

# MARAC

Mid-Atlantic Regional Archives Conference

Delaware • District of Columbia • Maryland • New Jersey  
New York • Pennsylvania • Virginia • West Virginia

UVGGTPI 'EQO O KVVGG"  
Vj wtuf c{.'Crthl34.'423:.'7<52'to '6'! <52'to "  
J gtuj g{ 'Nqf i g.'J gtuj g{.'RC"  
CI GPFC"

K0 Ecni'q'Qtf gt '\*7'b lp+'  
C0Ápvtqf wekqpu"  
D0ÁCr r tqxcrh'Ci gpf c"

K0 Cr rtqxcnqh'Uvggt lpi 'Eqo o kvgg'O kpwgu '\*7'b lp+'  
C0Lcpwct {'423: 'O kpwgu

K0QHegt au'T gr qt w' '\*37'b lp+'  
C0ÁEj ckt  
c0 Ej ckt au'T gr qtv '\*X0P qxctc+  
d0 Cf o kpxtcvqt au'T gr qtv '\*Rtgf o qtg+  
D0ÁEj ckt/Grgev '\*Eqnkt +"  
E0ÁO ggkpi u'Eqqtf kpcvqt '\*O cppkz +"  
F 0ÁUgetgvct {'\*Mplgu"  
G0ÁVtgcwvtgt '\*Tcy f qp+ "  
H0ÁRctrko gpvctkcp '\*Dgm+ "

KX0Cf xkqt {'Rqukqpu '\*37'b lp+'  
C0ÁJ kvqtkcp '\*N0Dtqy p+  
D0ÁCtej kxkv '\*G0P qxctc+  
E0ÁF gxgr o gpv'Eqqtf kpcvqt '\*Dj cvk+  
F 0ÁY gd'Vgco '\*Ectkpi qrc.'Eqtpgrkxu+  
G0ÁTgi kqpcn'Ctej kxcrh'Cuuqekvkqp'Eqpuqt vkw '\*X0P qxctc+  
H0ÁP cvkqpcn'Eqrkklqp'hqt'J kvqt {'\*\ cwtqy +

X0 Qif 'Dwulpgu' '\*52'b lp+'  
C0ÁTgxkgy 'qh'j g'F kxgtukv{ '( 'Kpenwukp'Vqy p'J cm'cpf 'Hkpcn'Tgeqo o gpf cvkqpu '\*I 0'  
J wn'X0P qxctc.'O 0'Vi j g+ "  
D0ÁQr gtcvkqpu'O cpwcn'tgxkgy '\*L0Mplgu'cpf 'O 0Mkf f +"  
E0ÁUwcvgi ke'Rrnp'tgxkgy 'wr f cvg '\*X0P qxctc+ "

**XH0P gy 'Dwulpgu'52'b lp+**

C0ÁGf ku'vq'D{/Ncy u'tgi ctf lpi 'O CTCE 'Ctej kxgu'cpf 'tgrvxf 'r qukkqpu'\*N0Dtqy p.'G0  
P qxcxc+"  
D0ÁY qtmuj qr 'Eqpvcew'cpf 'Rqkelgu'\*R0P gy o cp+"

**XH0 Ucpf lpi 'bpf 'QrgtevkqpcnEqo o kwgu'37'b lp+**

C0ÁCy ctf u'\*Ewgtxq+"  
D0ÁEqo o wplecvkqpu'\*EkcmUeqw+"  
E0ÁGf wecvkp '\*P gy o cp+"  
F0ÁO go dgtuj kr '\*Dqtf gp+"  
G0ÁP qo kpcvkqpu'cpf 'Grgevkqpu'\*Npf dgti +"

**XH40 Ucvg'Ecwewu'P gy 'Dwulpgu'bpf 'Wrf cvgu'37'b lp+**

C0ÁF grcy ctg '\*F gpkuqp+"  
D0ÁF kwtlev'qh'Eqrwo dlc '\*F qpcj wg+"  
E0ÁO ct {ncpf '\*Ur gem+"  
F0ÁP gy 'Lgtug{ '\*Rqm+"  
G0ÁP gy 'l qtn\*\ ctkmq+"  
H0ÁRgppu{ncpke '\*Tqj tdcwi j +"  
I 0ÁXki kpk '\*O qttk+"  
J 0ÁY guv'Xki kpk '\*Go gtrkpi +"

**KZ0Cf lqwt po gpv**

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UVGGTRPI 'EQO O KVVGG"  
Hkfc{.'Lcpwct{'3;.'423:.'32-22'CO '6'4-22'RO "  
Pcvkqpcn Ctej kgu'Y cuj lpi vqp.'FE"  
Cfco u'Eqphgt gpeg'Tqqo "  
O KPVWGU"

Kp'Cwgpfcpeg<'F cppo'Dgm'Uj cto krc'Dj cvkc.'Nk' 'Ectkpi qnc.'Dgem'Eqnkgc.'Cf tlcpc'Ewgtxq."  
Tcej grIF qpcj wg.'I gqh'J wj .'O cti ctgv'Mkf f.'Lgppkg'Mpku.'O grkuuc'Nkpf dgti .'Lguilec'N{ f qp."  
O ct{'O cppo'.'Rcki g'P gy o cp.'Nk' 'P qxcctc.'Xlp'P qxcctc.'Uctc'Rt gfo qtg.'Tcej grIF tqxg"  
Tqj tdcw j .'O qm{'Vki j g.'Lcp'\ cutqy "

Rj qpg'Cwgpfc ggu'Ncwct'Rqm'Uctc'Dqtf gp.'Lcuqp'Ur gem'Mcv{ 'Tcy f qp.'Uctej 'F gpkuqp.'F cplkmg"  
Go gtrkpi "

K- Ecml'v'Qtf gt<'Vj g'o ggkpi 'y cu'ecmgf 'v'q'qtf gt'cv'32-24co  
C+ Kpvtqf wvklpu

D+ Cr rtqxcn'qh'Ci gpf c<'Vj g'ci gpf c'y cu'err tqxgf ( 🤖 #

KK- Cr rtqxcn'qh'Uvggtkpi 'Eqo o kvgg'O kpwgu

C+ Hcm4239'O kpwgu'Dwllcm+0Vj g'o kpwgu'y gtg'err tqxgf ( 🤖 #

KKK-Qhlegtuø'Tgr qtvu

C+ Ej ckt'\*X0P qxcctc+<'Tgr qtv'uwo kwgf 0

k- UCC'F kwpki wkuj gf 'Ugtxleg'Cy ctf 'Eqo o kvgg'hqknkpi 'hqt'pgo kpcvqpu'hqt  
kpf kxkf wcn'v'q'dg'tgeqi pl gf 'cv'y g'pvcqpcn'rgxgr0

D+ Cf o kplutcvqtøu'Tgr qtv\*'Rt gfo qtg+<'Tgr qtv'uwo kwgf

k- O go dgtuj kr 'f qy p'ht qo 'ruv{' gct.'cmj qwi j 'uqo g'kphrcvqp'ukm'gz kuu'ht qo 'y j  
rtgxkqu'r qnec{' 'qh'cwqo cvkcm{' 'i tcvkpi 'eqphgt gpeg'cwgpfc ggu'o go dgtuj kr 0Vqvcn  
o go dgtuj kr 'cu'qh'y ku'o ggkpi 'ku': : 8'o go dgtu0

kk- O cp{' 'wr i tcf gu'v'q'O go dgtErkem0Uctc'j cu'dggp'y qtnkpi 'y kj 'y j g'Y gd'Eqo o kvgg  
cpf 'ku'i qkpi 'uo qqvj n(0'Vj g'pgy 'xgtukqp'j cu'o qtg'hkpcckn'kpgi tcvkqp'dw'y j g'ugctej  
hgcvwtgu'ctg'ukm'pqv'i tgcv0

kk+ Ur tkpi '423: 'eqphgt gpeg'tgi kntcvkqp'y kn'lvctv'pgz v'y ggm'Lcpwct{' '423: +

kx+ P gy 'kuuwg'qh'mid-atlantic archivist j cu'dggp'r wdrkuj gf 0

E+ Ej ckt/Grgev\*'D0Eqnkgc+<'Tgr qtv'uwo kwgf 0

k- S wgvkqpu'cdqw'xgpwg'cpf 'gcug'qh'ceegu'hqt'Uvggtkpi 'Eqo o kvgg'o ggkpi u0

kk+ P ggf "vq'ugv'uwo o gt llwn{ 'o ggvpki 'f cvg'd{ 'J gtuj g{ 'o ggvpki 0  
 F + O ggvpki u'Eqqtf kpcvt{\*O 00 cplkz+<'Tgr qtv'uwo kwgf 0  
 k+ Tgs wguv'hqt'ugtxleg'cy ctf u'hqt'Dwhcmq'Rtqi tco 'Eqo o kwgg{\*Elpf { 'Dgpf tqy . 'Dqppkg  
 Y gf fng+cpf 'NqecnCttcpi go gpw'Eqo o kwgg{\*lko 'Vco o ctq.'Co { 'O kngt+eq/ej cktu0  
**Vj ku'y cu'err t qxgf 0**  
 kk+ Rtgxky kpi 'O qti cpvqy p'nqecvqp'kp'vy q'y ggmu.'cpf 'j qr kpi 'vq'uki p'c'eqpvtcev'kp  
 Hgdtwct {  
 kk+ J gtuj g{ 'j qvgn'tqqo 'dmem'crt gcf { 'vcngp'hqt 'Ucwtf c{ 'pki j v0  
 G+ Ugetgvt { 'Mpkgu+<'P q'tgr qtv0  
 k+ O cti ctg'Mkf f'cpf 'Lgppkg'Mpkgu'y knitgxky 'vj g'Qr gtcvqpu'O cpwcn'r tkqt "vq'vj g'pgzv  
 Uggtkpi 'Eqo o kwgg'o ggvpki  
 H+ Vtgcwgt{\*Tcy fqp+<'Tgr qtv'uwo kwgf 0  
 k+ Uggtkpi 'Eqo o kwgg'o go dgtu'uj qwf 'uwo k'gZR gpug'tgs wguv'lp'c'vko gn{ 'o cpggt0  
 kk+ Rgqr ng'y j q'j cxg'dwf i gwy kn'dg'cumgf "vq'uwo k'tgs wguv'lp'Hgdtwct { 0  
 kk+ Dwhcmq'o ggvpki 'o cf g'c'r tqhko  
 kx+ Hpcpeg'j cu'err t qxgf 'hpcnJ gtuj g{ 'dwf i g0Uggtkpi 'y knipggf "vq'xqvg'qp'vj g'tgxkugf  
 dwf i g0Cm'lp'hcxqt0**Vj ku'y cu'err t qxgf 0**  
 I + Rctkco gpvtckp{\*Dgm+/'P q'tgr qtv0

KK+Af xkuqt { 'Rqukkqpu

C+ J kuvtckp{\*Dtqy p+<'Tgr qtv'uwo kwgf 0  
 D+ Ctej kxlv{\*G0P qxctc+<'Tgr qtv'uwo kwgf 0  
 E+ F gxgr o gpv'Eqqtf kpcvt{\*Dj cvk+<'P q'tgr qtv0  
 k+ Gf wecvqpcn'Gpf qy o gpv'Hwpf 0Tgeqo o gpf cvkqp'vq'ej cpi g'pco g'vq'tghgev'pgy "wugu  
 qh'hwpf 0Tcy f qp'pqvgf 'vj cv'vj g'f kuewuukqp'egpvtgf "qp'j qy 'o wej "qh'o ggvpki 'r tqhku  
 vq'vj g'hwpf.'cpf "pqv'vj g'hwpf 'kugth0'Vj g'Gf wecvqpcn'Gpf qy o gpv'Hwpf 'ku'ukni'wugf 'hqt  
 gf wecvqpcn'r wtr qugu0Vj ku'ohwpf o'ku'pqv'cewcm{ 'kp'c'ugr ctcv'ceeqwpv.'y g'lwv'tcem  
 k'cu'c'hpg'kgo 'kp'qwt'dwf i g0'Dj cvk'ukni'r tqr qugu'tgo qxkpi 'vj g'y qtf "oGpf qy o gpv0  
 Itqo "vj g'vkg'qh'hwpf kpi 0Hwpf "ewtgpwn{ 'j cu'&344.222{\*Eqmkt'pqvu'vj cv'hwpf 'y cu  
 uctvgf 'd{ "cp'cpqp{ o quw'f qpcvqp'qh'&4.222'lp'vj g'rcv'3; ; 2u0Ewtgpwn{.'k'i tqy u  
 rtko ctkn{ 'Itqo 'f qpcvqpu'ltqo 'o go dgtu0Vj ku'hwpf "gctpu'kpvtgu'cu'r ctv'qh'vj g  
 Xcpi wctf "ceeqwpv.'cmj qwi j 'k'ku'pqv'eqpukf gtedrg0  
 kk+ OCTCE'j cu'c'pwo dgt'qh'qy gt'uo cm'hwpf u.'cpf 'vj gtg'ku'c'tgeqo o gpf cvkqp'vq  
 tgcmecev'uo g'qh'vj g'Gf wecvqpcn'Gpf qy o gpv'Hwpf "vq'gZR cpf "gzkukpi 'uej qrtuj kr u  
 cpf lqt'vq'etgcvg'c'uej qrtuj kr 'vj cv'eqwf "dg'wugf "vq'cwtcev'f kgtug'o go dgtu0  
 kk+ Uj qwf 'y g'eqpxgtv'vj g'Gf wecvqpcn'Gpf qy o gpv'Hwpf 'lpvq'c'v'wg'gpf qy o gpv'cpf  
 tgutlev'vj g'r tkpek ng'cpf "qpni 'wug'vj g'lpvtgu0Y qwf 'vj ku'r qvgpvcn{ 'ecwug'r tqdrgo u  
 hqt'OCTCEA  
 kx+ Cnuq'pggf "vq'vj kpmcdqwh'tgs wgpe{ "qh'f qpcvqpu'vq'hwpf 0F kuewuukqp'qh'uko r n{  
 etgcvpki "cpqj gt'uej qrtuj kr "vq'i cvj gt'f qpcvqpu'cpf 'r w'vj g'f kuewuukqp'qh'j qy "vq  
 o cpci g'vj g'cewcn'hwpf "cv'c'rcvt'vko gA  
 x+ Rtqr qucn'vq'vj kpm'qh'cf f kkpccn'uej qrtuj kr u'pqv'lp'v'gto u'qh'c'eqpegr v'rkng'of kxgtuk{ o  
 dw'r gtj cr u'lp'v'gto u'qh'y j cv'r gqr ng'o ki j v'cewcm{ 'pggf "vq'cwgp'f 'c'OCTCE'o ggvpki  
 \*ej kfectg.'hqt'gzco r ng+0  
 xk+ Dj cvk'r tqr qugu'vq'f gxgr "uegpctku'qp'vj ku'rkpg'kgo "vj g'Gf wecvqpcn'Gpf qy o gpv  
 Hwpf +d{ 'vj g'J gtuj g{ 'o ggvpki 0P gzv'uci g'y qwf "dg'vq'f g'v'gto kpg'y j cv'vq'FQ'y kj

vj g"o qpg{0Ej ckt'tgeqo o gpf u'vj cv'F gxgnr o gpv'cpf "vj g"Vtgcwtgt'y qtn'vqi gjv gt"qp"  
 y ku'cun0"  
 xk+ Aj ckt'tgo kpf u'wu'vj cv'y g"ctg"ctgi kqpcn'qti cpl'vkvq"dw'y g"ctg"pqv'c'uo cm  
 qti cpl'vkvq."cpf "vj cv'y g'ecp'uj qwf "vj kpm'dki 0  
 F+ Y gd"Vgco <\*Ectkpi qrc+"Tgr qt v'uwo kvgf 0  
 k+ o ctcey gdwgo B i o cktqgo "ku'vj g'cf f tguu'vq"vug"vq"eqpcev'vj g"Y gd"vgo 0Cpf "c'y gd  
 r ci g<"j wr <ly y y 0 ctce0phq ly gd/vgo  
 G+ Tgi kqpcn'Ctej kxci'Cuqek'vkvq"Eqpuqt v'kwo \*TCCE+"P qxctc+<P q'tgr qt v0  
 k+ Tgi kqpcn'Ctej kxci'Cuqek'vkvq"Eqpuqt v'kwo \*TCCE+"tgs wgvkpi "hwpf kpi "htqo "ku  
 o go dgtu'vq"r c{ "hqt"cp"lpvgt'vq"uwr r qtv\$Ctej kxgu'F c{ "qp"vj g"J knt'f wtkpi "vj g  
 wreco kpi "UCC"o ggvkpi "lp"Cwi wu0UCC"ku'tgs wgvkpi "TCCE"tgi kqpcn'vq"r c{ "cp  
 cf f kqpcn'&47"vqy ctf "vj ku'ghqt v0O go dgtu'qh"TCCE"Uvggtkpi "ctg"pqv'j cr r { "cdqww  
 vj ku"vj g{ "hgn'vj g"Uqekv{ "qh"Co gtlecp"Ctej kxkuu'uj qwf "eqp'vkvq"vj g'rkp'u'uj ctg0  
 k+ O g'vugxgtcn'vko gu'lp"vj g'hcm'cpf "ci clp"lp"Lcpwct{ 0  
 k+ Gf wecvkq"Uwdeqo o kvgg"ej cktgf "d{ "X0P qxctc+"cdqww"vq"rwpej "c"uwtxg{ "vq"vj g  
 tgi kqpcn'vq"cum'cdqww"vj gkt "gf wecvkqpcn'qhgtkpi u0  
 H+ P cvkqpcn'Eqcrk'vkvq"htq"J kxqt { "P cwtqy +<Tgr qt v'uwo kvgf 0  
 k+ TCCE"u'P cvkqpcn'Eqcrk'vkvq"htq"J kxqt { "P E J +Tgr tgu'pvc'vkg."Lcp" cwtqy ."cwgpf gf  
 vj g"PEJ "Rqrk{ "Dqctf "O ggvkpi "qp"vkvwct{ "7."cpf "hgt'p'vq"vj cv'PEJ "j cu'c'dwf i gv  
 etwpej <"vj gtgu'cp"qpi qkpi "uj qtv'vcm'qh'&9.222."gxgp"y kj "qpn{ "qpg'hwm'vko g'vclh  
 o go dgt'cpf "c"r ctv'vko g'lpvgt'0Cnq."hgy gt"vj cp"j cni'qh'vj g"o go dgt"qti cpl'vkvq  
 ewtgpv{ "hpm'vq"PEJ "qp"vj gkt"qy p'y gdukgu0O go dgt"qti cpl'vkvq"ctg"geqwtci gf  
 vq"r tqo kpgpv{ "i kur r{ "vj g"PEJ "hqi q'lp"vj g'hwwt'g0PEJ "j cu'r tgr ctgf "hqi qu'cpf "vgz v  
 vj cv'o go dgt"qti cpl'vkvq"ecp"vug0Vj g"O CTCE"Y gd"Vgco "y kmj gr "eqqtf kpcv0  
 k+ k+ TCCE"u'o go dgtuj k'lp"PEJ "y kmj pggf "vq"dg'tgxkukgf "lp"vj g'hcm'cu'vj g'ewtgpv"  
 eqpuqt v'vkn'cttcepi go gpv'qpn{ "i qgu'wpv'vkvwct{ "423; 0Cu'qh'pqy ."qpn{ "c'r gtegpvci g"qh'  
 TCCE"r c{ u'lpvq"vj g"PEJ "o go dgtuj k'0

# **KP VGTO KUKQP \*7'O KP WGU+" O ggvkpi "tguwo gf "v33-28'eo "**

X+ Qrf "Dwukpguu

C+ Tgxky "qh'vj g"F kxgtuk{ "( "kpenwukq"Vcun'Hqteg"cpf "Vqy p"J cni'lp"Dwh'vq"cpf "Hkpcn  
 Tgeqo o gpf vkvqpu"i 0J wj ."X0P qxctc."O 0Vki j g+  
 k+ Vj cpnu'vq"i gqh'cpf "O qm{ "hqt"eqqtf kpcvki  
 k+ Vcngcy c{ u<O CTCE"ku'pqv'ewtgpv{ "c"xgt { "f kxgtug"qti cpl'vkvq"cpf "vj cv'y g"eqwf  
 dg"dgwgt"cnku'cu'cp"qti cpl'vkvq0Vj gtg"ctg"o cp{ "f khtgpv'y c{ u'vq"mqm'cv'vj ku'kuuwg0  
 Hqt"gzco r ng."mqm'kpi "cv'dettlgtu'vq"gpvgtkpi "vj g'r tqhguukq"ku'qpg'y c{ "vq"mqm'cv'vj gug  
 kuuwgu'cpf "j qy "vq"cf f tguu'vj go 0Ucrct { "kpgs vkv{ "ku'cpq'vj gt"kuuwg0  
 k+ Uj qwf "dg"c"o vnk'r tqpi gf "cr r tqcej ."cnj qwi j "hcnwtg"ku'c'r qvgp'vkn'qweqo g0  
 k+ O CTCE"j cu'uqo g"o qo gpwo "cpf "j cu'dggp"mqm'kpi "lpvq"vj gug"kuuwgu'lp"cp"lp/f gr vj  
 o cpgt0  
 x+ Rqqr ng"uggo gf "lp'hxqt"qh'j cxkpi "c"F kxgtuk{ "cpf "kpenwukq"Eqo o kvgg  
 xk+ Rqvgp'vkn'y qtmuj qr u<D{ uvcpf gt"vcl'kpi ."O letq/ci i tguukq"vcl'kpi 0UCC"j cu'dggp  
 j cxkpi "y qtmuj qr u'qp"Ewntcn'Eqo r gvgpe{ "cwi j v'd{ "J grgp"Y qpi "Uo kj +0Rgtj cr u  
 qpg"eqwf "dg"j grf "lp"eqplwpevq"y kj "vj g"Y kn kpi vq."F G."O CTCE"o ggvkpi 0Rcki g

P gy o cp'y kmltgcej 'qww'q'J gngp'Y qpi 'Uo kj 'cdqweqqtflpvc'kpi 'vj ku'qp'dgi cni'qh'vj g'  
 Gf wecvkqp'Ego o kwgg'  
 xkk+ A qy 'f'q'y g'gpeqwtci g'c'f kxgtug'i tqwr 'qh'r qqr ng'vj cv'vj gtg'ctg'dgpgkhu'v'q'dgkpi 'cp  
 ctej kxkvA'Uwi i gukqp'v'kpxqmg'pgy l{qwp'gt'r tqhgukqpcni'i gpgtcv'kqpcni'f kxgtug+  
 cpf 'ctej kxcluwf gpw'lp'qtf gt'v'q'i gv'c'lt guj 'r gtur gev'xg'cpf 'tgcni' 'vj kpm'vay ctf 'vj g  
 hwwtg0  
 xkk+ Uwi i gukqp'v'kpxqmg'O CTCE'lp'o qtg'o gpv'qtkpi 0  
 kz+ Uj qwf 'vj gtg'dg'c'ucpf kpi 'r qukkqp'qp'vj g'Uvgtkpi 'Ego o kwgg'hqt'c'i tcf wcv'uwf gpvA  
 Tcv'gt'vj cp'j c'kpi 'qpg'uwf gpv'tgr tgu'p'v'y j { 'pqv'j c'xg'lpv'gt'pulu'uwf gpv  
 tgr tgu'p'v'xgu'qp'cm'vj g'ucpf kpi 'eqo o kwgg'uA'Ec'p'Ecwewu'tgr u'dg'o qtg'kpxqmg'f 'lp  
 ctej kxcl'gf wecvkqp'r tqi tco u'lp'vj gk'eqo o w'p'k'gu' r gtj cr u'j c'kpi 'c'uwf gpv'uj cf qy  
 Ecwewu'tgr uA'Uqo g'hcw'w' 'ctg'o qtg'kpxqmg'f 'lp'r tqhgukqpcni'qti cpl'cv'kpu'vj cp  
 qy gtu'vj gtg'hqt'g'vj g'uwf gpw'j c'xg'xct { kpi 'r'xg'ni'qh'kpxqmg'o gpv'cv'xkv' 'lp'O CTCE+0  
 ðUP CRö'Uwf gpw'cpf 'P gy 'Ctej kxcl'Rtqhgukqpcni'i tqwr 'cv'UCC'o ki j v'dg'c'o qf gr0  
 z+ Eqwf 'uwxg'f 'i tcf wcv'uwf gpw'v'q'cun'j qy 'vj g'f 'o ki j v'dgu'v'kng'v'q'i gv'kpxqmg'f 'lp  
 O CTCEA'Eqwf 'Uvgtkpi 'j c'xg'c'i tcf wcv'uwf gpv'hc'k'qp'A'Eqwf 'vj g'i tcf wcv'g  
 uwf gpv'cv'wpgf c'peg'cv'Uvgtkpi 'dg'tq'cv'kpi A'P qv'vj cv'Uvgtkpi 'Ego o kwgg'o ggv'kpi u  
 ctg'cewcm' 'qr gp'v'q'O CTCE'o go dgtu0  
 zk+ Uvgtkpi 'y kml'p'x'g'v'ki cv'g'uqo g'qh'vj g'qr v'kpu'f k'uew'ugf 'j gtg0Vj g'Cf o k'p'k'w'cv'qt'ecp  
 i kxg'eqo o kwgg'ej cktu'ceegu'v'q'm'q'ni'cv'eqo o kwgg'x'q'w'p'vggt'qr v'kpu'ug'ge'v'f 'qp  
 O go dgt'Er'k'em0Uq.'eqo o kwgg'ej cktu'ecp'ugctej 'hqt'uwf gpw'lp'c'r ct'v'ew'rt'tgi kqp0  
 zkk+ A'vcy 'r qm'v'q'Uvgtkpi 'tg'et'g'cv'kqp'qh'p'gy 'r qukkqp'<F kxgtuk'f 'Eqqtf k'pc'v'qt'x'q'v'kpi  
 o go dgt'qh'Uvgtkpi . 'g'ge'v'f 'r qukkqp.'ej cpi g'v'q'D{/m'y u0Uqo g'eq'p'egtpu'gzr tgu'ugf  
 ó j qy 'v'q'cu'guu'cpf 'g'x'c'w'cv'g'ch'ge'v'uA'U'qt'p'p' 'eq'p'egtpu'gzr tgu'ugf 'ur g'ek'hc'cm' 'd {  
 o k'p'qtk'f 'o go dgtu'qp'Uvgtkpi 'cdq'w'j c'kpi 'c'x'q'v'kpi 'o go dgt'qp'Uvgtkpi 0K'ic'x'q'v'kpi "  
 o go dgt. 'k'v'ku'cp'g'ge'v'f 'r qukkqp.'tc'vj gt'vj cp'cr r q'k'p'v'g'f 0F q'gu'p'q'v'j c'kpi 'c'x'q'v'g'v'k'k'ng'  
 eq'p'x'gt'uc'v'kqp'A'c'nu'q'c'f 'k'ue'w'uk'qp'qh'et'g'cv'kqp'qh'c'eqo o kwgg'qp'F kxgtuk'f 'cpf "  
 k'p'en'uk'qp'0N'guu'q'dl'ge'v'kqp'v'q'vj g'et'g'cv'kqp'qh'vj g'Ego o kwgg'vj cv'ecp'hqto w'cv'g'r q'k'ek'gu'  
 cpf 'ce'v'kpu'vj cv'y g'ecp'ko r ngo gpv0Uvgtkpi 'o go dgtu'uw' r q't'v'g'f 'vj g'k'f'gc'qh'et'g'cv'kpi 'c'  
 uc'pf kpi 'eqo o kwgg.'y j k'ej 'y q'wf 't'gs'w'k'g'c'ej cpi g'v'q'vj g'D{/m'y u0Vj k'u't'gs'w'k'gu'c'  
 d'cm'q'v'x'q'v'g'0"



**NWPEJ '**  
**O ggv'kpi 't'guwo gf 't'v'34<57't'o "**

zkk+ Xqvg'tg'<gu'cd'rkuj o gpv'c'F kxgtuk'f 'cpf 'k'p'en'uk'qp'Eqqtf k'pc'v'qt0Q'pg'cd'w'gp'v'kqp0  
**Vj k'u'y cu'è'r r t'q'x'g'f "**  
 zkx+ Xqvg'tg'<uj qwf 'F kxgtuk'f 'cpf 'k'p'en'uk'qp'Eqqtf k'pc'v'qt'j c'xg'x'q'v'kpi 'r t'k'x'k'ngi guA'Vy q  
 k'p'h'x'qt0V'y q'cd'w'gp'v'kpu0C'm'q'vj gtu'qr r qu'g'f 0P q'v'è'r r t'q'x'g'f 0'  
 zx+ Xqvg'tg'<gu'cd'rkuj o gpv'qh'c'F kxgtuk'f 'cpf 'k'p'en'uk'qp'Ego o kwgg'y kj 'c'f'g'uki pc'v'g'f  
 dw'f i gv'f g'v'gto k'pgf 'lp'eq'pl'w'p'ev'kqp'y kj 'vj g'Vt'g'cu'wt'gt.'vj g'Ej ckt.'cpf 'vj g'F'(' 'K  
 Eqqtf k'pc'v'qt0Vj k'u'y cu'è'r r t'q'x'g'f 0  
 zxk+ P g'z'v'ug'r u'P g'g'f 'v'q'r tgr ctg'y qtf kpi 'hqt'D{/m'y 't'g'x'k'uk'qp'u'52'f'c { u'lp'cf x'c'p'eg'qh  
 vj g'D'w'uk'p'guu'o ggv'kpi 'lp'J gtu'j g { 0C'h'gt'vj cv'y g'j c'xg'52'f'c { u'v'q'ug'pf 'q'w'c'd'cm'q'v'v'q'  
 vj g'O CTCE'o go dgtuj kr 0C'ur g'ek'ni'eqo o kwgg'y k'ni'd'g'cr r q'k'p'v'g'f 'd { 'vj g'ej ckt'v'q'v'cm'f "

yj g'xqvu0O 0Vki j g.'O 0Mkf f '\*o go dgtu'cv'rti g+."cpf 'O 0Nlpf dgti j '\*Ej ckt."  
 P qo kpcvkpu'cpf 'Ggevkpu+y kn'dg'y ku'eqo o kwgg0'  
 zxkk+ ðY gðg'cn'dgcwkhwr' gqr ng.ð'uckf 'Xkp'y kj 'eqpxkvpq0  
 D+ Qr gtevkpu'O cpwcn'tgxkgy '\*XOP qxctc+  
 k+ Ugg'Ugetgvct { ð'tgr qtv'cdqyg  
 E+ Utcvgi le'Rncp'tgxkgy '\*XOP qxctc+  
 k+ XOP qxctc'j cu'cttcpi gf 'hqt'c'hckkcvqt'i tqwr '\*htqo 'y g'Egpvt'hqt'Ngcf gtuj kr 'cpf  
 Qti cplk cvkqpcn'Ej cpi g'cv'y g'Wpksgtukf { 'qh'O ct { rpf +v'q'o cpci g'y g'f kuewukqp  
 co qpi 'y g'i tqwr 'y cv'y cu'etgcvgf 'v'vcng'qp'y ku'cun0  
 kk+ Uggtkpi 'o c { 'j cxg'v'cr r tqxg'c'o kqqt'dwf i gv'v'q'hckkcvg'y ku'cevkkf { 0

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C+ O 0Mkf f 'ð'ui i guu'y cv'dgecwug'qwt'cdkkrf { 'v'eqo o wpkcv'xktwcmf { 'j cu'ko r tqxgf.  
 uj qwf 'y g'cwgo r v'v'j'j cxg'y g'ecr cdkkrf { 'qh'j cxkpi 'y g'Uggtkpi 'Eqo o kwgg'o ggkpi  
 xktwcmf { 'wukpi 'I qVq'O ggkpi 'qt'cpqj gt'vgej pqrqi { 00EE 'Eqqt kpcvt'y kn'eqpvcev'CX  
 Eqqt kpcvt'cdqwlpxguki cvkpi 'c'o ketqr j qpg'cpf 'y gd'eco 0

~~XXX~~ Ucpf kpi 'cpf 'Qr gtevkpcn'Ego o kwgg

C+ Cy ctf u'\*Ewtxq+<'Tgr qtv'uwo kwgf 0  
 D+ Ego o wpkcvkpu'\*EkcmUeqw+<'Tgr qtv'uwo kwgf 0  
 E+ Gf wecvkp '\*P gy o cp+<'Tgr qtv'uwo kwgf 0  
 k+ Uwi i gukpu'hqt'y qtmij qr u'y greqo g  
 kk+ Ego o kwgg'uggnkpi 'eqo o gpvct { 'qp'f tch'j cpf qw'qh'y qtf kpi 'tgi ctf kpi 'c'r qrke { 'cpf  
 eqptcev'y cv'cf f tguugu'qh'eqphgtgpeg'y qtmij qr 'ecpegm'v'kpu0'Vy q'f tch'eqptcew  
 f kntkdwgf 'hqt'kputwexqtu0'Y kn'cnq'dg'f kntkdwgf 'd { 'go cki'cpf 'y kn'eqpvkpwg  
 f kuewukqp'cv'y g'J gtuj g { 'o ggkpi 0  
 kk+ Uwi i gukqp'htqo 'D0Eqnkt'y cv'O CTCE'lp'xguki cvg'f gxgnr kpi 'c'y ggm/rpi  
 ðO qf gtp'Ctej kgu'k'pukwgo'v'r g'r tqi tco 0  
 F+ O go dgtuj kr '\*Dqtf gp+<'Tgr qtv'uwo kwgf 0  
 G+ P qo kpcvkpu'cpf 'Ggevkpu'\*Nlpf dgti +<'Tgr qtv'uwo kwgf 0  
 k+ Uxgten'wpeqpvugf 'tcegu'hqt'qr gp'r qukkpu0F kuewukqp'qh'y c { u'v'q'gpeqwtci g'r gqr ng  
 v'v'p'hqt'ðj gcx { 'rk'kpi ð'r qukkpu'\*Ecwewu'tgr tgu'pvc'kxgu.'Qh'hegtu+  
 kk+ Rgtj cr u'c'o gpvktpi 'r tqi tco 'eqwf 'j gr 'k'pur k'g'r gqr ng'v'y cpv'v'q'dg'o qtg'lp'xqrxgf  
 lp'O CTCE'cevkkkku

~~XXXX~~ Ucv'g'Ecwewu'P gy 'Dwulpguu'cpf 'Wf f cvgu

I gpgten'pqv'htqo 'y g'Cf o kpkntcvqt0Y qwf 'rkng'v'cf f 'ecwewu'gxgpv'v'q'y g'y gduk'gxgpw' ecngpf ct0'

Cf f kkp'cn'eqo o gpw+<'F 0Dgm'ðN'ku'hqt'Nkgtcwgtgö'xqnpvggt'qr r qtwpkf { 'cv'y g'Nkdtct { 'qh'  
 Eqpi tgu0'Ec'p'y g'r w'q'w'ecm'v'q'O CTCE'o go dgtu0'

C+ F gny ctg'\*F gpkuqp+<'Tgr qtv'uwo kwgf 0  
 D+ F kntk'v'qh'Eqrno dlc'\*F qpcj vg+<'Tgr qtv'uwo kwgf 0

k+ kphqto cvkqp'kgo <"Vj g'P GJ "j cu'c'pgy "i tcpv'r tqi tco "ur gekhecmf "hqt'uwucvklpi  
gzkukpi "rtqlgevu'y cv'tgrvg"vq'y g'J wo cplkgu"Rtgugtxcvklpi"cpf "Ceeguu+0  
kk+ F O E C "gz go r vklpi" { gct "o "uj qwf "ctej kxkuu'ukm'dg'cmqy gf "vq"i q "ctqwpf "F T O "qp  
f ki kcn'hkgu0

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F+ P gy "Lgtug{ "Rqm<"Tgr qtv'uwo kwgf 0  
G+ P gy "[ qtn" cttkmq<"Tgr qtv'uwo kwgf 0  
H+ Rgppu{ rxcplc" Tqj tdcwi j <"Tgr qtv'uwo kwgf 0  
I + Xkti kplc" O qttku<"Tgr qtv'uwo kwgf 0  
J + Y guv'Xkti kplc" Go gtrkpi <"Tgr qtv'uwo kwgf 0

KZ0Cf lqwt po gpv

1 : 31pm



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## Tgr qt v'qhv'j g'Ej ckt " Urt lpi '423: 'Uvggt lpi 'Eqo o kvgg'O ggv lpi " 34'Cr tkl423: "

- 30 Kp'O ctej . 'Kr ctvlekr cvgf 'kp'vj g'r j qpg'o ggv lpi 'qh'vj g'Tgi kqpcn'Ctej kxgu'Cuuqekcvkqpu  
Eqpuqt vkw 'TCCE-0Vj g'Gf wecvkqp'Uwdeqo o kvgg'O CTCEa'tgr 0ej cktu+j' cu'f kmtkdwgf 'c  
uwtxg{ 'r gtvc lpi 'v'gf wecvkqpcn'qht lpi u'vj tqwi j qw'vj g'tgi kqpcn'Uq'ht 'vj gtg'ctg'45  
tgr qpugu'qw'qh'66'qti cpl cvkqpu'Y g'y kn'r tgegu'vj g'f cv'f w lpi 'rcvt 'kp'Cr tkl'cpf 'r tqr qug  
tgeqo o gpf cvkqpu'cv'vj g'pgzv'TCCE'r j qpg'o ggv lpi 'qp'4; 'O c{ '423: 0
- 40 Eqo r qugf 'o { 'kpcn'0Hqo 'vj g'Ej ckt'0'ht 'vj g'ur t lpi 'kuwg'qh'Mid-Atlantic Archivist0
- 50 Kgpv'k'gf 'cpf 'o gv'y kj 'c'hckkcvqt'v'q'dgi kp'r rpp lpi 'vj g'o ggv lpi 'hqt cv'ht 'vj g'Utcvgi le  
Rcp'j ch'f c{ 'tgvgecv'uej gf wgf 'ht'37'xpg'423: 'cv'vj g'Wpkxgtukv'qh'O ct { rpf a'u'O lej gmg  
Uo kj 'Rgthqto lpi 'Ctw'Nkdtct { 'Rkcpq'Tqgo -0Vj ku'r rpp lpi 'hmqy gf 'eqo o wplecv lpi 'qt  
o ggv lpi 'y kj 'qvj gt'r qvgp'v'cn'hckkcvqtu'y j q'f'f 'pqv'y qtn'q'w'ht'xctk'wu'tgcuppu0
- 60 Y qtn'gf 'y kj 'F kxgtukv'(' 'kpcn'ukqp'Eqqtf kpcvqtu'o'I gq'h'J wj 'cpf 'O qm'('Vki j g'o'qp'r kq'v lpi  
vj g'wug'qh'r tqpqw'kddqpu'ht'vj g'Urt lpi '423: 'O CTCE'o ggv lpi 0Vj g'r wtej cug'qh'vj g  
tkddqpu'y cu'hw'pf gf 'vj tqwi j 'c'i k'0
- 70 Vj cpmu'q'c'ui i gukqp'htqo 'cp'kvgtguvf 'o go dgt.'Ky qtn'gf 'y kj 'Cy ctf u'Eqo o kvgg'Ej ckt  
o Cf tlcpc'Ewgtxq'o'qp'htqo ckl lpi 'vj g'pco lpi 'qh'vj g'uej qrtuj k'u'cpf 'tgh'gecv lpi 'vj cv'pco lpi  
qp'vj g'O CTCE'y gduk'g'cpf 'kp'vj cv'eqo o kvgg'a'u'cpw'cn'

Tgr gev'hw'v' 'uwo kvgf ."  
Xlpegpv'LOP qxctc"

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**To: MARAC STEERING COMMITTEE**  
**From: SARA PREDMORE, MARAC ADMINISTRATOR**  
**Date: April 6, 2018**  
**Re: ADMINISTRATOR'S REPORT**

Submitted to the Steering Committee on Thursday, April 12, 2018 in Hershey, PA.

## **Membership Statistics**

There are currently 935 active members (as of April 5, 2018):

Regular Members: 804  
Retired Members: 28  
Student Members: 103

## **Membership Statistics Comparison**

<b>Member Type</b>	<b>2015 (as of 3/12/2015)</b>	<b>2016 (as of 4/10/2016)</b>	<b>2017 (as of 4/10/2017)</b>	<b>2018 (as of 4/5/2018)</b>	<b>% change 2017-2018</b>
<b>Regular</b>	967	927	891	804	-9.76
<b>Retired</b>	32	30	23	28	21.74
<b>Student</b>	112	113	135	103	-23.70
<b>Total</b>	1111	1070	1049	935	-10.87

## **Current State Caucus Membership**

<b>Caucus</b>	<b>2017 – 2018 Membership (as of 4/5/2018)</b>
<b>DC</b>	152
<b>Delaware</b>	46
<b>Maryland</b>	192
<b>New Jersey</b>	143
<b>New York</b>	246
<b>Pennsylvania</b>	226
<b>Virginia</b>	149
<b>West Virginia</b>	15

**Note:** As some members may be part of more than one caucus, total membership numbers and total state caucus numbers may differ.

### State Caucus Membership Statistics Comparison

Caucus	2016 (as reported 4/10/16)	2017 (as reported 4/10/17)	2018 (as of 4/6/2018)
DC	172	190	152
Delaware	42	43	46
Maryland	202	240	192
New Jersey	134	144	143
New York	227	234	246
Pennsylvania	257	239	226
Virginia	179	171	149
West Virginia	19	19	15

### New Membership Applications

Month	2017-2018
February	11
March	5
April (as of 4/5/18)	0
Total	16

### Additional Information

**MemberClicks Upgrade:** Making adjustments and troubleshooting issues has taken a significant amount of time and will be ongoing as we approach the first member renewal period using the upgraded system.

- ⊘ Overall, the system is smoother. It provides greater accessibility for members on the front end and simpler payment processing for 3<sup>rd</sup> party payments.
- ⊘ The search functions, however, are not as robust. Requests have been forwarded to the technology engineers to address this issue.
- ⊘ E-lists (listserv): Trying to manage the new e-lists in the same manner as in the old system is very labor intensive. I recommend adjusting our procedures to allow members to personally manage their participation on caucus e-lists without Administrator intervention.

**Spring Conference:** Registration included 367 pre-registered attendees, 19 vendors, 8 sponsors, and 2 advertisers.

**Mid-Atlantic Archivist:** The Spring 2018 newsletter was uploaded to the website on March 21, 2018.

**Elections:** The 2018 Election ran from January 26, 2018 to February 9, 2018. 885 ballots were distributed. 356 people voted.

**By-laws revision:** The vote regarding the establishment of a Diversity & Inclusion Committee and Coordinator will take place after the spring conference. Ballots will be mailed out no later than April 20th and the vote will close on May 4, 2018.

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""Vq"<"OCTCE"Uvggtkpi "Eqo o kwgg'O go dgtu"

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"TG"<"Ej ckt/grgevTgr qtv"

30Hqwtvggp"cr r qkpvo gpvultgcr r qkpvo gpw'j cxg'dggp'o cf g'ukpeg'yj g'Y kpvgt"Uvggtkpi "Eqo o kwgg  
o ggkpi <"

**Eqo o wplecvkpu'//"**kj cp"Ekcm\*eq/Ej ckt+"

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**Hpcpeg'//"**Mcv{ "Tcy f qp"

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60Ej ckt/grgev'y kn'f kuewu'y kj "lpeqo kpi "Ej ckt/grgev<

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o go dgtu'y j gp"xcecpelgu'qeew"cpf "q'hkmlp'hqt"yj g'Ej ckt'h'yj g'pggf "ctkugu0

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eqo o kwggu"gzegr vP qo kpcvkpu'("Ggevkpu'+cu'r gt"yj g'D{/Ncy u."yj g{ "uj qwf "f kxf g"yj g  
eqo o kwggu'dgy ggp"yj go "hqt"o czko wo "eqxgtci g0

≠ Ukpeg"yj g'hktu'f gct"ku'wrr qugf "vq"dg"c"rgctkpi "vko g'hqt"yj g'Ej ckt/grgev"yj g'Ej ckt)u'f wkgu  
uj qwf "dg"uj ctgf "qt"f kxf gf "dgy ggp"yj g'vy q"qh'yj go 0

## Meetings Coordinating Committee

### 9 April 2018

#### 1) This Meeting (In Case You Aren't Sure):

When: April 12-14, 2018

Where: Hershey, PA

Hotel: Hotel Hershey

Room Rate: \$169

Food and Beverage Minimum is \$10,000

Local Arrangements: Pam Whitenack (Hershey Community Archives) and Tara Wink (University of Maryland Baltimore)

Program Committee: Deirdre Joyce (Central New York Library Resources Council) and Jessica Wagner Webster (Baruch College, City University of New York)

Update: Pre-conference registration 366.

#### 2) Next Meeting:

##### **Fall 2018**

When: October 11-13, 2018

Where: Wilmington, DE

Hotel: Hotel DuPont

Room Rate: \$169

Food and Beverage Minimum is \$17,500

Local Arrangements and Program Co-Chairs: Emily Cottle (Vanguard), Sarah Denison (Delaware Public Archives), Kate Fair (Vanguard) and Maegan Peterman (Delaware Public Archives) --  
MARAC.Wilmington@gmail.com.

Update: It is looking as if the plan to have Helen Wong Smith teach her Cultural Diversity Competency workshop, as well as give the plenary address, may not be feasible. I will provide an update at Steering and explain further.

The Treasurer forwarded the budget.

#### 3) Pretty Sure Will Take Place, Better Be Pretty Darn Sure:

##### **Spring 2019**

Morgantown, WVA

When: April 11-13, 2019

Hotel: Morgantown Marriott at Waterfront Place

Proposed Room Rate: \$169

Proposed Food and Beverage Minimum is \$12,000.00

Local Arrangements Co-Chairs: Lori Hostuttler (WVU) and Danielle Emerling (WVU)

Program Committee Co-Chairs: Marie Elia University at Buffalo (and Elizabeth Scot (East Stroudsburg University of Pennsylvania)

Update: Have not been able to get final contract from hotel yet. Hopefully, will report signing at Steering.

4) Hot Off The E-mail:

**Spring 2020**

Considering Return to Saratoga Springs

Local Arrangements Co-Chair: Brian Keough

5) Other Considerations:

**Fall 2019**

Alexandria, VA

Hotels CFPs sent, wondering about LAC, and other details.

**Fall 2020**

Bedford Springs Omni?

Still courting us.

Submitted by

Mary K. Mannix, MCC Chair

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VQ<' O CTCE'QHHEGTU"  
UVCVG'ECWEWU'TGR TGUGPVCVKGU"  
EQO O KVVGG'EJ CKU"  
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o ggkpi 'v'dg'j grf 'lp'J gtuj g{.'RC'qp'Cr tkl34.'423: 0

30 J ki j rki j w'qh'j g'Vj kf 'S wctvgt'Vtgcuwgtø'Tgr qtv\*ugg'cwcej gf +'ctg'rkugf 'dgmj 0

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r wdrkcvkp'ucrgu=qh'o ggkpi 'y qtmij qr 'kpego g=dcprnkpvgtguf=cpf 'i klu'v'j gpptcn  
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Vcz 'hgg=lpuguo gpv'huugu=Hcm'4239'cpf 'Ur tkpi '423: 'eqphgtgpeg'gzr gpugu=cpf 'dcprnkpi 'cpf  
etgf k'ectf 'tcpuvcvkp'hgu0

40 Vj g'O CTCE'H 423; 'Dwf i gv\*ugg'cwcej gf +'ku'hqy ctf gf 'v'j g'Uggtkpi 'Eqo o kwgg'hqt'ku'cr r tqxcn  
cpf 'cf qr vkp0'C'eqo r ctukp'v'j g'dwf i gv'hqt'H 423: 'ku'cnq'r tqxf gf 0+

≠ Vj g'Gf wecvkp'Eqo o kwgg'r mpu'cr r tqzko cvn{ '32'qh'o ggkpi 'y qtmij qr u'lp'H 3; . 'f qy p  
ltqo '37'lp'H 3: =kpego g'cpf 'gzr gpugu'j cxg'dggp'cf lwugf 'hqt'j g'mj gt'pwo dgt0

≠ Rtkpvpi 'equu'hqt'j g'pgy urgwgt'j cxg'kpetgcugf 'uki pkkecpv{0Vj g'Eqo o wplecvkpu  
Eqo o kwgg'cnq'pggf u'v'r tkpvltgr tkpv'c'pwo dgt'qh'r tqo qvkpcn0 cvtkcn0

50 Cxgtci g'tgwtpu'qp'lpuguo gpv'hqt'O CTCEø'ceeqwpu'f wtkpi 'j g'r tgxkwu's wctvgt '\*tqwpgf gf 'v'j g  
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Ugggtkpi 'Eqo o kwegg0Rgcug'pqw'vj cv'qwt'gxr gpugu'cpf 'kpeqo g'ctg'vpcvkg0Vj g"NCE 'ku'cy ctg'qh  
vj g'j k j 'equv'qh'hqqf "cv'vj g'j qvgn'cpf "y kn'dg'y qtnkpi "q"dtkpi "vj g'equv'f qy p"cu'o wej "cu'r quukdr0  
Vj g'Hkpcpeg"eqo o kwegg'tgeqo o gpf u'crr tqxcn'y kj "vj g'hqmqy kpi "cf lwuo gpv<Nqy gtlkpi "qp'vj g  
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**FY 2018, 3rd Quarter** (January 1, 2018 to March 31, 2018)

<u>CATEGORY</u>	<u>Budget</u>	<u>1st Quarter</u>	<u>2nd Quarter</u>	<u>3rd Quarter</u>	<u>4th Quarter</u>	<u>Total</u>	<u>% Budget</u>
<b>INCOME</b>							
Membership Dues	\$43,000.00	\$31,025.00	\$4,105.00	\$3,012.00		\$38,142.00	89%
Conference Registration	\$90,000.00	\$23,697.00	\$7,446.00	\$44,062.00		\$75,205.00	84%
Conference Vendors	\$15,000.00	\$2,800.00	\$5,525.00	\$6,850.00		\$15,175.00	101%
Conference Sponsorship	\$6,000.00	\$250.00	\$3,000.00	\$2,500.00		\$5,750.00	96%
Publication Advertising	\$4,000.00	\$1,260.00	\$560.00	\$268.00		\$2,088.00	52%
Publication Sales	\$350.00	\$45.00	\$0.00	\$270.00		\$315.00	90%
Mailing List Sales	\$150.00	\$0.00	\$0.00	\$0.00		\$0.00	0%
Off-Meeting Workshops	\$24,400.00	\$7,131.00	\$540.00	\$1,710.00		\$9,381.00	38%
Bank Interest	\$100.00	\$22.86	\$22.87	\$22.87		\$68.60	69%
Investment Interest	\$2,000.00	\$358.32	\$0.00	\$0.00		\$358.32	18%
Gifts to Operations	\$500.00	\$627.00	\$30.00	\$65.00		\$722.00	144%
Miscellaneous	\$0.00	\$0.00	\$250.00	\$25.00		\$275.00	0%
<b>Total Income</b>	<b>\$185,500.00</b>	<b>\$67,216.18</b>	<b>\$21,478.87</b>	<b>\$58,784.87</b>	<b>\$0.00</b>	<b>\$147,479.92</b>	<b>80%</b>
<b>EXPENSES</b>							
Administrator	\$20,000.00	\$6,014.75	\$3,562.95	\$5,069.52		\$14,647.22	73%
Web Services	\$6,400.00	\$5,100.00	\$0.00	\$277.00		\$5,377.00	84%
Archivist	\$1,000.00	\$1,000.00	\$0.00	\$0.00		\$1,000.00	100%
Accountant	\$1,500.00	\$0.00	\$0.00	\$1,075.00		\$1,075.00	72%
Advocacy	\$2,145.00	\$231.72	\$1,500.00	\$275.00		\$2,006.72	94%
Insurance Policy	\$1,100.00	\$0.00	\$0.00	\$0.00		\$0.00	0%
Phone	\$650.00	\$164.47	\$164.77	\$165.09		\$494.33	76%
Postage	\$1,000.00	\$108.83	\$254.58	\$173.30		\$536.71	54%
Office Supplies	\$150.00	\$0.00	\$0.00	\$12.78		\$12.78	9%
Food	\$6,255.00	\$861.24	\$730.62	\$379.48		\$1,971.34	32%
Travel	\$5,850.00	\$1,221.69	\$1,018.37	\$941.62		\$3,181.68	54%
Equipment	\$0.00	\$114.29	\$27.20	\$0.00		\$141.49	0%
Printing and Design	\$7,100.00	\$2,005.59	\$2,349.93	\$1,531.64		\$5,887.16	83%
Conference	\$110,000.00	\$306.85	\$34,566.42	\$7,730.27		\$42,603.54	39%
Lodging	\$4,200.00	\$1,366.72	\$567.04	\$486.92		\$2,420.68	58%
Honoraria	\$8,900.00	\$3,000.00	\$1,500.00	\$0.00		\$4,500.00	51%
Awards and Prizes	\$1,450.00	\$120.00	\$575.00	\$0.00		\$695.00	48%
Scholarships	\$2,000.00	\$0.00	\$2,790.00	\$0.00		\$2,790.00	140%
Banking Fees	\$5,500.00	\$1,465.75	\$1,677.38	\$1,141.51		\$4,284.64	78%
Investments	\$0.00	\$0.00	\$112.70	\$364.56		\$477.26	0%
Disaster Assistance	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	0%
Miscellaneous	\$300.00	\$90.00	\$50.00	\$25.00		\$165.00	55%
<b>Total Expenses</b>	<b>\$185,500.00</b>	<b>\$23,171.90</b>	<b>\$51,446.96</b>	<b>\$19,648.69</b>	<b>\$0.00</b>	<b>\$94,267.55</b>	<b>51%</b>
<b>Net Income or (Loss)</b>		<b>\$44,044.28</b>	<b>(\$29,968.09)</b>	<b>\$39,136.18</b>	<b>\$0.00</b>	<b>\$53,212.37</b>	

<u>Account Balances</u>			<u>Opening</u>	<u>Credits</u>	<u>Debits</u>	<u>Closing</u>
PNC Checking	\$122,556.78	Operating	\$14,076.19	\$58,784.87	(\$19,648.69)	\$53,212.37
PNC Savings	\$76,461.19	Restricted	\$139,660.00	\$65.00	\$0.00	\$139,725.00
Vanguard Bonds	\$80,280.13	Reserve	\$65,000.00	\$0.00	\$0.00	\$65,000.00
<b>Total</b>	<b>\$279,298.10</b>	<b>Surplus</b>	<b>\$21,360.73</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$21,360.73</b>
		<b>Totals</b>	<b>\$240,096.92</b>	<b>\$58,849.87</b>	<b>(\$19,648.69)</b>	<b>\$279,298.10</b>

**Summary - Second Quarter FY 2018**

Opening Balance	\$240,096.92
Total Income	\$58,849.87
Total Expenses	(\$19,648.69)
Closing Balance	\$279,298.10

<u>Restricted Funds</u>			<u>Opening</u>	<u>New Gifts</u>	<u>Spending</u>	<u>Closing</u>
PNC Savings	\$59,444.87	Disaster Assist.	\$11,323.00	\$20.00	\$0.00	\$11,343.00
Vanguard Bonds	\$80,280.13	Education	\$122,602.00	\$25.00	\$0.00	\$122,627.00
<b>Total</b>	<b>\$139,725.00</b>	<b>Finch Award</b>	<b>\$5,735.00</b>	<b>\$20.00</b>	<b>\$0.00</b>	<b>\$5,755.00</b>
		<b>Total</b>	<b>\$139,660.00</b>	<b>\$65.00</b>	<b>\$0.00</b>	<b>\$139,725.00</b>

# MARAC Budget - Fiscal 2019

## MARAC Income

Category	Anticipated
<b>Annual Receipts</b>	
Membership Dues	\$43,000.00
Conference Registration	\$95,000.00
Conference Vendors	\$15,000.00
Conference Sponsorship	\$6,000.00
Publication Advertising	\$4,000.00
Publication Sales	\$350.00
Mailing List Sales	\$150.00
Off-Meeting Workshops	\$13,500.00
Bank Interest	\$100.00
Investment Interest	\$2,000.00
Gifts to Operations	\$500.00
Miscellaneous	\$0.00
<b>TOTAL</b>	<b>\$179,600.00</b>

## MARAC Expenses

Category	Allocated
<b>General</b>	
Administrator	\$7,830.00
Executive Officers	\$23,600.00
<b>Caucuses</b>	
Delaware	\$500.00
District of Columbia	\$500.00
Maryland	\$500.00
New Jersey	\$500.00
New York	\$500.00
Pennsylvania	\$500.00
Virginia	\$400.00
West Virginia	\$450.00
<b>Committees</b>	
Steering	\$6,440.00
Communications	\$9,850.00
Education	\$10,600.00
Finance	\$8,730.00
Meetings Coordinating	\$0.00
Membership	\$200.00
Nominating	\$50.00
Custer	\$450.00
Distinguished Service	\$250.00
Finding Aids	\$750.00
Scholarship	\$2,000.00
Fall Conference (LAC)	\$50,000.00
Spring Conference (LAC)	\$55,000.00
<b>TOTAL</b>	<b>\$179,600.00</b>

## MARAC Income

Category	Anticipated
<b>Annual Receipts</b>	
Membership Dues	\$43,000.00
Conference Registration	\$95,000.00
Conference Vendors	\$15,000.00
Conference Sponsorship	\$6,000.00
Publication Advertising	\$4,000.00
Publication Sales	\$350.00
Mailing List Sales	\$150.00
Off-Meeting Workshops	\$13,500.00
Bank Interest	\$100.00
Investment Interest	\$2,000.00
Gifts to Operations	\$500.00
Miscellaneous	\$0.00
<b>TOTAL</b>	<b>\$179,600.00</b>

## MARAC Expenses

Category	Allocated
<b>Operational Support</b>	
Administrator Salary	\$20,000.00
Web Services	\$5,125.00
Archivist	\$1,000.00
Accountant	\$1,500.00
Advocacy	\$2,095.00
Insurance Policy	\$1,100.00
<b>General Support</b>	
Phone	\$650.00
Postage	\$1,085.00
Office Supplies	\$150.00
Food	\$6,305.00
Travel	\$5,290.00
<b>Rented Services</b>	
Equipment	\$0.00
Printing and Design	\$8,700.00
Conference	\$105,000.00
Lodging	\$3,700.00
Honoraria	\$6,350.00
<b>Awards and Scholarships</b>	
Awards and Prizes	\$1,450.00
Scholarships	\$2,000.00
<b>Financial Operations</b>	
Banking Fees	\$7,200.00
Investments	\$0.00
<b>Other</b>	
Disaster Relief	\$0.00
Miscellaneous	\$900.00
<b>TOTAL</b>	<b>\$179,600.00</b>

## MARAC Budget - FY2018

### MARAC Income

Category	Anticipated
<b>Annual Receipts</b>	
Membership Dues	\$43,000.00
Conference Registration	\$90,000.00
Conference Vendors	\$15,000.00
Conference Sponsorship	\$6,000.00
Publication Advertising	\$4,000.00
Publication Sales	\$350.00
Mailing List Sales	\$150.00
Off-Meeting Workshops	\$24,400.00
Bank Interest	\$100.00
Investment Interest	\$2,000.00
Gifts to Operations	\$500.00
Miscellaneous	\$0.00
<b>TOTAL</b>	<b>\$185,500.00</b>

### MARAC Expenses

Category	Allocated
<b>Operational Support</b>	
Administrator Salary	\$20,000.00
Web Services	\$6,400.00
Archivist	\$1,000.00
Accountant	\$1,500.00
Advocacy	\$2,145.00
Insurance Policy	\$1,100.00
<b>General Support</b>	
Phone	\$650.00
Postage	\$1,000.00
Office Supplies	\$150.00
Food	\$6,255.00
Travel	\$5,850.00
<b>Rented Services</b>	
Equipment	\$0.00
Printing and Design	\$7,100.00
Conference	\$110,000.00
Lodging	\$4,200.00
Honoraria	\$8,900.00
<b>Awards and Scholarships</b>	
Awards and Prizes	\$1,450.00
Scholarships	\$2,000.00
<b>Financial Operations</b>	
Banking Fees	\$5,500.00
Investments	\$0.00
<b>Other</b>	
Disaster Relief	\$0.00
Miscellaneous	\$300.00
<b>TOTAL</b>	<b>\$185,500.00</b>

## MARAC Budget - FY2019

### MARAC Income

Category	Anticipated
<b>Annual Receipts</b>	
Membership Dues	\$43,000.00
Conference Registration	\$95,000.00
Conference Vendors	\$15,000.00
Conference Sponsorship	\$6,000.00
Publication Advertising	\$4,000.00
Publication Sales	\$350.00
Mailing List Sales	\$150.00
Off-Meeting Workshops	\$13,500.00
Bank Interest	\$100.00
Investment Interest	\$2,000.00
Gifts to Operations	\$500.00
Miscellaneous	\$0.00
<b>TOTAL</b>	<b>\$179,600.00</b>

### MARAC Expenses

Category	Allocated
<b>Operational Support</b>	
Administrator Salary	\$20,000.00
Web Services	\$5,125.00
Archivist	\$1,000.00
Accountant	\$1,500.00
Advocacy	\$2,095.00
Insurance Policy	\$1,100.00
<b>General Support</b>	
Phone	\$650.00
Postage	\$1,085.00
Office Supplies	\$150.00
Food	\$6,305.00
Travel	\$5,290.00
<b>Rented Services</b>	
Equipment	\$0.00
Printing and Design	\$8,700.00
Conference	\$105,000.00
Lodging	\$3,700.00
Honoraria	\$6,350.00
<b>Awards and Scholarships</b>	
Awards and Prizes	\$1,450.00
Scholarships	\$2,000.00
<b>Financial Operations</b>	
Banking Fees	\$7,200.00
Investments	\$0.00
<b>Other</b>	
Disaster Relief	\$0.00
Miscellaneous	\$900.00
<b>TOTAL</b>	<b>\$179,600.00</b>

**MARAC Fall 2018 Meeting****Wilmington, DE****Proposed Budget**

<b>Category</b>	<b>Total for 350 Attendees</b>	<b>Total for 400 Attendees</b>	<b>Total for 450 Attendees</b>
<b>INCOME</b>			
Registration Fees	\$36,125	\$41,365	\$46,890
Exhibitor Fees + Sponsorships	\$11,600	\$11,600	\$11,600
Meals	\$6,728	\$7,434	\$8,114
Thursday NM Reception	\$1,000	\$1,000	\$1,000
Friday Reception	\$1,500	\$1,625	\$1,750
Tour Fees	\$600	\$600	\$600
Workshop Fees	\$3,925	\$3,925	\$3,925
<b>TOTAL INCOME</b>	<b>\$61,478</b>	<b>\$67,549</b>	<b>\$73,879</b>
<b>EXPENSES</b>			
Administrative Services	\$5,000	\$5,000	\$5,000
Hotel Expenses	\$7,250	\$7,250	\$7,250
LAC Expenses	\$400	\$400	\$400
Meal Expenses	\$24,285	\$27,459	\$30,688
Reception	\$13,907	\$13,907	\$13,907
Registration/Program	\$3,050	\$3,050	\$3,050
Session/Plenary Speakers	\$1,266	\$1,266	\$1,266
Tour Expenses	\$0	\$0	\$0
Workshop Expenses	\$3,100	\$3,100	\$3,100
<b>TOTAL EXPENSES</b>	<b>\$58,258</b>	<b>\$61,432</b>	<b>\$64,661</b>
<b>Profit</b>	<b>\$3,220</b>	<b>\$6,117</b>	<b>\$9,218</b>
Thursday Steering Dinner	\$1,600	\$1,600	\$1,600
<b>Net Income/Projected Profit</b>	<b>\$4,820</b>	<b>\$7,717</b>	<b>\$10,818</b>

**Wilmington, DE**

Category	350			400			450		
	Cost/Item	Attendees	Total	Cost/Item	Attendees	Total	Cost/Item	Attendees	Total
INCOME									
Registration Fees									
Pre-Reg Members	\$95.00	180	\$17,100.00	\$95.00	210	\$19,950.00	\$95.00	230	\$21,850.00
Pre-Reg Non-Members	\$135.00	55	\$7,425.00	\$135.00	60	\$8,100.00	\$135.00	70	\$9,450.00
Late Reg Members	\$105.00	30	\$3,150.00	\$105.00	35	\$3,675.00	\$105.00	42	\$4,410.00
Late Reg Non-Members	\$145.00	25	\$3,625.00	\$145.00	28	\$4,060.00	\$145.00	32	\$4,640.00
Member, on-site	\$115.00	15	\$1,725.00	\$115.00	18	\$2,070.00	\$115.00	21	\$2,415.00
Non-member, on-site	\$155.00	10	\$1,550.00	\$155.00	12	\$1,860.00	\$155.00	15	\$2,325.00
Student registration	\$50.00	30	\$1,500.00	\$50.00	32	\$1,600.00	\$50.00	35	\$1,750.00
(1-day) Saturday only	\$55.00	5	\$275.00	\$55.00	5	\$275.00	\$55.00	5	\$275.00
Total Registration Fees		350	\$36,350.00		400	\$41,590.00		450	\$47,115.00
Exhibitor Fees									
Ads (Full Page)	\$500.00	1	\$500.00	\$500.00	1	\$500.00	\$500.00	1	\$500.00
Ads (Half Page)	\$300.00	2	\$600.00	\$300.00	2	\$600.00	\$300.00	2	\$600.00
Ads (Quarter Page)	\$200.00	2	\$400.00	\$200.00	2	\$400.00	\$200.00	2	\$400.00
Ads (Business Card)	\$125.00	2	\$250.00	\$125.00	2	\$250.00	\$125.00	2	\$250.00
Donations/Sponsorships	\$500.00	2	\$1,000.00	\$500.00	2	\$1,000.00	\$500.00	2	\$1,000.00
Donations/Sponsorships	\$250.00	3	\$750.00	\$250.00	3	\$750.00	\$250.00	3	\$750.00
Rental-1 Table	\$600.00	6	\$3,600.00	\$600.00	6	\$3,600.00	\$600.00	6	\$3,600.00
Rental-2 Tables	\$800.00	6	\$4,800.00	\$800.00	6	\$4,800.00	\$800.00	6	\$4,800.00
Total Exhibitor Fees			\$11,900.00			\$11,900.00			\$11,900.00
Meals									
Exhibitor Lunch - Friday	\$37.00	2	\$74.00	\$37.00	2	\$74.00	\$37.00	2	\$74.00
Lunch, Friday (Chicken)	\$36.60	65	\$2,379.00	\$37.00	70	\$2,590.00	\$37.00	75	\$2,775.00
Lunch, Friday (Steak)	\$37.00	50	\$1,850.00	\$37.00	55	\$2,035.00	\$37.00	60	\$2,220.00
Lunch, Friday (Veg)	\$37.00	25	\$925.00	\$37.00	30	\$1,110.00	\$37.00	35	\$1,295.00
Sat Breakfast Mtg	\$25.00	60	\$1,500.00	\$25.00	65	\$1,625.00	\$25.00	70	\$1,750.00
Total Meals			\$6,728.00			\$7,434.00			\$8,114.00
Thurs. New Member Reception									
Sponsorship	#####	1	\$1,000.00	#####	1	\$1,000.00	\$1,000.00	1	\$1,000.00
Total TNM Reception Income			\$1,000.00			\$1,000.00			\$1,000.00
Friday Reception									
Guest Tickets	\$25.00	20	\$500.00	\$25.00	25	\$625.00	\$25.00	30	\$750.00
Sponsorship	#####	1	\$1,000.00	#####	1	\$1,000.00	\$1,000.00	1	\$1,000.00
Total Reception Income			\$1,500.00			\$1,625.00			\$1,750.00
Tour Fees									

Tour #1 (Hagley)	\$5.00	10	\$50.00	\$5.00	10	\$50.00	\$5.00	10	\$50.00
Tour #2 (Brandywine River Museum of Art)	\$22.00	10	\$220.00	\$22.00	10	\$220.00	\$22.00	10	\$220.00
Tour #3 (Old Swede's Church)	\$5.00	10	\$50.00	\$5.00	10	\$50.00	\$5.00	10	\$50.00
Tour #4 (Twin Lakes Brewing Company)	\$5.00	10	\$50.00	\$5.00	10	\$50.00	\$5.00	10	\$50.00
Tour #5 (Auburn Heights and the Marshall Steam Museum)	\$14.00	10	\$140.00	\$14.00	10	\$140.00	\$14.00	10	\$140.00
Tour #6 (Mt. Cuba Center)	\$12.00	10	\$120.00	\$12.00	10	\$120.00	\$12.00	10	\$120.00
Tour #7 (Delaware History Museum)	\$5.00	10	\$50.00	\$5.00	10	\$50.00	\$5.00	10	\$50.00
Tour #8 (Nemours Mansion & Gardens)	\$15.00	10	\$150.00	\$15.00	10	\$150.00	\$15.00	10	\$150.00
<b>Total Tour Fees</b>			<b>\$830.00</b>			<b>\$830.00</b>			<b>\$830.00</b>
<b>Workshop Fees</b>									
Workshop #1	\$45.00	15	\$675.00	\$45.00	15	\$675.00	\$45.00	15	\$675.00
Workshop #2	\$45.00	20	\$900.00	\$45.00	20	\$900.00	\$45.00	20	\$900.00
Workshop #3	\$90.00	15	\$1,350.00	\$90.00	15	\$1,350.00	\$90.00	15	\$1,350.00
Helen Wong Smith	\$25.00	40	\$1,000.00	\$25.00	40	\$1,000.00	\$25.00	40	\$1,000.00
<b>Total Workshop Fees</b>		<b>90</b>	<b>\$3,925.00</b>		<b>90</b>	<b>\$3,925.00</b>		<b>90</b>	<b>\$3,925.00</b>
<b>Total Income</b>			<b>\$62,233.00</b>			<b>\$68,304.00</b>			<b>\$74,634.00</b>

## Proposed Budget - Expense Estimates

Category	350			400			450		
	Cost/Item	Attendees	Total	Cost/Item	Attendees	Total	Cost/Item	Attendees	Total
<b>EXPENSES</b>									
<b>Administrative Services</b>			<b>\$5,000.00</b>			<b>\$5,000.00</b>			<b>\$5,000.00</b>
<b>Hotel Expenses</b>									
AV Expenses			\$7,000.00			\$7,000.00			\$7,000.00
Misc. Expenses			\$250.00			\$250.00			\$250.00
<b>Total Hotel Expenses</b>			<b>\$7,250.00</b>			<b>\$7,250.00</b>			<b>\$7,250.00</b>
<b>LAC Expenses</b>			<b>\$400.00</b>			<b>\$400.00</b>			<b>\$400.00</b>
<b>Meal Expenses</b>									
Coffee Breaks Thursday am/pm	\$30.00	40	\$1,200.00	\$30.00	45	\$1,350.00	\$30.00	55	\$1,650.00
Steering Committee	\$64.00	25	\$1,600.00	\$64.00	25	\$1,600.00	\$64.00	25	\$1,600.00
New Member Reception		30	\$300.00		40	\$400.00		50	\$500.00
Friday Continental Breakfast	\$22.00	260	\$5,720.00	\$22.00	300	\$6,600.00	\$22.00	338	\$7,436.00
Coffee Breaks Friday am/pm	\$30.00	260	\$7,800.00	\$30.00	300	\$9,000.00	\$30.00	338	\$10,140.00
Lunch, Friday (Chicken)	\$37.00	65	\$2,405.00	\$37.00	70	\$2,590.00	\$37.00	75	\$2,775.00
Lunch, Friday (Steak)	\$37.00	50	\$1,850.00	\$37.00	55	\$2,035.00	\$37.00	60	\$2,220.00
Lunch, Friday (Veg)	\$37.00	25	\$925.00	\$37.00	30	\$1,110.00	\$37.00	35	\$1,295.00
Exhibitor Lunch - Friday	\$37.00	2	\$74.00	\$37.00	2	\$74.00	\$37.00	2	\$74.00
Sat. Bus. Breakfast	\$30.00	115	\$3,450.00	\$30.00	130	\$3,900.00	\$30.00	145	\$4,350.00
<b>Total Meal Expenses</b>			<b>\$25,324.00</b>			<b>\$28,659.00</b>			<b>\$32,040.00</b>
<b>Reception</b>									
Insurance			\$400.00			\$400.00			\$400.00
Caterer			\$8,506.50			\$8,506.50			\$8,506.50
Transportation Fees			\$0.00			\$0.00			\$0.00
Facility Fees			\$5,000.00			\$5,000.00			\$5,000.00
<b>Total Reception Costs</b>			<b>\$13,906.50</b>			<b>\$13,906.50</b>			<b>\$13,906.50</b>
<b>Registration/Program</b>									
Program			\$2,800.00			\$2,800.00			\$2,800.00

Folders, Badges, etc.			\$250.00			\$250.00			\$250.00
<b>Total</b>									
<b>Registration/Program Costs</b>			<b>\$3,050.00</b>			<b>\$3,050.00</b>			<b>\$3,050.00</b>
<b>Session/Plenary Speakers</b>									
Lodging			\$0.00			\$0.00			\$0.00
Meals/Per diem			\$266.00			\$266.00			\$266.00
Travel			\$1,000.00			\$1,000.00			\$1,000.00
<b>Total Session/Plenary</b>			<b>\$1,266.00</b>			<b>\$1,266.00</b>			<b>\$1,266.00</b>
<b>Tour Expenses</b>									
Tour #1 (Hagley			\$0.00			\$0.00			\$0.00
Tour #2									
(Brandywine River	\$22.00	10	\$220.00	\$22.00	10	\$220.00	\$22.00	10	\$220.00
Museum of Art									
Tour #3 (Old			\$0.00			\$0.00			\$0.00
Swede's Church)									
Tour #4 (Twin			\$0.00			\$0.00			\$0.00
Lakes Brewing									
Company)									
Tour #5 (Auburn									
Heights and the	\$14.00	10	\$140.00	\$14.00	10	\$140.00	\$14.00	10	\$140.00
Marshall Steam									
Museum)									
Tour #6 (Mt. Cuba	\$12.00	10	\$120.00	\$12.00	10	\$120.00	\$12.00	10	\$120.00
Center)									
Tour #7 (Delaware			\$0.00			\$0.00			\$0.00
History Museum)									
Tour #8 (Nemours	\$15.00	10	\$150.00	\$15.00	10	\$150.00	\$15.00	10	\$150.00
Mansion & Gardens)									
<b>Total Tour Expenses</b>			<b>\$630.00</b>			<b>\$630.00</b>			<b>\$630.00</b>
<b>Workshop</b>									
Honoraria			\$2,000.00			\$2,000.00			\$2,000.00
Lodging/Meals			\$500.00			\$500.00			\$500.00
Travel (Speakers)			\$400.00			\$400.00			\$400.00
Misc. Expenses			\$200.00			\$200.00			\$200.00
<b>Total Workshop Expenses</b>			<b>\$3,100.00</b>			<b>\$3,100.00</b>			<b>\$3,100.00</b>
<b>Total Expenses</b>			<b>\$59,926.50</b>			<b>\$63,261.50</b>			<b>\$66,642.50</b>



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# MARAC

Mid-Atlantic Regional Archives Conference

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## **MARAC Archivist Report Steering Committee Meeting April 12, 2018 Hershey, PA**

### **Records Retention Schedule**

I am continuing to work on drafting a detailed records retention schedule with the assistance of the MARAC Historian, Lauren Brown.

### **DRUM Submissions**

I sent an email reminder to the Hershey Program Committee co-chairs to solicit submissions for DRUM (Digital Repository at the University of Maryland) both before and after the Hershey conference. There have been no additional DRUM submissions since the January 2018 Steering Committee meeting. (Presentation submissions are generally highest immediately after a conference.)

### **Processing**

Lauren Brown, the MARAC Historian, continues to volunteer his time to work on appraising materials in the MARAC archives that have accumulated over the last few years. We are planning to have a student work with Lauren this summer to assist with arrangement.

### **Reference**

Since January 2018 (last report), there have been no reference questions submitted to the MARAC archivist or the MARAC historian.

Respectfully submitted,

Elizabeth A. Novara  
MARAC Archivist"



Date: April 12, 2018

To: Steering Committee

From: Sharmila Bhatia, Development Coordinator

Subject: Development Coordinator's Report to Steering

### Education Endowment Fund Proposals

#### Background:

MARAC is an exempt organization as an educational organization under section 501(c)(3) of the Internal Revenue Code and since the 1990s has been committed to expanding educational opportunities for members. In 1993 Finance Committee recommended that MARAC use 20% from conference profits to fund meeting scholarships and this passed in 1994. In the late 1990s funds for an endowment fund were set aside and invested first in a savings account and later in certificates of deposit. MARAC obtaining 501(c)(3) status lead to further exploration of expanding MARAC's educational role and the MARAC Educational Endowment Fund was established in 2001. The fund is not held in a separate account, but is tracked separately as a budget line item. It is not maintained or operated as a true endowment fund. In 2017, Steering approved to discontinue having 20% of meeting profits automatically transferred to this fund. Finance Committee reviews the meeting profits for the fiscal year and makes a recommendation for the disposition of meeting profits to the Steering Committee. As of January 2018 the balance for this fund was \$122,000.

#### Proposal 1:

The first proposal is to rename the Educational Endowment Fund to be the Archival Education Fund. This fund can be used to support the following educational opportunities:

- MARAC Workshop registrations.
- MARAC Meeting registrations and travel awards.
- Scholarships for students enrolled in an archival graduate program.

As a 501(c)(3) exempt organization, MARAC can accept donations for scholarships which are tax deductible for the donor as long the following criteria are met:

- The scholarship is awarded on an objective and nondiscriminatory basis.
- The donation must be used for the purpose of paying tuition, fees, books, and supplies for courses at an educational institution.

Furthermore, for the student recipient, the scholarship is tax free if the scholarship will be used to pay tuition, fees, books, or supplies for courses at an educational institution. If a scholarship is used for any other purpose, it is considered taxable income.

MARAC Steering voted at the July 2017 meeting that scholarships for graduate archival education will be paid to the students' universities. This ensures that the funds are being used for educational purposes, meets all the tax requirements for being tax free for the student, the donations are tax deductible, and MARAC is distributing the funds appropriately.

MARAC, as an educational organization, can use the funds to support its own educational offerings, such as workshops, conference registrations, and travel to support attendance.

The fund does not have to be self-supporting through donations. Finance Committee already has a procedure to review and allocate meeting profits for educational purposes.

#### Proposal 2:

The second proposal is to create an endowment fund. While use of the funds will be similar to the proposed archival education fund, it would be managed differently. Generally with endowment funds, some or all of the principal is restricted with the interest used fund scholarships and awards. Funds are not liquid and are unavailable for operating expenses if the need arises. The assumption is that an endowment fund would limit MARAC's ability to be flexible if there is a financial hardship; however, Steering could, in the future, vote to unrestricted the funds for such use. There is no legal/tax limitation, but this option should not be used to manage periodic short falls in the operating budget.

MARAC will have to create an investment policy for investing the principal for growth and may have to hire a professional to manage the endowment.

Currently MARAC has a Vanguard account and could explore expanding our investments through Vanguard. The policy should identify the appropriate investment vehicles (mutual funds, stocks, bonds, etc.), manage risk, and define the uses for the funds. Ideally, endowments should be large enough and well invested in a diversified portfolio to be self-funding. Earnings may be tax free for non-profits. In addition to the investment policy, MARAC should create a spending policy. With the fund's current balance of \$122,000, it would be difficult to earn enough in interest or dividends to be self-funding. This could very well be a future option especially if MARAC sees an increase in donations or receives a donation through a major sponsor or an estate. MARAC could continue to add to the endowment with meeting profits.

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## **Web Team Report**

Steering Committee Meeting  
Hershey, PA  
April 12, 2018

Web Team members: Liz Caringola, Christy Fic, Anastasia Matijkiw, Laura Montgomery, Don Sailer

### **Updates since the last Steering Meeting:**

Laura completed an accessibility review of the MARAC website. While at the Hershey conference, the Web Team will review her report and discuss how to address problems with the site. In addition, we are continuing to work on “refreshing” sections of the site, including Upcoming Conferences and Committee pages.

The Web Team will also talk with MCC about exploring alternative options to the Guidebook app in light of their new pricing package. Instead of creating Guidebooks for free (for under 200 downloads), they will charge \$5 for each time a guide is downloaded to a unique device. Liz crunched some quick numbers to see what we would have paid for the last four conferences (see chart on following page).

### **Other tasks include:**

- € Liz and Anastasia maintained the Job Opportunities page
- € Liz made updates to caucus pages as requested.
- € Don made updates to committee pages as well as the publication page as requested

Respectfully submitted,

Don Sailer

<b>Guidebook Metered Prices</b>		
<b>Conference</b>	<b># of downloads</b>	<b>Price if we had been on the new metered pricing*</b>
Buffalo	91	430
Newark	147	710
Annapolis	116	555
Pittsburgh	136	655
		*Price is \$5 per download, first 5 downloads are free. If people view the web version, we are not charged