5 \$135	
				Editor Travel (ACA Meeting)				
			5610	(1p x \$500 airfare/ground)	\$0		5 \$500	
			5620	(1p x \$175 x 2d lodging)	\$0		5 \$350	
			5630	(1p x \$45 x 3d per diem)	\$0		5 \$135	
	6	General and Administrative Cost Allocation				42,418		39,730
	7	Computer Support Cost Allocation				2,247		1,645
				Total Income		115,985		(129,670)
				Total Expenses		199,695		168,432
				Gain / (Loss) From Operations		(83,710)		\$38,762
				Pubs Fund		-		-
				B List		-		-
				Tech Fund				
				Net Operating Gain / (Loss)		(\$83,710)		\$38,762

**Society of American Archivists Council Meeting
May 22 – 24, 2014
Chicago, Illinois**

**FY15 Proposed Budget Narrative:
Archival Outlook / In The Loop (Program 103)
(Prepared by Teresa Brinati)**

The FY 2015 budget projects a net loss of \$111,296 in this program area. This is \$7,456 (6.28%) less than the FY 2014 budgeted net loss and \$611 (0.55%) less than the FY 2014 projected net loss.

Effort of all staff members is allocated across the budget based on adjusted FY14 patterns. Personnel costs reflect 0.48 FTEs or 4.02% of total salaries, taxes, and benefits. The cost of benefits is expected to increase by 7.23% as of January 1, 2015. A 3% placeholder has been included in the salary budget for staff merit increases.

The proposed budget for *Archival Outlook* (and *In The Loop*) assumes the following:

- A decrease in advertising revenue (total projected at \$15,000) based on trends and availability within SAA of other options for advertisers. (Activity 2.a.)
- An increase in advertising revenue for *In the Loop* based on trends and optimal frequency. (Activity 3)

Per the Council's Action List, scenarios for "opting out" of the print edition of *Archival Outlook* are outlined in the program planner. (Activity 2.c.)

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
Archival Outlook

Revenues

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14 Actuals</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	21,600.00	26,000.00	23,113.96	(4,400.00)	(16.92%)	(1,513.96)	(6.55%)
Workshops	-	-	-	-	N/A	-	N/A
Annual Meeting	-	-	-	-	N/A	-	N/A
Publications	-	-	-	-	N/A	-	N/A
Contributions	-	-	-	-	N/A	-	N/A
Investments	-	-	-	-	N/A	-	N/A
Other	2,400.00	2,250.00	2,415.00	150.00	6.67%	(15.00)	(0.62%)
Total Revenues	\$ 24,000.00	\$ 28,250.00	\$ 25,528.96	\$ (4,250.00)	(15.04%)	\$ (1,528.96)	(5.99%)

Expenses

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14 Actuals</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 41,205.98	\$ 57,900.11	\$ 44,778.26	\$ (16,694.13)	(28.83%)	\$ (3,572.28)	(7.98%)
Office Occupancy & Utilities	3,980.98	5,650.60	4,423.21	(1,669.62)	(29.55%)	(442.23)	(10.00%)
Services	87,182.74	81,253.60	87,018.97	5,929.14	7.30%	163.77	0.19%
Supplies	301.79	386.83	391.02	(85.04)	(21.98%)	(89.23)	(22.82%)
Travel	100.00	100.00	-	-	0.00%	100.00	N/A
Leases, Rentals & Licenses	2,029.55	1,466.07	825.01	563.49	38.44%	1,204.54	146.00%
Taxes, Dues and Subscriptions	495.00	245.00	-	250.00	102.04%	495.00	N/A
Depreciation, COGS, and Other	-	-	-	-	N/A	-	N/A
Total Expenses	\$ 135,296.04	\$ 147,002.20	\$ 137,436.47	\$ (11,706.16)	(7.96%)	\$ (2,140.43)	(1.56%)
Gain / (Loss) from Operations	\$ (111,296.04)	\$ (118,752.20)	\$ (111,907.51)	\$ 7,456.16	(6.28%)	\$ 611.47	(0.55%)

Transferred to Funds

- - -

Net Gain / (Loss)

\$ (111,296.04) \$ (118,752.20) \$ (111,907.51)

The Society of American Archivists
Program Planner
Fiscal 2015 Budget

Program Name: Archival Outlook / In the Loop
Program Number: 103

Goal 2	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	1	Management and Administration Administer activities of <i>Archival Outlook</i> and <i>In the Loop</i> . Develop and monitor budget; maintain resource materials; consult with staff, leaders, and members regarding content needs; interact with persons within and outside the profession regarding association management periodical publishing-related issues; and respond to feedback.				\$595		\$345
		a. Membership dues (two for one - TB, AH) - Association Media and Publishing	5820	Membership Fee	\$495	5	\$245	
		b. Professional recognition	5640	Awards Competition Entry Fee	\$100	5	\$100	
	2	Publish Archival Outlook 6 times per year (5 issues @ 28 pages + cover) x 6,200 copies (1 issue @ 40 pages + cover) x 6,200 copies Includes writing, editing, layout, design of house ads to promote SAA activities, digital conversion and posting, printing and distribution to members, and comp copies to contributors.				\$17,400 \$80,900		(\$22,750) \$78,980
		a. Display advertising (7.5 pages x 6 issues)	4150	Display Ads	\$15,000	4	(\$20,500)	
		b. First-class and airmail service	4800	First-Class + Airmail Income	\$2,400	4	(\$2,250)	

Program Name: Archival Outlook / In the Loop
Program Number: 103

ProgPlanner-FY15-ArchOutlook.xlsx

**Society of American Archivists Council Meeting
May 22 – 24, 2014
Chicago, Illinois**

**FY15 Proposed Budget Narrative:
Publications (Program 104)
(Prepared by Teresa Brinati)**

The FY15 proposed budget projects a net loss of \$28,926. This is \$57,123 less than the FY14 budgeted net gain and \$6,441 (28.65%) more than the FY14 projected net loss.

Effort of all staff members is allocated across the budget based on adjusted FY14 patterns. Personnel costs reflect 0.97 FTEs or 8.08% of total salaries, taxes, and benefits. The cost of benefits is expected to increase by 7.23% as of January 1, 2015. A 3% placeholder has been included in the salary budget for staff merit increases.

Relation of this program to Strategic Plan: Goal 2: Enhancing Professional Growth, Activity 2.1.2. Review, expand, and continuously improve SAA's published content to address both archival fundamentals and the latest thinking and best practices in the field.

The proposed budget assumes the following:

- The Publications Board will meet at SAA headquarters, February/March 2015. (Activity 1.b.)
- Revenue projections are based on 68 active items; average cost per item of \$12.14; average revenue per item sold of \$33.76; percentage of items sold from total listed at 30.09%; and a COGS ratio to revenue of 35.97%. (Activity 2; publications sales budget spreadsheet projecting cost of goods sold versus revenue per title is attached to the program planner.)
- Shipping revenue offsets 40.8% of postage, processing labor, and materials associated with third-party fulfillment. We will be investigating alternative pick/pack/ship options. (Activities 2.b. and 2.f.)
- Completion of one new publication by August 2014 (*EAD3*); 8 new Trends in Archives Practice modules (clustered under *Digital Preservation Essentials* and *Rights in the Digital Era*) by Fall 2014; one new SAA Sampler on *Social Justice*; and three new brochures (Spanish-language versions of the donor brochures). (Activity 3)
- Revenue trends from the past four fiscal years are as follows:

July 2013 (\$320,247) to June 2014 (projected \$286,636):	10.5% decrease
July 2012 (\$371,974) to June 2013 (\$320,247):	13.91% decrease
July 2011 (\$408,430) to June 2012 (\$371,974):	8.93% decrease
July 2010 (\$454,993) to June 2011 (\$408,430):	10.23% decrease

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
Publications

Revenues

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14</u> <u>Actuals</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	-	-	-	-	N/A	-	N/A
Workshops	-	-	-	-	N/A	-	N/A
Annual Meeting	-	-	-	-	N/A	-	N/A
Publications	225,859.93	304,112.93	258,091.29	(78,253.01)	(25.73%)	(32,231.36)	(12.49%)
Contributions	-	-	-	-	N/A	-	N/A
Investments	-	-	-	-	N/A	-	N/A
Other	29,164.19	49,553.46	28,545.42	(20,389.28)	(41.15%)	618.77	2.17%
Total Revenues	\$ 255,024.11	\$ 353,666.40	\$ 286,636.71	\$ (98,642.28)	(27.89%)	\$ (31,612.60)	(11.03%)

Expenses

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14</u> <u>Actuals</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 82,723.86	\$ 91,851.50	\$ 79,344.84	\$ (9,127.64)	(9.94%)	\$ 3,379.02	4.26%
Office Occupancy & Utilities	7,983.54	9,109.57	8,543.92	(1,126.03)	(12.36%)	(560.38)	(6.56%)
Services	95,630.48	95,799.13	92,635.77	(168.65)	(0.18%)	2,994.71	3.23%
Supplies	1,627.17	1,606.81	977.75	20.36	1.27%	649.42	66.42%
Travel	13,005.00	8,655.00	13,828.96	4,350.00	50.26%	(823.96)	(5.96%)
Leases, Rentals & Licenses	8,224.04	5,783.78	4,968.33	2,440.26	42.19%	3,255.71	65.53%
Taxes, Dues and Subscriptions	-	-	1,761.00	-	N/A	(1,761.00)	(100.00%)
Depreciation, COGS, and Other	74,756.37	112,663.59	107,061.13	(37,907.22)	(33.65%)	(32,304.76)	(30.17%)
Total Expenses	\$ 283,950.47	\$ 325,469.39	\$ 309,121.70	\$ (41,518.92)	(12.76%)	\$ (25,171.23)	(8.14%)
Gain / (Loss) from Operations	\$ (28,926.36)	\$ 28,197.01	\$ (22,484.99)	\$ (57,123.37)	(202.59%)	\$ (6,441.37)	28.65%

Transferred to Funds

- - -

Net Gain / (Loss)

\$ (28,926.36) \$ 28,197.01 \$ (22,484.99)

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: Publications
Program Number: 104**

Goal 2&3	Activity No.	Narrative	Account No.	Account Description	Proposed FY 15 Budget		FY 14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	1	Management and Administration Administer activities of the Publications Department: develop and monitor budget; prepare reports and resource materials for the Publications Board; organize and attend semi-annual Publications Board meetings; consult with Publications Editor; maintain microsite and listserv; liaise with strategic publishing partners; negotiate contracts with vendors, authors, and contributors; maintain stable of freelance copyeditors, designers, indexers; facilitate copyright and permissions; interact with persons within and outside the profession regarding association management and publishing-related issues; respond to feedback on publications; and prepare performance evaluation of Publications Editor. With regard to the Dictionary Working Group, prepare reports and resource materials; organize and attend semi-annual meetings; consult with DWG chair; maintain microsite, listserv, and sandbox; participate in semi-monthly conference calls.				\$40,256		\$30,450
	a.	Publications Editor	5370	Honorarium	25,000		22,500	
	b.	Publications Board – Winter Meeting in Chicago (9 members + 1 Council liaison + 2 staff)	5610	Airfare / Ground Transport	2,500		3,500	
			5620	Lodging (\$125 x 2n x 10p)	2,500		3,100	
			5290	Business Meals	1,500		800	
			5295	Local Travel	-		-	
	c.	Archival Fundamentals Series III Series editor + author honorariums for 7 new volumes; multi-year honorarium expenses to total \$45,000.	15XX	Honorarium Installments	10,000		1	

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: Publications
Program Number: 104**

Goal 2&3	Activity No.	Narrative	Account No.	Account Description	Proposed FY 15 Budget		FY 14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
		d. Dictionary Working Group (9 members + 1 Council liaison + 1 staff person) - Dinner @ Annual Meeting - Winter Meeting in Chicago (9p x 2n x \$125)	5290 5110 5610 5620	Dinner @ Ann Mtg (11p x \$75 x 1.34) Conference Calls (included in allocables) Airfare/Ground Transport @ Winter Mtg Lodging @ Winter Mtg	1,106 - 2,700 2,250		400 150	
		e. Dictionary Creation Software	5700	Software Licensing	2,700		5	
	2	Sales and Distribution				220,224		(293,389)
		Work with Service Center regarding onsite order processing and third-party fulfillment of titles in bookstore. Add new SAA titles; reprint existing SAA titles as needed; acquire titles from other publishing outlets for distribution based on criteria established by Publications Board; reorder titles from other publishing outlets as needed (3- to 6-mo. inventory); monitor sales and remove underperforming titles; refresh and update online bookstore.				122,001		151,441
		a. Sale of Publications (see worksheet)	4400	Sale of Publications	186,060		(243,836)	
		b. Revenue from customers to offset shipping expense	4800	Shipping Revenue	19,164		(27,553)	
		c. e-Books	4400	Sales	5,000		-	
			5335	E-Production	- 2,760		- 5	
		d. Royalties earned from publishing/distribution partnerships:	4860	Royalty Income	10,000		(22,000)	

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: Publications
Program Number: 104**

Goal 2&3	Activity No.	Narrative	Account No.	Account Description	Proposed FY 15 Budget		FY 14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
		<ul style="list-style-type: none"> - American Library Association (95%) - Scarecrow Press (3%) - Copyright Clearance Center (2%) 						
		e. Cost of goods sold @ average of .2441 of sales (Sustaining institutional member COGS reflected in Membership budget; CD sales in Education budget.)	5940	Cost of Goods Sold	66,918		71,584	
		f. Warehousing, packaging, and distribution	5700	Warehouse (\$270/m x 12)	3,240		3,240	
		- Fulfillment via Diamond Marketing Solutions, Inc.	5300	Postage	40,000		45,000	
			5335	Processing Labor / Materials	7,000		9,000	
		g. Royalties paid to authors of SAA books:	5395	Royalties Paid	2,083		2,618	
		- <i>Managing Archival and Manuscript Repositories</i>		(\$1/book x 200)				
		- <i>Photographs: Archival Care and Management</i>		(\$1/book x 300)				
		- <i>Preserving Archives and Manuscripts</i>		(\$1/book x 395)				
		- <i>Providing Reference Services</i>		(\$1.50/book x 325)				
		- <i>Understanding Archives and Manuscripts</i>		(\$1/book x 2 authors x 350)				
		h. Reserve set up to cover unsold assets	5960	Inventory Reserve Depreciation	-		20,000	
3		New Publication Production, Distribution, and Sales	4400	New Publications--Sales	34,800	34,800	(60,277)	(60,277)
		Manage print and electronic production and distribution of new titles.	5940	New Publications--Cost of Sales	7,838	7,838	21,080	21,080
		Expenses include research and development; production; e- conversion; honoraria; and distribution of review, comp, and sustaining member copies.						
		<i>See attachment for detail.</i>						

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: Publications
Program Number: 104**

Goal 2&3	Activity No.	Narrative	Account No.	Account Description	Proposed FY 15 Budget		FY 14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	4	Marketing and Promotion Market and promote new and existing titles. Promote participation in SAA's publishing program.				- 15,317		- 14,210
		a. Produce a publications mini-catalog in July	5350	Design	800		1,500	
		- Co-mail with Sep/Oct <i>Archival Outlook</i>	5400	Printing (8,500)	3,200		3,700	
		- Distribute at Annual Meeting, regional meetings, wkshps	5300	Postage / Freight	400		1,800	
		b. Promotional items	5550	Promo items	1,000		1,000	
		c. Staff attendance at SAA Annual Meeting	5600	Staff Travel (\$400 x 2)	800		1,000	
		- Brinati and Hartman	5600	Lodging (6d x \$150)	1,800		600	
			5600	Per Diem (1p x 7d + 1p x 6d x \$35)	455		455	
		d. Bookstore at Annual Meeting	5350	Graphics	750		600	
			5400	Printing (25 signs @ \$32)	800		525	
			5300	Freight (RT warehouse to site)	3,200		2,000	
		e. "Salute to Authors" Lemonade Toast at Annual Meeting	5290	F&B (4 gals x \$94 x 1.34 svc/tax)	504		505	
		f. "Write Away" Morning Forum at Annual Meeting (50/50 split with <i>The American Archivist</i>)	5290	F&B (Continental Breakfast) (75p x \$32 x 1.34 svc/tax) @ 50%	1,608		525	

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: Publications
Program Number: 104**

Goal 2&3	Activity No.	Narrative	Account No.	Account Description	Proposed FY 15 Budget		FY 14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	5	General and Administrative Cost Allocation	5XXX			93,576	5	104,003
	6	Computer Support Cost Allocation	5XXX			4,963	5	4,285
				Total Income		255,024		(353,666)
				Total Expenses		283,950		325,469
				Gain / (Loss) From Operations		<u>(28,926)</u>		<u>(28,197)</u>
					W-I-P	-	W-I-P	-
				Net Operating Gain / (Loss)		<u>(\$28,926)</u>		<u>(\$28,197)</u>

**The Society of American Archivists
Publications Sales Budget
Fiscal 2015**

<u>Item #</u>	<u>Item/Title</u>	<u>Copyright</u>	<u># Sold</u>	<u>Cost</u>	<u>Price</u>	<u>COGS</u>	<u>Revenue</u>	<u>% of COGS</u>	<u>% of Rev</u>	<u>% of Units</u>	<u>FY14 budget</u>	<u>diff</u>
BOOKRES-0525	X-Archives and Archivists (Holland & Manning)	2007	-	\$ 33.00	\$ -	\$ -	\$ -	0.00%	0.00%	0.00%	0	-
BOOKRES-0456	X-The Long-term Pres of Authentic Elec Recs-InterPA		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0214	X-Guide to Genealogical Research in the National Ar		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0216	X-Creating a Winning Online Exhibition: A Guide for L	2003	-	49.05	15.00	-	-	0.00%	0.00%	0.00%	8	(8)
BOOKSAA-ACS0455	Lester J. Cappon and the Relationship of History, A	2004	8	4.78	23.50	38.24	188.00	0.06%	0.10%	0.15%	7	1
AOBACKISSUE	Archival Outlook Issue (1972-1999)		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0317	X-The Organization of Information		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0212	X-Marginalia: Readers Writing in Books		-	16.67	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0183	X-Digital Futures: Strategies for the Information A		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0292	X-Preservation Microfilming: A Guide for Librarians a	1995	-	96.67	99.00	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0192	X-Student Assistants in Archival Repositories: A Ha		-	5.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0194	X-Thesaurus of University Terms		-	1.75	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0521	X-Archives and Justice: A South African Perspective (2007	-	28.84	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0358	X-Emergency Management for Records and Information		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKJNT-0196	Varsity Letters: Documenting Modern Colleges and Un	1992	8	37.19	41.63	297.52	333.00	0.44%	0.17%	0.15%	10	(2)
BOOKJNT-0197	Without Consent: The Ethics of Disclosing Personal	1992	3	29.40	40.00	88.20	120.00	0.13%	0.06%	0.05%	2	1
BOOKRES-0524	X-Preserving Archives (2007)	2007	-	69.96	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0299	X-Records Management: A Practical Guide for Cities		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0523	Planning New and Remodeled Archival Facilities (200	2007	50	5.91	31.03	295.50	1,551.47	0.44%	0.81%	0.91%	40	10
BOOKSAA-0201	X-Preserving Archives and Manuscripts		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0349	X-Encoded Archival Description: Context, Theory and C		-	9.09	-	-	-	0.00%	0.00%	0.00%	0	-
AABACKISSUE	American Archivist - Single Issue		-	5.00	143.69	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0110	Appraising the Records of Modern Science and Techno	1985	25	-	0.71	-	17.63	0.00%	0.01%	0.45%	24	1
BOOKRES-0207	X-Libraries, Museums, and Archives: Legal Issues		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKJNT-0215	X-Canadian Archival Studies and the Rediscovery of		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKJNT-0319	X-Research and the Manuscript Tradition	1997	-	48.30	59.00	-	-	0.00%	0.00%	0.00%	1	(1)
BOOKRES-0220	X-Archives and the Public Good: Accountability and Re	2002	-	78.59	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0177	X-Preservation Management of Digital Materials		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0136	X-Book Repair: A How-to-do-it Manual (2nd ed.)		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0143	X-Creating Digital Resources for the Visual Arts		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0146	X-Creating and Documenting Electronic Texts	2000	-	17.40	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0149	X-Trophies of War and Empire		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0129	X-Effects of Light on Materials in Collections		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0176	Sample Forms for Archival & Records Management	2002	3	26.30	41.67	78.90	125.00	0.12%	0.07%	0.05%	20	(17)
BOOKSAA-ACS0174	X-Archives in the Ancient World		-	5.29	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0247	Oral History Manual, The	2010	10	26.76	22.14	267.60	221.43	0.40%	0.12%	0.18%	10	-
BOOKSAA-ACS0257	Manual for the Arrangement and Description of Archi	2003	-	3.90	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0411	X-Refiguring the Archive		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0412	X-Preservation of the Integrity of Electronic Records	2002	-	35.69	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-ACS0415	Selected Writings of Sir Hilary Jenkinson	2003	5	6.60	26.00	33.00	130.00	0.05%	0.07%	0.09%	25	(20)
BOOKJNT-0416	Imagining Archives: Essays and Reflections by Hugh	2003	5	37.19	35.00	185.95	175.00	0.28%	0.09%	0.09%	5	-
BOOKSAA-0417	Ethics and the Archival Profession: Introduction an	2003	-	15.39	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0429	X-Time Capsules: A Cultural History		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0418	X-First City: Philadelphia & the Forging of Histori		-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0420	X-Management of Library and Archival Security (1998		-	20.35	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0424	X-Owning Memory: How a Caribbean Community Lost Its A	2003	-	51.24	28.00	-	-	0.00%	0.00%	0.00%	2	(2)
BOOKRES-0431	X-War on Our Freedoms, The (2003)		-	9.75	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0427	Thirty Years of Electronic Records	2003	-	42.00	33.33	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0434	X-Picturing Place: Photography & the Geographic Ima		-	-	-	-	-	0.00%	0.00%	0.00%	0	-

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BOOKSAA-0435	Museum Archives: An Introduction (2nd ed.) (2004)	2004	100	17.60	36.60	1,760.00	3,660.18	2.63%	1.92%	1.81%	100	-
BOOKSAA-0436	Describing Archives: A Content Standard (2013)	2013	400	3.14	22.48	1,256.00	8,991.24	1.88%	4.72%	7.26%	0	400
BOOKSAA-AFS0437	Managing Archival and Manuscript Repositories (AFS	2004	200	4.97	33.26	994.00	6,652.98	1.49%	3.49%	3.63%	250	(50)
BOOKRES-0438	X-Archival Information: How to Find It, How to Use	-	-	45.46	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0441	X-Essays in Honour of Michael Cook	-	-	12.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-ACS0433	X-The Management of Archives (1965)	-	-	7.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0442	X-Building Digital Archives, Descriptions, and Displa	2003	-	45.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0439	X-Digitizing Collections: Strategic Issues for the In	2004	-	73.50	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0440	X-Copyright for Archivists and Users of Archives (2	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0443	X-Managing Electronic Records 4th ed.	2009	-	56.00	47.97	-	-	0.00%	0.00%	0.00%	10	(10)
BOOKRES-0444	Electronic Records Retention: New Strategies/Data L	2003	-	33.27	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0445	No Innocent Deposits: Forming Archives by Rethinkin	2004	9	42.87	44.44	385.83	399.95	0.58%	0.21%	0.16%	10	(1)
BOOKRES-0446	X-Who Owns Native Culture (2003)	-	-	14.77	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0448	X-Business Processes: An Archival Science Approach	-	-	65.20	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0450	X-Organizing Archival Records: A Practical Method of	2003	-	18.99	30.86	-	-	0.00%	0.00%	0.00%	10	(10)
BOOKRES-0449	Film Preservation Guide: The Basics for Archives, L	2004	20	15.00	12.81	300.00	256.23	0.45%	0.13%	0.36%	20	-
BOOKRES-0447	Archival Appraisal: Theory and Practice	2004	5	80.55	100.00	402.75	500.00	0.60%	0.26%	0.09%	5	-
BOOKRES-0453	X-Ancient Archives and Archival Traditions: Concepts	2004	-	106.52	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0454	X-Flowers After the Funeral: Ref lections on Post 9	-	-	22.97	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0451	X-Introduction to Imaging	2003	-	20.00	12.50	-	-	0.00%	0.00%	0.00%	8	(8)
BOOKRES-0452	X-Guide to Preventive Conservati on of Photo Collecti	2003	-	36.00	45.00	-	-	0.00%	0.00%	0.00%	8	(8)
BOOKSAA-AFS0458	Arranging & Describing Archives and Mss (AFS II)	2005	700	3.57	33.38	2,499.00	23,364.64	3.73%	12.27%	12.70%	700	-
BOOKSAA-AFS0459	Providing Reference Services f or Archives and Manu	2005	325	3.02	37.99	981.50	12,346.54	1.47%	6.48%	5.90%	475	(150)
BOOKSAA-AFS0460	A Glossary of Archival and Records Terminology (Arc	2005	-	9.30	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0461	Privacy & Confidentiality Perspectives: Archivists	2005	40	21.89	22.68	875.60	907.00	1.31%	0.48%	0.73%	50	(10)
BOOKRES-0463	X-The Scarith of Scornello: A Tale of Renaissance F	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0464	X-Archives and Archivists in the Information Age (200	2005	-	63.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0160	X-Libraries and Archives: Design and Renovation wit	-	-	33.69	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0366	X-The Management of Information from Archives (2nd	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKJNT-0162	The Management of College and University Archives	1992	5	45.50	23.60	227.50	118.00	0.34%	0.06%	0.09%	0	5
BOOKRES-0263	Doing Oral History: A Practical Guide (2nd ed.)	2003	5	15.56	16.80	77.80	84.00	0.12%	0.04%	0.09%	6	(1)
BOOKRES-0164	X-The Management of Oral History Sound Archives	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0267	Local History Collections in Libraries	1995	-	25.20	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0522	Film Preservation: Competing Definitions of Value,	2007	20	16.63	18.85	332.60	377.00	0.50%	0.20%	0.36%	10	10
BOOKRES-0269	X-Slide Collection Management in Libraries & Info U	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0168	X-Manual of Sound Archive Administration	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0169	Modern Archives Reader: Basic Readings on Archival	1984	-	14.40	13.21	-	-	0.00%	0.00%	0.00%	15	(15)
BOOKSAA-0171	X-Native American Archives: An Introduction	-	-	2.54	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0175	X-Preservation and Storage of Sound Recordings	1991	-	6.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKJNT-0278	X-Documenting Localities	1996	-	35.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0225	X-Dust: The Archive and Cultural History	-	-	15.70	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-AFS0457	Selecting & Appraising Archives & Manuscripts (AFS	2005	275	3.74	37.27	1,028.50	10,249.86	1.54%	5.38%	4.99%	325	(50)
BOOKRES-0189	Encoded Archival Description on the Internet	2002	5	29.73	39.40	148.65	197.00	0.22%	0.10%	0.09%	15	(10)
BOOKSAA-0120	X-Archives and Manuscripts: Surveys (1977)	1977	-	5.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-ACS0323	X-Modern Archives: Principles & Techniques (1956)	-	-	2.40	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0221	X-Vandals in the Stacks?	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0329	Developing and Maintaining Practical Archives: A Ho	2003	-	63.03	75.00	-	-	0.00%	0.00%	0.00%	125	(125)
BOOKRES-0229	Corporate Archives and History: Making the Past Wor	1993	-	22.56	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0331	Records of American Business, The	1997	35	16.60	2.85	581.00	99.88	0.87%	0.05%	0.64%	50	(15)

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BOOKRES-0208	X-Creating Digital Audio Resources: A Guide to Good P	2002	-	16.60	13.33	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0187	X-Archives in the UK and the Government Agenda	-	-	7.45	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0334	X-Administration of Television Newsfilm and Videotape	1997	-	42.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0224	X-Moving Archives: The Experiences of Eleven Archivis	2002	-	37.29	40.00	-	-	0.00%	0.00%	0.00%	3	(3)
BOOKRES-0191	X-Public Services Issues with Rare and Archival Law	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0368	X-Basic Book Repair Methods	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0338	X-MARC Manual: Understanding and Using MARC Records (1997	-	42.00	73.33	-	-	0.00%	0.00%	0.00%	3	(3)
BOOKRES-0206	X-Moving Theory into Practice	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0341	X-Archival Image: Collected Essays	-	-	14.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0343	X-Encoded Archival Description: Tag Library (Versio	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0243	Donating Personal or Family Papers to a Repository	2013	50	10.00	20.61	500.00	1,030.61	0.75%	0.54%	0.91%	0	50
BOOKSAA-0346	Guide to Deeds of Gift Brochure	2013	50	5.00	19.73	250.00	986.54	0.37%	0.52%	0.91%	0	50
BOOKJNT-0245	Starting an Archives	1994	2	38.33	49.00	76.66	98.00	0.11%	0.05%	0.04%	5	(3)
BOOKJNT-0246	X-Advocating Archives: An Introduction to Public Rela	1994	-	33.08	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0248	Oral History Cataloging Manual	1995	15	3.00	-	45.00	-	0.07%	0.00%	0.27%	20	(5)
BOOKRES-0148	X-Describing Archival Materials: The Use of the MAR	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0365	X-Encoded Archival Description: Application Guideli	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0234	X-Public Records and Archives in Classical Athens	1999	-	40.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0253	Protecting Your Collections: A Manual of Archival S	1995	35	7.17	2.93	250.95	102.56	0.38%	0.05%	0.64%	50	(15)
BOOKRES-0254	X-Permanence and Care of Color Photographs	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0227	Appraising Moving Images: Assessing the Archival an	2002	5	42.00	34.00	210.00	170.00	0.31%	0.09%	0.09%	4	1
BOOKRES-0255	X-RLG Archives Microfilming Manual	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0213	X-Death of a Notary: Conquest and Change in Colonia	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0260	Donating Your Organizational Records to a Repositor	2013	30	10.00	20.00	300.00	600.00	0.45%	0.31%	0.54%	0	30
BOOKRES-0261	X-Libraries and Archives: An Overview of Risk and L	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0193	X-Archive Fever: A Freudian Impression	1998	-	10.20	9.00	-	-	0.00%	0.00%	0.00%	4	(4)
BOOKRES-0380	X-Archiving Aerial Photography and Remote Sensing D	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0179	An Ounce of Prevention: Integrated Disaster Plannin	2002	4	31.50	30.00	126.00	120.00	0.19%	0.06%	0.07%	5	(1)
BOOKRES-0385	X-Museum Guide to Copyright and Trademark	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0392	Preserving Digital Information: A How-To-Do-It Manu	2000	-	45.50	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0394	X-New Directions in Archival Research	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0395	American Archival Studies: Readings in Theory and P	2000	72	15.90	36.88	1,144.80	2,655.05	1.71%	1.39%	1.31%	50	22
BOOKRES-0118	X-Closing An Era:	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-ACS0121	Norton on Archives: The Writings of Margaret Cross	2003	10	8.92	19.00	89.20	190.00	0.13%	0.10%	0.18%	15	(5)
BOOKRES-0123	X-Managing Historical Records Programs: A Guide for	-	-	21.29	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0131	X-Managing Records as Evidence and Information	2001	-	24.00	97.00	-	-	0.00%	0.00%	0.00%	0	-
BOOKJNT-0137	X-AMIA Compendium of Moving Image Cataloging Practice	2001	-	11.00	26.71	-	-	0.00%	0.00%	0.00%	5	(5)
BOOKRES-0134	X-Trusting Records: Legal, Hist, Diplomatic Perspecti	2001	-	73.25	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0470	X-The Archive and the Repetioire (2003)	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0473	Final Acts: Guide to Preserving the Recs of Truth C	2005	-	15.73	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0474	X-Control through Communication: The Rise of System	-	-	13.08	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0475	X-Structuring the Information Age (2005)	-	-	40.76	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0476	X-Creating EAD-Compatible Finding Guides on Paper	2005	-	37.15	38.80	-	-	0.00%	0.00%	0.00%	5	(5)
BOOKRES-0478	Managing Records: A Handbook of Principles and Prac	2002	-	62.96	-	-	-	0.00%	0.00%	0.00%	5	(5)
CD-0605	X-Security in the Reading Rm-CD (2005)	-	-	6.00	-	-	-	0.00%	0.00%	0.00%	0	-
CD-0606	Ethical Problem Solving: When Inst Compete for Coll	2003	-	6.00	-	-	-	0.00%	0.00%	0.00%	0	-
CD-0607	EAD Tips & Tricks: Converting Data MARC & EAD - CD	2005	-	6.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0480	Political Pressure and the Archival Record	2005	25	19.00	8.28	475.00	206.92	0.71%	0.11%	0.45%	30	(5)
BOOKSAA-0481	Photographs: Archival Care and Management	2006	300	13.72	35.31	4,116.00	10,593.07	6.15%	5.56%	5.44%	250	50

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BOOKSAA-0482	Architectural Records: Managing Design and Construc	2006	75	18.62	43.76	1,396.50	3,281.74	2.09%	1.72%	1.36%	50	25
BOOKSAA-AFS0483	Understanding Archives and Manuscripts (Archival Fu	2006	350	2.06	40.75	721.00	14,263.50	1.08%	7.49%	6.35%	450	(100)
BOOKSAA-ACS0484	Archives and the Public Interest: Selected Essays o	2006	10	15.00	14.27	150.00	142.73	0.22%	0.07%	0.18%	5	5
BOOKRES-0485	Archives, Documentation, and Institutions of Social	2006	-	49.21	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0486	Archives: Recordkeeping in Society (2005)	2005	-	77.17	90.00	-	-	0.00%	0.00%	0.00%	10	(10)
BOOKRES-0487	Oral History Reader, The (2006)	2006	-	34.09	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0488	X-Refuge of a Scoundrel (2004)	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
ITEM-0495	X-100% Archivist T-shirt (SMALL)	-	-	2.53	-	-	-	0.00%	0.00%	0.00%	0	-
ITEM-0496	X-100% Archivist T-shirt (MEDIUM)	-	-	2.53	-	-	-	0.00%	0.00%	0.00%	0	-
ITEM-0497	X-100% Archivist T-shirt (LARGE)	-	-	2.53	-	-	-	0.00%	0.00%	0.00%	0	-
ITEM-0498	X-100% Archivist T-shirt (X-LARGE)	-	-	2.53	-	-	-	0.00%	0.00%	0.00%	0	-
ITEM-0499	X-CAP - 100% Archivist	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0489	X-Encoding Across Frontiers	-	-	14.51	-	-	-	0.00%	0.00%	0.00%	0	-
ITEM-0500	X-100% Archivist T-shirt (2X-LARGE)	-	-	2.53	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0512	X-Managing Archives: Foundations, Principles, Practic	-	-	69.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0516	X-A Prisoner in the Garden (2006)	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0517	X-Archive Stories: Facts, Fictions, and the Writing o	2005	-	16.34	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0515	X-Managing Electronic Records (McLeod and Hare) (2005	-	-	12.59	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0513	X-Archiving Websites (2006)	2006	-	69.97	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0514	X-Preservation Management for Libraries, Archives, Mu	2006	-	87.50	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0518	X-Recordkeeping in a Hybrid Environment	2006	-	69.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0519	X-Building a Successful Archival Programme	2006	-	69.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0520	X-Ethics, Accountability and Recordkeeping in Dangero	2006	-	80.50	-	-	-	0.00%	0.00%	0.00%	0	-
CD-0608	Electronic Records: Preservation Options of PDF	-	-	6.00	-	-	-	0.00%	0.00%	0.00%	0	-
CD-0609	Thinking Digital . . . A Practical Session to Help	2007	-	6.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0526	X-Sign Here! Handwriting in the Age of the New Medi	-	-	25.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0527	Archives and the Digital Library	2007	5	51.25	61.29	256.25	306.45	0.38%	0.16%	0.09%	10	(5)
BOOKRES-0528	Curating Oral Histories: From Interview to Archive	2006	5	24.90	10.00	124.50	50.00	0.19%	0.03%	0.09%	5	-
BOOKSAA-0620	Guia para donar sus documentos personales o familia	2007	2	5.00	15.00	10.00	30.00	0.01%	0.02%	0.04%	0	2
BOOKSAA-0531	Archival Internships: A Guide for Faculty, Supervis	2008	35	6.65	11.13	232.75	389.68	0.35%	0.20%	0.64%	20	15
BOOKRES-0550	X-Returned from Russia: Nazi Archival Plunder in West	2007	-	47.02	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0552	Leading and Managing Archives and Records Programs	2008	8	56.00	43.13	448.00	345.00	0.67%	0.18%	0.15%	15	(7)
BOOKRES-0551	X-Understanding Data and Information Systems	2008	-	61.00	42.80	-	-	0.00%	0.00%	0.00%	5	(5)
BOOKRES-0553	X-Cataloging Cultural Objects: Guide to Describing Cu	2006	-	80.00	95.00	-	-	0.00%	0.00%	0.00%	2	(2)
CD-0610	A Beginner's Guide to Metadata!	2008	-	6.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0532	College and University Archives: Readings in Theory	2008	50	13.07	24.32	653.50	1,215.90	0.98%	0.64%	0.91%	25	25
AM08TIX:BBALL	X-Baseball and Business Cards	-	-	11.00	-	-	-	0.00%	0.00%	0.00%	0	-
ITEM-0502	X-2 Sustainable Sacks	-	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0530	Navigating Legal Issues in Archives	2008	50	10.63	26.23	531.50	1,311.37	0.79%	0.69%	0.91%	50	-
BOOKSAA-0535	Managing Congressional Collections	2008	20	5.64	16.86	112.80	337.30	0.17%	0.18%	0.36%	20	-
ITEM-0501	SAA Chico Bag	2008	-	3.00	0.06	-	-	0.00%	0.00%	0.00%	175	(175)
BOOKRES-0554	Managing the Crowd: Rethinking Records Management f	2008	-	80.50	91.00	-	-	0.00%	0.00%	0.00%	0	-
CD-0611	Privacy and Health Information	2008	-	6.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0555	X-InterPARES 2: Experiential, Interactive and Dynamic Record	-	-	86.26	-	-	-	0.00%	0.00%	0.00%	0	-
CD-0612	Green Is Great: Planning and Developing an Environmentally...	2009	-	6.00	65.00	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0556	Archives Power: Memory, Accountability, and Social Justice	2009	75	5.64	30.19	423.00	2,264.17	0.63%	1.19%	1.36%	100	(25)
BOOKSAA-0538	Archival and Special Collections Facilities: Guidelines	2009	50	4.49	20.30	224.50	1,015.15	0.34%	0.53%	0.91%	50	-
BOOKSAA-0541	Guia para donar los registros de su organizacion a un deposito	2009	-	-	-	-	-	0.00%	0.00%	0.00%	0	-
CD-0613	Archival Content Management Systems	2009	-	6.00	161.67	-	-	0.00%	0.00%	0.00%	0	-

**The Society of American Archivists
Publications Sales Budget
Fiscal 2015**

<u>Item #</u>	<u>Item/Title</u>	<u>Copyright</u>	<u># Sold</u>	<u>Cost</u>	<u>Price</u>	<u>COGS</u>	<u>Revenue</u>	<u>% of COGS</u>	<u>% of Rev</u>	<u>% of Units</u>	<u>FY14 budget</u>	<u>diff</u>
BOOKRES-0558	An American Political Archives Reader	2009	3	59.50	39.60	178.50	118.80	0.27%	0.06%	0.05%	3	-
BOOKRES-0557	Electronic Records in the Manuscript Repository	2009	15	35.00	33.67	525.00	505.00	0.78%	0.27%	0.27%	15	-
BOOKRES-0559	X-Documenting: Lighting Design	2007	-	15.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0560	X-Respect for Authority: Authority, Control, Context Control...	2008	-	49.32	46.40	-	-	0.00%	0.00%	0.00%	4	(4)
CD-0614	Introduction to Web 2.0 in Archives...	2009	-	6.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0561	Copyright and Cultural Institutions: Guidelines for Digitization	2009	10	24.77	25.11	247.70	251.11	0.37%	0.13%	0.18%	15	(5)
BOOKSAA-AFS05	Preserving Archives and Manuscripts (2nd ed)	2010	395	8.79	45.59	3,472.05	18,007.96	5.19%	9.45%	7.17%	500	(105)
CD-0615	Becoming an Archives Consultant...	2009	-	6.00	95.00	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0562	Community Archives: The Shaping of Memory	2009	-	94.50	109.00	-	-	0.00%	0.00%	0.00%	0	-
CD-0616	Basics of Managing Electronic Records...	2010	-	6.00	155.00	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0563	Personal Archives and a New Archival Calling	2009	-	26.25	30.00	-	-	0.00%	0.00%	0.00%	6	(6)
BOOKRES-0564	The Story Behind The Book: Preserving Authors'...	2009	5	35.00	30.50	175.00	152.50	0.26%	0.08%	0.09%	3	2
BOOKRES-0565	Web 2.0 Tools and Strategies for Archives...	2010	-	59.67	43.33	-	-	0.00%	0.00%	0.00%	5	(5)
BOOKSAA-0570	The Ethical Archivist	2010	75	5.70	28.72	427.50	2,153.66	0.64%	1.13%	1.36%	100	(25)
BOOKSAA-0571	How to Keep Union Records	2010	20	27.88	12.23	557.60	244.67	0.83%	0.13%	0.36%	5	15
BOOKSAA-0572	Controlling the Past: Documenting Society and Institutions	2011	100	18.90	36.73	1,890.00	3,672.66	2.82%	1.93%	1.81%	135	(35)
BOOKRES-0566	Currents of Archival Thinking	2009	20	27.00	21.60	540.00	432.00	0.81%	0.23%	0.36%	30	(10)
BOOKRES-0567	Archives: Principles and Practices	2010	10	58.68	44.58	586.80	445.83	0.88%	0.23%	0.18%	35	(25)
CD-0617	What is EAC-CPF?	2010	-	6.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0568	Many Happy Returns: Advocacy and the Development...	2011	75	23.60	35.87	1,770.00	2,690.50	2.65%	1.41%	1.36%	115	(40)
BOOKRES-0569	Processing the Past: Contesting Authorities...		5	47.47	22.56	237.35	112.78	0.35%	0.06%	0.09%	5	-
BOOKRES-0573	Better Off Forgetting? Essays on Archives...		10	15.51	14.14	155.10	141.44	0.23%	0.07%	0.18%	15	(5)
BOOKRES-0574	Future of Archives		4	80.50	74.75	322.00	299.00	0.48%	0.16%	0.07%	3	1
CD-0618	Electronic Records...The Next Step!		-	6.00	175.00	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0575	Waldo Gifford Leland and the Origins of the American ...	2011	10	39.18	43.27	391.80	432.70	0.59%	0.23%	0.18%	30	(20)
BOOKSAA-0578	I, Digital: Personal Collections in the Digital Era	2011	25	7.01	47.51	175.25	1,187.82	0.26%	0.62%	0.45%	60	(35)
BOOKSAA-0576	A Different Kind of Web: New Connections Between...	2011	35	7.46	40.20	261.10	1,407.13	0.39%	0.74%	0.64%	100	(65)
BOOKJNT-0577	Public Relations and Marketing for Archives		15	56.00	65.07	840.00	976.00	1.26%	0.51%	0.27%	15	-
CD-619	Train the Trainer: Building a Successful Continuing Education		-	6.00	65.00	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0580	The Lone Arranger: Succeeding in a Small Repository	2012	100	4.64	41.66	464.00	4,166.07	0.69%	2.19%	1.81%	400	(300)
CD-0620	Standards for Digital Archives (DAS)	2012	-	6.00	155.00	-	-	0.00%	0.00%	0.00%	0	-
CD-0621	Change Management...what you should know		-	6.00	65.00	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0582	Managing the Next Generation of College and University...		-	95.00	58.08	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0581	How to Manage Processing in Archives and Special Collections	2012	100	26.24	36.60	2,624.00	3,660.05	3.92%	1.92%	1.81%	100	-
BOOKRES-0583	Records Management for Museums and Galleries		-	70.00	-	-	-	0.00%	0.00%	0.00%	5	(5)
CD-0622	Using and Understanding PDF		-	6.00	-	-	-	0.00%	0.00%	0.00%	0	-
BOOKRES-0586	Archives and Societal Provenance: Australian Essays		-	79.14	50.83	-	-	0.00%	0.00%	0.00%	5	(5)
BOOKSAA-0584	Archival Arrangement and Description (print)		250	3.19	17.70	797.50	4,426.15	1.19%	2.32%	4.54%	700	(450)
PDF-1004	Archival Arrangement and Description (PDF)		-	-	24.99	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0585	Two-Fer Special (print): Arrangement and Description		-	-	59.99	-	-	0.00%	0.00%	0.00%	0	-
BOOKSAA-0587	Exhibits in Archives and Special Collections Libraries		375	29.88	52.81	11,205.00	19,804.65	16.74%	10.40%	6.80%	500	(125)
BOOKSAA-0588	Perspectives on Women's Archives		150	59.23	47.65	8,884.50	7,147.23	13.28%	3.75%	2.72%	350	(200)
BOOKRES-0592	Tribal Libraries, Archives & Museums: Preserving Our Language		5	28.62	51.40	143.10	257.00	0.21%	0.13%	0.09%	0	5
BOOKRES-0591	Archivists, Collectors, Dealers, and Replevin: Case Studies		5	35.16	75.20	175.80	376.00	0.26%	0.20%	0.09%	0	5
BOOKSAA-0590	Conceptualizing 21st-Century Archives (print)		100	38.68	46.46	3,868.00	4,645.75	5.78%	2.44%	1.81%	350	(250)
			-	-	-	-	-	0.00%	0.00%	0.00%	0	0
			-	-	-	-	-	0.00%	0.00%	0.00%	0	0
			<u>5,511</u>			<u>\$ 66,918.20</u>	<u>\$ 190,486.20</u>	<u>100.00%</u>	<u>100.00%</u>	<u>100.00%</u>	<u>7401</u>	<u>-1890</u>

The Society of American Archivists
Publications Sales Budget
Fiscal 2015

<u>Item #</u>	<u>Item/Title</u>	<u>Copyright</u>	<u># Sold</u>	<u>Cost</u>	<u>Price</u>	<u>COGS</u>	<u>Revenue</u>	<u>% of COGS</u>	<u>% of Rev</u>	<u>% of Units</u>	<u>FY14 budget</u>	<u>diff</u>
	# of items sold		75									
	Average cost per item sold		\$	12.14								
	Average revenue per item sold		\$	34.56								
	% of items sold			30.86%								
	COGS ratio to revenue			35.13%								

**Society of American Archivists Council Meeting
May 22 - 24, 2014
Chicago, Illinois**

**FY15 Proposed Budget Narrative:
Education (Program 105)
(Prepared by Solveig De Sutter)**

The projected net gain in this program for FY 2015 is \$97,876. This is \$55,697 (132.05%) more than the FY 2014 budgeted net gain and \$4,959 (5.34%) more than the FY 2014 projected net gain.

Effort of all staff members is allocated across the budget based on adjusted FY 2014 patterns. Personnel costs for Education reflect 2.51 FTEs or 20.91% of total salaries, taxes, and benefits. The cost of benefits is expected to increase by 7.23% as of January 1, 2015. A 3% placeholder has been included in the salary budget for staff merit increases.

Relation of this program to Strategic Plan: Goal 2: Enhancing Professional Growth, Activity 2.1.1. Review, expand, and continuously improve SAA's course and conference content to address both archival fundamentals and the latest thinking and best practices in the field.

The proposed budget assumes the following:

- 118 events (including face-to-face courses/workshops, webinars, and comprehensive examinations) with approximately 1,900 registrants.
- A decrease in CD sales based on FY 2014 sales trends.
- Early-bird fees (for SAA members) remain at the FY08 – FY 13 level for non-DAS offerings and increase by \$4 for DAS courses. Nonmember fees increase across the board.
- R&D expenses for development of four DAS webinars and updates/revisions of five DAS courses.
- R&D and meeting expenses for development of three CE webinars, updates/revisions of five workshops for the A&D track, and an Education Task Force meeting (pending Council approval).
- Maintaining the current level of “premium” Education Directory listings (36).
- A faculty training session on webinar content development and presentation.

Provided at the end of this narrative is a summary of Education offerings from FY07 through FY14, including total number of events per year, new events per year, total registrations, number of co-hosted offerings, live webinars, registrations for live webinars, CDs sold, online/on-demand offerings sold, and DAS comprehensive examinations administered.

Education programs have a very small profit margin, especially when many nonmembers become members to take advantage of the \$60 to \$150 savings in registration fees. Traditional means of enhancing revenues, such as increasing registration fees or the number of class participants, are not

feasible because 1) some competitors charge much lower fees and 2) increasing class size becomes a quality issue and many instructors won't agree to teach classes of more than 30 people. Face-to-face offerings continue to be the preferred choice of format; however, an increase in web seminar offerings and increasing online presence is necessary to retain market share.

I believe that SAA can position itself as the education provider of choice by building on the success of the DAS program with other like-structured programs in various topic areas, although it will not be feasible to administer comprehensive examinations in these cases. In my experience, individuals seek out continuing education to 1) gain knowledge that they need right now or 2) gain something tangible (certificate or certification) that is perceived to show employers that they have training for/in a specific body of knowledge. Further, I think it is important that SAA not rely on just the DAS program, but that we diversify. That course of action will require continued investment in infrastructure and human resources.

Summary of Education Offerings, FY 2007 – FY 2014

Fiscal Year	Events	New	Regs.	Collabs.	Live Webs.	Live Regs.	CDs Sold	Online/on Demand	DAS Comp Exams	Revenue
2007	54	10	1,463	5	2	225/1,120	22	20	NA	\$391,339
2008	57	10	1,422	6	2	68/ 395	39	43	NA	\$329,309
2009	71	14	1,412	10	2	52/ 292	48	49	NA	\$402,577
2010	58	13	1,166	13	4	188/ 570	55	53	NA	\$279,752
2011	58	11	1,190	11	4	168/518	65	105	NA	\$315,884
2012	78	14	1,711	17	5	281/660	35	539	NA	\$428,466
2013	87	7	1,995	18	2	100/110	30	625	NA	\$469,000
2014	115	6	2,294*	9	0	0	25	768	94	\$525,944*

**Projected.*

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
Education

Revenues

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14 Actuals</u>	<u>FY '15 Budget v. FY '14 Budget \$ Difference % Difference</u>	<u>FY '15 Budget v. FY '14 Actuals \$ Difference % Difference</u>
Dues	\$ -	\$ -	\$ -	\$ - N/A	\$ - N/A
Subscriptions & Advertising	6,300.00	6,300.00	7,260.00	- 0.00%	(960.00) (13.22%)
Workshops	607,922.00	476,600.00	517,469.18	131,322.00 27.55%	90,452.82 17.48%
Annual Meeting	-	-	-	- N/A	- N/A
Publications & CD Sales	720.00	1,200.00	1,215.00	(480.00) (40.00%)	(495.00) (40.74%)
Contributions	-	-	-	- N/A	- N/A
Investments	-	-	-	- N/A	- N/A
Other	-	-	-	- N/A	- N/A
Total Revenues	\$ 614,942.00	\$ 484,100.00	\$ 525,944.18	\$ 130,842.00 27.03%	\$ 88,997.82 16.92%

Expenses

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14 Actuals</u>	<u>FY '15 Budget v. FY '14 Budget \$ Difference % Difference</u>	<u>FY '15 Budget v. FY '14 Actuals \$ Difference % Difference</u>
Personnel	\$ 214,198.01	\$ 165,836.05	\$ 181,125.37	\$ 48,361.96 29.16%	\$ 33,072.64 18.26%
Office Occupancy & Utilities	20,690.41	16,382.30	17,609.57	4,308.11 26.30%	3,080.84 17.50%
Services	143,099.20	138,554.29	130,758.70	4,544.91 3.28%	12,340.50 9.44%
Supplies	3,439.04	2,798.55	2,708.52	640.50 22.89%	730.52 26.97%
Travel	129,240.00	111,953.00	95,233.53	17,287.00 15.44%	34,006.47 35.71%
Leases, Rentals & Licenses	6,808.55	5,496.57	5,140.76	1,311.98 23.87%	1,667.79 32.44%
Taxes, Dues and Subscriptions	-	-	-	- N/A	- N/A
Depreciation, COGS, and Other	900.00	900.00	450.00	- 0.00%	450.00 100.00%
Total Expenses	\$ 518,375.21	\$ 441,920.76	\$ 433,026.45	\$ 76,454.46 17.30%	\$ 85,348.76 19.71%
Gain / (Loss) from Operations	\$ 96,566.79	\$ 42,179.24	\$ 92,917.73	\$ 54,387.54 128.94%	\$ 3,649.06 3.93%

Transferred to Funds

	-	-	-
Net Gain / (Loss)	\$ 96,566.79	\$ 42,179.24	\$ 92,917.73

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Education
Program Number: 105**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	1	Management and Administration Administer activities of the Education Department: prepare and conduct performance appraisals; develop and monitor budgets; manage Comprehensive Examination processes, including interpretation of pass/fail ratios and statistical reports; interact with and prepare materials for the Education Committee and DAS Subcommittee and attend committee and task force meetings; research and develop new education programs and new faculty; solicit, plan, market, and provide education programs; monitor and evaluate existing faculty, program content, and delivery methods; interact with Education Directory providers, potential course/workshop hosts, and education program participants; secure alternative sources of funding; and respond to general inquiries.				\$ 4,885		\$ 3,090
		a. Membership dues	5820	ASAE	5	-	-	
			5820	Association Forum of Chicagoland	5	-	-	
			5820	Amigos	5	-	-	
		b. Staff professional development (included in G&A budget in FY15)	5640	ASAE Meeting Registration	5	-	-	
			5640	Association Forum Registrations (1)	5	250	250	
		c. Provide staff support for Annual Meeting (De Sutter, Capodilupo, Jarosek)	5600	Staff Travel (1p x \$150/d x 6d lodging) (SD) = 900 (2p x \$150/d x 6 d lodging) (AJ/MC)=1800 (1p x \$35/d x 7d per diem) (SD) = 245 (2p x \$35/d x 7d per diem) (AJ/MC) = 490 (3p x \$400) travel (SD/AJ/MC) = 1,200	5	4,635	2,840	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Education
Program Number: 105**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	2	Support the work of the Committee on Education, the DAS Subcommittee, and other committees and task forces as assigned. Monitor Archival Continuing Education guidelines and GPAS; develop strategic and work plans; solicit input for and develop pre-con and other programs as needed; provide staff support to Education Committee, DAS Subcommittee, and SAA leaders.				24,158		13,478
		a. One mid-year COE planning meeting (Chicago)	5610	Member Travel (11p x \$400 airfare/bags/ground) = 4,400	5	4,400	6,464	
			5620	(11p x \$125/d x 2d lodging) = 2750	5	2,750		
			5630	(11 p x \$60/d x 2d per diem) = 1300	5	1,300		
			5295	Staff Travel (2p x 2d x \$16) = 64	5	64		
		b. Two DAS Subcommittee meetings (Chicago) One meeting includes 3 reviewers for the Comprehensive Examination	5610	Member Travel (16p x \$400 airfare/bags/ground) = 6400	5	6,400	7,014	
			5620	(16p x \$125/d x 2d lodging) = 4800	5	4,800		
			5630	(16p x \$60/d x 2d per diem) = 1920	5	1,920		
			5295	Staff Travel (2p x 2d x \$16) = 64	5	64		
		c. Education TF meeting, pending approval in May based on 3 members and 3 staff	5610	(3p x \$400 airfare/bags/ground) = 1200	5	1,200		
			5620	(3p x \$125/d x 2d lodging) = 750	5	750		
			5290	(3p x \$60/d x 2d per diem) = 360 Staff meals (3p x \$50 x 2d) = 150	5	510		
	3	Maintain Online Education Directory				6,300		(6,300)
		- Current total of premium listings = 36.	4170	Directory Listings (36 x \$175)	4	6,300	(6,300)	-

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Education
Program Number: 105**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	4	Plan, develop, market, implement, monitor, and evaluate a variety of high-quality continuing education programs.				607,922		(491,600)
						200,220		208,135
		- See attached worksheets for breakdown of revenues and expenses per offering.	4200	Total Registrations (see attached)	4 607,922		(491,600)	
			5XXX	Total Expenses (see attached)	5 200,220		193,135	
		- This includes revenues from the Comprehensive Examinations, web exams, and challenge exams.			-		-	
		- Assumes 114 events, including hands-on workshops, seminars, DAS courses, web seminars, and Online/On Demand registrations.					15,000	
	5	Research and develop new CE offerings.				-		-
						\$31,775		\$31,854
		a. Develop/revise/update courses for DAS curriculum.	5200	Development Fee (1 course x \$1,950)	5 1,950		3,900	
		- Providing Access to Digital Archives [NEW]						
		- Revise/update 5 courses/webinars	5200	Revision/Update Fee (5 courses x \$600)	5 3,000		3,500	
		b. Develop a DAS webinar that explains the curriculum, gives overview, and provides guidance.	5200	Development Fee (1 course x \$400)	5 400		400	
		c. Develop a course (format TBD) on visual materials.	5200	Development Fee (1 course x \$1,950)	5 1,950		1,950	
		d. Develop 3 DAS web seminars in Tools/Services tier.	5200	Development Fee (2 x \$750)	5 1,500		1,200	
		e. Develop 3 CE web seminars (for A&D track).	5200	Development Fee (2 x \$750)	5 1,500		800	
		f. Update/revise 5 CE workshops (for A&D track).	5200	Revision/Update Fee (5 x \$700)	5 3,500		-	
		- Five additional updates/revisions for the A&D track are expected to take place in FY 2016.						
		g. Test hosting service						

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Education
Program Number: 105**

Goal	Activity No.	Narrative	Account No.	Account Description		Proposed FY15 Budget		FY14 Budget	
						Line Amount	Activity Total	Line Amount	Activity Total
		- 1,000 credits for 1,000 tests	5200	Testing Services	5	400		400	
		- Instructor licenses	5200	Instructor Licenses (3 x \$25)	5	75		75	
		h. Psychometrician	5200	Consultant	5	6,000		6,000	
		i. Audits and faculty training	5610	Member Travel	5	-		-	
		- Six additional instructors (DAS)		(6p x \$500 airfare/lodging)		3,000		3,000	
		j. Conference calls (DAS) (included in allocables)	5110	Conference Calls	5	-		-	
								129	
		k. Audit and faculty training (workshops)	5610	Member Travel	5	1,000		1,000	
				(2p x \$500 airfare/lodging)					
		l. Offer session on online content development & instr.	5610	Consultant	5	1,000			
		m. Develop an online course template/process	5200	Development Fee	5	2,000		2,000	
		- Creating and Compiling Processing Manuals	5200	Hosting Fee	5	500		500	
			5200	Miscellaneous	5	-		1,000	
	6	Marketing and Promotion							
		a. Education Mini-Catalog	5350	Design and Printing (catalog)	5	3,500		4,500	
		b. DAS Certificate	5350	Design and Printing (certificates)	5	500		1,500	
	7	Miscellaneous							
		General beverage breaks: Most breaks are negotiated; assumes payment for 6 breaks.	5290	F&B (\$200 x 6 courses)	5	1,200	\$720	1,200	(\$1,200)
							\$2,220		\$4,805
		General space rental: Most meeting rooms negotiated; assumes payment for 3 meeting rooms.	5700	Space Rental (3 meeting rooms x \$300)	5	900		900	
		CD sales from Web seminars.	4450	CD Sales (\$60/m)	4	720		(1,200)	
			5395	Royalties (\$15/CD)	5	120		240	
		Conference calls (CEPD) (included in allocables)	5110	Conference Calls	5			65	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Education
Program Number: 105**

Goal	Activity No.	Narrative	Account No.	Account Description		Proposed FY15 Budget		FY14 Budget	
						Line Amount	Activity Total	Line Amount	Activity Total
		Develop custom MemberMax reports for DAS (provide extracts from student data)	5226		5			2,400	
	8	General and Administrative Allocation	5XXX		5	242,278		187,815	
	9	IT Allocation	5XXX		5	12,840		7,744	
					0				
					0				
				Total Income			614,942		(499,100)
				Total Expenses			518,375		456,921
				Gain / (Loss) From Operations			\$ 96,567		\$ (42,179)
				Net Operating Gain / (Loss)	0		\$ 96,567		\$ (42,179)

The Society of American Archivists						
Education Workshop Analysis						
Fiscal 2015 Budget						
	Revenues				Expenses	
<u>Workshop Title</u>	<u>Member</u>	<u>Non-Member</u>	<u>Last Minute</u>	<u>Total</u>	<u>Total</u>	<u>Net Gain</u>
Cataloging Visual Materials	\$ 6,804.00	\$ 1,992.00	\$ 1,314.00	\$ 10,110.00	\$ 3,590.00	\$ 6,520.00
Practices for Managing Storage	6,804.00	1,494.00	1,314.00	9,612.00	3,280.00	6,332.00
Business Archives	7,485.00	1,138.00	534.00	9,157.00	4,860.00	4,297.00
Rights and Permissions	5,670.00	1,992.00	1,752.00	9,414.00	3,080.00	6,334.00
Archives: Principles and Practices	8,670.00	3,690.00	1,974.00	14,334.00	8,230.00	6,104.00
Using Open Source OCR Tools	5,670.00	1,992.00	1,752.00	9,414.00	3,090.00	6,324.00
Copyright: A Risk Assessment	2,835.00	996.00	876.00	4,707.00	2,150.00	2,557.00
DACS	7,560.00	1,494.00	1,314.00	10,368.00	4,100.00	6,268.00
EAD - XSLT	11,700.00	1,620.00	2,920.00	16,240.00	9,050.00	7,190.00
Project Management	4,158.00	747.00	657.00	5,562.00	1,550.00	4,012.00
Implementing More Product Less Process	5,670.00	1,494.00	1,752.00	8,916.00	2,800.00	6,116.00
Rare Books for Archivists	3,887.00	379.00	349.00	4,615.00	3,020.00	1,595.00
Archives: Principles and Practices (Cctr.)	1,500.00	-	-	1,500.00	1,350.00	150.00
Fundamentals of Appraisal	2,835.00	747.00	657.00	4,239.00	1,610.00	2,629.00
Web Seminar Live	29,000.00	-	-	29,000.00	9,000.00	20,000.00
Web Seminar on demand	34,800.00	-	-	34,800.00	4,515.00	30,285.00
Y/Archives: Principles and Practices	5,780.00	2,952.00	987.00	9,719.00	6,070.00	3,649.00
Y/Practices for Managing Storgae	3,780.00	1,245.00	876.00	5,901.00	2,395.00	3,506.00
Y/DAS/Accessioning and Ingest	4,975.00	777.00	458.00	6,210.00	2,495.00	3,715.00
Y/Copyright: A Risk Assessment Approcach	6,647.00	1,137.00	658.00	8,442.00	2,895.00	5,547.00
Y/DAS/Curating Research Assets	4,975.00	777.00	458.00	6,210.00	2,445.00	3,765.00
Y/Planning New & Remodelled Facilities	8,670.00	1,845.00	1,645.00	12,160.00	3,960.00	8,200.00
Y/Using Open Source OCR Tools	2,835.00	1,245.00	1,095.00	5,175.00	2,245.00	2,930.00
Y/Cataloging Visual Materials	5,670.00	1,245.00	1,095.00	8,010.00	2,355.00	5,655.00
Y/DAS Arrangement and Description	5,382.00	1,197.00	1,356.00	7,935.00	4,400.00	3,535.00
Y/Advocating for Archives	-	-	-	-	-	-
Z/DAS/F/ Digital Repositories	8,955.00	5,439.00	2,061.00	16,455.00	5,100.00	11,355.00
Z/DAS/F/Appraisal of ER	5,970.00	3,626.00	1,374.00	10,970.00	3,400.00	7,570.00
Z/DAS/F/Basic Electronic Records	7,164.00	1,554.00	1,832.00	10,550.00	3,300.00	7,250.00
Z/DAS/TST/Inreach & Outreach	5,970.00	3,626.00	916.00	10,512.00	3,900.00	6,612.00
Z/DAS/F/Digital Curation	17,910.00	3,885.00	4,580.00	26,375.00	8,250.00	18,125.00
Z/DAS/F/Digital Curation II	10,746.00	2,331.00	2,748.00	15,825.00	5,100.00	10,725.00
Z/DAS/TA/Accessioning and Ingest	11,940.00	8,288.00	2,748.00	22,976.00	6,820.00	16,156.00

The Society of American Archivists						
Education Workshop Analysis						
Fiscal 2015 Budget						
	Revenues				Expenses	
<u>Workshop Title</u>	<u>Member</u>	<u>Non-Member</u>	<u>Last Minute</u>	<u>Total</u>	<u>Total</u>	<u>Net Gain</u>
Z/DAS/TS/Digital Forensics I	17,910.00	3,885.00	4,580.00	26,375.00	8,525.00	17,850.00
Z/DAS/TS/Digital Forensics II	17,910.00	3,885.00	4,580.00	26,375.00	9,000.00	17,375.00
Z/DAS/F/Arrangement & Description 1	14,328.00	8,288.00	2,748.00	25,364.00	6,820.00	18,544.00
Z/DAS/TA/Arrangement & Description - 2	14,328.00	3,108.00	3,664.00	21,100.00	6,800.00	14,300.00
Z/DAS/TA/Copyright Issues	14,328.00	3,108.00	3,664.00	21,100.00	6,820.00	14,280.00
Z/DAS/TA/Privacy & Confidentiality	7,164.00	1,554.00	1,832.00	10,550.00	4,100.00	6,450.00
Z/DAS/TA/Preserving Digital Archives ARL	5,970.00	3,626.00	1,374.00	10,970.00	3,400.00	7,570.00
Z/DAS/TA/Preserving Digital Archives	11,940.00	7,252.00	2,748.00	21,940.00	7,200.00	14,740.00
Z/DAS/TR/Managing ER in Archives	7,164.00	2,072.00	1,374.00	10,610.00	3,400.00	7,210.00
Z/DAS/TA/Digital Archives & Libs Reg	8,955.00	6,216.00	2,061.00	17,232.00	5,250.00	11,982.00
Z/DAS/TS/Achiev. Email Acct Preserv/XML	5,970.00	4,144.00	1,374.00	11,488.00	3,400.00	8,088.00
Z/DAS/TA/Providing Access	3,582.00	777.00	916.00	5,275.00	1,700.00	3,575.00
Z/DAS/TST/RFPs	5,970.00	3,626.00	1,374.00	10,970.00	3,400.00	7,570.00
Webinar exams	7,980.00	-	-	7,980.00	-	7,980.00
Comprehensive Exam	10,500.00	-	-	10,500.00	-	10,500.00
Challenge Exams	4,680.00	-	-	4,680.00	-	4,680.00
Totals	\$ 421,096.00	\$ 112,485.00	\$ 74,341.00	\$607,922.00	\$ 200,220.00	\$ 407,702.00

**Society of American Archivists Council Meeting
May 22 -24, 2014
Chicago, Illinois**

**FY15 Proposed Budget Narrative:
Advocacy and Public Awareness (Program 107)
(Prepared by Nancy Beaumont)**

The proposed FY 2015 budget projects a net loss of \$131,063 in this program area. This is \$30,742 (30.64%) greater than the FY 2014 budgeted net loss and \$55,850 (74.26%) greater than the FY 2014 projected net loss.

Effort of all staff members is allocated across the budget based on FY 2013 patterns. Personnel costs reflect 0.73 FTEs or 6.06% of total salaries, taxes, and benefits. The cost of benefits is expected to increase by 7.23% as of January 1, 2015. A 3% placeholder has been included in the salary budget for staff merit increases.

Relation of this program to Strategic Plan: This budget represents a significant increase in SAA's commitment to advocacy and public awareness as identified in Goal 1: Advocating for Archivists and Archives, Strategies 1.1., 1.2., and 1.4.

The proposed budget assumes the following:

- Funded face-to-face meetings of both the Committee on Public Awareness (Activity 1.a.) and the Committee on Advocacy and Public Policy. (Activity 2.a.)
- Professional PR counsel, based in Chicago, to work with COPA and staff to accomplish tasks outlined in Strategy 1.1. (Activity 1.a.)
- Professional design assistance in creating engaging materials (web and print) for 1) public awareness campaigns (Activity 1.b.), 2) assisting archivists in developing and implementing PR competencies (Activity 1.c.), and 3) distribution to policymakers (Activity 2.d.).
- Member and staff representation at one meeting each during the year, presumably in Washington, D.C., directed to SAA's advocacy priorities. (Activity 2.b.)
- The desirability of continued support for the National Coalition for History at a slightly higher level than in FY14 (\$12,000 vs. \$10,000) to enhance SAA's advocacy representation. (Activity 2.c.)

- Member travel to one meeting of coalition partners (e.g., Issues and Awareness Group sponsored by CoSA). (Activity 2.e.)
- Provision at DC 2014 of a low-cost “Advocating for Archives” workshop (Activity 3.b.) and development and hosting of a free online, on-demand “Advocating for Archives” webinar (Activity 3.c.).
- Operations funding for SAA representatives to attend: two WIPO/SCCR meetings in Geneva (July and December 2014), the International Council on Archives Congress (location and date TBD), and the ICA Section on Professional Associations meeting (location and date TBD). The costs of the ICA and ICA/SPA meetings are shared at 50% with the Academy of Certified Archivists. (Activity 4)
- Funding to support local, state, or regional organizations via sponsorship or advertising in their conference materials, as well as member travel to one local, state, or regional meeting. (Activity 4)

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
Advocacy and Public Awareness

Revenues

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14 Actuals</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	-	-	-	-	N/A	-	N/A
Workshops	2,340.00	250.00	-	2,090.00	836.00%	2,340.00	N/A
Annual Meeting	-	-	-	-	N/A	-	N/A
Publications	-	-	-	-	N/A	-	N/A
Contributions	-	-	-	-	N/A	-	N/A
Investments	-	-	-	-	N/A	-	N/A
Other	-	-	-	-	N/A	-	N/A
Total Revenues	\$ 2,340.00	\$ 250.00	\$ -	\$ 2,090.00	836.00%	\$ 2,340.00	N/A

Expenses

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14 Actuals</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 62,144.50	\$ 49,069.30	\$ 46,864.28	\$ 13,075.20	26.65%	\$ 15,280.22	32.61%
Office Occupancy & Utilities	5,994.57	5,087.36	4,704.44	907.20	17.83%	1,290.13	27.42%
Services	26,933.79	23,641.48	3,708.75	3,292.31	13.93%	23,225.04	626.22%
Supplies	442.02	321.14	417.45	120.88	37.64%	24.57	5.88%
Travel	24,175.00	11,095.00	8,505.50	13,080.00	117.89%	15,669.50	184.23%
Leases, Rentals & Licenses	1,713.05	1,356.69	1,011.92	356.36	26.27%	701.13	69.29%
Taxes, Dues and Subscriptions	12,000.00	10,000.00	10,000.00	2,000.00	20.00%	2,000.00	20.00%
Depreciation, COGS, and Other	-	-	-	-	N/A	-	N/A
Total Expenses	\$ 133,402.93	\$ 100,570.98	\$ 75,212.34	\$ 32,831.95	32.65%	\$ 58,190.59	77.37%
Gain / (Loss) from Operations	\$ (131,062.93)	\$ (100,320.98)	\$ (75,212.34)	\$ (30,741.95)	30.64%	\$ (55,850.59)	74.26%

Transferred to Funds

	-	-	-
Net Gain / (Loss)	\$ (131,062.93)	\$ (100,320.98)	\$ (75,212.34)

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Advocacy and Public Awareness
Program Number: 107**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
1.1	1	Promote the value of archives and archivists to institutions, communities, and society.				17,500		11,050
		a. Conduct mid-year meeting of Committee on Public Awareness to support work on Strategy 1.1.:	5200	Consultant (Public Awareness)	3,000		2,000	
			5610	Member Travel	5,560		-	
		- Work plan development and refinement.		(8p x \$350 [avg] airfare/ground) = 2800			3,000	
		- Draft plan for American Archives Month, including evaluation.		(8p x \$150 x 2d lodging) = 2400			-	
		- Create and distribute PA resources via SAA website.		(8p x \$45 x 1d per diem) = 360			1,050	
		- Increase visibility of archives within existing PA campaigns.	5290	Food and Beverage	940			
				(10p x 2 breakfasts x \$10) = 200				
				(10p x 2 lunches x \$12) = 240				
				(10p x 2 dinners x \$25) = 500				
		b. Implement ongoing publicity and media plan and sponsor public awareness campaigns (including AAM). (1.1.3.)	5300	Postage/Freight (online/co-mail with AO)	-		-	
			5350	Design/Photography/Production	3,000		3,000	
			5400	Printing	2,000		2,000	
		c. Promote public relations competencies among archivists via web resources; incorporate PA goals into SAA website redesign. (1.1.3.)	5350	Design/Photography/Production	3,000			
1.2	2	Educate and influence decision makers about the importance of archives and archivists.				23,770		14,830
		a. Conduct mid-year meeting of Committee on Advocacy and Public Policy to support work on Strategy 1.2.	5610	Member Travel	5,560			
				(8p x \$350 [avg] airfare/ground) = 2800				
				(8p x \$150 x 2d lodging) = 2400				
				(8p x \$45 x 1d per diem) = 360				
		- Continue development of issue briefs. (1.2.2.)	5290	Food and Beverage	940			
		- ID additional priorities for Advocacy Agenda. (1.2.2.)		(10p x 2 breakfasts x \$10) = 200				
		- Develop work plan for determining members' resource needs and developing and disseminating practical resources to aid them in advocating for archives. (1.2.2.)		(10p x 2 lunches x \$12) = 240				
				(10p x 2 dinners x \$25) = 500				

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Advocacy and Public Awareness
Program Number: 107**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
		b. Fund travel by SAA representatives to Washington, DC, for Hill visits and other meetings and briefings as needed.	5600	Staff Travel (1p x \$300 airfare/ground x 1m) = 300 (1p x \$175 x 2d lodging x 1m) = 350 (1p x \$45 x 2d per diem x 1m) = 90	740		740	
			5610	Member Travel (1p x \$350 airfare/ground x 1m) = 350 (1p x \$175 x 2d lodging x 1m) = 350 (1p x \$45 x 2d per diem x 1m) = 90	790		790	
		c. Provide support to the National Coalition for History.	5820	NCH Membership Dues	12,000		-	
		d. Develop and distribute, via the website and other means, materials that explain to policymakers the relevance and importance of archives and archivists.	5350	Design/Production	3,000		300	
							10,000	
		e. Participate in meetings with coalition partners (eg, Issues and Awareness group sponsored by CoSA). (1.2.1.)	5610	Member Travel (1p x \$350 airfare/ground x 1m) = 300 (1p x \$175 x 2d lodging x 1m) = 350 (1p x \$45 x 2d per diem x 1m) = 90	740		3,000	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Advocacy and Public Awareness
Program Number: 107**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
1.4	3	Strengthen the ability of those who manage and use archival material to articulate the value of archives.				2,340		-
						6,750		5,210
		a. Develop resources designed to meet the stated needs of members, including free "Basics of Advocating" guide. (1.4.1.)	5350	Design/Production	1,000		4,230	
		b. Provide low-cost "Advocating for Archives" workshop at 2014 Joint Annual Meeting for up to 60 attendees. - \$39 fee to offset F&B and ensure reservation. (1.4.1.)	4200	Registrations (60 x \$39)	2,340			
			5380	Honoraria (2p x \$500)	1,000			
			5610	Member Travel (2p x \$350 airfare/ground)	700			
			5290	Food and Beverage (two breaks)	1,800			
			5360	Audiovisual	750		980	
		c. Develop and host free online, on-demand webinar on "Advocating for Archives." (1.4.1.)	5200	Development Fee	1,500			
	4	Provide funding for SAA representation at meetings of various organizations.				11,385		5,485
		a. National and international organizations:	5610	Member Travel	5,800		-	-
		- World Intellectual Property Organization/SCCR (Geneva, Switzerland, July and December 2014)		(1p x \$1500 airfare/ground x 2m) = 3000 (1p x \$130 x 8n lodging x 2m) = 2080 (1p x \$45 x 8d per diem x 2m) = 720				
		- International Council on Archives Congress (Location/date TBD) (Cost shared 50% with ACA)	5610	Member Travel--ICA Congress	2,000		2,000	
				(1p x \$1600 airfare/ground) = 1600 @ 50% (1p x \$200 x 5d lodging) = 1000 @ 50% (1p x \$100 per diem x 5d) = 500 @ 50% Early-Bird Registration @ \$887				
		- ICA Section on Professional Associations (SPA) (Location/date TBD) (Cost shared 50% with ACA)	5610	Member Travel--ICA SPA	1,500		1,500	
				(1p x \$1,500 air/ground) = 1500 @ 50% (1p x \$200 x 5d lodging) = 1000 @ 50% (1p x \$100 per diem x 5d) = 500 @ 50%				

The Society of American Archivists
Program Planner
Fiscal Year 2015

Program Name: Advocacy and Public Awareness
Program Number: 107

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
			5300	Freight	200		100	
		b. Regional and local organizations, such as:	5640	Registration Fees	-		-	
		- CIMA	5285	Advertising / Sponsorship	1,000		1,000	
		- MAC	5300	Freight (ship display materials)	100		100	
		- MARAC	5600	Staff Travel	-		-	
		- NEA		(1p x \$250 airfare/ground x 1m) = 250				
		- SSA		(1p x \$150 x 2d lodging) = 300				
		- SCA		(1p x \$45 x 3d per diem) = 135				
			5610	Member Travel	785		785	
				(1p x \$350 airfare/ground x 1m) = 350				
				(1p x \$150 x 2d) = 300				
				(1p x \$45 x 3d) = 135				
								(250)
								6,150
							(250)	
							1,800	
							750	
							-	
							600	
							3,000	
5		General and Administrative Cost Allocation	5XXX			70,275		55,560

The Society of American Archivists

Program Planner

Fiscal Year 2015

Program Name: Advocacy and Public Awareness

Program Number: 107

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	6	Computer Support Cost Allocation	5XXX			3,723		2,286
				Total Income		\$2,340		(\$250)
				Total Expenses		\$133,403		\$100,571
						\$0	[Norton] B LIST	\$0
						\$0		\$0
				Net Gain / (Loss)		(\$131,063)		\$100,321

**Society of American Archivists Council Meeting
May 22 - 24, 2014
Chicago, Illinois**

**FY14 Proposed Budget Narrative:
Governance (Program 108)
(Prepared by Nancy Beaumont)**

The FY 2015 budget projects a net loss of \$170,913. This is \$26,499 (18.35%) greater than the FY 2014 budgeted net loss and \$3,316 (1.98%) more than the FY 2014 projected net loss.

Effort of all staff members is allocated across the budget based on adjusted FY 2014 patterns. Personnel costs reflect 1.1 FTEs or 9.15% of total salaries, taxes, and benefits. The cost of benefits is expected to increase by 7.23% as of January 1, 2015. A 3% placeholder has been included in the salary budget for staff merit increases.

Relation of this program to Strategic Plan: Goal 4: Meeting Members' Needs, Strategies 4.1. – 4.3.

The proposed budget assumes the following:

- Funding for one hotel night for 10 Council members at the August Council meeting to account for the meeting occurring on Monday. (The President's room is complimentary per the hotel contract and one Council member lives close to the hotel.) (Activity 1.a.)
- Both the fall/winter and spring Council meetings will be held in Chicago, eliminating the possibility of meeting jointly with the CoSA and/or NAGARA boards during those times. In addition, both meetings will be held during the week. (Activities 1.b. and 1.c.)
- Funding of \$4,265 for an appointed group (TBD) to meet at SAA headquarters during the year. Previous examples: Dictionary Working Group (FY14), TS-DACS (FY13), and Annual Meeting Task Force (FY12). (Activity 3)
- Funding for one online election but no separate funding for an all-member referendum. An all-member referendum could be needed and/or that referendum could be conducted in conjunction with the election. (Activity 4.b.)
- Continued funding for SAA's membership in Heritage Preservation (\$1,000), International Council on Archives (\$780), and NISO (\$2,490).
- Inclusion of funding for AV support for all roundtables at DC 2014 (\$7,500) and contingency funding of \$2,000 for section/RT projects to be determined based on completion of formal requests for funding.

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
Governance

Revenues

	Projected FY '14			FY '15 Budget v. FY '14 Budget		FY '15 Budget v. FY '14 Actuals	
	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	-	-	-	-	N/A	-	N/A
Workshops	-	-	-	-	N/A	-	N/A
Annual Meeting	-	-	-	-	N/A	-	N/A
Publications	-	-	-	-	N/A	-	N/A
Contributions	-	-	-	-	N/A	-	N/A
Investments	-	-	-	-	N/A	-	N/A
Other	-	-	-	-	N/A	-	N/A
Total Revenues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A

Expenses

	Projected FY '14			FY '15 Budget v. FY '14 Budget		FY '15 Budget v. FY '14 Actuals	
	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 93,888.41	\$ 79,753.63	\$ 88,956.03	\$ 14,134.78	17.72%	\$ 4,932.38	5.54%
Office Occupancy & Utilities	9,072.60	7,776.68	10,267.59	1,295.91	16.66%	(1,194.99)	(11.64%)
Services	31,002.02	17,638.45	24,929.67	13,363.57	75.76%	6,072.35	24.36%
Supplies	666.43	635.39	1,052.51	31.05	4.89%	(386.08)	(36.68%)
Travel	29,310.00	32,135.00	35,262.35	(2,825.00)	(8.79%)	(5,952.35)	(16.88%)
Leases, Rentals & Licenses	2,583.42	2,204.20	1,961.29	379.22	17.20%	622.13	31.72%
Taxes, Dues and Subscriptions	4,390.00	4,270.00	5,167.22	120.00	2.81%	(777.22)	(15.04%)
Depreciation, COGS, and Other	-	-	-	-	N/A	-	N/A
Total Expenses	\$ 170,912.88	\$ 144,413.35	\$ 167,596.66	\$ 26,499.53	18.35%	3,316.22	1.98%
Gain / (Loss) from Operations	\$ (170,912.88)	\$ (144,413.35)	\$ (167,596.66)	\$ (26,499.53)	18.35%	(3,316.22)	1.98%

Transferred to Funds

- - -

Net Gain / (Loss)

\$ (170,912.88) \$ (144,413.35) \$ (167,596.66)

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Governance
Program Number: 108**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	1	Conduct four in-person meetings of SAA Council.				\$34,725		\$31,130
		a. August meetings (2) at 2014 Joint Annual Mtg	5290	Food and Beverage (Breaks: 20p x \$25 + 34% svc/tax x 2) (Dinner: 20p x \$52 + 34% svc/tax) (Breakfast: 16p x \$40 + 34% svc/tax)	\$3,595		\$2,735	
		- Assumes SAA President has comp room.						
		- Assumes one night paid for each Council member (except Bell and Kaplan) to cover early arrival for Monday meeting.	5290	Food and Beverage--Leadership Forum	\$250		\$250	
			5290	Food and Beverage--Regional Summit	\$200		\$150	
			5610	Member Travel (10p x \$250)	\$2,500		\$2,500	
		b. Nov 2014 or Jan/Feb 2015 meeting (Chicago)	5610	Member Travel (12p x \$400 [avg] airfare/ground) = 4800 (12p x \$130 x 3d lodging) = 4680	\$9,480		\$9,360	
		- Assumes Tuesday/Wednesday/Thursday meeting.						
			5295	Staff Travel No airfare/ground No lodging No per diem Local Travel = 100	\$100		\$100	
			5290	Food and Beverage (Cont/breaks: 18p x \$12 x 2d) = 430 (Lunch: 19p x \$12 x 2d) = 455 (Working Dinner: 18p x \$18) = 325 (Dinner: 18p x \$20) = 360 (Bkfst/break: 19p x \$12 x 1d) = 230	\$1,800		\$1,620	
			5200	Consultant Fees (Facilitator)	\$3,000		\$0	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Governance
Program Number: 108**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
		c. May/June 2015 meeting (Chicago)	5610	Member Travel (12p x \$400 [avg] airfare/ground) = 4800 (12p x \$170 x 3d lodging) = 6120	\$10,920		\$11,520	
		- Assumes Tuesday/Wednesday/Thursday meeting.						
		- Assumes one dinner with all (12) staff.						
		- Assumes one "newly elected" attending (F&B).						
			5600	Staff Travel--Local	\$100		\$100	
			5290	Food and Beverage (Cont/breaks: 18p x \$12 x 2d) = 430 (Lunch: 18p x \$12 x 2d) = 430 (Working Dinner: 18p x \$18) = 325 (Dinner: 24p x \$40) = 960 (Bkfst/break: 18p x \$12 x 1d) = 215	\$2,360		\$2,395	
		d. Meeting support	5385	Awards & Recognition	\$300		\$300	
			5810	Books/ASAE Leadership Issue	\$120		\$100	
			5130	Conference Calls	\$0		\$0	
			5300	Postage (included in G&A)	\$0		\$0	
			5400	Printing/Duplicating (included in G&A)	\$0		\$0	
			5500	Supplies (included in G&A)	\$0		\$0	
	2	Provide funding for activities related to Strategic Plan that are not included in other budgets.				-		4,000
		To be determined.	5610	Activity(ies) to be determined.	\$0		\$2,000	
			5200	Activity(ies) to be determined.	\$0		\$2,000	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Governance
Program Number: 108**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	3	Provide funding for designated meetings and tasks of appointed groups.				4,265		4,565
		a. Group TBD.	5610	Member Travel (5p x \$400 [avg] airfare/ground) = 2000 (5p x \$150 x 2d lodging) = 1500 (5p x \$45 x 1d per diem) = 225	\$3,725		\$4,025	
		Examples: - Dictionary Working Group funded in FY 14. - TS-DACS funded in FY 13. - Annual Meeting TF funded in FY 12.	5290	Food and Beverage (6p x 2 cont x \$10) = 120 (6p x 2 lunches x \$12) = 145 (6p x 2 dinners x \$23) = 275	\$540		\$540	
	4	Provide for balloting to elect vice-president, three Council members, and three Nominating Committee members.				\$3,800		\$3,800
		a. Post candidate statements on website; contract with VoteNet for online ballot; send paper ballot to requestors only.	5200	Consultants (VoteNet)	\$3,800		\$3,800	
			5300	Postage (included in G&A)	\$0		\$0	
			5400	Printing/Duplicating (included in G&A)	\$0		\$0	
		b. Conduct one all-member referendum as needed.	5200	Consultants (VoteNet)	\$0		\$0	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Governance
Program Number: 108**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	5	Dues for membership in related organizations.				\$4,270		\$4,270
			5820	Institutional Membership Dues:				
				Assn of Canadian Archivists	\$0		\$0	
			5820	Heritage Preservation	\$1,000		\$1,000	
			5820	ICA (600 Euros @ \$1.30)	\$780		\$780	
			5820	NISO	\$2,490		\$2,490	
	6	Provide funding for president-elect and executive director to attend ASAE CEO Symposium.				\$2,585		\$2,630
		Assumes attendance at Chicago offering, April 2015.						
			5640	Registration Fees (2p x \$945)	\$1,890		\$1,890	
			5610	Member Travel (1p x \$300 airfare/ground) = 300 (1p x \$175 x 2d lodging) = 350 (1p x \$45 x 1d per diem) = 45	\$695		\$740	
	7	Provide funding to support SAA Sections and Roundtables.				\$9,500		
		a. Provide AV support for roundtables at DC 2014.	5360	10 rooms @ \$750/room/day (x 1d)	\$7,500			
		b. Provide funding for section/RT projects TBD.	5200	Projects TBD.	\$2,000			
	8	General and Administrative Cost Allocation	5XXX			\$106,153		\$90,295
	9	Computer Support Cost Allocation	5XXX			\$5,615		\$3,724

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Governance
Program Number: 108**

Goal	Activity <u>No.</u>	<u>Narrative</u>	Account <u>No.</u>	<u>Account Description</u>	Proposed FY15 Budget		FY14 Budget	
					<u>Line Amount</u>	<u>Activity Total</u>	<u>Line Amount</u>	<u>Activity Total</u>
				Total Expenses		\$170,913		\$144,413
						\$0		\$0
						\$0		\$0
				Net Operating Gain / (Loss)		(\$170,913)		\$144,413

**Society of American Archivists Council Meeting
May 22 – 24, 2014
Chicago, Illinois**

**FY15 Proposed Budget Narrative:
Career Services (Program 115)
(Prepared by Thomas Jurczak and Nancy Beaumont)**

The proposed FY 2015 budget projects a net gain for the Career Services program of \$33,326. This is \$936 (2.89%) greater than the FY 2014 budgeted net gain and \$2,311 (6.49%) less than the FY 2014 projected net gain.

Effort of all staff members is allocated across the budget based on adjusted FY14 patterns. Personnel costs for Career Services reflect 0.05 FTEs or 0.38% of total salaries, taxes, and benefits. The cost of benefits is expected to increase by 7.23% as of January 1, 2015. A 3% placeholder has been included in the salary budget for staff merit increases.

The proposed budget assumes the following:

- For Online Job Ads, net revenues of \$38,298 based on the volume of ads placed in the past 12 months. The job board is outsourced to Boxwood Technologies; Boxwood's "consulting" (sales and hosting) and processing fees are based on a percentage of revenue.
- Continued expenses of \$3,000 for the onsite Networking Café/Career Center at the Annual Meeting.
- Minimal growth (of \$200) in revenue from the online Directory of Archival Consultants, which was launched in April 2012.

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
Career Services

Revenues

	Projected FY '14			FY '15 Budget v. FY '14 Budget		FY '15 Budget v. FY '14 Actuals	
	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	58,700.00	53,500.00	57,605.92	5,200.00	9.72%	1,094.08	1.90%
Workshops	-	-	-	-	N/A	-	N/A
Annual Meeting	-	-	-	-	N/A	-	N/A
Publications	-	-	-	-	N/A	-	N/A
Contributions	-	-	-	-	N/A	-	N/A
Investments	-	-	-	-	N/A	-	N/A
Other	-	-	-	-	N/A	-	N/A
Total Revenues	\$ 58,700.00	\$ 53,500.00	\$ 57,605.92	\$ 5,200.00	9.72%	\$ 1,094.08	1.90%

Expenses

	Projected FY '14			FY '15 Budget v. FY '14 Budget		FY '15 Budget v. FY '14 Actuals	
	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 3,920.67	\$ 1,688.33	\$ 3,524.90	\$ 2,232.34	132.22%	\$ 395.77	11.23%
Office Occupancy & Utilities	378.55	164.58	345.58	213.97	130.01%	32.97	9.54%
Services	20,937.46	19,200.73	17,996.29	1,736.72	9.05%	2,941.17	16.34%
Supplies	29.03	10.38	32.81	18.66	179.77%	(3.78)	(11.51%)
Travel	-	-	-	-	N/A	-	N/A
Leases, Rentals & Licenses	108.47	46.54	69.13	61.93	133.05%	39.34	56.91%
Taxes, Dues and Subscriptions	-	-	-	-	N/A	-	N/A
Depreciation, COGS, and Other	-	-	-	-	N/A	-	N/A
Total Expenses	\$ 25,374.18	\$ 21,110.56	\$ 21,968.71	\$ 4,263.62	20.20%	\$ 3,405.47	15.50%
Gain / (Loss) from Operations	\$ 33,325.82	\$ 32,389.44	\$ 35,637.21	\$ 936.38	2.89%	\$ (2,311.39)	(6.49%)

Transferred to Funds

Net Gain / (Loss)

-	-	-
\$ 33,325.82	\$ 32,389.44	\$ 35,637.21

**The Society of American Archivists
Program Planner
Fiscal 2015 Budget**

**Program Name: Career Services
Program Number: 115**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	1	Online Career Center Job board outsourced to Boxwood Technologies Boxwood revenue share Boxwood service fee	4160 5200 5335	Advertising Revenue Consulting Fees (30% revenue sharing) Processing fees (~ 2.3%)	56,000 16,414 1,288	\$ 56,000 17,702	(51,000) 14,948 1,173	\$ (51,000) 16,121
	2	Administer Career Center at Annual Meeting				- 3,000		- 3,000
			5600	Staff travel [JS] (Moved to G&A)	-		-	
			5360	Networking Café / Career Center	3,000		3,000	
			5380	Honorarium for invited "Career Coach"	-		-	
	3	Online Consultants Directory Annual listing fee (\$399 list; \$198 members) All listings to run from Jan 1 to Dec 31.	4170 4170	Directory Listings (14 member) Directory Listings	2,700 -	2,700	(2,500) -	(2,500)
	4	General and Administrative Cost Allocation	5XXX			4,437		1,911
	5	Computer Support Cost Allocation	5XXX			236		78
				Total Income		58,700		(53,500)
				Total Expenses		25,374		21,111
				Gain / (Loss) From Operations		33,326		(32,389)

**Society of American Archivists Council Meeting
May 15 – 17, 2013
Chicago, Illinois**

**FY14 Proposed Budget Narrative:
Membership (Program 120)
(Prepared by Thomas Jurczak and Nancy Beaumont)**

The FY 2015 budget projects a net gain of \$780,800. This is \$17,447 (2.29%) greater than the FY 2014 budgeted net gain and \$14,622 (1.91%) greater than the FY 2014 projected net gain. The budget projects total dues revenue of \$882,531—an increase of 2.64% from the FY14 budget and an increase of 2.40% from projected FY14 actuals.

Effort of all staff members is allocated across the budget based on adjusted FY 2014 patterns. Personnel costs for Membership reflect 0.89 FTEs or 7.44% of total salaries, taxes, and benefits. The cost of benefits is expected to increase by 7.23% as of January 1, 2015. A 3% placeholder has been included in the salary budget for staff merit increases.

The proposed budget assumes the following:

- No dues increase in FY15. The last dues increase approved by the membership was implemented over a three-year period, effective July 1, 2011, 2012, and 2013.
- Membership projections are based on reported March 2014 figures in conjunction with trend analysis by membership class over the period covering FY 2010 through FY 2013.
- Other budgeted activities in the Membership program include collection of revenue from mailing list rentals and provision of such member services as administration of the awards program and mailing of complimentary publications to sustaining institutional members.

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
Membership

Revenues

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14</u> <u>Actuals</u>	<u>FY '15 Budget v. FY '14 Budget</u> <u>\$ Difference</u>	<u>% Difference</u>	<u>FY '15 Budget v. FY '14 Actuals</u> <u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ 882,531.64	\$ 859,852.37	\$ 861,812.53	\$ 22,679.27	2.64%	\$ 20,719.11	2.40%
Subscriptions & Advertising	-	-	-	-	N/A	-	N/A
Workshops	-	-	-	-	N/A	-	N/A
Annual Meeting	-	-	-	-	N/A	-	N/A
Publications	-	-	-	-	N/A	-	N/A
Contributions	-	-	-	-	N/A	-	N/A
Investments	-	-	-	-	N/A	-	N/A
Other	2,100.00	1,100.00	1,870.20	1,000.00	90.91%	229.80	12.29%
Total Revenues	\$ 884,631.64	\$ 860,952.37	\$ 863,682.73	\$ 23,679.27	2.75%	\$ 20,948.91	2.43%

Expenses

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14</u> <u>Actuals</u>	<u>FY '15 Budget v. FY '14 Budget</u> <u>\$ Difference</u>	<u>% Difference</u>	<u>FY '15 Budget v. FY '14 Actuals</u> <u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 76,159.31	\$ 71,604.92	\$ 73,811.98	\$ 4,554.40	6.36%	\$ 2,347.33	3.18%
Office Occupancy & Utilities	7,349.33	6,986.68	7,271.02	362.65	5.19%	78.31	1.08%
Services	8,467.47	7,360.24	8,181.85	1,107.23	15.04%	285.62	3.49%
Supplies	1,754.37	1,665.78	660.47	88.59	5.32%	1,093.90	165.62%
Travel	-	-	-	-	N/A	-	N/A
Leases, Rentals & Licenses	2,101.10	1,981.75	1,540.83	119.35	6.02%	560.27	36.36%
Taxes, Dues and Subscriptions	-	-	-	-	N/A	-	N/A
Depreciation, COGS, and Other	8,000.00	8,000.00	6,038.60	-	0.00%	1,961.40	32.48%
Total Expenses	\$ 103,831.59	\$ 97,599.37	\$ 97,504.75	\$ 6,232.22	6.39%	\$ 6,326.84	6.49%
Gain / (Loss) from Operations	\$ 780,800.04	\$ 763,352.99	\$ 766,177.98	\$ 17,447.05	2.29%	\$ 14,622.06	1.91%

Transferred to Funds

Net Gain / (Loss)

-	-	-
\$ 780,800.04	\$ 763,352.99	\$ 766,177.98

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Membership
Program Number: 120**

Goal No.	Activity No.	Narrative	Acct No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	1	Collect membership dues. Assumes the following growth rates per member category: - Assoc Dom (\$100) @ -1.83% - Assoc Int'l (\$125) @ -0.3% - Bridge (\$48) @ 0.32% - ID1 [Salary <\$20k] (\$80) @ 8.68% - ID2 [Salary <\$30k] (\$105) @ 1.18% - ID3 [Salary <\$40k] (\$130) @ -0.24% - ID4 [Salary <\$50k] (\$160) @ 1.04% - ID5 [Salary <\$60k] (\$200) @ 3.14% - ID6 [Salary <\$75k] (\$225) @ 3.48% - ID7 [Salary >\$75k] (\$250) @ 4.50% - Hon/Life (\$0) @ -4.21% - Retired (\$70) @ 4.69% - Student (\$50) @ -7.26% - Reg Inst (\$300) @ -1.54% - Sus Inst (\$550) @ -1.54%	4000	Membership Dues		\$882,532	4	(\$859,852)
	2	Collect revenue from member mailing list rental.	4870	Mailing Label Rental	2,100	\$2,100	(\$1,100)	(\$1,100)
	3	Increase member retention.				\$0		\$0
		a. New Member Orientation and Forum at Annual Meeting	4360	Sponsor	\$0	\$3,035	\$0	\$3,035
			5290	F & B (200p x \$15 incl svc/tax)	3,035		3,035	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Membership
Program Number: 120**

Goal No.	Activity No.	Narrative	Acct No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	4	Deliver member services.				\$9,650		\$9,650
		a. Mail copies of new SAA books to sustaining inst. members Assumes 4 books in FY14	5300	Shipping/Related Fees (negligible)	\$0		\$0	\$8,000
			5940	Cost of goods sold (4 books @ \$25 ea. x 80)	\$8,000		\$8,000	
		b. Administer SAA Fellows, Awards & Scholarship Programs (See SAA Foundation program planner for details on funding of awards and scholarships.)	5570	Supplies (plaques and certificates)	\$1,200		\$1,200	\$1,200
			5400	Printing for Program	\$0		\$0	
			5350	Develop/Produce Promo Display	\$0		\$0	
			5300	Postage (included in allocables)	\$0	[G&A Alloc]	\$0	[G&A Alloc]
			5290	F&B--Ceremony Toast	\$0		\$0	
			5350	Graphic Design for Program	\$150		\$150	
		c. Administer the Mentoring Program. Mentor/Protege Meet and Greet at Annual Meeting Support online "Mentoring Directory" Redesign Mentoring Program brochure	5290	Food & Beverage	\$300	\$300	\$300	\$300
					\$0		\$0	
			5350	Graphic Design	\$0		\$0	
			5400	Printing (\$2,000 @ \$.50/ea)	\$0		\$0	
	5	Support the Membership Committee.				\$270		\$270
		a. Meeting of Membership Development Task Force - Cmte Chair, Cmte Vice Chair, Council liaison, 1 cmte rep - Staff	5610	Member Travel (4p x \$350)	\$0		\$0	
			5620	Member Lodging (4p x 2d x \$155)	\$0		\$0	
			5630	Member Per Diem (4p x 2d x \$45)	\$0		\$0	
			5290	F & B [6p x (\$10x2 + \$15x1 + \$35x1)	\$0		\$0	
			5295	Local Travel (Staff) (15 x 2 x 2p)	\$0		\$0	
		a. Conference Calls 3 teleconfs for committee (included in allocables) 1 subcommittee teleconf (included in allocables)	5110	Conference Calls	\$0		\$0	
			5110	Conference Calls	\$0		\$0	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Membership
Program Number: 120**

Goal No.	Activity No.	Narrative	Acct No.	Account Description	Proposed FY15 Budget		FY14 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
		b. Key Contact Breakfast at Annual Meeting (Per request from Membership Committee officers.)	5290	F&B--Continental Breakfast (15p x \$18)	\$270		\$270	
	6	Membership staffing at Annual Meeting Staffing to be provided by Beaumont, Salgado, others as needed and appropriate (included in other program budgets).	5600	Staff Travel	\$0	\$0	\$0	\$0
	7	Staff professional memberships/development. (Included in G&A budget.)				\$0		\$0
			5820	ASAE Membership	\$0		\$0	
			5820	Assoc. Forum Membership	\$0		\$0	
			5640	ASAE Reg Fee	\$0		\$0	
	8	Miscellaneous Database Support	5226	Computer Support	\$0	\$0	\$0	\$0
	9	General and Administrative Cost Allocation	5XXX			86,311	5	81,306
	10	IT Cost Allocation	5XXX			4,566	5	3,339
				Total Income		\$884,632		(\$860,952)
				Total Expenses		103,832		98,249
				Gain / (Loss) From Operations		\$780,800		(\$762,703)
				[Brack]		\$0		\$650
				Henry		\$0		\$0
				[B-LIST]		\$0		\$0
				Net Operating Gain / (Loss)		\$780,800		(\$763,353)

Society of American Archivists Council Meeting
May 22 – 24, 2014
Chicago, Illinois

FY15 Proposed Budget Narrative:
Annual Meeting (Program 194)
(Prepared by Nancy Beaumont)

The proposed FY 2015 budget projects a net gain of \$136,795 from the Joint Annual Meeting. This is \$42,827 (45.58%) greater than the FY 2014 budgeted net gain and \$42,375 (23.65%) less than the FY 2014 actual net gain.

Effort of all staff members is allocated across the budget based on FY 2014 patterns. Personnel costs reflect 0.73 FTEs or 6.12% of total salaries, taxes, and benefits. The cost of benefits is expected to increase by 7.23% as of January 1, 2015. A 3% placeholder has been included in the salary budget for staff merit increases.

The proposed budget for the Joint Annual Meeting assumes the following:

- Prepaid expenses (incurred during FY14 but related to the Washington, DC, meeting in FY15) are highlighted in the program planner. These costs will be allocated in FY15 via the General/Administrative Cost Allocation. This generally accepted accounting procedure, implemented beginning in FY08, enables us to reflect staff effort and related expenses more accurately. Program planners for the 2015 and 2016 annual meetings (Programs 195 and 196) reflect costs that will be booked as prepaid expenses but not expensed until those meetings take place. (Activities 2, 3, and 5b)
- Payment to Conference & Logistics Consultants of \$52,300, which includes pre-meeting and onsite management and travel/per diem, creation of the “Virtual Expo” for exhibitor sign-up, and exhibit hall management. (Activities 2, 4, and 5)
- Promotion of the conference via an online-only PDF of the full preliminary program and mailing of an 8-page flyer highlighting various aspects of the meeting and referring to the conference website (now is Sched.org) for detailed information. (Activity 3)
- An expense of \$53,500 for AV, which reflects coverage of all education and plenary sessions (Activity 4c) and the negative impact of labor costs for minimums and overtime hours (evenings and Saturday). As in FY13 and FY14, we propose no videotaping of the plenaries. The expenses associated with Roundtable meeting AV appear in Program 108, Governance, Activity 7.
- A new expense of \$6,000 for provision of a subsidy for an onsite child care center. [TO BE DISCUSSED.]
- In FY09 and FY10 SAA incurred expenses for ASL interpreters, based on the needs of an individual attendee as well a desire to provide ASL at the plenaries and Accessibility

Forum. The proposed FY15 budget does not include funding for an ASL interpreter.
(Activity 4)

- A total of 1,800 paid attendees, spread per trends in the past six years. This best-guess estimate is based on economic trends and registration patterns to date. (Reference of paid attendees: 2013 = 1,644; 2012 = 1,519; 2011 = 1,664; 2010 = 1,909; 2009 = 1,452; 2008 = 1,754; 2007 = 1,699.) (Activity 4)
- A payment to NAGARA of 15% of the net gain from the conference, per a Council-approved memorandum of agreement. NAGARA also pays all of its own expenses for the meeting. (See last two lines in program planner.)

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
Annual Meeting - Washington

Revenues

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14 Actuals (NO)</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	9,000.00	15,000.00	12,705.00	(6,000.00)	(40.00%)	(3,705.00)	(29.16%)
Workshops	-	-	-	-	N/A	-	N/A
Annual Meeting	677,881.03	564,610.04	639,606.41	113,271.00	20.06%	38,274.62	5.98%
Publications	-	7,500.00	-	(7,500.00)	(100.00%)	-	N/A
Contributions	-	-	-	-	N/A	-	N/A
Investments	-	-	-	-	N/A	-	N/A
Other	6,250.00	1,250.00	6,272.37	5,000.00	400.00%	(22.37)	(0.36%)
Total Revenues	\$ 693,131.03	\$ 588,360.04	\$ 658,583.78	\$ 104,771.00	17.81%	\$ 34,547.25	5.25%

Expenses

	<u>Fiscal '15</u>	<u>Fiscal '14</u>	<u>Projected FY '14 Actuals (NO)</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 61,927.41	\$ 58,809.49	\$ 57,797.89	\$ 3,117.92	5.30%	\$ 4,129.52	7.14%
Office Occupancy & Utilities	5,957.24	5,766.70	5,883.54	190.53	3.30%	73.70	1.25%
Services	306,075.80	252,802.28	242,968.68	53,273.51	21.07%	63,107.12	25.97%
Supplies	2,432.94	3,021.20	6,720.67	(588.26)	(19.47%)	(4,287.73)	(63.80%)
Travel	3,575.00	2,450.00	(486.62)	1,125.00	45.92%	4,061.62	(834.66%)
Leases, Rentals & Licenses	16,481.12	11,656.66	1,031.79	4,824.45	41.39%	15,449.33	1497.33%
Taxes, Dues and Subscriptions	-	-	-	-	N/A	-	N/A
Depreciation, COGS, and Other	159,885.67	159,885.67	165,496.92	-	0.00%	(5,611.25)	(3.39%)
Total Expenses	\$ 556,335.16	\$ 494,392.01	\$ 479,412.87	\$ 61,943.16	12.53%	\$ 76,922.29	16.05%
Gain / (Loss) from Operations	\$ 136,795.87	\$ 93,968.03	\$ 179,170.91	\$ 42,827.84	45.58%	\$ (42,375.04)	(23.65%)

Transferred to Funds

	-	-	-
Net Gain / (Loss)	\$ 136,795.87	\$ 93,968.03	\$ 179,170.91

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Annual Meeting - Washington
Program Number: 194**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
	1	Management & Administration Administer activities associated with the Joint Annual Meeting in Washington; develop and monitor budgets; provide support to the Program and Host committees; promote the meeting via all available means; research future meeting sites and vendors; monitor and evaluate current vendors; market exhibit space and sponsorship opportunities; and respond to general inquiries.				\$ -		\$ -		\$ -
		a. Staff professional development	5640	Included in G&A budget, activity 1.c.	-		-		-	
	2	Provide for program development, planning, and evaluation of the Joint Annual Meeting.				38,670		38,440		36,285
		a. Negotiated Agreement with NAGARA	5480	See below.	-		-		-	
		a. Program Committee (13 members + 2 <i>ex officios</i> + 1 CoSA staff person)	5295	Staff--Local Travel (Meeting in Chicago)	60		60		30	
			5610	Member Travel (13p x airfare/ground) (actual)	10,585		9,860		8,495	
		EXPENSES APPEARING IN SCREENED BOXES WERE INCURRED IN FY14 AND ARE INCLUDED IN GENERAL/ADMINISTRATIVE ALLOCATION AT END OF PROGRAM PLANNER.		(13p x \$160) (actual)	-		-		-	
				(14p x \$45 x 1d per diem) (actual)	-		-		-	
			5290	F&B--Breaks, lunches, dinners (actual)	1,625		1,400		1,160	
			5200	Consulting Fees	-		720		800	
			5130	Conference Calls	-		-		-	
			5360	Audiovisual	-		-		-	
		b. Host Committee	5290	F&B--Host Committee Meetings	-		-		-	
		c. Pre-Meeting Planning	5200	Consulting Fees (CLC) (\$4,400 x 6)	26,400		26,400		25,800	
		- Conference & Logistics Consultants (CLC)	5200	Meeting Planner Expenses (CLC)	-		-		-	
			5600	Staff Travel (site visit)	-		-		-	

The Society of American Archivists
Program Planner
Fiscal Year 2015

Program Name: Annual Meeting - Washington
Program Number: 194

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
	3	Promote attendance at Annual Meeting.				-		16,245		16,200
	a.	Preliminary program and flyers	5350	Design/Layout/Prepress	6,400		6,400		6,400	
			5400	Printing (flyer only)	4,125		4,125		4,125	
		Preliminary program book will not print and mail,	5300	Mail Services/Postage/Freight (flyer)	1,340		1,340		1,340	
		designed PDF on conference website; 8-panel flyer	5310	Express Mail (advance copies)	20		20		20	
		will print and mail to all members (7,500).								
	b.	Flyer mailed to other targeted audiences (500 cc)	5300	Postage	300		300		300	
			5335	Mail Services	100		100		100	
	c.	Banner, web button, ads, calendar submissions	5350	Flyers for Regional Meetings	200		200		200	
			5350	ID/Banner Development, Ads for AO / AA	3,300		3,300		3,300	
			5400	Banner Production	460		460		415	
	d.	Email blasts to nonmembers		Assumes Use of Lyris List Product	-		-		-	
	e.	Web version	5350	Web-formatted Graphics	-		-		-	
	f.	Press release via Bacon's (or other) online service	5285	Press Release	-		-		-	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Annual Meeting - Washington
Program Number: 194**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
	4	Provide on-site management of a high-quality annual conference.				556,681		(471,565)		(425,775)
		a. Registration income (1,800 paid attendees)				97,545		92,690		76,465
			4300	Early-Bird Member (50.8%) (Approx 737 x \$319)	349,587		4	(233,604)		(227,414)
			4300	Early-Bird Employee / Member Inst (4.7%) (Approx 69 x \$369)	22,951		4	(22,951)		-
			4300	Early-Bird Nonmember (14.8%) (Approx 215 x \$499)	52,402		4	(69,339)		(66,736)
			4300	Advance Member (6.5%) (Approx 94 x \$369)	21,956		4	(29,763)		(31,510)
			4300	Advance Employee / Member Inst (1.1%) (Approx 16 x \$419)	5,268		4	(5,268)		-
			4300	Advance Nonmember (3.8%) (Approx 55 x \$549)	5,060		4	(17,671)		(17,804)
			4300	Onsite Member (4.2%) (Approx 61 x \$429)	27,701		4	(19,338)		(20,602)
			4300	Onsite Employee / Member Inst (0.8%) (Approx 11 x \$479)	3,784		4	(3,784)		-
			4300	Onsite Nonmember (3.3%) (Approx 48 x \$599)	11,025		4	(15,284)		(15,502)
			4300	One-Day Member (1.6%) (Approx 23 x \$189)	8,772		4	(7,421)		(7,204)
			4300	One-Day Employee / Member Inst (N/A)	-		4	-		-
			4300	One-Day Nonmember (2.3%) (Approx 33 x \$269)	13,606		4	(11,529)		(9,177)
			4300	Student Member (3.5%) (Approx 51 x \$139)	20,447		4	(16,118)		(15,583)
			4300	Student Member One-Day (0.04%) (Approx 1 x \$119)	-		4	-		(252)
			4300	Student Nonmember (1.9%) (Approx 28 x \$209)	10,332		4	(8,740)		(9,895)
			4300	Student Nonmember One-Day (0.1%) (Approx 1 x \$159)	-		4	-		(1,008)

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Annual Meeting - Washington
Program Number: 194**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
			4300	Guest (of Member) (0.4%) (Approx 6 x \$99)	2,279		4	(1,883)		(1,456)
			4300	Guest (of Nonmember) (0.1%) (Approx 2 x \$139)	762		4	(623)		(882)
			4300	Complimentary Registrations (90--exhibitors, sponsors, presenters)	-		4	-		-
			4300	Research Forum (Approx 15 x \$50)	750		4	(750)		(750)
		b. Staffing	5600	Staff Travel (2p x \$400 air/ground) (NPB, RC) = 800 (1p x \$40/d x 8d per diem) (NPB) = 320 (1p x \$40/d x 7d per diem) (RC) = 280 (1p x \$125/d x 7d lodging) = 875	2,275		5	2,300		2,545
		- NPB room is comped.								
		- One staff room (RC) @ \$125/day.								
		- Three CLC staff rooms @ comp.								
			5650	Meeting Assistants	-		5	-		-
			5200	Consulting Fees (CLC) (\$4400/mo x 4)	17,600		5	17,600		17,200
			5200	Third Onsite CLC Staff (\$550/d x 4d)	2,200		5	2,200		2,200
			5200	Meeting Planner Expenses (CLC) (3p x local travel from Annapolis) = 150 (2 x \$40 x 8 + 1 x \$40 x 4 per diem) = 800	950		5	2,300		5,000
			5610	Host Committee (6p x \$25 transportation/parking) = 150	150		5	150		150
		c. Logistics								
		- AV services provided by in-house PSAV:	4450	CD Sales (special track)	-		4	(7,500)		
		Management fees included in 2014;	5360	Audiovisual (basic for all sessions)	53,500		5	47,000		32,620
		assumes no additional cost for in-house sound.	5360	Audiovisual (IMAG/video of plenaries)	-		5	-		4,700
		- Does <u>not</u> include IMAG + video capture of	5360	Audiovisual (special track)	-		5	7,500		
		2 plenaries for podcasting/other uses.	5500	Equipment (phones, computers, Cybercafe)	750		5	1,500		700
			5110	Credit card machines	-		5	-		-
			5500	Supplies	500		5	500		500
			5340	Hotel Handling Fees	700		5	1,000		1,000
			5480	Floral	150		5	-		-

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The Society of American Archivists
Program Planner
Fiscal Year 2015

Program Name: Annual Meeting - Washington
Program Number: 194

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
			5480	Photography	1,200		1,100		1,000	
			5300	Postage/Freight (conference materials)	1,900		1,900		1,800	
			5400	Signs	2,760		1,780		1,100	
				(32 new headers + 32 footers @ \$40 + art @ \$50 + shipping)						
			4360	Sponsor for Signs (included in Silver pkg)	-		-		-	
		Kiddie Corp totals \$6,520 for 12 kids + AV, guest room, F&B for kids, refrigerator, pillows and blankets, etc.	5480	Child Care	6,000		300		300	
			5480	Gratuities (hotel and AV staff)	500		500		500	
			5385	Amenities and Awards	500		500		500	
			5260	Insurance	2,560		2,560		1,900	
			5290	F&B--Staff Office/Reg Desk/Host Desk	1,550		1,350		1,000	
			5650	Keynote Speaker Expenses (air + 3 nights)	1,150		-		1,000	
			5480	Security (office, reg desk, locks)	650		650		750	
			5236	Credit Card Fees (moved to allocables)	-		-		-	
			5200	ASL interpreter for individual attendee	-		-		-	
			5200	ASL interpreter for plenaries	-		-		-	
						122,200		(111,900)		(85,600)
						105,680		85,708		72,945
5		Provide for the International Archives and Information Technology Exposition.								
	a.	Exhibitor and sponsor income	4350	Exhibits Income	89,000		(71,000)		(66,000)	
		- 60 paid booths		(55 booths x \$1,500 avg) = 82,500						
		- 2 comp (Office Hours)		(5 booths x \$1,300 avg) = 6,500						
		- 5 @ \$1,300 (avg nonprofit rate)								
		- 55 @ \$1,500 (avg for-profit rate)	4150	Advertising in Preliminary/Onsite programs	9,000		(15,000)		(8,500)	
			4900	Exhibit Hall Ticket Sales	-		-		-	
				Sponsorship(s):						
			4360	Silver Sponsorship (Preservica)	11,800		(13,400)		(7,600)	
			4360	Bronze Sponsorship (Atlas)	12,400		(9,000)		-	
			4360	CyberCafe (TBD)	-		(2,000)		(2,000)	
			4360	Career Center (TBD)	-		(1,500)		(1,500)	
	b.	Promote exhibits/sponsorships via prospectus, calls	5350	Design/Layout/Web Graphics	400		400		400	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Annual Meeting - Washington
Program Number: 194**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
		- Prospectus is web-only	5300	Postage/Freight (two mailings)	-		-		-	
		- "Virtual Expo" provided by CLC/Event Rebels	5335	Mail Processing/Labor	-		-		-	
			5400	Printing (300 sets)	-		-		-	
			5200	Virtual Expo setup	450		450		450	
		c. Implement the Expo Hall	5200	Decorator (Alliance Expo Services) (Set up 62 booths x \$94 = \$5,830 + Reg Desk, Cybercafe, special set-ups/kiosks, posterboards, easels, meter panels, etc) (Floor plan to fire marshall = \$0)	11,900		11,900		11,900	
		- Grand Opening Happy Hour Assumes 1,200 people, very light food + open soft bar + cash bar (for liquor) (including cashiers/bartenders) + 34% svc/tax	5200	Security	1,000		1,000		1,700	
			5200	Consulting Fees (CLC) (60 booths x \$67)	4,020		3,350		3,350	
		Coffee/tea break on Friday (9:00 - 9:30 am)								
		Assumes 500 people, 62.5 gallons @ \$95/gal	5290	F&B--Grand Opening (1,200p x \$32 incl bartenders/svc/tax)	39,165		30,723		23,760	
		- Brunch/lunch (11:30 am - 1:00 pm) Assumes 1,200 people @ \$35 incl 34% svc/tax	5290	F&B--Coffee Break	-		7,445		-	
			5290	F&B--Brunch/Lunch (1,200p x \$35 incl svc/tax)	42,000		20,790		25,590	
		- Afternoon Break Assumes 900 people @ \$8.40 incl 34% svc/tax	5290	F&B--Afternoon Break (900p x \$8.40 incl svc/tax)	7,595		10,500		5,795	
6		Provide for a variety of networking, social, and business events.				14,250		(8,750)		(7,250)
						79,765		67,930		60,100
		a. All-Attendee Reception	4900	Adult Guest Tickets (25 x \$40)	1,000		(1,000)		(1,000)	
		- Assumes 1,200 people at Library of Congress @ \$38/p (inclusive) for buffet stations + bartenders + svc/tax.	4900	Child Guest Tickets (12 and under) (25 x \$10)	250		(250)		(250)	
			4850	Wrist Band Sales (500 x \$10)	5,000		-		-	
			4360	Sponsorship(s): (Preservation Technologies for buses, etc)	5,000		(5,000)		(3,500)	
			5480	Entertainment	-		2,000		1,500	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Annual Meeting - Washington
Program Number: 194**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
			5300	Wrist Bands (in stock)	-		-		-	
			5290	F&B (1,200p @ approx \$38)	47,880		47,880		53,000	
			5700	Facility Rental/Required Security	14,745		10,000		1,100	
			5295	Transportation (buses)	11,280		2,500		-	
		b. Presidents' Reception	4360	Sponsorship(s) (Hollinger/Metal Edge @ \$3,000)	3,000		(2,500)		(2,500)	
			5290	F&B (\$4,000 + 34% svc/tax)	5,360		5,050		4,000	
		c. Fellows' Reception (Combined with Presidents' Reception in 2014.)	5290	F&B	-		-		-	
		d. Academy of Certified Archivists Luncheon/Meeting (Free to ACA members; ACA billed directly)			-		-		-	
		e. SAA Annual Membership Meeting	5200	Parliamentarian Fees/Expenses	500		500		500	
7		Provide attendees with meeting materials.				14,835		13,720		12,455
		a. Promotional items and sponsor income	4360	Totebag Sponsorship	-		-		-	
			4360	Badge Holder/Lanyard Sponsorship	-		-		-	
			5400	Hotel Keycard Production (Atlas Sponsor)	1,950		1,935		-	
			5400	Lanyard/Badge Holder (2000 x \$1.28 + set-up and freight)	2,670		2,670		2,000	
		b. Onsite Program (1,600 cc) (Attendees given option to opt out of print program, assumes 10% opt out.)	5350	Design/Layout/Prepress	4,725		4,725		5,325	
			5400	Printing (1,600 x \$2.00)	3,200		2,200		2,960	
			5300	Postage/Freight	450		450		450	
		c. Name badges/ribbons	5400	Printing (1,600 badges, 500 ribbons)	700		600		600	
			5500	Supplies (badge stock)	500		500		500	
			5350	Badge Design	280		280		280	

The Society of American Archivists
Program Planner
Fiscal Year 2015

Program Name: Annual Meeting - Washington
Program Number: 194

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
		d. Registration Packet materials	5400	Printing/Duplicating	-		-		-	
		e. Onsite registration forms (200)	5350	Layout/Production	190		190		190	
			5400	Printing (multi-part form)	170		170		150	
	8	Provide space and assistance to various groups that meet during the Annual Meeting, including leader groups, sections, roundtables, committees, task forces, and allied groups.				500		4,950		5,700
		a. Leadership Forum	5360	AV for Roundtable Meetings	-		3,750		5,700	
		b. Committees and task forces		(Included for all roundtable meetings in						
		c. Sections and roundtables (see Governance, act. 7)		Program 108, Governance, activity 7.)						
		d. Allied groups	5290	F&B for Leadership Forum (100 x \$5)	500		500			
		e. Honoraria as needed (see Governance, act. 7)	5380	Honoraria	-		700			
	9	Program-specific computer support to assist in promotion and to streamline registration functions.	5226	Computer Support	-	-	-	-	-	-

The Society of American Archivists
Program Planner
Fiscal Year 2015

Program Name: Annual Meeting - Washington
Program Number: 194

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
	10	General and Administrative Cost Allocation	5XXX	(Includes all DC 2014 expenses incurred in FY14.)		230,100	5	226,603		217,150
	11	IT Cost Allocation	5XXX			3,769	5	2,791		2,660
				Total Income		\$ 693,131		\$ (592,215)		\$ (518,625)
				Total Expenses		532,195		494,392		446,626
				Gain / (Loss) From Operations		\$ 160,936		\$ (97,823)		\$ (71,999)
			5480	Negotiated Agreement with NAGARA		\$24,140	5	\$0		\$4,700
				Net Operating Gain / (Loss)		\$136,796		(\$97,823)		(\$76,699)

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
Annual Meeting - Cleveland

Revenues

	<u>Fiscal '15</u>	<u>Fiscal '14 (DC)</u>	<u>Projected FY '14 Actuals</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	-	-	-	-	N/A	-	N/A
Workshops	-	-	-	-	N/A	-	N/A
Annual Meeting	-	-	-	-	N/A	-	N/A
Publications	-	-	-	-	N/A	-	N/A
Contributions	-	-	-	-	N/A	-	N/A
Investments	-	-	-	-	N/A	-	N/A
Other	-	-	-	-	N/A	-	N/A
Total Revenues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A

Expenses

	<u>Fiscal '15</u>	<u>Fiscal '14 (DC)</u>	<u>Projected FY '14 Actuals</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 103,778.89	\$ 83,464.60	\$ 86,417.44	\$ 20,314.28	24.34%	\$ 17,361.45	20.09%
Office Occupancy & Utilities	10,073.12	8,132.53	8,602.61	1,940.60	23.86%	1,470.51	17.09%
Services	52,197.36	50,743.97	51,154.58	1,453.40	2.86%	1,042.78	2.04%
Supplies	690.25	566.42	695.60	123.83	21.86%	(5.35)	(0.77%)
Travel	8,015.00	12,665.00	11,962.32	(4,650.00)	(36.72%)	(3,947.32)	(33.00%)
Leases, Rentals & Licenses	2,847.89	2,292.05	2,436.55	555.84	24.25%	411.34	16.88%
Taxes, Dues and Subscriptions	-	-	-	-	N/A	-	N/A
Depreciation, COGS, and Other	(177,602.51)	(157,864.57)	(161,269.10)	(19,737.94)	12.50%	(16,333.41)	10.13%
Total Expenses	\$ -	\$ -	\$ -	\$ -	N/A	\$ (0.00)	N/A
Gain / (Loss) from Operations	\$ -	\$ -	\$ -	\$ -	N/A	\$ 0.00	N/A

Transferred to Funds

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Net Gain / (Loss)

\$ -	\$ -	\$ -
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**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Annual Meeting - Cleveland
Program Number: 195**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
	1	Management & Administration Administer activities associated with the 2015 Annual Meeting in Cleveland; develop and monitor budgets; provide support to the Program and Host committees; research meeting sites and vendors; select, monitor, and evaluate vendors; market exhibit space and sponsorship opportunities; and respond to general inquiries.			-	\$ -	-	\$ 500	-	\$ -
		a. Staff professional development	5640	Association Forum Registrations	-		500		-	
	2	Provide for program development, planning, and evaluation of the 2015 Annual Meeting.			-	37,275	-	41,625	-	37,145
		a. Program Committee	5295	Local Staff Travel (Meeting in Chicago)	60		60		30	
		- PC meeting to be held at SAA HQ in Chicago								
		- 11 Committee members (including 2 co-chairs) + 2 <i>ex officios</i> (2016 co-chairs)	5610	Member Travel (11p x \$400 airfare/ground) = 4400 (11p x \$150 lodging x 2d) = 3300 (7p x \$45 x 1d per diem) = 315	8,015		12,165		9,415	
			5290	F&B--Breaks, lunches, dinners	1,400		1,600		1,200	
			5130	Conference Calls	-		-		-	
			5360	Audiovisual	-		-		-	
		b. Host Committee	5290	F&B--Host Committee meetings	200		200		100	
		c. Pre-Meeting Planning	5200	Consulting Fees (CLC) (\$4600 x 6)	27,600		27,600		26,400	
		- Conference & Logistics Consultants (CLC)	5650	Meeting Planner Expenses (CLC)	-		-		-	
	3	Promote attendance, exhibits, and sponsorships at Annual Meeting.				16,810		17,410		17,310
		a. Preliminary program and flyers	5350	Design/Layout/Prepress	6,100		6,400		6,400	

**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: Annual Meeting - Cleveland
Program Number: 195**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
		Preliminary program book will not print and mail, but will reside as PDF on conference website; 8- to 12-page flyer will print and mail (7,500 cc)	5400	Printing (flyer only)	3,900		4,200		4,200	
			5300	Mail Services/Postage/Freight (flyer)	1,380		1,380		1,380	
			5310	Express Mail (approvals/advance copies)	30		30		30	
		b. Mailing to lapsed SAA members + members of state and regional orgs proximate to Cleveland (500 cc)	5300	Postage	300		300		300	
			5335	Mail Services	100		100		100	
		c. Banner, flyers, advertising, calendar submissions	5350	Flyers for Regional Meetings	200		200		200	
			5350	ID/Banner/Ad Development	3,400		3,400		3,400	
			5400	Banner Production	500		500		450	
		d. Promote exhibits/sponsorships via prospectus, calls	5350	Web Graphics	400		400		400	
		- Prospectus is web-only	5300	Postage/Freight	-		-		-	
		- "Virtual Expo" provided by CLC/Event Rebels	5335	Mail Processing/Labor	-		-		-	
			5400	Printing	-		-		-	
			5200	Virtual Expo setup	500		500		450	

The Society of American Archivists
Program Planner
Fiscal Year 2015

Program Name: Annual Meeting - Cleveland
Program Number: 195

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
	4	General and Administrative Cost Allocation	5XXX			117,327	5	94,468		85,506
	5	Computer Support Cost Allocation	5XXX			6,190	5	3,861		3,665
	6	Allocation to Future Period	5XXX			(177,603)	5	(157,865)		(143,626)
				Total Income		\$ -		\$ -		\$ -
				Total Expenses		-		-		-
				Net Result		\$ -		\$ -		\$ -

The Society of American Archivists
Income Statement
Fiscal 2015 Budget
Annual Meeting - Atlanta

Revenues

	<u>Fiscal '15</u>	<u>Fiscal '14 (Cle.)</u>	<u>Projected FY '14 Actuals (Cle.)</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	-	-	-	-	N/A	-	N/A
Workshops	-	-	-	-	N/A	-	N/A
Annual Meeting	-	-	-	-	N/A	-	N/A
Publications	-	-	-	-	N/A	-	N/A
Contributions	-	-	-	-	N/A	-	N/A
Investments	-	-	-	-	N/A	-	N/A
Other	-	-	-	-	N/A	-	N/A
Total Revenues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A

Expenses

	<u>Fiscal '15</u>	<u>Fiscal '14 (Cle.)</u>	<u>Projected FY '14 Actuals (Cle.)</u>	<u>FY '15 Budget v. FY '14 Budget</u>		<u>FY '15 Budget v. FY '14 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 1,751.67	\$ -	\$ 4,444.36	\$ 1,751.67	N/A	\$ (2,692.69)	(60.59%)
Office Occupancy & Utilities	169.45	-	434.08	169.45	N/A	(264.63)	(60.96%)
Services	694.21	-	330.92	694.21	N/A	363.29	109.78%
Supplies	11.13	-	51.03	11.13	N/A	(39.90)	(78.18%)
Travel	590.00	-	459.80	590.00	N/A	130.20	28.32%
Leases, Rentals & Licenses	48.10	-	78.78	48.10	N/A	(30.68)	(38.95%)
Taxes, Dues and Subscriptions	-	-	-	-	N/A	-	N/A
Depreciation, COGS, and Other	(3,264.56)	-	(5,798.97)	(3,264.56)	N/A	2,534.41	(43.70%)
Total Expenses	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Gain / (Loss) from Operations	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A

Transferred to Funds

-	-	-
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Net Gain / (Loss)

\$ -	\$ -	\$ -
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**The Society of American Archivists
Program Planner
Fiscal Year 2015**

**Program Name: 2016 Annual Meeting - Atlanta
Program Number: 196**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
	1	Management & Administration Administer activities associated with the 2016 Annual Meeting in Atlanta; develop and monitor budgets; provide support to the Program and Host committees; research future meeting sites and vendors; monitor and evaluate current vendors; market exhibit space and sponsorship opportunities; and respond to general inquiries.			-	\$ -	-	\$ -	-	\$ -
		a. Staff professional development	5640	Association Forum Registrations	-		-		-	
	2	Provide for program development, planning, and evaluation of the Annual Meeting.				1,180		-		3,850
		a. Program Committee	5110	Conference Calls	-		-		-	
		b. Pre-Meeting Planning	5600	Staff Travel (site visit)	590		-		-	
		- Conference & Logistics Consultants (CLC)	5200	Meeting Planner Expenses (site visit) (1p x \$350 airfare/ground) = 350 (1p x \$150 x 1d lodging) = 150 (1p x \$45 x 2d per diem) = 90	590		-		-	
			5350	ID Development (design)	-		-		3,400	
			5400	ID Development (banner)	-		-		450	
					-		-		-	
	3	General and Administrative Cost Allocation	5XXX			-	5	-		620
	4	IT Cost Allocation	5XXX			-	5	-		26

The Society of American Archivists
Program Planner
Fiscal Year 2015

Program Name: 2016 Annual Meeting - Atlanta
Program Number: 196

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY15 Budget		FY14 Budget		FY13 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total	Line Amount	Activity Total
	5	Allocation to Future Period	5XXX			-	5	-		(4,496)
				Total Income		\$ -		\$ -		\$ -
				Total Expenses		-		-		-
				Net Result		\$ -		\$ -		\$ -
					[Fellows]	\$0	[Fellows]	\$0	[Fellows]	\$0
						\$ -		\$ -		\$ -