

**Society of American Archivists
Council Meeting
June 11, 2021
Virtual Meeting**

**Budget Assumptions and Values for the
Proposed FY 2022 SAA Budget**
(Prepared by Finance/Administration Director Peter Carlson)

Fourteen months into the dislocations caused by the COVID-19 pandemic, SAA's business model continues to evolve to address the "new normal."

Although SAA's revenue streams have been affected significantly by such external factors as restrictions on in-person events, limitations in mail and delivery services, a unstable job market, and general economy, expenses have also been reduced and SAA's staff members have transitioned operations to accommodate virtual programming in all areas.

The guiding principles for the FY 2022 proposed budget are to: 1) maintain as much capacity as is possible, 2) minimize reliance on SAA's operating reserves, and 3) focus on evolving our education offerings and modalities, experimenting with new and different annual meeting approaches, and examining our book publishing program with an eye to sustainability.

The FY 2022 proposed budget reflects a projected net loss of \$36,623, which is \$17,637 less than the FY21 budgeted net loss of \$54,260.

Following are some important assumptions embedded in our proposed budget for FY22:

- Last year we froze salaries and left an opening unfilled. In the FY22 budget we propose a 3.84% increase in salaries distributed according to performance and internal equity as well as a market adjustment for two key staff positions, resulting in an overall increase of 6.4%.
- We have modeled an increase in health care costs of 12%, beginning in January 2022. Thus the budget reflects a 6% increase in the cost of benefits for the fiscal year.
- In Education, we will not fill a staff vacancy that we left unfilled in last year's budget (Education Coordinator), and we will retain an independent contractor to staff this program. Thus the budget includes 10 FTEs and one 75% contract position, compared with 12 FTEs in FY20.
- *Archival Outlook* will return to six printed issues in FY 2022, reflecting staff's judgment that the publication remains an important touch point to communicate with membership and that it offers unique opportunities for member participation.

- With the prospects for travel and in-person events improving but still uncertain, the FY '22 proposed budget includes funding for the May 2022 Council meeting, in-person media training, WIPO and ICA meeting attendance, advocacy meetings in Washington, D.C., and the VP/PE to come to Chicago for the CEO symposium. All of these will be dependent on the circumstances extant at the time of these activities.

The Society of American Archivists
Income Statement
Fiscal 2022 Budget
Budget Master - Operations

Revenues	Projected FY '21			FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference
Dues	\$ 964,759	\$ 939,493	\$ 987,637	\$ 25,265.50	2.69%	\$ (22,878.21)	(2.32%)
Subscriptions & Advertising	177,750	136,214	174,539	41,536.14	30.49%	3,211.54	1.84%
Education	381,930	381,930	295,499	-	(0.00%)	86,430.60	29.25%
Annual Meeting	445,500	347,000	440,604	98,500.00	28.39%	4,896.00	1.11%
Publications	179,490	244,965	171,550	(65,475.28)	(26.73%)	7,939.54	4.63%
Contributions	-	-	-	-	N/A	-	N/A
Investments	18,767	16,785	21,795	1,982.49	11.81%	(3,027.86)	(13.89%)
Other	31,949	41,236	41,458	(9,286.54)	(22.52%)	(9,509.18)	(22.94%)
Total Revenues	\$ 2,200,145	\$ 2,107,623	\$ 2,133,082	\$ 92,522.31	4.39%	\$ 67,062.43	3.14%
Expenses							
	Fiscal '22	Fiscal '21	Actuals	FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference
Personnel	\$ 1,076,500	\$ 1,026,338	\$ 1,016,517	\$ 50,162.24	4.89%	\$ 59,982.85	5.90%
Office Occupancy & Utilities	119,571	117,242	112,403	2,329.16	1.99%	7,168.26	6.38%
Services	756,876	690,914	698,900	65,961.26	9.55%	57,975.71	8.30%
Supplies	8,226	8,502	13,490	(276.23)	(3.25%)	(5,263.30)	(39.02%)
Travel	32,135	750	940	31,385.00	4184.67%	31,194.70	3317.51%
Leases, Rentals & Licenses	16,288	16,814	20,090	(525.59)	(3.13%)	(3,801.63)	(18.92%)
Taxes, Dues and Subscriptions	16,140	22,360	19,859	(6,220.00)	(27.82%)	(3,719.48)	(18.73%)
Depreciation, COGS, and Other	211,032	278,963	183,265	(67,930.39)	(24.35%)	27,767.14	15.15%
Total Expenses	\$ 2,236,768	\$ 2,161,883	\$ 2,065,464	\$ 74,885.45	3.46%	\$ 171,304.25	8.29%
Gain / (Loss) from Operations	\$ (36,623)	\$ (54,260)	\$ 67,618	\$ 17,636.86	(32.50%)	\$ (104,241.82)	(154.16%)
Replenishment of Council-Directed Funds	\$ -	\$ -	\$ -	\$ -	-	\$ -	-
Net Gain / (Loss)	\$ (36,623)	\$ (54,260)	\$ 67,618	\$ -	-	\$ -	-

**Society of American Archivists
Council Meeting
June 11, 2021
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**FY22 Proposed Budget Narrative:
Membership (Program 120)
(Prepared by Peter Carlson and Nancy Beaumont)**

The FY 2022 Membership budget projects a net gain of \$780,687. This is \$10,221 (1.33%) higher than the FY 2021 budgeted net gain of \$770,466.

Effort of all staff members is allocated across the budget based on management estimates of expected effort by program area. Personnel costs for Membership reflect 1.3 FTEs or 12.95% of total salaries, taxes, operating costs, and benefits. We have modeled an increase in health care costs of 12%, beginning in January 2022. Thus the budget reflects a 6% increase in the cost of benefits for the fiscal year. Last year we froze salaries and left an opening unfilled. In the FY22 budget we propose a 3.84% increase in salaries distributed according to performance and internal equity as well as a market adjustment for two key staff positions, resulting in an overall increase of 6.4%.

In FY 2021 we had assumed that the impact of the COVID-19 pandemic would accelerate attrition, and thus modeled for a 3.97% decrease in membership. Instead we have realized a *gain* (to date) of about 0.62%. Out of an abundance of caution, the FY22 Membership budget assumes attrition of about 4%, anticipating that the pandemic will have a trailing impact on institutions' support for both individual and institutional memberships. We are also assuming that SAA may need to continue to accommodate some members and groups with complimentary membership. Complimentary memberships (associated with the Archival Workers Emergency Fund) currently total 160. It is likely that other accommodations may be required as well.

The proposed budget assumes the following:

- Total dues revenue of \$964,759, an increase of 2.69% from the FY21 budgeted amount and a decrease of 2.3% from FY21 projected actuals.
- There will be no dues increase in FY 2022.
- Membership projections are based on reported March 2021 figures in conjunction with trend analysis by membership class from FY 2016 through FY 2021.

- Other budgeted activities in the Membership program include collection of revenue from mailing list rentals (Activity 2) and provision of such member services as mailing of complimentary publications to sustaining institutional members (Activity 4.a.) and administration of the awards program (Activity 4.b.).

**The Society of American Archivists
Income Statement
Fiscal 2022 Budget
Membership**

Revenues	Projected FY '21			FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	<u>Fiscal '22</u>	<u>Fiscal '21</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Dues	\$ 964,759	\$ 939,493	\$ 987,637	\$ 25,265	2.69%	\$ (22,878)	(2.32%)
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	3,095.24	1,270.00	3,880.20	\$ 1,825	143.72%	\$ (785)	(20.23%)
Total Revenues	\$ 967,854	\$ 940,763	\$ 991,517	\$ 27,091	2.88%	\$ (23,663)	(2.39%)
Expenses			Projected FY '21	FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	<u>Fiscal '22</u>	<u>Fiscal '21</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 145,356.52	\$ 118,578	\$ 118,884	\$ 26,778	22.58%	\$ 26,473	22.27%
Office Occupancy & Utilities	15,865	13,321	12,942	2,544	19.10%	\$ 2,923	22.59%
Services	13,297	17,416	9,686	(4,119)	(23.65%)	\$ 3,611	37.29%
Supplies	1,739	1,871	1,287	(132)	(7.06%)	\$ 452	35.11%
Travel	-	-	-	-	N/A	-	N/A
Leases, Rentals & Licenses	1,573	1,410	1,449	163	11.53%	\$ 124	8.54%
Taxes, Dues and Subscriptions	-	-	-	-	N/A	-	N/A
Depreciation, COGS, and Other	9,337	17,702	13,216	(8,365)	(47.26%)	(3,879)	(29.35%)
Total Expenses	\$ 187,167	\$ 170,298	\$ 157,463	\$ 16,869	9.91%	\$ 29,704	18.86%
Gain / (Loss) from Operations	\$ 780,687	\$ 770,466	\$ 834,054	\$ 10,221	1.33%	\$ (53,367)	(6.40%)
Transferred to Funds	-	-	-				
Net Gain / (Loss)	\$ 780,687	\$ 770,466	\$ 834,054				

The Society of American Archivists
Program Planner
Fiscal Year 2022

Program Name: Membership
Program Number: 120

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		
					Line Amount	Activity Total	
	1	Collect membership dues.	4000	Membership Dues		\$964,759	4
		Assumes the following growth rates per member category:					
		Associate Domestic : \$115 (-10.21%)	4000		13,583		4
		Associate International : \$145 (-2.93%)	4000		5,150		4
		Bridge : \$55 (7.81%)	4000		715		4
		ID1 (Part-time) : \$80 (-9.76%)	4000		56,901		4
		ID2 (\$20-29k/yr) : \$105 (-1.70%)	4000		21,697		4
		ID3 (\$30-39k/yr) : \$140 (-1.65%)	4000		31,567		4
		ID4 (\$40-49k/yr) : \$174 (1.31%)	4000		81,792		4
		ID5 (\$50-59k/yr) : \$218 (-2.43%)	4000		124,782		4
		ID6 (\$60-75k/yr) : \$250 (-0.11%)	4000		163,201		4
		ID7 (\$75-89k/yr) : \$285 (-12.88%)	4000		85,627		4
		ID8 (>\$90k/yr) : \$325 (1.5%)	4000		116,497		4
		Lifetime : \$	4000		0		4
		Honorary : \$	4000		0		4
		Retired : \$77 (3.29%)	4000		19,390		4
		Student : \$55 (-4.57%)	4000		56,166		4
		Regular : \$340 (-1.35%)	4000		140,502		4
		Sustaining : \$595 (-8.43%)	4000		47,188		4
	2	Collect revenue from member mailing list rental.	4870	Mailing Label Rental	3,095	\$3,095	4
	3	Increase retention of members.				\$0	
		a. New Member Orientation and Forum at Joint Annual Meeting (coffee break).	5290	F & B (300p x \$10 incl svc/tax)		\$0	5
	4	Deliver member services.				\$10,737	
		a. Mail copies of new SAA books to sustaining institutional members. Assumes 7 books in FY20.	5300	Shipping/Related Fees (nominal)	300		5
			5940	Cost of goods sold	9,337		5

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget	
					Line Amount	Activity Total
		b. Administer SAA Fellows, Awards, and Scholarship programs. (See SAA Foundation program planner for details on funding of awards and scholarships.)	5570	Supplies (Plaques and Certificates)	150	5
			5550	Promotional Materials	750	5
			5350	Develop/Produce Promo Display		5
			5300	Postage (included in allocables)		5
			5290	F&B--Ceremony Toast		5
			5350	Graphic Design for Program	200	5
		c. Administer the Mentoring Program. Mentor/Protégé Meet-and-Greet at Annual Meeting Support online "Mentoring Directory." Develop graphics to promote program online.	5290	Food & Beverage		\$0 5
			5350	Graphic Design		5
		d. Webcast and Virtual Job Fair Services at AM 2020	5226	Computer Services		5
	5	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 5
						\$0
	6	Miscellaneous Database Support	5226	Computer Support		\$0 5
	7	General and Administrative Cost Allocation	5XXX			164,406
	8	IT Cost Allocation	5XXX			12,024
				Total Income		\$967,854
				Total Expenses		187,166.90
				Gain / (Loss) From Operations		\$780,687

**Society of American Archivists
Council Meeting
June 11, 2021
Virtual Meeting**

**FY22 Proposed Budget Narrative:
American Archivist (Program 102)
(Prepared by Teresa Brinati)**

The proposed FY 2022 budget projects a net loss of \$3,821 in this program area, which is \$24,062 less than the FY 2021 budgeted net loss \$27,883.

Effort of all staff members is allocated across the budget based on management estimates. Personnel costs for *American Archivist* reflect 0.37 FTEs or 3.72% of total salaries, taxes, and benefits. We have modeled an increase in health care costs of 12% beginning in January 2022. Thus, the budget reflects a 6% increase in the cost of benefits for the fiscal year. Last year we froze salaries and left an open position unfilled. In the FY22 budget, we propose a 3.84% increase in salaries distributed according to performance and internal equity, as well as a market adjustment for two key staff positions, resulting in an overall increase of 6.4%.

Relation of this program to Strategic Plan: Goal 2: Enhancing Professional Growth 2.1, 2.2.; Goal 3: Advancing the Field 3.2, 3.3; and Goal 4: Meeting Members' Needs 4.1.

The proposed budget assumes the following:

- Solely digital issues of the journal.
- No in-person meetings of the Editorial Board; only virtual meetings.
- The negotiated Editor honorarium is \$31,500.
- Revenues for Subscriptions take into account the pivot to digital.
- The estimated JSTOR royalty is based on annual trends.

The Society of American Archivists
Income Statement
Fiscal 2022 Budget
American Archivist

Revenues	Projected FY '21			FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	\$ 95,000	\$ 91,500	\$ 93,836	\$ 3,500	3.83%	\$ 1,164	1.24%
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	\$ 7,600	\$ 7,500	\$ 7,712	\$ 100	1.33%	\$ (112)	(1.45%)
Total Revenues	\$ 102,600	\$ 99,000	\$ 101,548	\$ 3,600.00	3.64%	\$ 1,051.98	1.04%
Expenses							
	Fiscal '22	Fiscal '21	Actuals	FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
				\$ Difference	% Difference	\$ Difference	% Difference
Personnel	\$ 41,739	\$ 40,294	\$ 41,025	\$ 1,445	3.58%	\$ 714	1.74%
Office Occupancy & Utilities	4,706	4,527	4,278	179	3.97%	428	10.01%
Services	59,283	81,337	78,660	(22,055)	(27.12%)	(19,378)	(24.63%)
Supplies	241	245	-	(4)	(1.65%)	241	N/A
Travel	-	-	-	-	N/A	-	N/A
Leases, Rentals and Licenses	452	479	506	(27)	(5.73%)	(54)	(10.66%)
Taxes, Dues and Subscriptions	-	-	-	-	N/A	-	N/A
Depreciation, COGS, and Other	-	-	-	-	N/A	-	N/A
Total Expenses	\$ 106,421	\$ 126,883	\$ 124,469	\$ (20,462)	(16.13%)	\$ (18,049)	(14.50%)
Gain / (Loss) from Operations	\$ (3,821)	\$ (27,883)	\$ (22,921)	\$ 24,062	(86.30%)	\$ 19,101	(83.33%)
Transferred to Funds	-	-	-				
Net Gain / (Loss)	\$ (3,821)	\$ (27,883)	\$ (22,921)			\$ 24,062.33	

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

= Gen/Admin

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY21 Budget	
					Line Amount	Activity Total
	1	Management and Administration				\$0
		Administer activities of journal; develop and monitor budget; organize Editorial Board's virtual meetings; prepare reports and resource materials; manage all aspects of digital production; maintain journal website and assist with Reviews Portal; obtain professional literature as needed for reviews editor; facilitate copyright and permissions; consult with Service Center on monitoring of subscriptions and claims; respond to queries and feedback; participate in Editor's performance review.				\$150
	a.	Editorial Board Quarterly Zoom Calls	5110	Telecommunications	150	5
	2	Production				\$0
		Vol. 84, No. 2 (Fall/Winter 2021) Vol. 85, No. 1 (Spring/Summer 2022)				\$53,860
	a.	Manuscript Management	5480	PeerTrack Essentials (\$33.77 x 45 mss)	1,520	5
	b.	Editorial Services	5370	Editor Stipend	34,000	5
			5370	Copyeditor	4,000	5
			5370	Indexer	1,300	5
	c.	Composition Services	5350	Composition	3,800	5

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

= Gen/Admin

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY21 Budget		
					Line Amount	Activity Total	
		d. Meridean (digital platform)	5350	XML; HTML5 (\$3.25/pg x 600pg)	1,950		5
			5226	Online Journal Hosting (\$162/article x 45)	7,290		5
	3	Archives in Context Podcast Production				\$1,750	
		Sound Engineering	5480	Miscellaneous Services	1,500		5
		Equipment Distribution	5310	Express Delivery	250		5
		Wordpress Hosting (G&A Allocation)					
	4	Revenue				\$102,600	
		a. Subscriptions	4100	Subscriptions	90,000		4
		\$289 for subscription					
		b. JSTOR (digital library)	4860	Royalties	7,600		4
		(assumes plateau based on royalty trends)					
		c. Naylor advertising sales	4150	Advertising	5,000		4
	5	General and Administrative Cost Allocation				47,210	
	6	Computer Support Cost Allocation				3,450	
				Total Income		102,600	
				Total Expenses		106,421	
				Gain / (Loss) From Operations		(3,821)	
				Net Operating Gain / (Loss)		(3,821)	

**Society of American Archivists
Council Meeting
June 11, 2021
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**FY22 Proposed Budget Narrative:
Archival Outlook / In the Loop (Program 103)
(Prepared by Teresa Brinati)**

The FY 2022 budget projects a net loss of \$84,176 in this program area. This is \$20,243 more than the FY 2021 budgeted net loss of \$63,933.

Effort of all staff members is allocated across the budget based on management estimates. Personnel costs reflect 0.35 FTEs or 3.51% of total salaries, taxes, and benefits. We have modeled an increase in health care costs of 12% beginning in January 2022. Thus, the budget reflects a 6% increase in the cost of benefits for the fiscal year. Last year we froze salaries and left an open position unfilled. In the FY22 budget, we propose a 3.84% increase in salaries distributed according to performance and internal equity, as well as a market adjustment for two key staff positions, resulting in an overall increase of 6.4%.

Relation of this program to Strategic Plan: Goal 2: Enhancing Professional Growth (2.1, 2.2.); Goal 3: Advancing the Field (3.2, 3.3); and Goal 4: Meeting Members' Needs (4.1).

The proposed budget assumes the following:

- Restoring print publication of *Archival Outlook* back to six issues. The preceding fiscal year included only three print issues during the COVID-19 pandemic, both as a cost-saving measure and in recognition that many members were displaced from their typical mailing address. Based on a readership survey conducted in April 2021 to determine how and why members read the magazine, 52.19% of respondents prefer the print edition and another 26.22% prefer both print and digital editions. In addition, in light of the recent pivot to solely digital editions of *American Archivist*, the magazine remains the only membership communication in print. We believe it is critically important to have this physical “touchstone” with members.
- Digital publication of six issues of *Archival Outlook*.
- Digital publication of 26 issues of *In the Loop*.
- Advertising revenue estimate is based on trends.

The Society of American Archivists
Income Statement
Fiscal 2022 Budget
Archival Outlook

Revenues	Projected FY '21			FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	32,670	34,000	27,418	(1,330.33)	(3.91%)	5,251.86	19.15%
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	1,000	500	1,120	500.00	100.00%	(120.00)	(10.71%)
Total Revenues	\$ 33,670	\$ 34,500	\$ 28,538	\$ (830.33)	(2.41%)	\$ 5,131.86	17.98%
Expenses			Projected FY '21	FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference
Personnel	\$ 39,377	\$ 38,756	\$ 37,970	\$ 621.19	1.60%	\$ 1,406.57	3.70%
Office Occupancy & Utilities	4,299	4,355	4,150	(55.86)	(1.28%)	148.68	3.58%
Services	73,515	54,626	45,843	18,889.86	34.58%	27,672.89	60.37%
Supplies	227	236	260	(8.25)	(3.50%)	(32.66)	(12.56%)
Travel	-	-	-	-	N/A	-	N/A
Leases, Rentals & Licenses	426	461	465	(34.58)	(7.50%)	(38.36)	(8.26%)
Taxes, Dues and Subscriptions	-	-	-	-	N/A	-	N/A
Depreciation, COGS, and Other	-	-	-	-	N/A	-	N/A
Total Expenses	\$ 117,845	\$ 98,433	\$ 88,688	\$ 19,412.37	19.72%	\$ 29,157.12	32.88%
Gain / (Loss) from Operations	(84,176)	(63,933)	(60,150)	\$ (20,242.70)	31.66%	\$ (24,025.26)	39.94%
Transferred to Funds	-	-	-				
Net Gain / (Loss)	(84,176)	(63,933)	(60,150)				

The Society of American Archivists
Program Planner
Fiscal Year 2022

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

Goal	Activity No.	Narrative	Account No.	Account Description	= Gen/Admin		=FY 21 Data for Reference	
					Proposed FY22 Budget		FY21 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; manage multi-channel production; and respond to queries and feedback.						
	2	Publish <i>Archival Outlook</i> 6 times per year. Includes writing, editing, layout, design of house ads to promote SAA activities, digital conversion and posting, printing and distribution to members (excluding students), and comp copies to contributors. Production assumptions: - (5 issues@20 pages + cover, 4-color, 100#mpc text) x 4,500 copies - (1 issue @ 32 pages + cover, 4-color, 100#mpc text) x 4,500 copies - Digital conversion by Bluetoad.				\$70,045		\$50,650
			5350	Graphic Design (\$2,100 x 5 issues + \$2,400 x 1 issue)	11,500	5	14200	5
			5400	Printing (\$3,400 x 5 issues) + (\$4,200 x 1 issue)	21,200	5	17,500	5
			5335	Processing Labor / Materials for 6 Issues	6,600	5	3,150	5
			5300	Postage for 6 Issues	30,000	5	15,000	5
			5335	Digital Conversion (156pg @ \$4.75/pg)	745	5	800	5
	3	Publish <i>In the Loop</i> 26 times per year. In-house production allocated in G&A budget (Program 100).						
	4	Revenue:				\$33,670		\$34,500
	a.	Naylor ad sales for <i>Archival Outlook</i> and <i>In the Loop</i>	4150	Advertising	32,670	4	34000	4
	b.	<i>Archival Outlook</i> first-class and airmail service.	4800	First-Class + Airmail Revenue	1,000	4	500	4
	5	General and Administrative Cost Allocation				44,539		44,249
	6	Computer Support Cost Allocation				3,261		3,534
				Total Income		\$33,670		\$34,500
				Total Expenses		117,845		98,433
				Gain / (Loss) From Operations		(\$84,176)		(\$63,933)

**Society of American Archivists
Council Meeting
June 11, 2021
Virtual Meeting**

**FY22 Proposed Budget Narrative:
Annual Meeting (Programs 191 and 192)
(Prepared by Nancy Beaumont)**

The proposed FY 2022 budget projects a net gain of \$202,323 from the 2021 Virtual Annual Meeting. This is \$160,480 more than the FY 2021 budgeted net gain (of \$41,843) from the 2020 conference and \$63,967 more than the FY 2021 actual net gain (of \$138,356).

Effort of all staff members for FY 2022 is allocated across the budget based on management estimates. Personnel costs reflect 0.29 FTEs or 2.89% of total salaries, taxes, and benefits. We have modeled an increase in health care costs of 12%, beginning in January 2022. Thus the budget reflects a 6% increase in the cost of benefits for the fiscal year. Last year we froze salaries and left an opening unfilled. In the FY22 budget we propose a 3.84% increase in salaries distributed according to performance and internal equity, as well as a market adjustment for two key staff positions, resulting in an overall increase of 6.4%.

The shift in personnel costs reflects a decision to outsource production of the event to a firm that has experience with the platform, thus reducing significantly the staff time required to manage pre-recording, editing, captioning, and post-conference conversion to PathLMS.

The proposed budget for the 2021 Virtual Annual Meeting assumes the following:

- A significant amount of staff time to work with the Program and Host committees and to plan the conference schedule, as well as direct expenses for site visits and the logistics and production consultants, are invested prior to the start of the fiscal year in which the Annual Meeting occurs. These “prepaid expenses” (appearing in blue boxes on the program planner) are reflected in the income statement when the conference is implemented. (This generally accepted accounting procedure enables us to realize expenses in the proper period.) The income statement for the 2022 Annual Meeting (Program 192) reflects costs that will be booked as prepaid but not expensed until that conference takes place. (Activity 2)
- A total of 2,500 paid attendees at the same registration fees as implemented in FY21, which were reduced significantly to address both the nature of a virtual conference and the economic situation of many archivists. We have assumed that 20% of registrants in each registration category (SAA Member, Employee of Member Institution, and Nonmember) will choose the deeply discounted \$49 rate for unemployed/precariously employed archives workers. Our optimistic projection is based on the fact that we had 2,400 registrants in 2020 and we have more time to promote the 2021 conference. (Activity 4)

- Payment to DLPlan (logistics consultants) of \$38,880, which includes pre-meeting management and site visit travel for the in-person conference and the pivot to issuing an RFP, interviewing, recommending, and managing a technology platform and production vendor. (Activities 2 and 4)
- An expense of \$20,250 for a conference platform (Pathable) and \$74,975 for a full-service production company to manage all speaker and facilitator training, pre-recording, editing, captioning, poster set-ups, sponsor pages and mini-theaters, awards, and live events for the virtual conference. (Activity 4)
- Two lead sponsors (Preservica and Lucidea) and 18 “regular” sponsors, with total revenue of \$72,000. (Activity 5)
- An in-person reception for individuals attending the live presentation of the Presidential Address. The address will be recorded at the Denver Public Library and presented as Plenary 2 of the conference on Thursday, August 5. (Activity 6, \$1,200)

The Society of American Archivists
Income Statement
Fiscal 2022 Budget
Annual Meeting - Virtual (Anaheim)

				Projected FY '21		FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	Fiscal '22	Fiscal '21	Actuals (Chi Virt)	\$ Difference	% Difference	\$ Difference	% Difference		
Revenues									
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A		
Subscriptions & Advertising	-	-	1,000	-	N/A	(1,000.00)	(100.00%)		
Workshops	-	-	-	-	N/A	-	N/A		
Annual Meeting	445,500.00	342,550.00	440,604.00	102,950.00	30.05%	4,896.00	1.11%		
Publications	-	-	-	-	N/A	-	N/A		
Contributions	-	-	-	-	N/A	-	N/A		
Investments	-	-	-	-	N/A	-	N/A		
Other	-	-	-	-	N/A	-	N/A		
Total Revenues	\$ 445,500	\$ 342,550	\$ 441,604	\$ 102,950.00	30.05%	\$ 3,896.00	0.88%		
Expenses									
Personnel	\$ 32,013	\$ 47,221	\$ 68,727	\$ (15,208.08)	(32.21%)	\$ (36,714.61)	(53.42%)		
Office Occupancy & Utilities	\$ 3,517	\$ 5,288	\$ 8,743	(1,771.37)	(33.49%)	(5,226.02)	(59.77%)		
Services	\$ 70,189	\$ 105,741	\$ 120,188	(35,552.14)	(33.62%)	(49,998.42)	(41.60%)		
Supplies	\$ 187	\$ 290	\$ 168	(102.79)	(35.44%)	19.23	11.44%		
Travel	\$ 2,500	\$ -	\$ -	2,500.00	N/A	2,500.00	N/A		
Leases, Rentals & Licenses	\$ 351	\$ 567	\$ 851	(216.19)	(38.12%)	(500.47)	(58.78%)		
Taxes, Dues and Subscriptions	\$ -	\$ -	\$ -	-	N/A	-	N/A		
Depreciation, COGS, and Other	\$ 134,420	\$ 141,599	\$ 104,570	(7,178.72)	(5.07%)	29,849.94	28.55%		
Total Expenses	\$ 243,177	\$ 300,707	\$ 303,248	\$ (57,529.29)	(19.13%)	\$ (60,070.36)	(19.81%)		
Gain / (Loss) from Operations	\$ 202,323	\$ 41,843	\$ 138,356	\$ 160,479.29	383.52%	\$ 63,966.36	46.23%		
Transferred to Funds	\$ -	\$ -	\$ -						
Net Gain / (Loss)	\$ 202,323	\$ 41,843	\$ 138,356			\$ 160,479			

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

**Program Name: Annual Meeting Virtual (Anaheim)
Program Number: 191**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget	
					Line Amount	Activity Total
	1	Management and Administration Administer activities associated with the 2021 Virtual Annual Meeting, originally scheduled for Anaheim, CA: Develop and monitor budgets; provide support to the Program and Host committees; promote the meeting via all available means; market sponsorship opportunities; research platform and production companies, issue RFP, and select best fit; and respond to general inquiries.				\$0
	2	Provide for program development, planning, and evaluation implementation of the 2021 Virtual Annual Meeting.				\$0
	a.	Pre-meeting planning (site selection costs incurred in previous site selection costs incurred in previous year)	5200	Consulting Fees (DLPlan) (\$4,445 x 7)	31,115	5
			5200	Meeting Planner Expenses (DLPlan, site visit to Anaheim)	TK	5
			5600	Staff Travel (site visit to Anaheim)	TK	5
	b.	Legal expenses for terminating agreement with Anaheim hotel.	5280	Legal Expenses	TK	5
	c.	Partial payment for production management company (The Dynamic Communicator)	5360	Audiovisual (Production Management)	30,000	5
			5360	Audiovisual (Conference Platform)	10,260	5
		<i>Note that no costs were incurred for Program or Host committee meetings for this virtual conference.</i>				
	3	Promote attendance at Annual Meeting.				\$0
		<i>Note that no costs were incurred for graphic design, printing, or mailing for this virtual conference.</i>				

= Gen/Admin

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

**Program Name: Annual Meeting Virtual (Anaheim)
Program Number: 191**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		
					Line Amount	Activity Total	
	4	Provide for management of a high-quality virtual conference.				\$373,500	
		a. Registration income (2,500 paid attendees)	4300	SAA Members (74% of total, or 1,480 @ \$149)	230,205	\$68,104	4
			4300	Employees of Member Inst (9% of total, or 180 @ \$199)	42,536		4
		Registration fees cover attendance at all education sessions and events + access to all on-demand recordings.	4300	Nonmembers (9% of total, or 180 @ \$299)	63,911		4
			4300	Students (8% of total, or 160 @ \$49)	9,800		4
			4300	Precariously Employed	16,048		4
		b. Post-conference Sales	4300	Sale of Post-Conference Access (100 @ \$110 avg)	11,000		4
		c. Logistics					
		Conference platform (Pathable).	5360	Audiovisual (Conference Platform)	9,990		5
		Production management (The Dynamic Communicator).	5360	Audiovisual (Production Management)	44,975		5
		Honorarium for keynote speaker (Luis Argueta).	5260	Event Cancellation Insurance	1,750		5
			5650	Keynote Speaker Honorarium	2,500		5
		Logistics management (DL Plan).	5200	Consulting Fees (DL Plan)	8,889		5
	5	Provide for the International Archives and Information Technology Exposition.				\$72,000	
		a. Sponsorship and advertising income. (No virtual expo hall in 2021.)	4360	Sponsorship Income	72,000	\$500	4
		b. "Virtual Expo" software by Event Rebels to register sponsors.	5200	Virtual Expo Setup	500		5
	6	Provide for a variety of networking, social, and business events.				\$1,200	
		a. Presidents' Reception (at Denver Public Library, in conjunction with video-recording of 2021 Presidential IAddress).	5290	Food & Beverage	1,200		5

= Gen/Admin

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

**Program Name: Annual Meeting Virtual (Anaheim)
Program Number: 191**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		
					Line Amount	Activity Total	
	7	Provide attendees with meeting materials.					
	a.	Promotional items (to be determined based on sponsorships).	4360	Promotional Items		\$0	4
	8	Provide space and assistance to various groups that meet during the Annual Meeting, including leader groups, sections, appointed groups, and allied groups.				\$0	
	a.	Sections (See Governance [108], Act. 7)	5360	AV for Component Group Meetings		\$0	5
	9	Program-specific computer support for proposal submission, selection, display of program.	5226	Computer Support (ER Speaker)		\$0	5
			5226	Computer Support (Sched for website and mobile app)	0		5
	10	General and Administrative Cost Allocation	5XXX	(Includes all ARCHIVES*RECORDS 2021 expenses incurred in FY21.)		170,661	5
	11	IT Cost Allocation	5XXX			2,713	5
				Total Income		\$ 445,500	
				Total Expenses		243,177	
				Gain / (Loss) From Operations		\$ 202,323	
				Net Operating Gain / (Loss)		\$ 202,323	
				chksum		-	
				ATTENDANCE =	2500		

**The Society of American Archivists
Income Statement
Fiscal 2022 Budget
Annual Meeting - Boston**

Revenues	Projected FY '21			FY '21 Budget v. FY '20 Budget		FY '21 Budget v. FY '20 Actuals	
	Fiscal '22	Fiscal '21 (Ana)	Actuals (Ana)	\$ Difference	% Difference	\$ Difference	% Difference
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 '21			FY '21 Budget v. FY '20 Budget		FY '21 Budget v. FY '20 Actuals	
	Fiscal '22	Fiscal '21 (Ana)	Actuals (Ana)	\$ Difference	% Difference	\$ Difference	% Difference
Personnel	\$ 55,081	\$ 86,570	\$ 38,582	\$ (31,489.61)	(36.37%)	\$ 16,498.77	42.76%
Office Occupancy & Utilities	\$ 5,999	\$ 8,596	\$ 4,333	(2,597.27)	(30.21%)	1,666.01	38.45%
Services	\$ 4,816	\$ 5,096	\$ 17,231	(279.98)	(5.49%)	(12,415.64)	(72.05%)
Supplies	\$ 316	\$ 472	\$ 119	(156.02)	(33.06%)	197.40	166.59%
Travel	\$ -	\$ -	\$ -	-	N/A	-	N/A
Leases, Rentals & Licenses	\$ 592	\$ 2,217	\$ 481	(1,624.46)	(73.29%)	111.07	23.09%
Taxes, Dues and Subscriptions	\$ -	\$ -	\$ -	-	N/A	-	N/A
Depreciation, COGS, and Other	(66,804)	(102,951)	(60,746)	36,147.34	(35.11%)	(6,057.61)	9.97%
Total Expenses	\$ -	\$ -	\$ -	\$ -	N/A	\$ (0.00)	N/A
Gain / (Loss) from Operations	\$ -	\$ -	\$ -	\$ -	N/A	\$ 0.00	N/A
Transferred to Funds	-	-	-				
Net Gain / (Loss)	\$ -	\$ -	\$ -				

The Society of American Archivists
Program Planner
Fiscal Year 2022

Program Name: 2022 Annual Meeting - Boston
Program Number: 192

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		=FY 21 Data		
					Line Amount	Activity Total	Line Amount	Activity Total	
DELETE HIDE	1	Management and Administration Administer activities associated with the 2020 Annual Meeting in Chicago: 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.				\$0		\$0	
		a. Staff professional development	5640	Association Forum Registrations		5		5	
	2	Provide for program development, planning, and evaluation.				\$0		\$0	
		a. Program Committee Co-Chairs (x 3)	5110	Conference Calls		5	0	5	
		b. Pre-Meeting Planning	5600	Staff Travel (site visit)		5	600	5	
			5200	Meeting Planner Expenses (1p x \$350 airfare/ground) = \$350 (1p x \$150 x 1d lodging) = \$150 (1p x \$45 x 2d per diem) = \$90		5	640	5	
			5350	ID Development (design)		5	0	5	
			5400	ID Development (banner)		5	0	5	
		3	General and Administrative Cost Allocation	5XXX			62,279	5	78,106
		4	IT Cost Allocation	5XXX			4,524	5	6,160
	5	Allocation to Future Period	5XXX			(66,804)		(84,265.70)	
				Total Income		-		\$0	
				Total Expenses		-		-	
				Net Result		-		\$0	

* Anaheim Budget

**Society of American Archivists
Council Meeting
June 11, 2021
Virtual Meeting**

**FY22 Proposed Budget Narrative:
Publications (Program 104)
(Prepared by Teresa Brinati)**

The FY22 proposed budget projects a net loss of \$118,478. This is \$11,482 more than the FY21 budgeted net loss of \$106,996.

Effort of all staff members is allocated across the budget based on management estimates. Personnel costs reflect .95 FTEs or 9.54% of total salaries, taxes, and benefits. We have modeled an increase in health care costs of 12% beginning in January 2022. Thus, the budget reflects a 6% increase in the cost of benefits for the fiscal year. Last year we froze salaries and left an open position unfilled. In the FY22 budget, we propose a 3.84% increase in salaries distributed according to performance and internal equity, as well as a market adjustment for two key staff positions, resulting in an overall increase of 6.4%.

Relation of this program to Strategic Plan: Goal 2: Enhancing Professional Growth (2.1, 2.2.); Goal 3: Advancing the Field (3.1, 3.2, 3.3); and Goal 4: Meeting Members' Needs (4.1.).

The proposed budget assumes the following:

- Sale of SAA books only (includes books jointly published with the American Library Association and the Association of Canadian Archivists).
- Revenue projections on 80 unique titles available in print and/or digital editions (pdf, epub, Kindle) based on trends.
- Four new titles slated for print and digital editions in the first two quarters of the fiscal year.
- Digital printing (rather than “standard” ink-to-paper printing) to contain costs.
- Competitive (below-market) pricing of books for members.
- Commitment to remunerating editors/authors for their work.

The Society of American Archivists
Income Statement
Fiscal 2022 Budget
Publications

Revenues	Projected FY '21			FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals		
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference	
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A	
Subscriptions & Advertising	-	-	-	-	N/A	-	N/A	
Workshops	-	-	-	-	N/A	-	N/A	
Annual Meeting	-	4,450.00	-	(4,450)	(100.00%)	-	N/A	
Publications	179,489.50	244,964.78	171,549.96	(65,475)	(26.73%)	7,940	4.63%	
Contributions	-	-	-	-	N/A	-	N/A	
Investments	-	-	-	-	N/A	-	N/A	
Other	17,804.06	29,515.83	27,096.54	(11,712)	(39.68%)	(9,292)	(34.29%)	
Total Revenues	\$ 197,294	\$ 278,931	\$ 198,647	\$ (81,637)	(29.27%)	\$ (1,353)	(0.68%)	
Expenses								
	Projected FY '21			FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals		
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference	
Personnel	\$ 107,078	\$ 115,630	\$ 114,450	\$ (8,551.6)	(7.40%)	\$ (7,371.5)	(6.44%)	
Office Occupancy & Utilities	11,689.13	12,992.44	12,499.22	(1,303)	(10.03%)	(810)	(6.48%)	
Services	122,023.25	106,772.42	119,042.03	15,251	14.28%	2,981	2.50%	
Supplies	618.26	703.11	6,721.91	(85)	(12.07%)	(6,104)	(90.80%)	
Travel	-	-	-	-	N/A	-	N/A	
Leases, Rentals & Licenses	4,398.92	4,615.00	4,636.94	(216)	(4.68%)	(238)	(5.13%)	
Taxes, Dues and Subscriptions	-	-	-	-	N/A	-	N/A	
Depreciation, COGS, and Other	\$ 69,964	\$ 140,764	\$ 61,387	(70,800)	(50.30%)	8,577	13.97%	
Total Expenses	\$ 315,772	\$ 381,477	\$ 318,737	\$ (65,705)	(17.22%)	\$ (2,965)	(0.93%)	
Gain / (Loss) from Operations	\$ (118,478)	\$ (102,546)	\$ (120,091)	\$ (15,932)	15.54%	\$ 1,612	(1.34%)	
Transferred to Funds	\$ -	\$ -	\$ -					
Net Gain / (Loss)	\$ (118,478)	\$ (102,546)	\$ (120,091)					

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget	
					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. Liaise with Dictionary Working Group, publish and distribute Word of the Week; prepare reports and resource materials; organize annual meeting; consult with DWG chair; maintain microsite, and participate in semimonthly conference calls.				\$32,250
		a. Publications Editor	5370	Honorarium	32,000	
		b. Quarterly Zoom meeting with Publications Board	5480	Miscellaneous Services	250	
	2	Sales and Distribution of Existing Publications 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; monitor sales and remove underperforming titles; refresh and update online bookstore.				\$148,800
		a. Sale of Publications (Based on FY 2020 Actual Trend discounted by 18%.)	4400	Sale of Existing Publications	120,000	
		b. Revenue from customers to offset shipping expense. (~9% of sales)	4800	Shipping Revenue	10,800	
		c. eBooks (estimated based upon FY 19 actuals and FY 20 estimates)	4450	Sale of eBooks	15,000	
			5335	E-Production, Storage, Fulfillment	3,500	
						\$110,835

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget	
					Line Amount	Activity Total
		d. Royalties earned from publishing/distribution partnerships: - American Library Association ~ \$5,000 - Scarecrow Press (Rowman & Littlefield) ~ \$500 - Copyright Clearance Center ~ \$1,000	4860	Royalty Income	3,000	
		e. Cost of goods sold @ average of .35% of sales.	5940	Cost of Goods Sold	41,564	
		f. Warehousing, packaging, and distribution - Fulfillment via Diamond Communication Solutions	5700 5300 5335	Warehouse (\$270/m x 12) Postage Processing Labor / Materials	3,240 53,855 8,325	
		g. Royalties paid to authors of SAA books: - Photographs: Archival Care and Management (\$1/book x 25) - Preserving Archives and Manuscripts (\$1/book x 100) - Understanding Archives and Manuscripts (\$1/bk x 2 authors x 125)	5395 5395 5395	Royalty Paid Royalty Paid Royalty Paid	- 100 250	
		h. Reserve set up to cover unsold assets.	5960	Inventory Reserve Depreciation		
3	New Publication Production, Distribution, and Sales		4400	Sale of New Publications	44,490	\$48,494
	Manage print and digital production and distribution of new titles. Expenses include research and development; production; e-conversion; honoraria; and distribution.		5940	Cost of Goods Sold	28,400	\$41,150
	Production Sponsor Revenue		4360			

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget	
					Line Amount	Activity Total
		Sustaining institutional member COGS reflected in Membership budget (sustaining members receive copy of each new book produced).				
		Fulfillment via Diamond Fulfillment Solutions.	4800	Shipping Revenue (~9% of sales)	4,004	
			5300	Postage	11,550	
			5335	Processing Labor / Materials	1,200	
	4	Dictionary Working Group				1,560
		a. Elements Forge Software. MSA to exchange Software cost for advertising. Direct costs include monthly hosting fee.	5226	Software Hosting	1,560	
	5	Marketing and Promotion				
		Market and promote new and existing titles. Promote participation in SAA's publishing program.				
	6	General and Administrative Cost Allocation	5XXX			121,115
	7	Computer Support Cost Allocation	5XXX			8,863
				Total Income		\$197,294
				Total Expenses		\$315,772
				Gain / (Loss) From Operations		(\$118,478)

**Society of American Archivists
Council Meeting
June 11, 2021
Virtual Meeting**

**FY22 Proposed Budget Narrative:
Education (Program 105)
(Prepared by Rana Salzmann)**

The projected net gain in this program for FY22 is \$96,858. This is an increase of 24.4% compared to the FY21 budgeted net gain of \$77,846.

For FY22, effort of all staff members is allocated across the budget based on management estimates. Personnel costs for Education reflect 1.22 FTEs or 12.16% of total salaries, taxes, and benefits. This budget retains the Education consultant role piloted in FY21. The move to all-online education has exceeded current staff capacity and we have begun cross-training a member of the Service Center team to provide additional administrative support to Education. In the coming year, we need to assess the desire for program expansion against the realities of staffing costs for the department. I am confident that we could fill more than the budgeted 40 online education programs per year, but we need a new staffing model to support that growth.

We have modeled an increase in health care costs of 12%, beginning in January 2022. Thus the budget reflects a 6% increase in the cost of benefits for the fiscal year. Last year we froze salaries and left an opening unfilled. In the FY22 budget we propose a 3.84% increase in salaries distributed according to performance and internal equity, as well as a market adjustment for two key staff positions, resulting in an overall increase of 6.4%.

Relation of this program to Strategic Plan: Goal 2: Enhancing Professional Growth, Activity 2.1. Provide content, via education and publications, that reflects the latest thinking and best practices in the field; and Activity 2.2. Deliver information and education via methods that are accessible, affordable, and keep pace with technological change.

Our calculations for FY22 are optimistic in that they project a net gain for this upcoming, unprecedented year. Given continued COVID-19-related restrictions on meetings and travel, it is necessary to completely reimagine the SAA Education program in order to meet member needs and maintain solvency. We moved to a 100% online education model during FY21 and will continue innovating, iterating, and expanding online offerings into FY22 as the pandemic and its after-effects affect our members. Funding for in-person meetings of the DAS Subcommittee and the Committee on Education has been eliminated for the second year in a row. We have eliminated such “in-person” teaching expenses as travel, hotel, and meals and will persist with a streamlined, efficient education program development structure. The DEI Next Steps project will be complete by the end of August 2021 and we will continue with the second year of Management Track development (funded by NHPRC at \$25,000) in FY22.

Activity Areas

1. Management and Administration. Due to the shift to a Virtual Annual Meeting, “pre-conference” education as we have known it has been eliminated in this budget for the second year in a row. Scheduling and staff bandwidth concerns make it necessary to reimagine the pre-conference concept. We plan to hold the four DEI Next Steps webinars funded by the SAA Foundation grant later in the month of August to avoid conflict with the Annual Meeting.

2. Support the work of the Committee on Education and the DAS and GAE subcommittees. Support for these activities will continue via conference calls and using other technologies, such as Zoom, to maintain momentum with committee and subcommittee work while eliminating the significant costs associated with in-person meetings.

3. Plan and implement face-to-face courses, webcasts, and online courses. This area includes the following calculations, intended to support 100% online learning for the second year of the pandemic.

- No in-person courses and an estimated 40 Zoom courses, with an estimated 30 attendees in each. Although we may increase capacity limits for some Zoom courses beyond the typical 35-40 that fit in a face-to-face setting, we have found that most instructors prefer a limited class size to maintain best practices in online teaching.
- Four new webcasts in either the DAS or A&D programs.
- Honoraria for instructors and “secondary” instructors, as we may need to employ moderators or teaching assistants to operationalize best practices for online learning.
- Additional stipends to support instructors converting courses to online.
- Completion of one “conversion to online” project that was planned for FY20 and faced continued unanticipated delays in production.
- An estimated 90 registrations for the online DAS Comprehensive Exam.
- Retaining the FY18 pricing structure for Education products for **the fifth consecutive year.**

4. Develop new and revise existing educational offerings and maintain online platforms.

- No funding for in-person course development. Stipends for conversion to online.
- Continued funding from NHPRC in the form of a \$25,000 cooperative agreement to develop Management Track programs over two years.
- Funding to develop a DEI Next Steps course in the form of a \$5,000 grant from the SAA Foundation. This project will conclude in August 2021 with the launch of four live-to-recorded webinars on various DEI topics.
- BlueSky/Path LMS remains our chosen LMS tool for the delivery of online programs. We have moved entirely to Zoom and cancelled our contract with Adobe MeetingOne.

5. Marketing and Promotion. This activity is funded at base levels for the coming year.

The Society of American Archivists
Income Statement
Fiscal 2022 Budget
Education

Revenues	Projected FY '21			FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	-	-	-	\$ -	N/A	\$ -	N/A
Workshops	381,930	381,930	295,499	\$ -	(0.00%)	\$ 86,431	29.25%
Annual Meeting	-	-	-	\$ -	N/A	\$ -	N/A
Publications & CD Sales	-	-	-	\$ -	N/A	\$ -	N/A
Contributions	-	-	-	\$ -	N/A	\$ -	N/A
Investments	-	-	-	\$ -	N/A	\$ -	N/A
Other	-	-	150	\$ -	N/A	\$ (150)	(100.00%)
Total Revenues	381,930	381,930	295,649	\$ -	(0.00%)	\$ 86,281	29.18%
Expenses			Projected FY '21	FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference
Personnel	\$ 136,519	\$ 139,518	\$ 137,211	\$ (2,999)	(2.15%)	\$ (692)	(0.50%)
Office Occupancy & Utilities	16,101	16,877	15,242	\$ (776)	(4.60%)	\$ 858	5.63%
Services	130,087	145,082	115,080	\$ (14,995)	(10.34%)	\$ 15,007	13.04%
Supplies	888	948	971	\$ (60)	(6.36%)	\$ (82)	(8.49%)
Travel	-	-	-	\$ -	N/A	\$ -	N/A
Leases, Rentals & Licenses	1,477	1,659	1,683	\$ (182)	(10.96%)	\$ (205)	(12.21%)
Taxes, Dues and Subscriptions	-	-	-	\$ -	N/A	\$ -	N/A
Depreciation, COGS, and Other	-	-	-	\$ -	N/A	\$ -	N/A
Total Expenses	\$ 285,072	\$ 304,084	\$ 270,186	\$ (19,012)	(6.25%)	\$ 14,886	5.51%
Gain / (Loss) from Operations	\$ 96,858	\$ 77,846	\$ 25,463	\$ 19,012	24.42%	\$ 71,394	280.38%
Transferred to Funds	-	-	-				
Net Gain / (Loss)	\$ 96,858	\$ 77,846	\$ 25,463				

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		FY21 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
	1	Management and administration.				\$0		\$0
		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 and GAE Subcommittees 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.						
		Professional Development Lynda.com membership (\$360/year for TC and AR)	5640	Registration Fees (included in G&A)		5		5
		Provide staff support for Annual Meeting / pre-conference courses.		Staff Travel				
			5600	Hotel (2p x \$115/d x 7d) (RHS and AR)		5		5
			5600	Hotel (1p x \$115/d x 4d) (TC)		5		5
			5600	Per Diem (2p x \$65/d x 7d) (RHS and AR)		5		5
			5600	Per Diem (1p x \$65/d x 4d) (TC)		5		5
			5600	Air/Ground (2p x \$350 + 1p x \$435)		5		5
	2	Support the work of the Committee on Education, DAS and GAE Subcommittees, and other groups as needed.				\$0		\$0
		Conduct one Committee on Education meeting (Chicago):						
		- (13p x \$470 airfare/bags/ground) = 6110	5610	Member Travel		5		5
		- (13p x \$109/d x 2 days hotel) = 2834	5620	Member Lodging		5		5
		- (13 p x \$45/d x 2 days meals) = 1170	5630	Member Meals (Reimbursement)		5		5
		- Room Rental (\$75/day x 2 days) = 150	5700	Meeting Room Rental (SAA HQ)		5		5
		- Catering (2 breakfasts, 2 lunches) = 800	5630	Member Meals (Catering)		5		5

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		FY21 Budget	
					Line Amount	Activity Total	Line Amount	Activity Total
		Conduct one DAS Subcommittee meeting (Chicago, October)						
		- (9p x \$470 airfare/bags/ground) = 4230	5610	Member Travel		5		5
		- (9p x \$204/d x 2 days hotels) = 3672	5620	Member Lodging		5		5
		- (9p x \$45/d x 2 days meals) = 810	5630	Member Meals (Reimbursement)		5		5
		- Room Rental (\$75/day) x2 days	5295	Staff Travel (2p x 2d x \$16) = 64		5		5
		- Catering (2 breakfasts, 2 lunches) = 650	5700	Meeting Room Rental (SAA HQ)		5		5
			5630	Member Meals (Catering)		5		5
	3	Plan and implement F2F courses, webcasts, and online courses.				\$381,930		\$381,930
		40 "in-person" Zoom classes x30x\$224 (avg. price)	4200	Education Registration Revenue	268,800	4	268,800	4
		30 purchases x 4 new live webcasts x \$89 (avg price).	4210	Education Registration Revenue	10,680	4	10,680	4
		25 purchases x 34 existing on-demand webcasts x \$109 (avg price).	4210	On-Demand Revenue	92,650	4	92,650	4
			4210	On-Demand Revenue		4		4
		Course/Webcast Exams: 20 exams x 40.	4215	DAS Challenge Exams Revenue	800	4	800	4
		DAS Comprehensive Exam: 90 exams x \$100.	4215	DAS Challenge Exams Revenue	9,000	4	9,000	4
								4
		40 "in person" Zoom instructors + secondary instructors (moderators) (\$500, \$100)	5380	Instructor Honoraria	32,000	5	32,000	5
		Conversion/experiment stipends for instructors (20x\$500)	5380	Instructor Honoraria	10,000	5	10,000	5
					0	5	1,000	5
		DAS Instructor Exam Writing Honoraria (\$150 x 10)	5380	Instructor Honoraria	1,500	5	1,500	5
		4 beverage breaks not covered in host negotiations @ \$200 each.	5290	Business Meals		5		5
		AV for 8 pre-conference courses.	5360	Audiovisual (\$610/room/day x 8 courses)		5		5
		Extra AV (mics) and supplies for Unconference.	5360	Audiovisual (Unconference)		5		5
		F&B for 8 pre-conference courses.	5290	Business Meals		5		5
		Instructor travel, lodging, meals @ avg \$866 x 95 instructors.	5610	Instructor Travel		5		5
			5620	Lodging		5		5
			5630	Meal Allowance		5		5
		Print and ship workbooks @ \$160/course x 2 courses.	5400	Printing & Duplicating	0	5	1,000	5
	4	Develop new and revise existing educational offerings and maintain online platforms.				\$0		\$0
						\$12,140		\$22,140

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		FY21 Budget		
					Line Amount	Activity Total	Line Amount	Activity Total	
		- BlueSky eLearn Path LMS	5226	Computer Support	7,140		5	7,140	5
		- AdobeConnect.	5226	Computer Support	0		5	3,000	5
		- Webcast development fee (4 new webcasts x \$500).	5380	Honorarium (Webcast Development)	2,000		5	2,000	5
		- Mgt Track: Convert online courses (1 x \$1,500). (carry over from 2020)	5200	Consultant (Instructional Designer)	1,500		5	3,000	5
		- Mgt Track: Convert F2F courses to online (1 x \$500). (Carry over from 2020: Rosemary)	5380	Honorarium (Instructor)	500		5	1,000	5
		- DAS Comprehensive Exam question manager. (Tomaro Taylor and Sarah Shipley)	5200	Consultant (DAS Comprehensive Exam)	1,000		5	1,000	5
					0			5,000	5
	5	Management Track (covered by NHPRC) Program development will include Technology Management course and other soft skills topics TBD.							5
	6	DEI Next Steps (covered by SAAF) Four webinars to be developed by August 30, 2021							5
	7	Marketing and promotion.						\$600	\$800
		- Ad placement for courses, webcasts, and flash sales.	5285	Advertising & Marketing	0		5	0	5
		- DAS and A&D magnets for certificate holders.	5550	Promotional Items	50		5	50	5
		- Notecards.	5550	Promotional Items	50		5	50	5
		- LMS images.	5350	Graphic Design	500		5	500	5
		- Other printed marketing materials.	5285	Advertising & Marketing	0		5	200	5
									5
	8	Miscellaneous.						\$0	\$0
		- PGI conference call audio (\$100/m x 12).	5110	Telecommunications	1,200		5	1,200	5
		- Postage for DAS exams and certificates.	5310	Express Mail	500		5	1,000	5
		- Educational consulting for Program Operations	5200	Consulting	61,425		5	61,425	5
									4
	9	General and Administrative Allocation	5XXX		\$154,411	154,411.39	5	159,293	159,292.87

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		FY21 Budget			
					Line Amount	Activity Total	Line Amount	Activity Total		
	10	IT Allocation	5XXX		\$11,296	11,295.84	5	12,726	12,726.41	5
				Total Income		\$381,930			\$381,930	
				Total Expenses		\$285,072			\$304,084	
				Gain / (Loss) From Operations		\$ 96,858			\$ 77,846	
				Net Operating Gain / (Loss)		\$ 96,858			\$ 77,846	

**Society of American Archivists
Council Meeting
June 11, 2021
Virtual Meeting**

**FY22 Proposed Budget Narrative:
Career Services (Program 115)
(Prepared by Peter Carlson)**

The proposed FY 2022 budget projects a net gain for the Career Services program of \$26,320. This is \$21,872 (491.74%) higher than the FY 2021 budgeted net gain.

Effort of all staff members is allocated across the budget based on management estimates. Personnel costs for this program reflect 0.07 FTEs or 0.68% of total salaries, taxes, and benefits. We have modeled an increase in health care costs of 12% beginning in January 2022. Thus the budget reflects a 6% increase in the cost of benefits for the fiscal year. Last year we froze salaries and left an opening unfilled. In the FY22 budget we propose a 3.84% increase in salaries distributed according to performance and internal equity, as well as a market adjustment for two key staff positions, resulting in an overall increase of 6.4%

The proposed budget assumes the following:

- Revenues of \$44,081 for online job ads based on the volume of ads placed in the past 16 months. The job board is outsourced to Boxwood; their “consulting” (sales and hosting) and processing fees are based on a percentage of revenue.
- Revenues of \$6,000 from the online Directory of Archival Consultants due to an increase in participation from SAA members resulting from a decrease in price.

The Society of American Archivists
Income Statement
Fiscal 2022 Budget
Career Services

Revenues	Projected FY '21			FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference
Dues	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Subscriptions & Advertising	50,081	10,714	52,285	39,366	367.43%	(2,204)	(4.22%)
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	\$ 50,081	\$ 10,714	\$ 52,285	\$ 39,366	367.43%	\$ (2,204)	(4.22%)
Expenses			Projected FY '21	FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference
Personnel	\$ 7,647	\$ 3,295	\$ 3,858	\$ 4,352	132.07%	\$ 3,789	98.23%
Office Occupancy & Utilities	835	370	464	466	126.04%	371	80.06%
Services	15,151	2,542	11,950	12,609	496.02%	3,202	26.79%
Supplies	44	20	-	24	120.24%	44	N/A
Travel	-	-	-	-	N/A	-	N/A
Leases, Rentals & Licenses	83	39	46	44	111.11%	37	81.02%
Taxes, Dues and Subscriptions	-	-	-	-	N/A	-	N/A
Depreciation, COGS, and Other	-	-	-	-	N/A	-	N/A
Total Expenses	\$ 23,761	\$ 6,266	\$ 16,317	\$ 17,495	279.19%	\$ 7,443.82	45.62%
Gain / (Loss) from Operations	\$ 26,320	\$ 4,448	\$ 35,968	\$ 21,872	491.74%	\$ (9,648)	(26.82%)
Transferred to Funds	-	-	-				
Net Gain / (Loss)	\$ 26,320	\$ 4,448	\$ 35,968				

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		FY21 Budget		
					Line Amount	Activity Total	Line Amount	Activity Total	
	1	Online Career Center Job board outsourced to Boxwood Technologies				\$44,081		\$6,714	
		Boxwood revenue share averages ~ 28.86% of Gross Revenue	4160	Advertising Revenue	44,081	\$14,475	4	6,714	4
		Boxwood service fee	5200	Consulting Fees (30% revenue sharing)	12,688.10		5	1,933	5
			5335	Processing Fees (~ 4.05%)	1,787		5	269	5
	2	Administer Career Center at Annual Meeting. Staff Networking Café and Career Center. (C Salgado @ 6d) (1p x \$365 air/ground + \$50/d x 6d per diem + \$115/d x 6d lodging) = \$690				\$0		\$0	
		Career Center Resume Guide	5600	Staff Travel			5	-	5
		Administer Mentoring Program Meet-and-Greet.(In Membership)	5600	Staff Travel			5	-	5
			5400	Signage for Networking Café / Career Center			5	-	5
			5400	Printing			5	-	5
			5290	F&B (coffee break for mentors/protégés)			5	-	5
	3	Online Consultants Directory Annual listing fee.				\$6,000		\$4,000	
			4170	Directory Listings (~35 members)	6,000		4	4,000	4
	4	General and Administrative Cost Allocation	5XXX			8,650	5	3,762	5
	5	Computer Support Cost Allocation	5XXX			635	5	303	5
				Total Income		\$50,081		10,714	
				Total Expenses		23,761		6,266	
				Gain / (Loss) From Operations		\$26,320		4,448	

=FY 20 Data

**Society of American Archivists
Council Meeting
June 11, 2021
Virtual Meeting**

**FY22 Proposed Budget Narrative:
General and Administrative (Program 100)
(Prepared by Peter Carlson)**

The projected net loss in this area for FY 2022 is \$608,057. This is \$81,987 (15.58%) more than the FY 2021 budgeted net loss. This increase reflects increased staff effort devoted to core capacity-building projects, reduced Annual Meeting effort allocations, and increased effort to support the SAA Foundation.

Effort of all staff members is allocated across the budget based on management estimates of expected effort by program area. Personnel costs for G&A reflect 2.9 FTEs, or 29.42% of total salaries, taxes, operating costs, and benefits. We have modeled an increase in health care costs of 12% beginning in January 2022. Thus the budget reflects a 6% increase in the cost of benefits for the fiscal year. Last year we froze salaries and left an opening unfilled. In the FY22 budget we propose a 3.84% increase in salaries distributed according to performance and internal equity as well as a market adjustment for two key staff positions, resulting in an overall increase of 6.4%.

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

- We have curtailed the staff professional development/training budget for FY 2022. (Activities 1.b. and 1.c.)
- The content management system (CMS) that hosts our main homepage and website is currently on the same version of the software on which we built the site, Drupal 6. Drupal 6 has not been officially supported since 2016. The FY22 budget includes \$45,000 to rebuild this site. (Activity 6.b.)
- We rent 3,807 square feet for SAA's offices at a per-foot cost of \$29 per year (or approximately \$8,724 per month). We also rent two storage spaces at a monthly cost of \$335. In 2017, we signed an amendment to our lease at 17 North State Street at approximately 20% below market for similar properties in Chicago. Our current lease runs through March 2025. (Activity 2.d.)
- FY 2022 depreciation expenses are projected to decrease by 7% compared with FY 2021. This depreciation figure includes depreciation resulting from PC upgrades and furniture and fixtures. (Activity 2.h.)
- 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 2022, we estimate that this

will total \$49,715. This increase of \$6,951 (or 16.26%) results from the increased allocated costs necessary to support the Foundation's administration. (Activity 7)

The Society of American Archivists
Income Statement
Fiscal 2022 Budget
General & Administrative

Revenues	Projected FY '21			FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	Fiscal '22	Fiscal '21	Actuals	\$ Difference	% Difference	\$ Difference	% Difference
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	18,767	16,785	21,795	\$ 1,982	11.81%	\$ (3,028)	(13.89%)
Other	-	-	1,500	\$ -	N/A	\$ (1,500)	(100.00%)
Total Revenues	\$ 18,767.00	\$ 16,784.51	\$ 23,295	\$ 1,982.49	11.81%	\$ (4,527.86)	(19.44%)
Expenses							
	Fiscal '22	Fiscal '21	Actuals	FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
				\$ Difference	% Difference	\$ Difference	% Difference
Personnel	\$ 328,237	\$ 286,347	\$ 290,443	\$ 41,890	14.63%	\$ 37,793	13.01%
Office Occupancy & Utilities	36,035	32,384	31,447	\$ 3,650	11.27%	\$ 4,588	14.59%
Services	185,181	144,915	152,346	\$ 40,267	27.79%	\$ 32,835	21.55%
Supplies	2,906	2,752	3,114	\$ 154	5.60%	\$ (208)	(6.68%)
Travel	-	-	490	\$ -	N/A	\$ (490)	(100.00%)
Leases, Rentals & Licenses	4,950	4,773	7,956	\$ 177	3.71%	\$ (3,006)	(37.78%)
Taxes, Dues and Subscriptions	5,400	8,520	2,322	\$ (3,120)	(36.62%)	\$ 3,078	132.56%
Depreciation, COGS, and Other	64,115	63,164	64,838	\$ 951	1.51%	\$ (723)	(1.11%)
Total Expenses	\$ 626,824	\$ 542,855	\$ 552,956	\$ 83,969	15.47%	\$ 73,868	13.36%
Gain / (Loss) from Operations	\$ (608,057)	\$ (526,070)	\$ (529,661)	\$ (81,987)	15.58%	\$ (78,395)	14.80%
Transferred to Funds	-	-	-				
Net Gain / (Loss)	\$ (608,057)	\$ (526,070)	\$ (529,661)				

**The Society of American Archivists
Program Planner
Fiscal Year 2022
Program Name: General & Administrative
Program Number: 100**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget	
					Line Amount	Activity Total
	1	Staff an effective and efficient headquarters office.				\$328,925
		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, 22.8% of G&A expenses are allocated to the General & Administrative cost center.	5000 5000 5010 5020 5030 5040	Salaries & Wages Decrease in Vacation Liability Insurance Coverage Employer Payroll Taxes Retirement Benefit Bonuses	263,465 -1,800 22,612 21,723 22,236	
		Association Media & Publishing Membership \$810 <i>ASAE Membership</i> <i>LinkedIn.com membership (\$360/year for AR and TC) \$720</i> <i>AFC Staff Membership \$2,700</i>	5640	Staff Professional Development	0	
		d. Business meals and local transportation - Staff Acknowledgments (included in monthly amount)	5290	Various Occasions and Meetings @ \$225/m (G&A share)	588	
		e. Local transportation for various meetings.	5295	Local Transportation and parking fees	100	
	2	Overhead costs of SAA headquarters office.				\$70,894
		a. Electricity	5120	Electricity: Avg of \$355/m (G&A share)	635	
		b. Postage	5300 5310	Postage: Avg of \$710/m (G&A share) Express Mail Services: Avg of \$119.50/m	1,045 1,428	
		c. Insurance - Workers Compensation - Commercial Umbrella Package - Professional Liability - Director's and Officer's	5260	Insurance (combined @ approx \$450/m)	5,406	

**The Society of American Archivists
Program Planner
Fiscal Year 2022
Program Name: General & Administrative
Program Number: 100**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget	
					Line Amount	Activity Total
		d. Rent	5100	7/21 - 1/21: \$9,276 x 7m	32,971	
		- Current 10-year lease expires 3/31/25.		2/22 - 6/22: \$9,434 x 5m (G&A share)		
		- Includes storage space rental	5XXX	Services & Supplies	0	
		e. Supplies	5500	Office Supplies: Avg \$540/m @ 29.42%	1,906	
			5570	Miscellaneous Supplies		
		f. Telephone	5110	Telephone/Internet: \$8,256 annually @ 29.42%	2,429	
		g. Printing and duplication	5400	Check Printing (2 @ \$125)	200	
			5400	Monthly Printing (~\$35/m -- G&A share)	124	
		h. Equipment and depreciation	5250	Maintenance and Repairs		
		- Phone System: Avg \$644/m	5700	Equipment Lease, Site Licenses	4,950	
		- Copier / Scanner / Fax / Printer: Avg \$320/m				
		- Accounting Software License: \$1,377				
		- Pitney Bowes: Avg \$230/qtr				
		Depreciation: \$1,939/m	5900	Equipment Depreciation	14,400	
		i. Tax payments (property tax included in rent)	5800	Taxes (UBIT)	5,400	
3		Use outsource services as needed.				\$93,963
		a. Accounting	5240	Payroll Processing (\$273/mo + 150)	3,300	
		- Includes consultant to assist in analysis of new/	5210	Audit and Tax Preparation	30,350	
		upgraded accounting and payables management system.	5200	Consultant	5,950	
		b. Bank charges	5230	Investment Fees (Merrill Lynch and Bank of America)	315	
		c. Merchant service costs, including Int'l Bancard and Authorize.net	5236	Credit Card Processing Fees: Avg \$4,125/m	45,338	
		c. Legal services (general)	5280	Legal Services (\$1,250/qtr)	7,500	
		d. 1099 software and processing	5335	Renewal of 1099 Software License and Processing	650	
		e. Document disposal	5480	Miscellaneous Services	560	

**The Society of American Archivists
Program Planner
Fiscal Year 2022
Program Name: General & Administrative
Program Number: 100**

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget	
					Line Amount	Activity Total
	4	Miscellaneous Income - Return on Merrill Lynch Operations Account	4700	Interest / Dividends (Based upon ML Bond income estimate)	18,767	\$18,767
	5	Provide Staff Support at 2019 Annual Meeting. - Carlson, Black, Santiago, Valdez - Salgado budgeted in Career Services, Program 115 @ \$149 x 6n x 2p (MS, RV) + \$125 x 7n x 2p (MB, PC)	5600 5600 5600 5600	Staff Travel - Airfare @ \$375/p + bags/ground @ \$50/p x 4 = \$1,700 - Lodging (Staff rate \$115 * 26 person-nights) - Meal Allowance @ \$45/d x 6d x 2p + \$45/d x 7d x 2p = \$1,170	- - -	\$0
	6	Information Technology Expenses a. Hardware, software, hosting, programming support. - Commonplaces @ \$4,200 - Impact Solutions @ \$1,460 - General Support AZBS@ \$38,000 - Higher Logic @ \$9,000 - NimbleAMS @ \$33,000 b. Specify and replace SAA Website and CMS database - Application design and needs analysis - Project management and business process configuration - Coding and development c. Develop and refine reporting and payables processes d. General office supplies for technology support - Replacement of keyboards, mice, web-cameras, headsets, etc	5226 5200 5200 5280 5200 5500	Computer Support Consulting Service (Commonplaces or RFP) Consultant Legal Review (Paid in Activity 3.c.) Consulting Service (Great Plains configuration and report writing) Supplies	27,328 14,000 31,000 0 10,000 1,000	\$83,328
	7	Administrative support of SAA Foundation.	5915	In-kind Donations from SAA to SAA Foundation	49,715	49,715.10
				Total Income		\$18,767
				Total Expenses		\$626,824
				Gain / (Loss) From Operations		(\$608,057)

**Society of American Archivists
Council Meeting
June 11, 2021
Virtual Meeting**

**FY22 Proposed Budget Narrative:
Governance (Program 108)
(Prepared by Nancy Beaumont)**

The FY 2022 Governance budget projects a net loss of \$205,454, which is \$80,690 more than the FY21 budgeted net loss of \$124,765.

Effort of all staff members is allocated across the budget based on management estimates. Personnel costs for Governance reflect 1.02 FTEs or 10.18% of total salaries, taxes, and benefits. (This is an increase from FY21, when personnel costs reflected a previous high of 0.87 FTEs or 8.73% of total salaries, taxes, and benefits. Staff support for the Council, appointed groups, and sections has continued to increase over time.) We have modeled an increase in health care costs of 12%, beginning in January 2022. Thus the budget reflects a 6% increase in the cost of benefits for the fiscal year. Last year we froze salaries and left an opening unfilled. In the FY22 budget we propose a 3.84% increase in salaries distributed according to performance and internal equity, as well as a market adjustment for two key staff positions, resulting in an overall increase of 6.4%.

The proposed budget assumes the following:

- One in-person meeting of the SAA Council in May/June 2022 and up to 10 virtual meetings of the Council held via Zoom. (Activity 1, \$14,120)
- A paid consultant/facilitator to assist the Council as needed with development and implementation of a DEIA/cultural competency strategic work plan. (Activity 1, \$40,000)
- Honoraria for invited speakers/facilitators/consultants and Zoom webinar technology for four Council-led or -directed virtual events. (Activity 2, \$3,360)
- Use of Zoom webinar technology to support four Council-led or -directed town halls or forums throughout the year (i.e., \$340/month x 12 months = \$4,080). (Activity 2)
- Use of Zoom webinar technology to support six component-group-led virtual events (\$2,040) as well as conference call support for component groups (\$500). (Activity 3)
- No in-person meetings of appointed groups or task forces.

- Funding for one online election for Council and Nominating Committee positions. Should an all-member referendum be necessary and not time-sensitive, it will be conducted in conjunction with the annual election. (Activity 4, \$1,700)
- Continued funding for SAA's membership in the International Council on Archives (Activity 5, \$740). NOTE that the Finance Committee recommends not funding membership in the National Information Standards Organization (NISO). (Activity 5, \$3,100).
- Funding for attendance by the Vice President/President-Elect, executive director, and governance manager at the ASAE CEO Symposium in Chicago. (Activity 6, \$3,945)
- No funding for AV support of sections for the 2021 Annual Meeting. All meetings will be conducted via SAA's Zoom accounts in advance of the conference.
- Funding of section activities per the previously established "section funding pilot project" of \$250 per section. (Activity 7, \$11,250) NOTE that the Finance Committee recommends not funding this activity.
- Funding of two applications for "Component Group Funding" received by the March 1, 2021, deadline:
 - One from the Technical Subcommittee on Encoded Archival Standards for partial support of an in-person meeting, conducted in North America or Europe, to enable a major revision of the Encoded Archival Description standard. (Activity 7, \$10,000)
 - One from the Committee on Public Awareness to support honoraria of \$500 for each of two webcasts to build archivists' public awareness advocacy skills. (Activity 7, \$1,000)

NOTE that the Finance Committee recommends not funding these two requests. See the requests attached.

The Society of American Archivists
Income Statement
Fiscal 2022 Budget
Governance

	Projected FY '21			FY '22 Budget v. FY '21 Budget		FY '22 Budget v. FY '21 Actuals	
	<u>Fiscal '22</u>	<u>Fiscal '21</u>	<u>Actuals</u>	<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Revenues							
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							
Personnel	\$ 114,249.43	\$ 92,981.72	\$ 92,693.28	\$ 21,267.71	22.87%	\$ 21,556.15	23.26%
Office Occupancy & Utilities	12,969.58	10,946.75	10,430.10	2,022.84	18.48%	2,539.48	24.35%
Services	60,634.66	15,324.91	19,057.68	45,309.75	295.66%	41,576.98	218.16%
Supplies	659.40	565.42	849.18	93.98	16.62%	(189.78)	(22.35%)
Travel	14,965.00	-	-	14,965.00	N/A	14,965.00	N/A
Leases, Rentals & Licenses	1,236.04	1,105.72	1,124.49	130.32	11.79%	111.55	9.92%
Taxes, Dues and Subscriptions	740.00	3,840.00	2,537.48	(3,100.00)	(80.73%)	(1,797.48)	(70.84%)
Depreciation, COGS, and Other	-	-	-	-	N/A	-	N/A
Total Expenses	\$ 205,454.11	\$ 124,764.51	\$ 126,692.21	\$ 80,689.60	64.67%	78,761.91	62.17%
Gain / (Loss) from Operations	\$ (205,454.11)	\$ (124,764.51)	\$ (126,692.21)	\$ (80,689.60)	64.67%	(78,761.91)	62.17%
Transferred to Funds	-	-	-				
Net Gain / (Loss)	\$ (205,454)	\$ (124,765)	\$ (126,692)				

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

= Gen/Adm

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget	
					Line Amount	Activity Total
	1	Conduct one in-person meeting and 10 virtual meetings of the SAA Council.				\$54,495
		a. August meetings (2) in conjunction with 2021 Virtual Annual Meeting. - Assumes use of SAA Zoom account for all virtual meetings.	5226	Zoom Fees	250	5
		b. Virtual meetings in September, October, and November 2021 and January, February, March, April, and May or June 2022. - Assumes use of SAA Zoom account for all virtual meetings. - Assumes paid facilitator for some portion of one or more meetings to address DEIA work plan.	5226 5200	Zoom Fees Consultant Fees (DEIA Facilitator)	125 40,000	5 5
		c. May or June 2022 in-person meeting (Chicago). - Assumes face-to-face meeting with two nights lodging. - Assumes one dinner with all Council members and all staff.	5610 5610 5610 5600 5290 5290 5290 5290 5300	Member Travel (12p x \$400 [avg] air/ground) = \$4,800 Member Travel (Local Ground) (12p x \$50) = \$600 Member Travel (12p x \$229 x 2n lodging) = \$5,495 Staff Travel--Local Food and Beverage: (Breakfasts/breaks: 18p x \$15 x 2d) = \$540 (Lunch: 18p x \$20 x 2d) = \$360 (Dinner with staff: 22p x \$55 incl svc/tax) = \$1,210 (Dinner on own: 12p x \$45 x 1d) = \$540 Room Rental (SAA HQ) = \$450	4,800 600 5,495 125 540 360 1,210 540 450	5 5 5 5 5 5 5 5 5
	2	Conduct four Council-led or -directed virtual town halls or forums.				\$3,360
			5380	Honoraria for invited speakers, consultants x 4 events.	2,000	5
			5226	Zoom webinars for 1,000 seats x 4 Council-led events. (\$340/month x 4 months)	1,360	5
	3	Provide funding for designated meetings and tasks of component groups.				\$2,540
		Assumes no support for in-person meetings, full support for six Zoom meetings or webinars for appointed groups and sections.	5226	Zoom webinars for 1,000 seats x 6 component groups. (\$340/month x 6 months)	2,040	5
		Assumes conference call support for sections and appointed groups throughout the year.	5110	Conference Calls	500	5
	4	Provide for balloting to elect VP, three Council members, three Nominating Committee members.				\$1,700
		a. Post candidate statements on website; contract with vendor for online ballot; include referendum as needed.	5200	Consultant (Online Voting Service)	1,700	5
	5	Dues for membership in related organizations.				\$740
				Institutional Membership Dues:		5

The Society of American Archivists
Program Planner
Fiscal Year 2022

Program Name: Governance
Program Number: 108

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		
					Line Amount	Activity Total	
			5820	ICA (600 Euros @ \$1.23) = \$740	740		5
			5820	NISO = \$3,100	0		5
	6	Fund VP/President-Elect, executive director, and governance manager to attend ASAE CEO Symposium (Chicago).				\$3,945	
			5640	Registration Fees (3p x \$995)	2,985		5
			5610	Member Travel (1p x \$400 air/ground + \$225 lodging x 2 + \$60 per diem)	910		5
			5600	Staff Travel--Local	50		5
	7	Provide funding to support SAA sections, appointed groups, and others.				\$0	
		a. Per FY22 Component Group Funding Requests:					
		- TS-EAS: In-person meeting re major revision of EAD (partial support, North America or Europe).	5200	Funding for TS-EAS in-person meeting. 10,000	0		5
		- COPA: Honoraria of \$500 for each of two webinars to build archivists' public awareness advocacy skills.	5200	Funding for COPA webinar series (honoraria). 1,000	0		5
		b. Continue allocation of fixed amount for each of 45 sections.	5390	Section Funding (45 sections x \$250) 11,250	0		5
	8	General and Administrative Cost Allocation	5XXX			\$129,222	
	9	Computer Support Cost Allocation	5XXX			\$9,452	
				Total Expenses		\$205,454	
				Net Operating Gain / (Loss)		(\$205,454)	

**Society of American Archivists
Council Meeting
June 11, 2021
Virtual Meeting**

**FY22 Proposed Budget Narrative:
Advocacy (Program 107)
(Prepared by Nancy Beaumont)**

The proposed FY 2022 budget projects a net loss of \$122,825 in this program area. This is \$19,159 more than the FY 2021 budgeted net loss of \$103,666.

Effort of all staff members is allocated across the budget based on management estimates. Personnel costs for this program reflect 0.62 FTEs or 6.17% of total salaries, taxes, and benefits (compared with 0.71 FTEs or 7.07% in FY21). We have modeled an increase in health care costs of 12% beginning in January 2022. Thus the budget reflects a 6% increase in the cost of benefits for the fiscal year. Last year we froze salaries and left an opening unfilled. In the FY22 budget we propose a 3.84% increase in salaries distributed according to performance and internal equity, as well as a market adjustment for two key staff positions, resulting in an overall increase of 6.4%.

Relation of this program to Strategic Plan: This budget directly addresses Goal 1: Advocating for Archives and Archivists, Strategies 1.1., 1.2., and 1.4.

The proposed budget assumes the following:

- No in-person meetings of the Committee on Public Awareness or the Committee on Public Policy. The majority of the COPA and COPP work plans will be implemented by committee members (or other volunteers) and staff. Both committees meet at least monthly by phone/Zoom.
- Per Council discussions of the Strategic Plan in November and January, funding for five archivists/members to travel to Chicago (or other location) to receive professional media training from a consultant. (Activity 1.b., \$14,625)
- Conduct of a storytelling workshop in conjunction with the 2021 Annual Meeting by Micaela Blei, who led the storytelling workshop and event at the 2019 and 2020 conferences. Participants in the 4-hour virtual workshop will pay \$49, which will offset Blei's instructor fee. (Activity 1.e.)
- The storytelling events held at the 2018 and 2019 annual conferences and virtually on October 1, 2020, will be reprised as a virtual event on October 1, 2022, to launch American Archives Month. Blei will again coach the story-tellers and emcee the event for a nominal fee of \$500.

- Attendance by two members (at two meetings) and one staff member (at one meeting) to support in-person advocacy efforts in Washington, DC, or elsewhere. (Activity 2.c., \$3,025)
- Continued support for the National Coalition for History at a level equal to FY20 and FY21 (i.e., \$10,000). No funding for representative(s) to attend Policy Board meetings in person. (Activity 2.d.)
- Funding for international travel for SAA's representative to the World Intellectual Property Organization (one of two meetings at \$1,990) and SAA's representative to the International Council on Archives Forum on Professional Associations (one of two meetings at \$2,500). (Activity 3.a., \$4,490)
- Funding of \$1,530 to support member travel to, and an exhibit table at, the Association of Tribal Archives, Libraries, and Museums in October 2022 (with raffle prizes and giveaways drawn from existing SAA products or services). This activity also includes \$400 for sponsorship, advertising, and/or shipping of materials to other organizations' meetings. (Activity 4.b., \$1,930)

The Society of American Archivists
Income Statement
Fiscal 2022 Budget
Advocacy and Public Awareness

Revenues

	<u>Fiscal '22</u>	<u>Fiscal '21</u>	<u>Projected FY '21 Actuals</u>	<u>FY '22 Budget v. FY '21 Budget</u>		<u>FY '22 Budget v. FY '21 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	2,450	2,450	-	-	0.00%	2,450	N/A
Total Revenues	\$ 2,450.00	\$ 2,450.00	\$ -	\$ -	0.00%	\$ 2,450.00	N/A

Expenses

	<u>Fiscal '22</u>	<u>Fiscal '21</u>	<u>Projected FY '21 Actuals</u>	<u>FY '22 Budget v. FY '21 Budget</u>		<u>FY '22 Budget v. FY '21 Actuals</u>	
				<u>\$ Difference</u>	<u>% Difference</u>	<u>\$ Difference</u>	<u>% Difference</u>
Personnel	\$ 69,204	\$ 75,324	\$ 72,674	\$ (6,120)	(8.12%)	\$ (3,470)	(4.77%)
Office Occupancy & Utilities	\$ 7,555	\$ 8,466	\$ 7,874	\$ (911)	(10.77%)	\$ (319)	(4.05%)
Services	\$ 22,698	\$ 10,223	\$ 9,817	\$ 12,475	122.03%	\$ 12,881	131.22%
Supplies	\$ 400	\$ 458	\$ -	\$ (58)	(12.75%)	\$ 400	N/A
Travel	\$ 14,670	\$ 750	\$ 450	\$ 13,920	1856.00%	\$ 14,220	3160.00%
Leases, Rentals & Licenses	\$ 749	\$ 896	\$ 892	\$ (147)	(16.37%)	\$ (143)	(16.06%)
Taxes, Dues and Subscriptions	\$ 10,000	\$ 10,000	\$ 15,000	\$ -	0.00%	\$ (5,000)	(33.33%)
Depreciation, COGS, and Other	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Total Expenses	\$ 125,275	\$ 106,116	\$ 106,707	\$ 19,159	18.05%	\$ 18,568	17.40%
Gain / (Loss) from Operations	\$ (122,825)	\$ (103,666)	\$ (106,707)	\$ (19,159)	18.48%	\$ (16,118)	15.11%

Transferred to Funds

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Net Gain / (Loss)

\$ (122,825)	\$ (103,666)	\$ (106,707)	\$ (19,159)
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**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget			
					Line Amount	Activity Total		
1.1 1.3 1.4	1	Promote the value of archives and archivists to institutions, communities, and society, and strengthen the ability of those who manage and use archival material to articulate the value of archives. a. Based on COPA workplan, implement ongoing publicity and media plan (including feature releases) and sponsor public awareness campaigns (including AAM). b. Promote public relations competencies among archivists via mid-year media training (x 5p), online videos, web resources, and materials for distribution via periodicals and conferences; incorporate PA goals into SAA website. c. Podcast series for community/public on keeping/donating materials. d. Exhibit at NGS, other appropriate venues to promote "Creating Family Archives," build allyship with genealogists. e. Conduct story-telling workshop at 2021 Virtual Annual Meeting; workshop instructor (from Moth Radio Hour) to conduct storytelling event to launch American Archives Month in October 2021.					19,825	
								2,450
			5200	Consultant (Public Awareness)	\$ -	5		
			5350	Design/Photography/Production	\$ -	5		
			5200	Consultant / Trainer (Media Training)	\$ 10,000	5		
			5200	Consultant (Public Awareness)	\$ 2,000	5		
			5290	F&B	\$ 200	5		
			5610	Member Travel / Airfare (5p x \$365 airfare/ground) = \$1,825	\$ 1,825	5		
			5620	Member Travel / Lodging (5p x \$180 x 2d lodging) = \$1,800	\$ 1,800	5		
			5630	Member Travel / F&B (5p x \$100 x 2d) = \$1,000	\$ 1,000	5		
			5XXX	Not sure what the expenses are for this.		5		
			5480	Exhibit Fees	\$ 500	5		
			4900	Workshop Revenue (50p x \$49 = \$2,450)	\$ 2,450	4		
			5200	Consultant/Instructor for Workshop and October Event	\$ 2,500	5		
			1.2	2	Educate and influence decision makers about the importance of archives and archivists.			
						-		
		a. At the 2019 Joint Annual Meeting in Austin, provide a day of training on how to conduct local/district visits. (Instructors are COPP members.) Provide free member training in series of webcasts (COPP). (Subsidized fee to offset breaks, comp registration for instructors.)	5226	Web Events (x 3) (platform exp in Governance budget)			5	

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		
					Line Amount	Activity Total	
1.1 1.2 1.3 3.3	3	a. Determine members' resource needs; develop and disseminate practical resources to aid them in advocating for archives. - Develop online Advocacy Toolkit for members' use. - Provide free webcast on advocacy techniques. - Develop graphics/interactive map to track district visits; participation "countdown" to all 50 states.	5350	Design/Photography/Production for Toolkit	\$ 500	5	
			5226	Zoom Fees for Webcast		5	
			5350	Design/Photography/Production for Graphics and Map	\$ 500	5	
			b. Implement COPP work plan, 2020-2022. - Continue development of issue briefs and policy statements. - ID additional priorities for Public Policy/Legislative agendas. - Develop letters/editorials on two key public policy issues for members' use.	5600	Staff Travel (1p x \$365 airfare/ground x 1m) = \$365	\$ 365	5
					Staff Travel (1p x \$175 x 2d lodging x 1m) = \$350	\$ 350	5
					Staff Travel (1p x \$45 x 2d per diem x 1m) = \$90	\$ 90	5
			c. Fund travel by SAA representatives to Washington, DC, for Hill visits and other meetings and briefings as needed. - Draft legislation for national funding initiative; seek sponsors. - Various opps on federal funding issues outlined in Legislative Agenda. - Attendance at National Humanities Day.	5610	Member Travel (2p x \$400 airfare/ground x 2m) = \$1,600	\$ 1,600	5
					Member Lodging (2p x \$200 x 2d lodging x 2m) = \$1,600	\$ 1,600	5
					Member Per Diem (2p x \$65 x 2d x 2m) = \$520	\$ 520	5
		d. Provide support and participate actively in NCH.			5820	National Coalition for History Membership Dues	\$ 10,000
			e. Participate in meetings with coalition partners (eg, Joint Working Group on Issues and Awareness with CoSA/NAGARA/RAAC). [VIRTUAL]	5610		Member Travel (1p x \$365 airfare/ground x 1m) = \$365	
		Member Lodging (1p x \$175 x 2d lodging x 1m) = \$350				5	
		Member Per Diem (1p x \$65 x 2d per diem x 1m) = \$130				5	
		5,920					
		-					
		a. National and international organizations: - World Intellectual Property Organization/SCCR (Geneva, Switzerland, November 2021) [VIRTUAL] - WIPO/SCCR (Geneva, Switzerland, Spring/Summer 2022) [IN PERSON]	5610	Member Travel (1p x \$1500 airfare/ground x 1m) = \$1,500		5	
				Member Lodging (1p x \$130 x 12n lodging x 1m) = \$1,560		5	
				Member Per Diem (1p x \$60 x 12d per diem x 1m) = \$720		5	
				Member Travel (1p x \$1,050 airfare/ground) = \$1,050	\$ 1,050	5	
				Member Lodging (1p x \$160 x 4n) = \$640	\$ 640	5	
				Member Per Diem(1p x \$60 x 5d) = \$300	\$ 300	5	

**The Society of American Archivists
Program Planner
Fiscal Year 2022**

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

Goal	Activity No.	Narrative	Account No.	Account Description	Proposed FY22 Budget		
					Line Amount	Activity Total	
		- International Council on Archives Annual Congress [VIRTUAL] (Cost previously shared 50/50 with ACA)	5610	Member Travel (1p x \$1,000 airfare/ground) x .50 = \$500			5
			5620	Member Lodging (1p x \$225 x 5d lodging) x .50 = \$560			5
			5630	Member Per Diem (1p x \$100 per diem x 5d) x .50 = \$250			5
			5640	Early-Bird Registration @ \$900 x .50 = \$450			5
		- ICA Forum on Professional Associations (FPA) Steering Committee (Location TBD, April/May 2022, SAA Rep chairs the group) (Cost previously shared 50/50 with ACA)	5610	Member Travel (1p x \$1000 air/ground) = \$1,000	\$ 1,000		5
			5620	Member Lodging (1p x \$200 x 3d lodging) = \$600	\$ 600		5
			5630	Member Per Diem (1p x \$100 per diem x 4d) = \$400	\$ 400		5
			5300	Freight	a		5
		b. National, regional, and local organizations (eg, ATALM, CIMA, MAC, MARAC, NEA, SCA, SSA).	5640	Registration/Exhibit Fees (ATALM, October 2022)	\$ 750		5
			5285	Advertising / Sponsorship	\$ 300		5
			5300	Freight (ship display materials)	\$ 100		5
			5610	Member Travel (1p x \$350 airfare/ground x 1m) = \$350	\$ 350		5
			5620	Member Lodging (1p x \$150 x 2d) = \$300	\$ 300		5
			5630	Member Per Diem (1p x \$65 x 2d) = \$130	\$ 130		5
	5	General and Administrative Cost Allocation	5XXX		\$ 78,276	78,276	5
	6	Computer Support Cost Allocation	5XXX		\$ 5,729	5,729	5
				Total Income			\$2,450
				Total Expenses			\$125,275
				Net Gain / (Loss)			(\$122,825)