

# MARAC

Mid-Atlantic Regional Archives Conference

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New York • Pennsylvania • Virginia • West Virginia

## **Report of the Chair-Elect Winter 2017 Steering Committee Meeting January 27, 2017**

1. Participated in the phone interviews and in-person interviews at Dickinson College for MARAC Administrator candidates
2. Took part in two conference calls organized by Rachel Grove Rohrbach with Allen Dieterich-Ward (history professor at Shippensburg University), current president of the Pennsylvania Historical Association, to discuss potential partnerships and collaborative programming opportunities between MARAC and PHA. During the second call we were also joined by Tammy Hamilton (on behalf of Hershey Local Arrangements Committee), Jessica Wagner Webster (on behalf of Hershey Program Committee), and Mike Knies (MARAC and PHA member, soon to host PHA in Scranton). This idea was initiated by Prof. Dieterich-Ward and ably shepherded by Rachel.
3. Drafted a proposal for a Mentoring Program for MARAC, submitted at this meeting of the Steering Committee
4. Contributed revisions to the January 15, 2017 “Statement to the Archival Community from Concerned Archivists” (<https://actionnetwork.org/petitions/a-statement-to-the-archival-community>)

Respectfully submitted,  
Vincent J. Novara

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## **Chair's Report Winter 2017 Steering Committee Meeting January 19, 2017**

### **Administrator**

As you all know by now, we hired a new MARAC Administrator, Sara Predmore, who started on January 4. She will join us at the January 27 Steering Committee. Welcome Sara! Thank you to Jim Gerencser, Vin Novara, Mary Mannix, and Katy Rawdon for completing the successful search to fill this position. Thank you also to Jim Gerencser for serving as the Acting Administrator since August 2016.

### **Advocacy**

Sent a letter to the Governor of Virginia on December 20, 2016 to express MARAC concerns over recent budget cuts at the Library of Virginia.

### **Operations Manual/Wiki**

I have begun contacting officers and committee chairs to edit their section of the revised operation manual. I hope to have a completed version for the Steering Committee's approval at the April 2017 meeting. Danna Bell has agreed to help me complete this activity.

Respectfully submitted,  
Brian Keough, MARAC Chair, 2015-2017

# Report from the Task Force on Diversity & Inclusion

MARAC Steering Committee, January 27, 2017

Submitted by Lindsey Loeper, Chair

## 1. Overview

### 1.1 Summary of work completed

Established in Summer 2015 by MARAC Chair Brian Keough, the Task Force on Diversity and Inclusion has worked together to complete the charge as outlined by the Steering Committee.

During this time we

- completed a review of related professional organization's efforts in supporting diversity and inclusion (see report to Steering, Spring 2016);
- compiled a resource list of publications, reports, and other content related to diversity and inclusion in the archives field and the cultural heritage field in general (now available at [marac.info/diversity](http://marac.info/diversity));
- surveyed the MARAC membership to determine the efforts and goals that are valued by our members (see report to Steering, Spring 2016);
- and drafted and submitted to the Steering Committee a definition of diversity as it relates to our profession, a position statement on diversity, and a code of conduct (see report to Steering, Fall 2016, with updated versions below in sections 3, 4, and 5.1.5).

### 1.2 Summary of report

This report contains updated versions of the diversity definition, the position statement, and the code of conduct, incorporating suggested revisions by members of the Steering committee and the Task Force. The bulk of the report contains recommended initiatives to support the goals outlined in the position statement. These recommendations are arranged by related committee area: Steering, Communications, Meetings and Education, and Membership. Our intention is that this work will be supported by the D&I coordinator(s) and committee in partnership with the existing committees.

In addition to the specific initiatives outlined, we recommend that all MARAC committees and serving members consider how their work promotes, supports, and/or unintentionally hinders our shared goal of a working within a diverse and inclusive member organization and profession.

### 1.3 Task Force members

Kirsten Strigel Carter

Ken Cleary, Member-At-Large

E. Evan Echols  
Christine George, Member-At-Large  
Josue Hurtado  
Lindsey Loeper, Member-At-Large, Chair  
Megan Miller

## 2. Task Force Charge

MARAC seeks to encourage, enhance, and facilitate communication, education and relations among persons of various races, physical conditions, religions, national origins, citizenship, genders, ages, socio-economic backgrounds, and sexual orientation within the archival profession in general and within the MARAC region in particular. To accomplish this goal, the MARAC Task Force on Diversity and Inclusion has the following charge:

- Review and/or survey the efforts of other related professional organizations efforts to increase diversity
- Survey MARAC members to identify the critical issues pertaining to diversity facing the organization
- Define and articulate diversity as it applies to the profession, to MARAC and to our members
- Draft a position statement on diversity for the Steering Committee to consider and adopt as MARAC policy
- Recommend specific goals, objectives, and new initiatives for increasing diversity in MARAC and in the profession as a whole

The Task Force on Diversity reports to the Steering Committee and will works closely with the MARAC Chair. The Task Force is responsible for submitting items for action, discussion and feedback as necessary from the Steering Committee and the Task Force Chair is responsible for submitting a final report to the Steering Committee in an appropriate time period.

## 3. Diversity definition

The Mid-Atlantic Regional Archives Conference (MARAC) promotes a diverse and inclusive membership, one that will encourage, enhance, and facilitate communication, education and relations among persons of various races, physical conditions, religions, national origins, citizenship, gender identities or expressions, ages, socio-economic backgrounds, and sexual orientation within the archival profession, the archival repositories and cultural heritage organizations in the MARAC region, the archival collections in our care, and our research and scholarship partners.

## 4. Diversity statement

The Mid-Atlantic Regional Archives Conference (MARAC) seeks to be a diverse and inclusive member organization. As stated in the MARAC strategic plan, our members, research



communities, and collections will all “benefit from an organization that is dedicated to diversity, affordability, and collegiality.” We will work towards this goal by:

- promoting a respectful and open environment that welcomes members from all backgrounds, levels of expertise, and communities within the archival profession and the mid-Atlantic region;
- providing opportunities for professional discourse and engagement through service to MARAC and participation in meetings, publications, and other programming opportunities;
- identifying current barriers for participation and advocating for corrective action;
- and recognizing the varied strengths, needs, and perspectives present in our membership and valuing the opportunities for dialogue and growth that these differences provide.

Note: the recommended initiatives in section 5 were developed to specifically support the stated goals above.

## 5. Recommended initiatives

The recommendations outlined below are drawn from member feedback, the 2016 member survey, a survey of related member organization’s initiatives, and related publications. They are organized in relation to existing MARAC committees. Our hope is that this work will be carried out in partnership with these committees, drawing on their existing expertise and embedding the diversity and inclusion work into several areas of MARAC.

Many survey respondents pointed out the predominantly white membership of MARAC and other archival associations, reflecting the wider profession. Increasing diversity of the profession is a substantial task for MARAC to take on, but we can and should identify ways that we can support building a more inclusive profession. One option would be to support the existing programs established by our colleagues at other member associations or in the profession at large, programs such as the SAA/ACRL Mosaic scholarship, SAA-affiliated graduate student groups, and the annual Conference on Inclusion and Diversity in Library and Information Science (CIDLIS) at the University of Maryland, College Park, to name just a few examples.

### 5.1 Steering/MARAC infrastructure

#### **5.1.1 Establish Diversity and Inclusion Coordinator(s)**

The Diversity and Inclusion Coordinator shall serve as an officer of the Steering Committee, with voting privileges. This would require amending the bylaws and the requirements specified therein. The creation of such a position would signal to our membership our firm commitment to our diversity and inclusion goals, which would be furthered by the fact that an officer has voting rights. The Diversity and Inclusion Coordinator would act as a visible and accessible point of

contact for our members to bring their questions or concerns, as well as serve an instrumental part of the D&I Committee (see below).

The Diversity and Inclusion Coordinator shall hold office for two (2) years, from July 1st to June 30th and until a successor shall have been elected or qualified. The Diversity and Inclusion Coordinator shall attend all meetings of the Steering Committee and the Conference business meetings. The duties of the D&I Coordinator shall include, without limitation, to:

- a) serve as ex-officio chair of the Diversity and Inclusion Committee (in the same way that the Meetings Coordinator serves as the ex-officio chair of the Meetings Coordinating Committee);
- b) submit an annual report outlining work done in the past year to achieve diversity and inclusiveness and goals for the coming year;
- c) serve as the primary, confidential contact for Code of Conduct complaints, following up as necessary with the support and consultation of the Steering Committee;
- d) serve as the primary contact for all questions and concerns related to accessibility and inclusion at MARAC events, following up with appropriate leadership to address the question or concern;
- e) perform such other duties as pertain to the office and as may be assigned by the Steering Committee or as prescribed for the office by the adopted parliamentary authority.

Given the amount of work related to this position, as outlined in this report, we would like to propose a secondary option of creating a Diversity Coordinator and an Inclusion Coordinator as two separate positions. We envision the Inclusion Coordinator working, for example, on the code of conduct and the ADA compliance policy, whereas the Diversity Coordinator would focus on the work with Membership and the mentorship training. An alternative to this would be a single D&I coordinator but expanding the committee outlined below.

### **5.1.2 Establish Diversity and Inclusion Committee**

We believe that MARAC's work on diversity and inclusion will be best realized with the support of a standing committee. A standing committee "may be established upon recommendation of the Steering Committee and a majority vote of the membership" (Article 8.1); a special committee can be created with recommendation by Steering alone (Article 8.7). The Committee consists of three members, not including the Diversity and Inclusion Coordinator who serves as Committee Chair. The MARAC Chair-elect appoints all members of the committee, except for the committee chair. All committee members shall serve two-year terms and may be reappointed for a second term. Each Committee member will be assigned to serve as a liaison on one or more related committees - Communications, Education and Meetings Coordinating, or Membership. They will work in partnership to address the recommendations outlined in this report.

The primary purpose of the Committee is to facilitate, sponsor, and promote the diversity within the archival profession in general and the inclusiveness of the meetings and activities of MARAC particularly.

The Committee shall develop, coordinate, and support initiatives that will enhance and support the values and goals expressed in MARAC's diversity and inclusion statement.

The Committee shall identify ways to build and maintain an inclusive organization where differences of opinion, beliefs, and values are sought, listened to, respected, and valued.

The committee shall provides resources, consultation, and feedback to MARAC members as requested in order to support their efforts toward building and maintaining an inclusive, welcoming environment within the organization.

The committee shall serve as on-site coordinator for inclusion and diversity efforts at MARAC meetings.

*Note: some parts of this document are based in whole or in part on NEA's language regarding their Inclusion and Diversity Coordinator position. <https://newenglandarchivists.org/diversity>*

#### **5.1.3 Diversity & Inclusion priorities in strategic planning**

The current strategic plan is now 5 years old and will be under review in 2017. The language should be reviewed and clear objectives should be included.

#### **5.1.4 ADA compliance policy**

This may be a separate policy or could be included as part of the Meetings Manual. Emphasize MARAC's commitment to hosting meetings, workshops, and related events in ADA compliant venues. See example from the Association of Recorded Sound Collections:  
[http://www.arsc-audio.org/pdf/ARSC\\_ADA\\_Accessibility\\_Policy\\_and\\_Practices.pdf](http://www.arsc-audio.org/pdf/ARSC_ADA_Accessibility_Policy_and_Practices.pdf).

#### **5.1.5 Code of conduct policy**

The submitted policy incorporates changes requested by Steering in November 2016. Please note that additional work will need to be completed by the D&I coordinator in partnership with the Meetings and Education committees to outline how the policy will be enforced. We recommend that the policy be distributed annually to the membership e-mail list and then distributed to all attendees at future conferences or workshops.

#### **MARAC Code of Conduct**

The values delineated herein describe conduct based on a belief in the importance of civil discourse and the free exploration of ideas and concepts – with a fundamental respect for the rights, dignity and value of all persons.

MARAC does not tolerate harassment in any form. MARAC is committed to providing a harassment-free environment for its members and others who participate in its conferences, events, meetings, formal mentoring relationships, and online spaces, regardless of age, color, creed, disability, family relationship, gender identity and expression, individual lifestyle, marital status, national origin, physical appearance, race, religion, sex, sexual orientation, or veteran status.

Harassment may include abusive verbal comments and/or discriminatory images in public spaces, deliberate intimidation, stalking, harassing photography or recording, sustained disruption of talks or other events, inappropriate physical contact, and unwelcome sexual attention,

All participants are expected to observe these rules and behaviors in all conference venues, including online venues, and conference social events. Participants asked to stop a hostile or harassing behavior are expected to comply immediately. If an attendee continues to engage in harassing behavior, MARAC conference coordinators will take action in any form they deem appropriate, up to and including expulsion from the conference with no refund and/or notification of law enforcement authorities

If you feel that you are in immediate danger at any time during the MARAC meeting or related event, contact law enforcement (by dialing 911) or the facility front desk without delay. If you are not in immediate danger but feel that you are being harassed or that someone else is being harassed, or if you have other concerns, please immediately contact the MARAC Chair or the Local Arrangements co-chairs. All MARAC officers can be contacted with assistance from the volunteer staff at the Registration Desk.

Conference participants seek to learn, network and have fun. Please do so responsibly and with respect for the right of others to do likewise.

This policy is based on the [SAA Code of Conduct](#) which in turn is based on [the US OpenGLAM Friendly Space Policy](#), which in turn is based on [the Geek Feminism Wiki sample policy](#).

#### **5.1.6 Establish preference for online voting whenever possible**

The only matter that requires an in-person vote at a MARAC business meeting is a dues change (see Article 9.2 <http://www.marac.info/marac-bylaws>). Steering should default to recommending an online vote sent to the full membership whenever the method of the vote is not explicitly stated in the by-laws.

Notes provided by Jim Gerencser, December 7, 2016: "...the ONLY vote that is specifically outlined in the bylaws that it must take place at the business meeting is a change to dues. [article 9.2]

--During a business meeting, those members assembled can, by a majority vote, also force an action on the Steering Committee or overturn an action by the Steering Committee. [article 3.2]

--Votes to amend any proposed changes to the bylaws brought forward by the Steering Committee would take place at a business meeting [article 11.2], BUT, votes to actually approve to changes to the bylaws are voted on by the entire membership through referendum no later than 30 days after a business meeting. [article 11.3]

--The creation of new standing committees is to be voted upon "by the membership" (which I interpret as full membership by referendum), rather than only membership assembled at a business meeting. [article 8.1]

--So it seems to me that there is nothing to preclude voting via full member referendum -- in the same manner that we do for elections and bylaws amendments -- for many MARAC activities (excepting dues changes). The manner of voting for measures that are not specifically prescribed in the bylaws could be by whatever manner Steering chose."

### **5.1.7 Review language in Nominating and Elections Committee mission and CFN wording**

Current wording on the NEC webpage states, "In soliciting nominations and preparing a slate of candidates, the Committee shall strive for balanced representation of race, gender and gender identity, geographical distribution, and professional experience to insure that MARAC elections reflect the diverse constituency of its membership." This language should be reviewed for consistency with the D&I definition and statement adopted by MARAC. We also recommend that this statement be included in the call for nominations sent out to the membership each year.

## **5.2 Communications**

The first question on the member survey asked respondents to if they agreed with the following statement: "MARAC prioritizes diversity and inclusion in its programming and member services." Of 140 responses, 67 chose "Neutral"; open-ended responses in the survey support our interpretation that this is due in large part to members simply not knowing what is being done in this area. "I know that is formally a priority, but I have not been aware of how this priority manifests itself in the programming and services. This is not necessarily a failure on MARAC's part, but more a statement of my own lack of awareness."

Increased, targeted promotion of the D&I work by MARAC committees and members will not only help our members to learn more about this area but will also help to connect the services and resources available with the people that may benefit from them.

### **5.2.1 Promotion of MARAC service**

Our primary recommendation is promotion of existing MARAC initiatives to the MARAC membership through the MARAC mailing lists, blog, *Mid-Atlantic Archivist*, and other platforms. This outreach work should demonstrate the variety and the impact of work done by all MARAC groups; we want to highlight that this work is integrated throughout the work of MARAC and not as isolated initiatives. Examples of promotion Include highlights from meeting sessions, content

written by MARAC speakers (either expanded for *MAA* or as a summary for a blog or Facebook post), summaries of workshops with bibliographies of related resources, and summaries by committees on related projects.

### **5.2.2 Secondary: Promotion of MARAC members**

In addition to promoting the work done as part of MARAC service, we can also promote the work done by our members at their repositories or as part of service through other organizations. We recognize that this is already done through the *MAA* and in selection of speakers by the Program Committee, and simply wish to reiterate the importance of this work. Several examples of potential articles or sessions that we wish to highlight include:

- Mentor/mentee pairs roundtable to familiarize others with the SAA program
- Notification of related conferences, publications, or events in the MARAC region (for example, the annual Conference on Diversity and Inclusion in Library and Information Science at the University of Maryland, College Park)
- Examples of programming or collection development initiatives included in the Caucus News section of the *Mid-Atlantic Archivist*

### **5.2.3 Secondary: History Day service**

In addition to expanded outreach to graduate students, several survey respondents stressed the importance of advocating the importance of archives to a younger audience. Many of our colleagues have robust partnerships with K-12 audiences, not only school librarians and archivists, but also those serving in public libraries and museums. Archivists not working in these organizations may not feel prepared to work with younger researchers or be able to anticipate their research and instruction needs. A simple way to begin service to the K-12 community is by volunteering to work with the county or state History Day programs. There are several levels of involvement available, and serving as a History Day judge would be a low commitment option for our members. Service with History Day would make archivists a visible and active part of the event, and would increase our visibility within the local cultural heritage and K-12 education fields. It is also an opportunity to work with the State humanities councils. State caucuses could even plan this as a service day for MARAC members.

## **5.3 Education and Meetings Coordinating**

### **5.3.1 Workshop for entry level archival skills**

We recommend a workshop that is directly targeted at people working with archival collections, either as part of their profession or in a volunteer capacity, that have not had formal training either in the workplace or as part of an advanced degree. One survey respondent referred to “accidental archivists” - people that have found themselves working with archival collections in some capacity, typically as part of a larger project or community initiative. The workshop would focus on basic skills and techniques such as preservation best practices, hierarchical description, and access to materials. We recommend soliciting a CFP from interested instructors or groups of instructors to determine the syllabus and structure of the workshop; the New York State Documentary Heritage program’s basic workshops may serve as an example

(<http://www.archives.nysed.gov/workshops/catalog>). If combined with effective outreach and recruiting, this could be a good way to attract new membership and connect to communities in need of professional support.

Steering should consider how they might further support the workshop attendees through a reduced workshop fee or meeting registration. This would require a funding allocation by Steering to cover venue costs and the payment to the instructor(s). We do not wish to further strain the tight budgets of the Education and Local Arrangements committees, but a reduction in the registration fee would help certain communities of archivists working with no professional development budgets or working as volunteers. We may consider how this workshop, once in place, could further support the Karen A. Stuart Local History Collection Workshop & Conference Attendance.

### **5.3.2 Training workshop for mentors presented by SAA Mentoring group**

A successful mentor-mentee relationship can have a positive impact on new archival professionals. Instead of establishing a MARAC-specific mentorship program, we suggest working within the program available through the Society of American Archivists (<http://archivists.org/membership/mentoring>). Both potential mentors and mentees would benefit from increased promotion of this program. We also recommend a workshop for mentors offered in-person or as a free webinar for MARAC members. The workshop would provide an overview of the SAA program and prepare mentors for their role in the mentoring relationship.

### **5.3.3 Secondary: Best practices in MCC Meetings Manual**

Feedback about D&I related content at the MARAC meetings was generally quite positive. At this time, we do not want to put additional pressure on the Programming and Local Arrangements committees by implementing requirements or quotas on sessions relating to these topics. We should consider how we can better support the PC and LAC for each meeting, and one option would be to provide examples of previous session topics or best practices. This information could be incorporated into the existing Meetings Manual.

## **5.4 Membership**

### **5.4.1 Targeted outreach to graduate programs**

One group that is frequently mentioned for targeted outreach are graduate students in the MARAC region. We do not have funding to establish an academic scholarship but there are other ways that we can support this community. There has been inconsistent, though potentially expanding, outreach by state caucus representatives to Library/Information Science graduate programs. We recommend an expansion of this outreach to include related programs such as digital humanities, museum studies, public history, human-computer interaction, and traditional historical and cultural studies programs. Working with the state caucus representatives, committee members will compile a list of related graduate programs in the MARAC region and online based programs that service the MARAC region, including their point of contact, the best place to send related MARAC announcements such as a poster presentation CFP, if there is an

SAA chapter in place, if they have an archival studies scholarship in place, etc. The state caucus representative can use this information to plan outreach or networking events, to circulate information from MARAC, and to promote scholarship/fellowship programs that may be offered by other associations or institutions like the SAA Mosaic scholarship. MARAC members in different geographical regions may be recruited to assist the Membership and state caucus representative.

#### **5.4.2 Explanation of nomination and appointment process**

One barrier to serving in MARAC may be a widespread misunderstanding of the nomination and committee appointment process. We have heard from several members that they believe the main path to serving in MARAC is through the annual election cycle. Aside from the calls for service sent out by Program and Local Arrangements committees, it is unclear how members would volunteer to serve on the standing committees. We recommend a series of blog posts or *MAA* articles on how to participate in MARAC, including explicit instructions on how to join committees, how to work with the *MAA* editor to submit an article/case study, and how to prepare and submit a session proposal to the Program Committee. This content can be repurposed for the New Member meeting and/or sent out to all new members as part of the welcome message from their state caucus rep.

#### **5.4.3 Long-term: Membership drive**

A membership drive and outreach campaign should be part of the long term planning of the Membership committee. Looking beyond our traditional recruiting points (graduate schools and new hires), we can expand our membership base and better serve the archival profession in the MARAC region by reaching out to, as one survey respondent put it, “organizations that are culturally divergent from typical MARAC membership. Small museums, churches, temples, mosques, ethnic & social organizations and “news organizations” that exist or existed to serve an ethnic population act as repositories for information and records of their culture.” People that are serving the archival profession through their work with collections, communities, and researchers, but who may feel they are outsiders or not “real” archivists. We are doing ourselves a disservice by allowing this attitude to continue.

Another way to expand our scope would be to partner with related member associations and interest groups. There are other organizations in our region, such as the Small Museum Association and state library associations, that serve shared constituencies. MARAC has had some success seeking opportunities for joint meetings in the past, and we can explore further opportunities for partnership or promotion.

## **6. Next steps**

After reviewing and incorporating feedback from Steering, the task force will send a revised report out to the membership for feedback. We will allow a minimum of 30 days for feedback. The final report of the task force will be submitted at the Spring 2017 Steering Committee meeting in Newark, NJ, and the Task Force will recommend disbanding at that time.



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## **MARAC Archivist Report Steering Committee Meeting College Park, MD January 27, 2017**

### **Annapolis Conference – DRUM Submissions**

DRUM (Digital Repository at the University of Maryland) received 13 submissions of presentations from the Fall 2016 conference in Annapolis. The conference program is also available via DRUM. In addition, there was 1 presentation submission from a previous conference.

### **Accessioning**

For annual year 2016, the MARAC archives received 3 donations totaling 3.75 linear feet and 1 item (a poster from the spring 1983 conference) for inclusion in the collection.

### **Processing**

Lauren Brown, the Archives Coordinator (Historian) continues to volunteer his time to work on appraising materials in the MARAC archives that have accumulated over the last few years. Additional processing will take place once Lauren has finished his appraisal.

### **Reference**

Since November 1, 2016, there have been a total of 3 reference questions submitted to the MARAC archives.

Respectfully submitted,

Elizabeth A. Novara  
MARAC Archivist

**MARAC Historian Report****January/2017 (for the MARAC Steering Committee Meeting in College Park, MD)**

This season I have continued to assist MARAC Archivist Liz Novara with some appraisal work on partially-processed files earmarked for inclusion into the core archival collection. I've also begun to update and expand on an historical list of MARAC officers who have served in various positions in the organization over the years. In addition, I am beginning to identify and to attempt to fill some gaps in the historical documentation found in the archive. Recently I was able to assist Liz with one reference request that required research into the early years of MARAC history.

Adriana Cuervo, our Awards Committee chair, has kindly agreed to take on responsibility for preparing MARAC award certificates going forward. I will continue to coordinate the transition of this activity from the MARAC Archives to the MARAC Awards Committee this spring.

I am looking forward to participating in what I believe is only the second MARAC Steering Committee to have been held on the University of Maryland campus, apart from the original organizational meeting of MARAC at UMD which was hosted by Mary Boccaccio in June/1972.

Lauren Brown  
MARAC Historian

**Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

- ▶ Do not enter social security numbers on this form as it may be made public.  
 ▶ Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

**2015****Open to Public Inspection**Department of the Treasury  
Internal Revenue Service**A** For the 2015 calendar year, or tax year beginning Jul 1, 2015, and ending Jun 30, 2016

<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization MID-ATLANTIC REGIONAL ARCHIVES CONFERENCE		<b>D</b> Employer identification number
	Doing business as		23-7346917
	Number and street (or P.O. box if mail is not delivered to street address) Room/suite		<b>E</b> Telephone number
	P.O. BOX 1773 City or town, state or province, country, and ZIP or foreign postal code		(717) 422-8171
CARLISLE PA 17013		<b>G</b> Gross receipts \$ 154,387.	
<b>F</b> Name and address of principal officer: KATY RAWDON 315 SPRINGFIELD TER HADDONFIELD NJ 08033		<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? If 'No,' attach a list. (see instructions) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>I</b> Tax-exempt status <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(c)</b> Group exemption number ▶	
<b>J</b> Website: ▶ <a href="http://www.marac.info">www.marac.info</a>			
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		<b>L</b> Year of formation: 1972 <b>M</b> State of legal domicile: PA	

**Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: THE ORGANIZATION'S MISSION IS TO PROMOTE THE PRESERVATION AND USE OF HISTORICAL INFORMATION. ITS OBJECTIVE IS TO PROMOTE COOPERATION AND COMMUNICATION AMONG INDIVIDUALS INTERESTED IN ARCHIVAL AND MANUSCRIPT MATERIALS.		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	16
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	16
	<b>5</b> Total number of individuals employed in calendar year 2015 (Part V, line 2a)	<b>5</b>	0
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	75
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	0.
<b>7b</b> Net unrelated business taxable income from Form 990-T, line 34	<b>7b</b>	0.	
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	<b>9</b> Program service revenue (Part VIII, line 2g)	34,484.	37,357.
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	122,816.	114,878.
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	843.	2,152.
	<b>12</b> Total revenue — add lines 8 through 11 (must equal Part VIII, column (A), line 12)	158,143.	154,387.
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	9,300.	4,589.
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)		
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)		
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶	0.	
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	167,524.	153,866.
	<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	176,824.	158,455.
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	-18,681.	-4,068.	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16)	Beginning of Current Year	End of Year
	<b>21</b> Total liabilities (Part X, line 26)	183,181.	179,919.
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	0.	183,181.

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer		Date	
	KATY RAWDON		01/19/17	
<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input checked="" type="checkbox"/> if self-employed PTIN
	GORDON G. NOVINSKY, CPA		01/19/17	P01242881
	Firm's name ▶ GORDON G. NOVINSKY CPA, LLC	Firm's EIN ▶ 52-1677262		
	Firm's address ▶ 2141 INDUSTRIAL PKWY STE 206 SILVER SPRING MD 20904	Phone no. (301) 622-1069		

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

**Part III Statement of Program Service Accomplishments**Check if Schedule O contains a response or note to any line in this Part III ☒ ☒**1** Briefly describe the organization's mission:

THE ORGANIZATION'S MISSION IS TO  
 PROMOTE THE PRESERVATION AND USE OF HISTORICAL INFORMATION. ITS OBJECTIVE  
 See Form 990, Page 2, Part III, Line 1 (continued)

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If 'Yes,' describe these new services on Schedule O.

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If 'Yes,' describe these changes on Schedule O.

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.**4 a** (Code: ) (Expenses \$ 97,592. including grants of \$ 0. ) (Revenue \$ 102,041. )

CONFERENCES FOR MEMBERS TO EXCHANGE INFORMATION AND  
 ENCOURAGE PROFESSIONAL INVOLVEMENT OF PERSONS ENGAGED IN THE  
 PRESERVATION AND USE OF HISTORICAL INFORMATION

**4 b** (Code: ) (Expenses \$ 3,958. including grants of \$ 0. ) (Revenue \$ 6,257. )

QUARTERLY NEWSLETTER AND OTHER PUBLICATIONS DISTRIBUTED TO  
 MEMBERS CONTAINING INFORMATION ON PRESERVATION AND USE OF  
 HISTORICAL MATERIALS

**4 c** (Code: ) (Expenses \$ 0. including grants of \$ 0. ) (Revenue \$ 6,580. )

VARIOUS COMMITTEES/OUTREACH PROGRAMS AND WORKSHOPS TO PROMOTE  
 SPECIALIZED AREAS AND PROJECTS RELATED TO THE USE AND  
 PRESERVATION OF HISTORIC MATERIALS

**4 d** Other program services. (Describe in Schedule O.)

(Expenses \$ 4,589. including grants of \$ 4,589. ) (Revenue \$ 0. )

**4 e** Total program service expenses **106,139.**

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If 'Yes,' complete Schedule A. . . . .	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? . . . . .		X
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I. . . . .		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If 'Yes,' complete Schedule C, Part II . . . . .		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If 'Yes,' complete Schedule C, Part III . . . . .		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I . . . . .		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If 'Yes,' complete Schedule D, Part II . . . . .		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III. . . . .		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV . . . . .		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If 'Yes,' complete Schedule D, Part V . . . . .		X
11 If the organization's answer to any of the following questions is 'Yes,' then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings and equipment in Part X, line 10? If 'Yes,' complete Schedule D, Part VI. . . . .		X
b Did the organization report an amount for investments — other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VII. . . . .		X
c Did the organization report an amount for investments — program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VIII . . . . .		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part IX . . . . .		X
e Did the organization report an amount for other liabilities in Part X, line 25? If 'Yes,' complete Schedule D, Part X. . . . .		X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If 'Yes,' complete Schedule D, Part X . . . . .		X
12a Did the organization obtain separate, independent audited financial statements for the tax year? If 'Yes,' complete Schedule D, Parts XI, and XII. . . . .		X
b Was the organization included in consolidated, independent audited financial statements for the tax year? If 'Yes,' and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI and XII is optional . . . . .		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E. . . . .		X
14a Did the organization maintain an office, employees, or agents outside of the United States? . . . . .		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If 'Yes,' complete Schedule F, Parts I and IV . . . . .		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If 'Yes,' complete Schedule F, Parts II and IV . . . . .		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If 'Yes,' complete Schedule F, Parts III and IV . . . . .		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If 'Yes,' complete Schedule G, Part I (see instructions) . . . . .		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II . . . . .		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III. . . . .		X

**Part IV Checklist of Required Schedules (continued)**

	Yes	No
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If 'Yes,' complete Schedule H</i> . . . . .		X
<b>b</b> If 'Yes' to line 20a, did the organization attach a copy of its audited financial statements to this return? . . . . .		
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II</i> . . . . .		X
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and III</i> . . . . .	X	
<b>23</b> Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If 'Yes,' complete Schedule J</i> . . . . .		X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25a</i> . . . . .		X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .		
<b>d</b> Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year? . . . . .		
<b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If 'Yes,' complete Schedule L, Part I</i> . . . . .		X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If 'Yes,' complete Schedule L, Part I</i> . . . . .		X
<b>26</b> Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If 'Yes,' complete Schedule L, Part II</i> . . . . .		X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If 'Yes,' complete Schedule L, Part III</i> . . . . .		X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i> . . . . .		X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i> . . . . .		X
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If 'Yes,' complete Schedule L, Part IV</i> . . . . .		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M</i> . . . . .		X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M</i> . . . . .		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I</i> . . . . .		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II</i> . . . . .		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I</i> . . . . .		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Part II, III, or IV, and Part V, line 1</i> . . . . .		X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? . . . . .		X
<b>b</b> If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2</i> . . . . .		X
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2</i> . . . . .		X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI</i> . . . . .		X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O . . . . .	X	

BAA

Form 990 (2015)



**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V ☐

		Yes	No
1 a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable . . . . .		
1 b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable . . . . .		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? . . . . .	X	
2 a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return . . . . .		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? . . . . .		
<b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)			
3 a	Did the organization have unrelated business gross income of \$1,000 or more during the year? . . . . .		X
b	If 'Yes' has it filed a Form 990-T for this year? If 'No' to line 3b, provide an explanation in Schedule O . . . . .		
4 a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? . . . . .		X
b	If 'Yes,' enter the name of the foreign country: ▶ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts. (FBAR)		
5 a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . . . .		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? . . . . .		X
c	If 'Yes,' to line 5a or 5b, did the organization file Form 8886-T? . . . . .		
6 a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . . . .		X
b	If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? . . . . .		
<b>7 Organizations that may receive deductible contributions under section 170(c).</b>			
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? . . . . .		X
b	If 'Yes,' did the organization notify the donor of the value of the goods or services provided? . . . . .		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? . . . . .		X
d	If 'Yes,' indicate the number of Forms 8282 filed during the year . . . . .		
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . .		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . .		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? . . . . .		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? . . . . .		
8	<b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? . . . . .		X
<b>9 Sponsoring organizations maintaining donor advised funds.</b>			
a	Did the sponsoring organization make any taxable distributions under section 4966? . . . . .		X
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . . . .		X
<b>10 Section 501(c)(7) organizations.</b> Enter:			
a	Initiation fees and capital contributions included on Part VIII, line 12. . . . .		
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities . . . . .		
<b>11 Section 501(c)(12) organizations.</b> Enter:			
a	Gross income from members or shareholders. . . . .		
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) . . . . .		
12 a	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041? . . . . .		
b	If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year . . . . .		
<b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>			
a	Is the organization licensed to issue qualified health plans in more than one state? . . . . .		
<b>Note.</b> See the instructions for additional information the organization must report on Schedule O.			
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans . . . . .		
c	Enter the amount of reserves on hand . . . . .		
14 a	Did the organization receive any payments for indoor tanning services during the tax year? . . . . .		X
b	If 'Yes,' has it filed a Form 720 to report these payments? If 'No,' provide an explanation in Schedule O . . . . .		

**Part VI Governance, Management, and Disclosure** For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI. ☒ X

**Section A. Governing Body and Management**

	Yes	No
<b>1 a</b> Enter the number of voting members of the governing body at the end of the tax year . . . . . If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.	16	
<b>1 b</b> Enter the number of voting members included in line 1a, above, who are independent . . . . .	16	
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .	2	X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? . . . . .	3	X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . . . .	4	X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets? . . . . .	5	X
<b>6</b> Did the organization have members or stockholders? . . . . .	6	X
<b>7 a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . . . .	7 a	X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .	7 b	X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b> The governing body? . . . . .	8 a	X
<b>b</b> Each committee with authority to act on behalf of the governing body? . . . . .	8 b	X
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If 'Yes,' provide the names and addresses in Schedule O . . . . .	9	X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
<b>10 a</b> Did the organization have local chapters, branches, or affiliates? . . . . .	10 a	X
<b>b</b> If 'Yes,' did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? . . . . .	10 b	
<b>11 a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . . . . .	11 a	X
<b>b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12 a</b> Did the organization have a written conflict of interest policy? If 'No,' go to line 13 . . . . .	12 a	X
<b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . . . .	12 b	
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If 'Yes,' describe in Schedule O how this was done . . . . .	12 c	
<b>13</b> Did the organization have a written whistleblower policy? . . . . .	13	X
<b>14</b> Did the organization have a written document retention and destruction policy? . . . . .	14	X
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b> The organization's CEO, Executive Director, or top management official . . . . .	15 a	X
<b>b</b> Other officers or key employees of the organization . . . . .	15 b	X
If 'Yes' to line 15a or 15b, describe the process in Schedule O (see instructions).		
<b>16 a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . . . .	16 a	X
<b>b</b> If 'Yes,' did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? . . . . .	16 b	

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed ►

**18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☒ Own website ☐ Another's website ☐ Upon request ☐ Other (explain in Schedule O)

**19** Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

**20** State the name, address, and telephone number of the person who possesses the organization's books and records: ►

KATY RAWDON 315 SPRINGFIELD TER. HADDONFIELD NJ 08033 (215) 204-5250



**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1 a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of 'key employee.'
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☒ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) BRIAN KEOUGH CHAIR	5.00			X				0.	0.	0.
(2) VINCENT NOVARA CHAIR-ELECT	2.00			X				0.	0.	0.
(3) DYANI FEIGE SECRETARY	2.00			X				0.	0.	0.
(4) KATY RAWDON TREASURER	5.00			X				0.	0.	0.
(5)										
(6)										
(7)										
(8)										
(9)										
(10)										
(11)										
(12)										
(13)										
(14)										

**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) _____	_____									
(16) _____	_____									
(17) _____	_____									
(18) _____	_____									
(19) _____	_____									
(20) _____	_____									
(21) _____	_____									
(22) _____	_____									
(23) _____	_____									
(24) _____	_____									
(25) _____	_____									
<b>1 b Sub-total.</b> . . . . .								0.	0.	0.
<b>c Total from continuation sheets to Part VII, Section A</b> . . . . .										
<b>d Total (add lines 1b and 1c)</b> . . . . .								0.	0.	0.

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ►

	Yes	No
<b>3</b> Did the organization list any <b>former</b> officer, director, or trustee, key employee, or highest compensated employee on line 1a? <i>If 'Yes,' complete Schedule J for such individual</i> . . . . .		X
<b>4</b> For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If 'Yes,' complete Schedule J for such individual</i> . . . . .		X
<b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If 'Yes,' complete Schedule J for such person</i> . . . . .		X

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ►

**Part VIII Statement of Revenue**Check if Schedule O contains a response or note to any line in this Part VIII ☐

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1 a</b> Federated campaigns . . . . .	<b>1 a</b>				
	<b>b</b> Membership dues . . . . .	<b>1 b</b> 33,842.				
	<b>c</b> Fundraising events . . . . .	<b>1 c</b>				
	<b>d</b> Related organizations . . . . .	<b>1 d</b>				
	<b>e</b> Government grants (contributions) . .	<b>1 e</b>				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above . .	<b>1 f</b> 3,515.				
	<b>g</b> Noncash contributions included in lines 1a-1f: \$					
	<b>h Total.</b> Add lines 1a-1f . . . . .		37,357.			
<b>Program Service Revenue</b>		<b>Business Code</b>				
	<b>2 a</b> CONFERENCES	541900	102,041.	102,041.	0.	0.
	<b>b</b> PUBLICATIONS/NEWSLETTER	511120	6,257.	6,257.	0.	0.
	<b>c</b> WORKSHOPS	541900	6,580.	6,580.	0.	0.
	<b>d</b> _____					
	<b>e</b> _____					
	<b>f</b> All other program service revenue . . .					
	<b>g Total.</b> Add lines 2a-2f . . . . .		114,878.			
<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest and other similar amounts) . . . . .		2,152.	0.	0.	2,152.
	<b>4</b> Income from investment of tax-exempt bond proceeds . .					
	<b>5</b> Royalties . . . . .					
		(i) Real (ii) Personal				
	<b>6 a</b> Gross rents . . . . .					
	<b>b</b> Less: rental expenses					
	<b>c</b> Rental income or (loss) . .					
	<b>d</b> Net rental income or (loss) . . . . .					
	<b>7 a</b> Gross amount from sales of assets other than inventory	(i) Securities (ii) Other				
	<b>b</b> Less: cost or other basis and sales expenses . . .					
	<b>c</b> Gain or (loss) . . . . .					
	<b>d</b> Net gain or (loss) . . . . .					
	<b>8 a</b> Gross income from fundraising events (not including . . \$ _____ of contributions reported on line 1c). See Part IV, line 18. . . . .	<b>a</b>				
	<b>b</b> Less: direct expenses . . . . .	<b>b</b>				
	<b>c</b> Net income or (loss) from fundraising events . . . . .					
	<b>9 a</b> Gross income from gaming activities. See Part IV, line 19. . . . .	<b>a</b>				
	<b>b</b> Less: direct expenses . . . . .	<b>b</b>				
	<b>c</b> Net income or (loss) from gaming activities . . . . .					
<b>10 a</b> Gross sales of inventory, less returns and allowances . . . . .	<b>a</b>					
<b>b</b> Less: cost of goods sold . . . . .	<b>b</b>					
<b>c</b> Net income or (loss) from sales of inventory . . . . .						
<b>Miscellaneous Revenue</b>		<b>Business Code</b>				
<b>11 a</b> _____						
<b>b</b> _____						
<b>c</b> _____						
<b>d</b> All other revenue . . . . .						
<b>e Total.</b> Add lines 11a-11d . . . . .						
<b>12 Total revenue.</b> See instructions . . . . .		154,387.	114,878.	0.	2,152.	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX.

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.				
2 Grants and other assistance to domestic individuals. See Part IV, line 22.	4,589.	4,589.		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.				
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).				
7 Other salaries and wages.				
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).				
9 Other employee benefits.				
10 Payroll taxes.				
11 Fees for services (non-employees):				
a Management.	25,308.	0.	25,308.	0.
b Legal.				
c Accounting.	1,025.	0.	1,025.	0.
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)				
12 Advertising and promotion.				
13 Office expenses.	5,930.	3,958.	1,972.	0.
14 Information technology.				
15 Royalties.				
16 Occupancy.				
17 Travel.	3,940.	0.	3,940.	0.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.	97,592.	97,592.	0.	0.
20 Interest.				
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.				
23 Insurance.	954.	0.	954.	0.
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <u>BANKING/CREDIT CARD FEES</u>	7,878.	0.	7,878.	0.
b <u>MEETING EXPENSES</u>	2,636.	0.	2,636.	0.
c <u>POSTAGE</u>	939.	0.	939.	0.
d <u>WEB SERVICES</u>	4,364.	0.	4,364.	0.
e All other expenses	3,300.	0.	3,300.	0.
25 Total functional expenses. Add lines 1 through 24e.	158,455.	106,139.	52,316.	0.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				



**Part X Balance Sheet**Check if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash — non-interest-bearing . . . . .	29,059.	<b>1</b>	23,644.
	<b>2</b> Savings and temporary cash investments . . . . .	76,209.	<b>2</b>	76,301.
	<b>3</b> Pledges and grants receivable, net . . . . .		<b>3</b>	
	<b>4</b> Accounts receivable, net . . . . .		<b>4</b>	
	<b>5</b> Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L . . . . .		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L . . . . .		<b>6</b>	
	<b>7</b> Notes and loans receivable, net . . . . .		<b>7</b>	
	<b>8</b> Inventories for sale or use . . . . .		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges . . . . .		<b>9</b>	
	<b>10 a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D . . . . .	<b>10 a</b>		
	<b>b</b> Less: accumulated depreciation . . . . .	<b>10 b</b>	<b>10 c</b>	
	<b>11</b> Investments — publicly traded securities . . . . .	77,913.	<b>11</b>	79,974.
	<b>12</b> Investments — other securities. See Part IV, line 11 . . . . .		<b>12</b>	
	<b>13</b> Investments — program-related. See Part IV, line 11 . . . . .		<b>13</b>	
	<b>14</b> Intangible assets . . . . .		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11 . . . . .		<b>15</b>	
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 34) . . . . .	183,181.	<b>16</b>	179,919.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	0.	<b>17</b>	
	<b>18</b> Grants payable . . . . .		<b>18</b>	
	<b>19</b> Deferred revenue . . . . .		<b>19</b>	
	<b>20</b> Tax-exempt bond liabilities . . . . .		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D . . . . .		<b>21</b>	
	<b>22</b> Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L . . . . .		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties . . . . .		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties . . . . .		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D . . . . .		<b>25</b>	
	<b>26 Total liabilities.</b> Add lines 17 through 25 . . . . .	0.	<b>26</b>	0.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>			
	<b>27</b> Unrestricted net assets . . . . .	56,317.	<b>27</b>	51,213.
	<b>28</b> Temporarily restricted net assets . . . . .		<b>28</b>	
	<b>29</b> Permanently restricted net assets . . . . .	126,864.	<b>29</b>	128,706.
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.</b>			
	<b>30</b> Capital stock or trust principal, or current funds . . . . .		<b>30</b>	
	<b>31</b> Paid-in or capital surplus, or land, building, or equipment fund . . . . .		<b>31</b>	
	<b>32</b> Retained earnings, endowment, accumulated income, or other funds . . . . .		<b>32</b>	
<b>33</b> Total net assets or fund balances . . . . .	183,181.	<b>33</b>	179,919.	
<b>34</b> Total liabilities and net assets/fund balances . . . . .	183,181.	<b>34</b>	179,919.	

BAA

Form 990 (2015)

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI ☐

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	154,387.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	158,455.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	-4,068.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	<b>4</b>	183,181.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	806.
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain in Schedule O)	<b>9</b>	
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	<b>10</b>	179,919.

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
<b>1</b> Accounting method used to prepare the Form 990: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked 'Other,' explain in Schedule O.		
<b>2 a</b> Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . .	X	
If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		
<b>2 b</b> Were the organization's financial statements audited by an independent accountant? . . . . .		X
If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		
<b>2 c</b> If 'Yes' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? . . . . .		X
If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.		
<b>3 a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .		X
<b>3 b</b> If 'Yes,' did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits . . . . .		

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Form 990 (2015)

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ.

► Information about Schedule A (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2015**

**Open to Public Inspection**

Name of the organization

Employer identification number

MID-ATLANTIC REGIONAL ARCHIVES CONFERENCE

23-7346917

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☒ An organization that normally receives: (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g.
  - a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
  - f Enter the number of supported organizations . . . . .
  - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
<b>Total</b>						

**BAA** For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2015

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants'.) . . . . .						
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge. . . . .						
<b>4 Total.</b> Add lines 1 through 3 . . . . .						
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . . . . .						
<b>6 Public support.</b> Subtract line 5 from line 4 . . . . .						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
<b>7</b> Amounts from line 4 . . . . .						
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .						
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . .						
<b>11 Total support.</b> Add lines 7 through 10 . . . . .						
<b>12</b> Gross receipts from related activities, etc. (see instructions). . . . .					<b>12</b>	
<b>13 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . . <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2015 (line 6, column (f) divided by line 11, column (f)) . . . . .	<b>14</b>	%
<b>15</b> Public support percentage from 2014 Schedule A, Part II, line 14 . . . . .	<b>15</b>	%
<b>16a 33-1/3% support test – 2015.</b> If the organization did not check the box on line 13, and line 14 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>		
<b>b 33-1/3% support test – 2014.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>		
<b>17a 10%-facts-and-circumstances test – 2015.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>		
<b>b 10%-facts-and-circumstances test – 2014.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>		
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . . <input type="checkbox"/>		



**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
<b>1</b> Gifts, grants, contributions and membership fees received. (Do not include any 'unusual grants'.)	30,441.	36,632.	36,821.	34,484.	37,357.	175,735.
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose	98,575.	99,855.	123,688.	122,816.	114,878.	559,812.
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge.						
<b>6 Total.</b> Add lines 1 through 5	129,016.	136,487.	160,509.	157,300.	152,235.	735,547.
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
<b>c</b> Add lines 7a and 7b						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						735,547.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
<b>9</b> Amounts from line 6	129,016.	136,487.	160,509.	157,300.	152,235.	735,547.
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	2,002.	691.	1,499.	843.	2,152.	7,187.
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
<b>c</b> Add lines 10a and 10b	2,002.	691.	1,499.	843.	2,152.	7,187.
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)	131,018.	137,178.	162,008.	158,143.	154,387.	742,734.
<b>14 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2015 (line 8, column (f) divided by line 13, column (f))	<b>15</b>	99.03 %
<b>16</b> Public support percentage from 2014 Schedule A, Part III, line 15.	<b>16</b>	98.98 %

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2015 (line 10c, column (f) divided by line 13, column (f))	<b>17</b>	0.97 %
<b>18</b> Investment income percentage from 2014 Schedule A, Part III, line 17	<b>18</b>	1.02 %

- 19a 33-1/3% support tests – 2015.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☒
- b 33-1/3% support tests – 2014.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐
- 20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ☐

**Part IV Supporting Organizations**

(Complete only if you checked a box in line 11 on Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? If 'No,' describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain . . . . .		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If 'Yes,' explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2) . . . . .		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If 'Yes,' answer (b) and (c) below . . . . .		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If 'Yes,' describe in <b>Part VI</b> when and how the organization made the determination . . . . .		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If 'Yes,' explain in <b>Part VI</b> what controls the organization put in place to ensure such use . . . . .		
<b>4a</b> Was any supported organization not organized in the United States ('foreign supported organization')? If 'Yes' and if you checked 11a or 11b in Part I, answer (b) and (c) below . . . . .		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If 'Yes,' describe in <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations . . . . .		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If 'Yes,' explain in <b>Part VI</b> what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes . . . . .		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? If 'Yes,' answer (b) and (c) below (if applicable). Also, provide detail in <b>Part VI</b> , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document) . . . . .		
<b>b</b> <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document? . . . . .		
<b>c</b> <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control? . . . . .		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If 'Yes,' provide detail in <b>Part VI</b> . . . . .		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If 'Yes,' complete Part I of Schedule L (Form 990 or 990-EZ) . . . . .		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If 'Yes,' complete Part I of Schedule L (Form 990 or 990-EZ) . . . . .		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If 'Yes,' provide detail in <b>Part VI</b> . . . . .		
<b>b</b> Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If 'Yes,' provide detail in <b>Part VI</b> . . . . .		
<b>c</b> Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If 'Yes,' provide detail in <b>Part VI</b> . . . . .		
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If 'Yes,' answer 10b below . . . . .		
<b>b</b> Did the organization, have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.) . . . . .		

**Part IV Supporting Organizations** (continued)

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization? . . . . .	<b>11a</b>	
<b>b</b> A family member of a person described in (a) above? . . . . .	<b>11b</b>	
<b>c</b> A 35% controlled entity of a person described in (a) or (b) above? If 'Yes' to a, b, or c, provide detail in <b>Part VI</b> . . . . .	<b>11c</b>	

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If 'No,' describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year . . . . .	<b>1</b>	
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If 'Yes,' explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization . . . . .	<b>2</b>	

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If 'No,' describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s) . . . . .	<b>1</b>	

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided? . . . . .	<b>1</b>	
<b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If 'No,' explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s) . . . . .	<b>2</b>	
<b>3</b> By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If 'Yes,' describe in <b>Part VI</b> the role the organization's supported organizations played in this regard . . . . .	<b>3</b>	

**Section E. Type III Functionally-Integrated Supporting Organizations**

**1** Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):

**a** ☐ The organization satisfied the Activities Test. Complete **line 2** below.

**b** ☐ The organization is the parent of each of its supported organizations. Complete **line 3** below.

**c** ☐ The organization supported a governmental entity. Describe in **Part VI** how you supported a government entity (see instructions).

**2** Activities Test. Answer (a) and (b) below.

	Yes	No
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If 'Yes,' then in <b>Part VI</b> identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities . . . . .	<b>2a</b>	
<b>b</b> Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If 'Yes,' explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement . . . . .	<b>2b</b>	

**3** Parent of Supported Organizations. Answer (a) and (b) below.

<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in <b>Part VI</b> . . . . .	<b>3a</b>	
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If 'Yes,' describe in <b>Part VI</b> the role played by the organization in this regard . . . . .	<b>3b</b>	

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on November 20, 1970. See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A – Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain . . . . .	1	
2	Recoveries of prior-year distributions . . . . .	2	
3	Other gross income (see instructions). . . . .	3	
4	Add lines 1 through 3. . . . .	4	
5	Depreciation and depletion . . . . .	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) . . . . .	6	
7	Other expenses (see instructions) . . . . .	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6 and 7 from line 4) . . . . .	8	

Section B – Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities . . . . .	1 a	
b	Average monthly cash balances . . . . .	1 b	
c	Fair market value of other non-exempt-use assets . . . . .	1 c	
d	<b>Total</b> (add lines 1a, 1b, and 1c). . . . .	1 d	
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in <b>Part VI</b> ):		
2	Acquisition indebtedness applicable to non-exempt-use assets . . . . .	2	
3	Subtract line 2 from line 1d . . . . .	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions) . . . . .	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3) . . . . .	5	
6	Multiply line 5 by .035. . . . .	6	
7	Recoveries of prior-year distributions . . . . .	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6) . . . . .	8	

Section C – Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A) . . . . .	1	
2	Enter 85% of line 1 . . . . .	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A) . . . . .	3	
4	Enter greater of line 2 or line 3 . . . . .	4	
5	Income tax imposed in prior year . . . . .	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions) . . . . .	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions).		

BAA

Schedule A (Form 990 or 990-EZ) 2015



**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** (continued)**Section D – Distributions**

	Current Year
<b>1</b> Amounts paid to supported organizations to accomplish exempt purposes . . . . .	
<b>2</b> Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity . . . . .	
<b>3</b> Administrative expenses paid to accomplish exempt purposes of supported organizations . . . . .	
<b>4</b> Amounts paid to acquire exempt-use assets . . . . .	
<b>5</b> Qualified set-aside amounts (prior IRS approval required). . . . .	
<b>6</b> Other distributions (describe in <b>Part VI</b> ). See instructions . . . . .	
<b>7</b> <b>Total annual distributions.</b> Add lines 1 through 6 . . . . .	
<b>8</b> Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions. . . . .	
<b>9</b> Distributable amount for 2015 from Section C, line 6 . . . . .	
<b>10</b> Line 8 amount divided by Line 9 amount . . . . .	

**Section E – Distribution Allocations (see instructions)**

	(i) Excess Distributions	(ii) Underdistributions Pre-2015	(iii) Distributable Amount for 2015
<b>1</b> Distributable amount for 2015 from Section C, line 6 . . . . .			
<b>2</b> Underdistributions, if any, for years prior to 2015 (reasonable cause required – see instructions) . . . . .			
<b>3</b> Excess distributions carryover, if any, to 2015:			
<b>a</b> . . . . .			
<b>b</b> . . . . .			
<b>c</b> . . . . .			
<b>d</b> From 2013 . . . . .			
<b>e</b> From 2014 . . . . .			
<b>f</b> <b>Total</b> of lines 3a through e . . . . .			
<b>g</b> Applied to underdistributions of prior years . . . . .			
<b>h</b> Applied to 2015 distributable amount . . . . .			
<b>i</b> Carryover from 2010 not applied (see instructions) . . . . .			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from 3f . . . . .			
<b>4</b> Distributions for 2015 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years . . . . .			
<b>b</b> Applied to 2015 distributable amount . . . . .			
<b>c</b> Remainder. Subtract lines 4a and 4b from 4 . . . . .			
<b>5</b> Remaining underdistributions for years prior to 2015, if any. Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions) . . . . .			
<b>6</b> Remaining underdistributions for 2015. Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions) . . . . .			
<b>7</b> <b>Excess distributions carryover to 2016.</b> Add lines 3j and 4c . . . . .			
<b>8</b> Breakdown of line 7:			
<b>a</b> . . . . .			
<b>b</b> . . . . .			
<b>c</b> Excess from 2013 . . . . .			
<b>d</b> Excess from 2014 . . . . .			
<b>e</b> Excess from 2015 . . . . .			

BAA

Schedule A (Form 990 or 990-EZ) 2015

**Part VI** **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.  
(See instructions.)

SCHEDULE I  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States

Complete if the organization answered 'Yes' on Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.

▶ Information about Schedule I (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

2015

Open to Public  
Inspection

Name of the organization

MID-ATLANTIC REGIONAL ARCHIVES CONFERENCE

Part I General Information on Grants and Assistance

Employer identification number

23-7346917

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☒ Yes ☐ No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered 'Yes' on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) -----							
(2) -----							
(3) -----							
(4) -----							
(5) -----							
(6) -----							
(7) -----							
(8) -----							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table

3 Enter total number of other organizations listed in the line 1 table

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

TEEA3901 11/04/15

Schedule I (Form 990) (2015)

**Part III** Grants and Other Assistance to Domestic Individuals. Complete if the organization answered 'Yes' on Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
1 FINDING AID AWARDS	1	250.			
2 ARLINE CUSTER AWARDS	1	200.			
3 MEETINGS AND TRAVEL AWARDS	7	1,764.			
4 MODERN ARCHIVES INST SCHOLARSHIP	1	750.			
5 HONORARIA	2	1,000.			
6 DISTINGUISHED SERVICE AWARD	1	250.			
7 C. HERBERT FINCH AWARD	2	250.			

**Part IV** Supplemental Information. Provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

Pt I Line 2 FOR SCHOLARSHIPS, RECIPIENTS ARE REQUIRED TO BE NEW MEMBERS OF MID-ATLANTIC REGIONAL ARCHIVES CONFERENCE AND NEW TO THE PROFESSION. THE EDUCATIONAL COMMITTEE REVIEWS APPLICATIONS AND MAKES GRANTS FOR MEETING ATTENDANCE OR TUITION.

Pt I Line 2 AWARDS ARE GRANTED FOR DISTINGUISHED SERVICE, PREPARATION OF FINDING AIDS AND PUBLISHING. A MARAC COMMITTEE REVIEWS QUALIFICATIONS OF RECIPIENTS AND GRANTS THE AWARD AT THE SEMI-ANNUAL CONFERENCE



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[illegible]

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

► Attach to Form 990 or 990-EZ.

► Information about Schedule O (Form 990 or 990-EZ) and its instructions is  
at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2015**

**Open to Public  
Inspection**

Name of the organization

Employer identification number

MID-ATLANTIC REGIONAL ARCHIVES CONFERENCE

23-7346917

Pt VI, Line 11b	A REVIEW OF FORM 990 IS CONDUCTED BY AN OFFICER (NORMALLY
Pt VI, Line 11b	THE TREASURER) OF THE ORGANIZATION PRIOR TO FILING F990
Pt VI, Line 19	THE ORGANIZATION DOES NOT MAKE ITS GOVERNING DOCUMENTS,
Pt VI, Line 19	CONFLICT OF INTEREST POLICY AND FINANCIAL STATEMENTS
Pt VI, Line 19	AVAILABLE TO THE PUBLIC

Form **8879-EO****IRS e-file Signature Authorization  
for an Exempt Organization**

OMB No. 1545-1878

For calendar year 2015, or fiscal year beginning Jul 1, 2015, and ending Jun 30, 20 2016▶ **Do not send to the IRS. Keep for your records.**▶ **Information about Form 8879-EO and its instructions is at [www.irs.gov/form8879eo](http://www.irs.gov/form8879eo).****2015**Department of the Treasury  
Internal Revenue Service

Name of exempt organization

MID-ATLANTIC REGIONAL ARCHIVES CONFERENCE

Name and title of officer

KATY RAWDON

TREASURER

Employer identification number

23-7346917

**Part I Type of Return and Return Information (Whole Dollars Only)**

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line **1a**, **2a**, **3a**, **4a**, or **5a**, below, and the amount on that line for the return being filed with this form was blank, then leave line **1b**, **2b**, **3b**, **4b**, or **5b**, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than 1 line in Part I.

<b>1 a</b> Form 990 check here . . . ▶ <input checked="" type="checkbox"/>	<b>b Total revenue</b> , if any (Form 990, Part VIII, column (A), line 12) . . . . .	<b>1 b</b> <u>154,387.</u>
<b>2 a</b> Form 990-EZ check here . . . ▶ <input type="checkbox"/>	<b>b Total revenue</b> , if any (Form 990-EZ, line 9) . . . . .	<b>2 b</b> _____
<b>3 a</b> Form 1120-POL check here . . . ▶ <input type="checkbox"/>	<b>b Total tax</b> (Form 1120-POL, line 22) . . . . .	<b>3 b</b> _____
<b>4 a</b> Form 990-PF check here . . . ▶ <input type="checkbox"/>	<b>b Tax based on investment income</b> (Form 990-PF, Part VI, line 5). . . . .	<b>4 b</b> _____
<b>5 a</b> Form 8868 check here . . . ▶ <input type="checkbox"/>	<b>b Balance Due</b> (Form 8868, Part I, line 3c or Part II, line 8c). . . . .	<b>5 b</b> _____

**Part II Declaration and Signature Authorization of Officer**

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2015 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

**Officer's PIN: check one box only**

☐ I authorize \_\_\_\_\_ to enter my PIN \_\_\_\_\_ as my signature  
ERO firm name

Enter five numbers, but do not enter all zeros

on the organization's tax year 2015 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

☒ As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2015 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶ \_\_\_\_\_

Date ▶ 01/19/2017**Part III Certification and Authentication**

**ERO's EFIN/PIN.** Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN . . . . .

52828420904

do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2015 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163**, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶ \_\_\_\_\_

Date ▶ 01/19/2017

**ERO Must Retain This Form — See Instructions**  
**Do Not Submit This Form To the IRS Unless Requested To Do So**

BAA For Paperwork Reduction Act Notice, see instructions.

Form 8879-EO (2015)

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Schedule O (Form 990), Supplemental Information to Form 990  
**Form 990, Page 2, Part III, Line 1 (continued)**

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Briefly describe the organization's mission:

IS TO PROMOTE COOPERATION AND COMMUNICATION AMONG INDIVIDUALS INTERESTED  
IN ARCHIVAL AND MANUSCRIPT MATERIALS.

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Schedule O (Form 990), Supplemental Information to Form 990  
**Form 990, Page 2, Part III, Line 4d (continued)**

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Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

Code:		Description:	<u>GRANTS, AWARDS AND SCHOLARSHIPS GIVEN TO MARAC MEMBERS</u>
Expenses	<u>4,589.</u>		<u>AND RELATED PERSONS AND ORGANIZATIONS. AWARDS GRANTED</u>
Grants Of	<u>4,589.</u>		<u>TO PROMOTE MARAC'S PROGRAM SERVICES. (SEE SCHEDULE I)</u>
Revenue.	<u>0.</u>		

# MARAC

Mid-Atlantic Regional Archives Conference

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

**To: MARAC STEERING COMMITTEE**  
**From: SARA PREDMORE, MARAC ADMINISTRATOR**  
**Date: January 27, 2017**  
**Re: ADMINISTRATOR'S REPORT**

Submitted to the Steering Committee on Friday, January 27, 2017 in Baltimore, MD.

## **Membership Statistics**

There are currently 971 active members (as of January 15, 2017):

833 Regular Members

23 Retired Members

115 Student Members

## **Membership Statistics Comparison**

<b>Member Type</b>	<b>2014 (as of 1/31/2014)</b>	<b>2015 (as of 1/15/2015)</b>	<b>2016 (as of 1/15/2016)</b>	<b>2017 (as of 1/15/2017)</b>	<b>% change 2016-2017</b>
<b>Regular</b>	909	913	825	833	.97
<b>Retired</b>	32	32	29	23	-20.69
<b>Student</b>	121	104	95	115	21.05
<b>Total</b>	1062	1049	949	971	2.32

## **Current State Caucus Membership**

<b>Caucus</b>	<b>2016–17 Membership (as of 1/15/2017)</b>
<b>DC</b>	185
<b>Delaware</b>	40
<b>Maryland</b>	232
<b>New Jersey</b>	123
<b>New York</b>	206
<b>Pennsylvania</b>	221
<b>Virginia</b>	163
<b>West Virginia</b>	18

**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	2015 (as reported 1/31/15)	2016 (as reported 1/15/16)	2017 (as reported 1/15/17)
DC	180	165	185
Delaware	52	39	40
Maryland	221	187	232
New Jersey	127	122	123
New York	233	212	206
Pennsylvania	242	213	221
Virginia	159	170	163
West Virginia	14	16	18

### New Membership Applications

Month	2016-17
November	14
December	14
January	4
Total	32

### Additional Information

**Mid-Atlantic Archivist:** The Winter 2017 newsletter was mailed and uploaded to the website on January 20, 2017.

**Elections:** The 2017 Election was launched on January 24, 2017 and will run until February 22, 2017. We mailed 39 paper ballots and sent out 936 e-ballots from Survey Monkey.

**Spring Conference:** The printed program for the MARAC Spring 2017 Conference in Newark, NJ will be mailed during the first week in February. Online registration will go live at the same time.

**New MARAC Administrator** – Sara Predmore assumed the Administrator position on January 5, 2017.



**Winter 2017 NATIONAL COALITION FOR HISTORY Report  
MARAC Steering Committee Meeting, UMD, January 27, 2017**

**REGIONAL ARCHIVAL ASSOCIATIONS CONSORTIUM GAINS SEAT ON NCH POLICY BOARD:** As of this month, RAAC has been instated as a Sustaining Member on the National Coalition for History Policy Board. The term runs from January 2017 to January 2019. RAAC joins SAA and CoSA in representing archival interests on the Board. A big *thank you* to all who worked so diligently to make this happen—and especially to the participating regionals!

**NCH TO MONITOR THE INCOMING TRUMP ADMINISTRATION'S APPROACH TO OPEN GOVERNMENT ACTIVITIES:** NCH will continue to work towards identifying new areas in which to promote openness and transparency within the federal government while remaining vigilant for any attempts by the Trump administration to undo the tremendous progress made in this area during the Obama administration. Executive Director Lee White continues to follow the lead of OpenTheGovernment.org, the National Security Archive and other pro-transparency groups in lobbying on these issues.

**HISTORY OFFICE AT NASA'S JOHNSON SPACE CENTER SAVED FROM ELIMINATION:** The history office at NASA's Johnson Space Center (JSC) was slated to be defunded and closed on Sept. 30, 2016. Ironically, the office was the 2016 recipient of the Organization of American Historians' *Friend of History* award for outstanding support of historical research.

NCH sent a letter urging NASA Administrator Charles Bolden to provide the funding necessary to keep the JSC office open and fully staffed. On Sept. 23, NCH received a highly favorable reply from NASA's Chief Historian William Barry stating that Administrator Bolden placed "a high priority on having a strong history program at NASA" and that steps were being taken to strengthen the program and even add an additional staffer! The outcome was the direct result of NCH working collaboratively with OAH, the American Historical Association and the Society for History in the Federal Government to achieve this welcome resolution.

**NEW FEDERAL RULE EXEMPTS ORAL HISTORY FROM IRB REVIEW:** On Jan. 19, 2017, the federal government issued its final rule governing Institutional Review Boards (IRBs) which "explicitly removes" oral history and journalism from the Federal Policy for the Protection of Human Subjects. The historical community, collaborating through NCH, has long argued that scholarly history projects should not be subject to standard IRB procedures since those were designed for the research practices of the sciences. The new rule goes into effect Jan. 19, 2018. Great news! Learn more at <http://historycoalition.org/> ...

—Jan Zastrow  
[zastrow@hawaii.edu](mailto:zastrow@hawaii.edu)  
RAAC NCH Representative

# MARAC

Mid-Atlantic Regional Archives Conference

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

**TO: MARAC OFFICERS  
STATE CAUCUS REPRESENTATIVES  
COMMITTEE CHAIRS  
MARAC ADMINISTRATOR  
MARAC ARCHIVIST**

**FROM: KATY RAWDON, MARAC TREASURER**

**RE: TREASURER/FINANCE COMMITTEE REPORT**

Respectfully submitted to the Steering Committee on Monday, January 23, 2017, in advance of the Winter 2017 meeting to be held in College Park, MD on January 27, 2017.

1. Highlights of the Second Quarter Treasurer's Report (see attached) are listed below.

- The income is from membership dues, Fall 2016 conference income, MAA advertising, publication sales, late off-meeting workshop income for a workshop held in Q1, bank and investment interest, and gifts to general operations and the restricted funds.
- Expenses are from administrator's salary (for work done in FY16 Q1 before Tammy Hoffman's departure); MemberClicks fees; MARAC's contribution to the National Coalition for History; caucus advocacy; phone, postage, and office supplies costs; food, travel, and lodging for Steering and Executive Committee meetings and caucus meetings; printing and mailing charges; Spring 2017 conference costs; awards, prizes, and scholarships; and banking and credit card transaction fees.
- Note that PNC banking fees are significantly higher than in the past. According to Jim Gerencser, when MARAC first began banking with PNC, credit services fees were around 2.5%. They now appear to be around 6%. I have contacted our representatives at PNC for more information, and will report back to Steering.

2. The Finance Committee would like to propose the addition of the following language to the Finance Committee web page and to the Finance Committee charge, respectively:

- Language to be added to the Finance Committee page on MARAC's web site regarding a policy for returned checks:

"If a check written to MARAC is returned due to insufficient funds (a bounced check), MARAC's bank charges the organization a returned check fee. MARAC requires the person responsible for that check not only to make payment to MARAC promptly either by replacement check or by credit card for the original charge, but also to pay an additional



\$15 to MARAC to cover the bank fee. All membership services to the individual will be suspended until payment is received and successfully deposited.”

- Language written at the Steering Committee’s request to be added to the Finance Committee charge, detailing the change approved by Steering at the Annapolis meeting regarding disposition of meeting profits:

“Each fiscal year, the Finance Committee will review the total profits, if any, generated from the Fall and Spring meetings, and make a recommendation to the Steering Committee as to where those funds should be directed. Options include returning the profits to the general operating funds, where they may support budgetary increases to designated spending lines or simply enhance budgetary reserves and surpluses; directing them to any of the restricted line items (i.e. Education, Disaster Assistance, and Finch Award); or directing them to other purposes in support of MARAC and the archival profession. In making its recommendation, the Finance Committee shall keep in mind that financial stability is the first priority, followed by MARAC’s primary mission of education. The Finance Committee will include its recommendation with the report submitted to Steering Committee during the first quarter of the fiscal year, and Steering will vote upon that recommendation.”

3. Average returns on investment for MARAC’s accounts during the previous quarter (rounded to the nearest hundredth of a percent) are listed below.
  - PNC Savings Account – 0.12%
  - Vanguard Bonds – -2.37%
4. Accountant Gordon Novinsky has prepared and filed IRS Tax Form 990 on behalf of MARAC for FY2016. A copy is available to Steering members via Dropbox.
5. Due to a delay in receiving all income and paying all expenses related to the Fall 2016 meeting in Annapolis, MD, the final financial report for that meeting is in process but not yet completed. It should be completed in January or early February, and will be forwarded to the Steering Committee, Finance Committee, and Meetings Coordinating Committee.
6. A reminder that the budget for the Spring 2017 meeting in Newark, NJ was approved at the Annapolis meeting. It is attached.
7. Committee and caucus chairs will be asked to send their budget requests for Fiscal Year 2018 to the MARAC Treasurer between March 15 and April 1. A standardized request form will be provided. For those chairs that will be changing hands in the near future, it is suggested that outgoing and incoming parties communicate with one another when preparing the budget request.

**FY 2017, 2nd Quarter** (October 1, 2016 to December 31, 2016)

<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	\$33,000.00	\$33,273.00	\$5,572.00			\$38,845.00	118%
Conference Registration	\$90,000.00	\$35,060.00	\$16,835.00			\$51,895.00	58%
Conference Vendors	\$15,000.00	\$6,550.00	\$4,500.00			\$11,050.00	74%
Conference Sponsorship	\$6,500.00	\$650.00	\$2,000.00			\$2,650.00	41%
Publication Advertising	\$4,000.00	\$1,080.00	\$360.00			\$1,440.00	36%
Publication Sales	\$350.00	\$45.00	\$225.00			\$270.00	77%
Mailing List Sales	\$150.00	\$0.00	\$0.00			\$0.00	0%
Off-Meeting Workshops	\$6,400.00	\$4,779.32	\$90.00			\$4,869.32	76%
Bank Interest	\$100.00	\$23.02	\$22.77			\$45.79	46%
Investment Interest	\$2,000.00	\$259.30	\$0.00			\$259.30	13%
Gifts to Operations	\$500.00	\$648.00	\$25.00			\$673.00	135%
Miscellaneous	\$0.00	\$0.00	\$0.00			\$0.00	0%
<b>Total Income</b>	<b>\$158,000.00</b>	<b>\$82,367.64</b>	<b>\$29,629.77</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$111,997.41</b>	<b>71%</b>
<b>EXPENSES</b>							
Administrator	\$20,000.00	\$7,033.31	\$2,790.17			\$9,823.48	49%
Web Services	\$6,000.00	\$1,395.00	\$1,395.00			\$2,790.00	47%
Archivist	\$1,000.00	\$1,000.00	\$0.00			\$1,000.00	100%
Accountant	\$1,500.00	\$0.00	\$0.00			\$0.00	0%
Advocacy	\$2,100.00	\$0.00	\$1,800.00			\$1,800.00	0%
Insurance Policy	\$1,100.00	\$0.00	\$0.00			\$0.00	0%
Phone	\$650.00	\$164.57	\$164.49			\$329.06	51%
Postage	\$725.00	\$363.60	\$549.49			\$913.09	126%
Office Supplies	\$175.00	\$0.00	\$305.23			\$305.23	174%
Food	\$5,700.00	\$373.31	\$823.13			\$1,196.44	21%
Travel	\$4,100.00	\$796.50	\$208.16			\$1,004.66	25%
Equipment	\$0.00	\$0.00	\$0.00			\$0.00	0%
Printing and Design	\$4,050.00	\$1,362.26	\$4,069.34			\$5,431.60	134%
Conference	\$100,000.00	\$500.00	\$55,112.20			\$55,612.20	56%
Lodging	\$2,950.00	\$274.51	\$461.04			\$735.55	25%
Honoraria	\$2,000.00	\$250.00	\$250.00			\$500.00	25%
Awards and Prizes	\$1,450.00	\$145.00	\$550.00			\$695.00	48%
Scholarships	\$2,200.00	\$0.00	\$845.00			\$845.00	38%
Banking Fees	\$2,000.00	\$1,351.27	\$3,022.10			\$4,373.37	219%
Investments	\$0.00	\$0.00	\$686.82			\$686.82	0%
Disaster Assistance	\$0.00	\$0.00	\$0.00			\$0.00	0%
Miscellaneous	\$300.00	\$199.95	\$0.00			\$199.95	67%
<b>Total Expenses</b>	<b>\$158,000.00</b>	<b>\$15,209.28</b>	<b>\$73,032.17</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$88,241.45</b>	<b>56%</b>
<b>Net Income or (Loss)</b>		<b>\$67,158.36</b>	<b>(\$43,402.40)</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$23,755.96</b>	

**Account Balances**

			<u>Opening</u>	<u>Credits</u>	<u>Debits</u>	<u>Closing</u>
PNC Checking	\$47,491.98	Operating	\$67,158.36	\$29,629.77	(\$73,032.17)	\$23,755.96
PNC Savings	\$76,346.90	Restricted	\$128,600.00	\$2,129.00	\$0.00	\$130,729.00
Vanguard Bonds	\$79,546.41	Reserve	\$55,300.00	\$0.00	\$0.00	\$55,300.00
Total	\$203,385.29	Surplus	(\$6,399.67)	\$0.00	\$0.00	(\$6,399.67)
		Totals	\$244,658.69	\$31,758.77	(\$73,032.17)	\$203,385.29

**Summary - First Quarter FY 2017**

Opening Balance	\$244,658.69
Total Income	\$31,758.77
Total Expenses	(\$73,032.17)
Closing Balance	\$203,385.29

**Restricted Funds**

			<u>Opening</u>	<u>New Gifts</u>	<u>Spending</u>	<u>Closing</u>
PNC Savings	\$51,182.59	Disaster Assist.	\$1,014.00	\$2,094.00	\$0.00	\$3,108.00
Vanguard Bonds	\$79,546.41	Education	\$121,891.00	\$30.00	\$0.00	\$121,921.00
Total	\$130,729.00	Finch Award	\$5,695.00	\$5.00	\$0.00	\$5,700.00
		Total	\$128,600.00	\$2,129.00	\$0.00	\$130,729.00

MARAC Spring 2017 MEETING

Newark, NJ

Proposed Budget

Category	Total for 250 Attendees	Total for 300 Attendees
<b>INCOME</b>		
Registration Fees	\$25,650.00	\$30,600.00
Exhibitor Fees	\$10,900.00	\$10,900.00
Meals	\$5,125.00	\$6,250.00
Reception	\$1,200.00	\$1,300.00
Tour Fees	\$1,920.00	\$1,920.00
Workshop Fees	\$4,500.00	\$5,850.00
Total Income	\$49,295.00	\$56,820.00
<b>EXPENSES</b>		
Administrative Services	\$5,000.00	\$5,000.00
Hospitality	\$250.00	\$250.00
Hotel Expenses	\$350.00	\$350.00
LAC Expenses	\$750.00	\$750.00
Meal Expenses	\$18,566.00	\$21,646.00
Reception	\$11,400.00	\$13,400.00
Registration/Program	\$3,250.00	\$3,250.00
Session/Plenary Speakers	\$900.00	\$900.00
Tour Expenses	\$1,683.00	\$1,683.00
Workshop Expenses	\$2,850.00	\$2,850.00
Total Expenses	\$44,999.00	\$50,079.00
NET INCOME / PROJECTED PROFIT	\$4,296.00	\$6,741.00

## MARAC Spring 2017 MEETING

Newark, NJ

## Proposed Budget - Income Estimates

Category	250			300		
	Cost/Item	Attendees	Total	Cost/Item	Attendees	Total
<b>INCOME</b>						
<b>Registration Fees</b>						
Pre-Reg Members	\$95.00	140	\$13,300.00	\$95.00	175	\$16,625.00
Pre-Reg Non-Members	\$135.00	35	\$4,725.00	\$135.00	25	\$3,375.00
Late Reg Members	\$105.00	25	\$2,625.00	\$105.00	25	\$2,625.00
Late Reg Non-Members	\$145.00	10	\$1,450.00	\$145.00	10	\$1,450.00
Member, on-site	\$115.00	15	\$1,725.00	\$115.00	25	\$2,875.00
Non-member, on-site	\$155.00	5	\$775.00	\$155.00	15	\$2,325.00
Student registration	\$50.00	10	\$500.00	\$50.00	10	\$500.00
One day (Saturday only)	\$55.00	10	\$550.00	\$55.00	15	\$825.00
<b>Total Registration Fees</b>		<b>250</b>	<b>\$25,650.00</b>		<b>300</b>	<b>\$30,600.00</b>
<b>Exhibitor Fees</b>						
Ads	\$100.00	2	\$200.00	\$100.00	2	\$200.00
Donations/Sponsorships	\$250.00	8	\$2,000.00	\$250.00	8	\$2,000.00
Rental - 1 Table	\$600.00	12	\$7,200.00	\$600.00	12	\$7,200.00
Rental - 2 Tables	\$750.00	2	\$1,500.00	\$750.00	2	\$1,500.00
<b>Total Exhibitor Fees</b>			<b>\$10,900.00</b>			<b>\$10,900.00</b>
<b>Meals</b>						
Breakfast - Business Mtg.	\$20.00	100	\$2,000.00	\$20.00	125	\$2,500.00
Lunch - Friday	\$25.00	125	\$3,125.00	\$25.00	150	\$3,750.00
<b>Total Meals</b>			<b>\$5,125.00</b>			<b>\$6,250.00</b>
<b>Reception</b>						
Sponsorship	\$500.00	2	\$1,000.00	\$500.00	2	\$1,000.00
Guest Tickets	\$20.00	10	\$200.00	\$20.00	15	\$300.00
<b>Total Reception Income</b>			<b>\$1,200.00</b>			<b>\$1,300.00</b>
<b>Tour Fees</b>						
Tour #1	\$5.00	15	\$75.00	\$5.00	15	\$75.00
Tour #2	\$5.00	25	\$125.00	\$5.00	25	\$125.00
Tour #3	\$15.00	15	\$225.00	\$15.00	15	\$225.00
Tour #4	\$15.00	24	\$360.00	\$15.00	24	\$360.00
Tour #5	\$15.00	20	\$300.00	\$15.00	20	\$300.00
Tour #6	\$10.00	20	\$200.00	\$10.00	20	\$200.00
Tour #7	\$10.00	20	\$200.00	\$10.00	20	\$200.00
Tour #8	\$5.00	15	\$75.00	\$5.00	15	\$75.00
Tour #9	\$15.00	24	\$360.00	\$15.00	24	\$360.00
<b>Total Tour Fees</b>			<b>\$1,920.00</b>			<b>\$1,920.00</b>
<b>Workshop Fees</b>						
Workshop #1 (half-day)	\$45.00	20	\$900.00	\$45.00	25	\$1,125.00
Workshop #2 (half-day)	\$45.00	20	\$900.00	\$45.00	25	\$1,125.00
Workshop #3 (half-day)	\$45.00	15	\$675.00	\$45.00	20	\$900.00
Workshop #4 (half-day)	\$45.00	15	\$675.00	\$45.00	20	\$900.00
Business Forum	\$45.00	30	\$1,350.00	\$45.00	40	\$1,800.00
<b>Total Workshop Fees</b>			<b>\$4,500.00</b>			<b>\$5,850.00</b>
<b>Total Income</b>			<b>\$49,295.00</b>			<b>\$56,820.00</b>

Proposed Budget - Expense Estimates

Category	250			300		
	Cost/Item	Attendees	Total	Cost/Item	Attendees	Total
EXPENSES						
Administrative Services			\$5,000.00			\$5,000.00
Hospitality Suite			\$250.00			\$250.00
Hotel Expenses						
AV Equipment Tech			\$0.00			\$0.00
AV Equipment Rental			\$0.00			\$0.00
Room Rentals			\$0.00			\$0.00
Miscellaneous Expenses			\$350.00			\$350.00
Taxes / Fees						
Total Hotel Expenses			\$350.00			\$350.00
LAC Expenses			\$750.00			\$750.00
Meal Expenses						
Breakfast Buffet - Sat	\$20.00	100	\$2,000.00	\$20.00	125	\$2,500.00
Continential Breakfast - Fri	\$18.00	200	\$3,600.00	\$18.00	225	\$4,050.00
Coffee Breaks Thur (AM & PM)	\$8.00	120	\$960.00	\$8.00	130	\$1,040.00
Coffee Breaks Fri (AM & PM)	\$8.00	375	\$3,000.00	\$8.00	450	\$3,600.00
Coffee Break Sat.	\$8.00	150	\$1,200.00	\$8.00	150	\$1,200.00
Lunch - Friday (meat)	\$38.00	100	\$3,800.00	\$38.00	125	\$4,750.00
Lunch - Friday (veg)	\$38.00	25	\$950.00	\$38.00	25	\$950.00
Vendor Lunches	\$16.00	16	\$256.00	\$16.00	16	\$256.00
Reception Thursday	\$20.00	100	\$2,000.00	\$20.00	125	\$2,500.00
Steering Committee - Th	\$40.00	20	\$800.00	\$40.00	20	\$800.00
Total Meal Expenses			\$18,566.00			\$21,646.00
Reception						
Caterer	\$40.00	250	\$10,000.00	\$40.00	300	\$12,000.00
Entertainment			\$400.00			\$400.00
Insurance			\$400.00			\$400.00
Facility Fees			\$0.00			\$0.00
Transportation			\$600.00			\$600.00
Total Reception Costs			\$11,400.00			\$13,400.00
Registration/Program						
Program			\$3,000.00			\$3,000.00
Folders, Badges, etc.			\$250.00			\$250.00
Total Registration/Program Costs			\$3,250.00			\$3,250.00
Session/Plenary Speakers						
Lodging			\$100.00			\$100.00
Meals			\$200.00			\$200.00
Honoraria			\$400.00			\$400.00
Travel			\$200.00			\$200.00
Total Session/Plenary Costs			\$900.00			\$900.00
Total Tour Expenses			\$1,683.00			\$1,683.00
Workshop Expenses						
Honoraria			\$1,000.00			\$1,000.00
Lodging/Meals			\$500.00			\$500.00
Travel (Speakers)			\$1,250.00			\$1,250.00
Misc. Expenses			\$100.00			\$100.00
Total Workshop Expenses			\$2,850.00			\$2,850.00
Total Expenses			\$44,999.00			\$50,079.00