

**Society of American Archivists
Council Meeting
May 16–17, 2017
Chicago, Illinois**

**Introduction to the FY 2018 Proposed Budget
(Prepared by Nancy Beaumont and Peter Carlson)**

For the past several years the SAA staff has often heard that our detailed budget documents are too big, too complicated due to their specificity, and unwieldy. Although it is true that our budget presentation is rather long, it is also true that the SAA Council and our members in general value transparency, care about the details of programs that are important to them, and want to understand the drivers that shape our spending priorities. With these perspectives in mind, following is a discussion of our budget process and the documents that you will review for our discussion of the FY 2018 Proposed Budget.

The SAA budget comprises three important parts:

1. The **Budget Narrative**, in which we present the rationale for the activities proposed for a given program (revenue or cost center), with an emphasis on shifts from previous years;
2. The **Income Statement**, a concise rollup of revenues and expenses for each revenue or cost center; and
3. The **Program Planner**, the detailed budget plan that SAA’s program directors use to develop and communicate our budget plans and priorities. The Planners serve as an important tool during the year as we actively manage our resources and plan our quarterly priorities.

All of these documents are shared with the Council and the Finance Committee to ensure that our presentation satisfies all levels of our stakeholders’ interests.

Unlike many organizations, SAA does zero-based budgeting each year—that is, we assume no baseline of expense from prior budget periods. Unlike traditional incremental budgeting practices, zero-based budgeting creates a discipline that causes us to critically evaluate every program, activity, and line item expense as we develop our plans for the coming year. (Of course, SAA’s Strategic Plan—which spans more than one year—is very much taken into account as we do this.)

To assist Council members in their review of the FY 2018 Proposed Budget, we are providing it to you in two versions:

- The first version, “0517-IV-A-2-FY18Budget-Narratives-IncStatements,” is a bookmarked pdf document containing the budget narratives and income statements only.

If you are not interested in the specific details of a given revenue/cost center, this document provides a high-level view of trends and the relative contributions of a program to the bottom line.

- The second version, “0517-IV-A-3-FY18Budget-SortbyProgram,” is the more complete and very detailed presentation of the information.

Both documents can be searched, scrolled through, or navigated using the bookmarks that appear on the left when the document is opened.

If you have any questions upon opening the documents, don’t hesitate to contact us before, during, or after the Council meeting.