



ARCHIVES SOCIETY OF ALBERTA

GUIDEBOOK TO  
EDUCATIONAL AND TRAVEL GRANT  
PROGRAMS

Provided through the assistance of the  
**Alberta Historical Resources Foundation**

Revised Spring 2006

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## Introduction

The Archives Society of Alberta was registered under the Societies Act in 1992. Its goals and objectives are:

- to provide a framework through which all those engaged in, or interested in archival preservation work may meet, discuss, and resolve common needs and issues;
- to promote and advance the acquisition, collection, preservation, and use of archival material; and
- to encourage and develop archival skills among those engaged in archival work.

To meet these objectives, the ASA has developed education and travel assistance grant programs to meet the professional development needs of Albertans in fostering the preservation of the Province's archival resources.

The guide to the ASA's educational and travel grant programs is comprised of three parts.

1. General Support Guidelines
2. Categories of Programs; and
3. Grant Application Forms

Together, these provide the applicant with comprehensive requirements regarding the grant process.

The grant programs are subject to periodic review and modification. Funds of one program not spent in a given year may be allocated to other programs, or held over to subsequent years.

The funds at the disposal of the Society for these grants are primarily derived from an allocation from the Alberta Historical Resources Foundation.

For more information and to submit completed grant forms contact:

Archives Society of Alberta  
P.O. Box 4067 South Edmonton Post Office  
Edmonton, Alberta T6E 4S8

## Part 1: General Support Guidelines

### 1.1 Eligibility

1. Applicants shall be resident Albertans or those whose permanent address is in Alberta.
2. Education and travel grants are available only to individual members of the ASA and to representatives from associate institutional and institutional members, who are resident in Alberta.

### 1.2 Applications

1. The Treasurer of the Archives Society of Alberta shall approve and award all education and travel grants subject to available funding and the terms and conditions described in this guidebook.
2. Funding amounts described in each program category represent the total amount available per program in each fiscal year. Funding for each program is expended on a first come, first served basis and may therefore be completely expended before the end of the fiscal year. Consequently, not all applications may receive funding.
3. Applications received more than thirty (30) days after the activity has taken place will not normally be considered.
4. Successful applicants will normally be funded only once in the duration of an event or course.
5. Applicants should use the most economical methods of travel and accommodation and adhere to the ASA's expense guidelines. Failure to do so may result in the application being denied, or the amount paid being reduced to reflect the lower cost alternative.
6. All applicants must submit their applications for funding on the forms provided in this handbook.
7. Incomplete applications will not be considered.

### 1.3 Evaluation

1. The following factors will be considered relative to each application:
  - a) relationship of the application to the purpose of the grant applied for;
  - b) evidence that applicant has applied to other possible funding sources;
  - c) evidence of the applicant's commitment to the archival profession in the form of employment and / or volunteer time in archives, or commitment to archival education and training.
2. All applicants, whether successful or unsuccessful, will be notified by letter from the Treasurer or designate.
3. Applicants should not expect automatic approval. In the event an application is denied funding, the ASA Board of Directors will review the decision only if significant additional information is provided within one (1) month of the date of rejection. Partial funding may be approved.

### 1.4 Reports and Commitments

1. Submission of applicable receipts is a condition of financial assistance.
2. Grant recipients may be required to submit progress reports as is appropriate.
3. Submission of a final report may be required, the format and content of which will be determined by the Treasurer.
4. Final project monies may be withheld at the Society's discretion until receipt and approval of the final report.
5. Any monies not utilized for the activity shall be returned to the Society within thirty (30) days of the date that activity was to commence.
6. Any monies not used for the purpose for which the grant was provided shall be returned to the Society.
7. A condition of accepting a grant from the Archives Society of Alberta is that auditors for the Alberta Historical Resources Foundation are authorized to audit all books and records in connection with the monies received.

## Part 2: Description of Grant Programs

### 2.1 Bursary Program

- Purpose: To provide an incentive for promising Alberta students or professionals to obtain graduate education in archival studies.
- Use of Grant: Tuition, books, and other related expenses.
- Amount: \$1,000 awarded annually. This sum maybe divided if more than one application is approved.
- Conditions:
- a) Eligibility: Applicants must be resident Albertans (or those whose permanent address is in Alberta) accepted as a full-time first or second year student in a graduate program of archival studies, or equivalent.
  - b) Criteria for selection:
    - i) academic and /or professional merit
    - ii) potential for contributing to Alberta's archival community
    - iii) preference will be given to first-time applicants
  - c) Applications should be received no later than July 30. Grants will be awarded before the end of September.
  - d) Grants will be paid in two installments:
    - i) One-half the amount at the beginning of the first semester of the academic year, and
    - ii) One-half the amount at the beginning of the second semester, pending submission of proof of continuing enrollment in the program

## 2.2 Archival Practicum Program

- Purpose: To assist individuals in acquiring practical hands-on experience at established archival institutions in Alberta.
- Use of Grant: Transportation expenses, accommodation, and meals.
- Amount: Total \$1000.00 annually. A maximum amount of \$1000.00 will be awarded to any one applicant, based on a two-week practicum.
- Conditions:
- a) Eligibility: Applicants must be resident Albertans (or those whose permanent address is in Alberta) who have completed the ASA Institute, or an equivalent educational program.
  - b) Criteria for selection:
    - i) The proposed practicum must provide practical hands-on experience with basic archival functions, including appraisal, arrangement and description.
    - ii) The practicum must be pre-arranged between applicant and host institutions prior to submitting application for funding\*, normally at the nearest appropriate institution to the applicant.
    - iii) Applicants may approach any institutional member to host a practicum, subject to the approval of the ASA Board of Directors. Preference will be given to established archival institutions that are best able to provide supervision and direction to the applicant.
    - iv) Practicum will be funded for a minimum of one work week and a maximum of two work weeks.
    - v) Preference will be given to applicants who wish to take a two-week practicum.
    - vi) Expenses will be paid at the following rates:
      - Travel: \$0.35/km for private vehicle or least expensive alternate method
      - Accommodation: to \$75.00/night maximum
      - Meals to \$40.00/day maximum
    - vii) Receipts must be submitted for expenses other than for travel by private vehicle.
  - c) Both the applicants and the institution will submit a final report to the ASA describing their experiences during the practicum.
  - d) Grant will be paid after successful completion of practicum.

\*If applicant requires assistance in making initial contacts to arrange practicum, please contact any member of the ASA Board of Directors or the Archives Advisor.

### 2.3 Tuition Support Program

- Purpose: To assist with tuition and other costs incurred in completing a post-secondary education course or courses in archives administration or records management.
- Use of Grant: Tuition, textbooks, library fees, and other expenses incurred in attending courses in archive administration or records management.
- Amount: Total \$500.00. A maximum of \$250.00 per course will be paid.
- Conditions:
- a) Eligibility:
    - i) Applicants must be resident Albertans (or those whose permanent address is in Alberta).
    - ii) Applicants must be enrolled in an appropriate course at a post –secondary institution; or applicants have thirty (30) days after completion of activity to submit applications for funding.
    - iii) Applications will be accepted from students who wish to attend out-of-province institutions, or who have completed courses at out-of-province institutions, within thirty (30) days of completing the course.
  - b) Criteria for selection:
    - i) Preference will be given to those applicants who wish to attend, or who have completed courses at institutions in Alberta
    - ii) Preference will be given to those applicants who are currently employed in archives or records management
    - iii) Grant payments will be made after completion of the course
    - iv) No single applicant will receive more than one grant per year.

## 2.4 Professional Development Travel Assistance - General \*

**Purpose:** To assist members who wish to attend meetings, conferences, and workshops related to archival activities. The following criteria are used to establish funding priorities:

- a) conferences, workshops or seminars that relate directly to Archives;
- b) conferences, workshops or seminars that relate indirectly to archives (records management, library science, museum science, historical or other allied professions);
- c) one of a kind or one-time conferences.

\*Note that this assistance program excludes workshops offered by the Archives Society of Alberta. See Section 2.5 for Professional Development Travel Assistance-AGM, PDTA; Section 2.6 for Education Program Travel Assistance – Special Topics Workshop, or Section 2.7 for Education Program Travel Assistance – ASA Institute.

**Use of Grant:** Transportation expenses, accommodation, and meals. PDTA Grants are based on a cost-sharing principle and are not designed to fully support attendance at conferences, seminars or workshops.

**Amount:** \$6000.00 or more awarded annually based on available funding.

- Conditions:**
- a) Applicants must be resident Albertans (or those whose permanent address is in Alberta).
  - b) The maximum granted is 50% of actual travel costs.
  - c) Expenses for transportation by private vehicle will be based on the rate of \$0.35/km.
  - d) Expenses for other methods of transportation will be based on actual costs. Preference will be given to those who use the most economical mode of transportation.
  - e) Other expenses will be paid at the following rates:
    - Accommodation: to \$75.00/per night maximum;
    - Meals: to \$40.00/per day maximum (includes breakfast, lunch and dinner)
  - f) Receipts must be submitted except for transportation by private vehicle.

D. Professional Development Travel Assistance - General \*- continued

- g) Grants will be paid after completion of the activity and upon submission of receipts. Application must be made within thirty (30) days after the completion of the event to be eligible for funding.
- h) Persons may be eligible for more than one travel assistance grant to a maximum of \$500.00 per fiscal year per person.

## 2.5 Educational Program Travel Assistance – Special Topics Workshops

- Purpose:** To assist members attending workshops offered through the ASA Education Program
- SEE Section 2.4 for Professional Development Travel Assistance – General; See Section 2.5 for Professional Development Travel Assistance – AGM or Institutional Forum; See Section 2.7 for Education Program Travel Assistance – ASA Institute
- Use of Grant:** Transportation, accommodation, and meals. EPTA Grants are based on a cost-sharing principle and are not designed to fully support attendance at workshops or the Institute.
- Amount:** \$2500.00 awarded annually, based on two workshops per year
- Conditions:**
- a) **Eligibility:** Applicants must be resident Albertans (or those whose permanent address is in Alberta) and complete the workshop.
  - b) **Criteria:**
    - i) Transportation expenses will be paid at the rate of \$0.35/km or the least expensive alternate method.
    - ii) Receipts must be submitted except for transportation by private vehicle.
    - iii) Other expenses will be paid at the following rates:
      - Accommodation: to \$75.00/per night maximum;
      - Meals: to \$40.00/per day maximum (includes breakfast, lunch and dinner).
    - iv) Grants will be paid after the completion of the workshop and upon submission of receipts.
    - v) Applications must be made within thirty (30) days after completion of the workshop.
    - vi) The amount allocated per workshop may be pro-rated according to the number of applicants.

## 2.6 Educational Program Travel Assistance – ASA Institute

- Purpose:** To assist members attending the ASA Institute offered through the ASA Education Program
- SEE Section 2.4 for Professional Development Travel Assistance – General; See Section 2.5 for Professional Development Travel Assistance – AGM or Institutional Forum; See Section 2.6 for Education Program Travel Assistance – Special Topics Workshops
- Use of Grant:** Transportation, accommodation, and meals will be considered. EPTA Grants are based on a cost-sharing principle and are not designed to fully support attendance at workshops or the Institute.
- Amount:** Funds will be determined annually based on revenue generated by course fees and the costs of holding the Institute.
- Conditions:**
- a) **Eligibility:** Applicants must be resident Albertans (or those whose permanent address is in Alberta) and complete the Institute.
  - b) **Criteria:**
    - i) Transportation expenses will be paid at the rate of \$0.35/km or the least expensive alternate method.
    - ii) Receipts must be submitted except for transportation by private vehicle.
    - iii) Other expenses will be paid at the following rates:
      - Accommodation: to \$75.00/per night maximum;
      - Meals: to \$40.00/per day maximum (includes breakfast, lunch and dinner)
    - iv) Grants will be paid after the completion of the Institute and upon submission of receipts.
  - ii) Applications must be made within thirty (30) days after completion of the workshop.
  - iii) The amount allocated may be pro-rated according to the number of applicants and the total amount requested for travel assistance.

## Part 3: Application Forms

1. Bursary Program / Tuition Support Program
2. Archival Practicum Program
3. Professional Development Travel Assistance / Educational Program Travel Assistance

- NOTE:
- a) Before completing application forms, make sure you read Parts 1 and 2 of the Guidebook to Educational and Travel Grant Programs.
  - b) Before submitting your application for funding, make sure you have attached copies of all necessary documents requested on the application forms.



**APPLICATION FOR FUNDING:  
BURSARY or TUITION SUPPORT PROGRAM**

(Please print legibly)

- Bursary Program (\$1000 awarded annually – grants will be paid in installments)
- Tuition Support Program (\$500 awarded annually; maximum of \$250 per course)

**PERSONAL INFORMATION**

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ PHONE: \_\_\_\_\_  
 \_\_\_\_\_ (bus)  
 \_\_\_\_\_ (res)  
 \_\_\_\_\_ (city) \_\_\_\_\_ (prov) POSTAL CODE: \_\_\_\_\_

INSTITUTIONAL AFFILIATION (if any): \_\_\_\_\_

NAME OF EDUCATIONAL INSTITUTION: \_\_\_\_\_

NAME OF COURSE OR PROGRAM \_\_\_\_\_

Please attach a copy of letter of acceptance or enrolment.

Starting Date: \_\_\_\_\_ Anticipated Completion Date: \_\_\_\_\_

**TUITION SUPPORT PROGRAM**

Describe how this course benefits you or your institution. (please attach separate sheet)

|                  |                         |                            |
|------------------|-------------------------|----------------------------|
| <b>EXPENSES:</b> | Tuition:                | _____                      |
|                  | Books:                  | _____                      |
|                  | Other (please specify): | _____                      |
|                  | AMOUNT REQUESTED:       | _____ (Maximum: \$ 250.00) |

(complete "All Applicants" section on next page)

**BURSARY PROGRAM**

EDUCATION, RELATED EMPLOYMENT OR OTHER EXPERIENCE. Please attach copy of transcript and you may attach resume

**APPLICATION FOR FUNDING**

**BURSARY or TUITION SUPPORT PROGRAM**

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**BURSARY PROGRAM - continued**

REFERENCES: List at least two and attach letters from those individuals.

\_\_\_\_\_  
Telephone: (\_\_\_\_) \_\_\_\_\_ Telephone: (\_\_\_\_) \_\_\_\_\_ /2

| LIST REQUESTS TO OTHER FUNDING SOURCES | AMOUNT AWARDED |
|--|----------------|
| _____                                  | _____          |
| _____                                  | _____          |
| _____                                  | _____          |

**ALL APPLICANTS**

Other pertinent information: \_\_\_\_\_

| <b>Attachments Checklist:</b> | Bursary | Tuition support |
|-------------------------------|---------|-----------------|
| Course / Conference enrolment | x       | x               |
| Benefits of course            |         | x               |
| References                    | x       |                 |

I certify that the information provided in this application and attached documents is accurate and complete and I will abide by the conditions specified in the Guidebook to Educational and Travel Grant Programs.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Forward to: ASA Administrative Coordinator  
P.O. Box 4067 South Edmonton Post Office  
Edmonton, AB T6E 4S8

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For Office Use Only:  
Date recd: \_\_\_\_\_ Amt: \_\_\_\_\_ Date Issued: \_\_\_\_\_ Cheque # \_\_\_\_\_ Init: \_\_\_\_\_  
Bursary 2<sup>nd</sup> Payment Amt: \_\_\_\_\_ Date Issued: \_\_\_\_\_ Cheque # \_\_\_\_\_ Init: \_\_\_\_\_  
Signature certifying continuing enrollment \_\_\_\_\_



APPLICATION FOR FUNDING:
EDUCATION AND PROFESSIONAL DEVELOPMENT
TRAVEL ASSISTANCE PROGRAMS

(Please print legibly)

Please check one:

- Education Program Travel Assistance (pro rated among applicants from available funding)
Professional Development Travel Assistance (maximum 50% of costs to maximum of \$500)

Before completing application form, please ensure you read Parts 1 and 2 of the Guidebook to Educational and Travel Grant Programs.

Course/Conference: Date(s):

PERSONAL INFORMATION

NAME:

ADDRESS: PHONE: (bus)

(res)

POSTAL CODE:

(city)

(prov)

INSTITUTIONAL AFFILIATION (if any):

Is application for funding being made under Institutional Membership? Yes No

EXPENSES:

Transportation:

Private Vehicle: kms @ \$0.35/km = \$ (no receipts required)
Commercial Transportation (Plane/bus/train) = \$ (specify & attach receipts)
Accommodation: (# nights @ \$) = \$
Meals (follow guidebook criteria) = \$ (specify & attach receipts)
Other Costs (please specify) = \$
TOTAL COSTS = \$
AMOUNT REQUESTED = \$

# APPLICATION FOR FUNDING

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Before submitting your Application for Funding, make sure you have attached copies of all necessary documents requested.

| <b>Attachments Checklist:</b>   | <b>EPTA</b> | <b>PDTA</b> |
|---------------------------------|-------------|-------------|
| Course / Conference description | x           | x           |
| Receipts for travel             | x           | x           |
| Receipts for other expenses     |             | x           |

I certify that the information provided in this application and attached document(s) is accurate and complete and I will abide by the conditions specified in the Support Guidelines.

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Signature

---

Date

Forward to: ASA Administrative Coordinator  
P.O. Box 4067 South Edmonton Post Office  
Edmonton, AB T6E 4S8

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For Office Use Only:

Date recd: \_\_\_\_\_ Amt: \_\_\_\_\_ Date Issued: \_\_\_\_\_ Cheque # \_\_\_\_\_ Init: \_\_\_\_\_  
06/00



**APPLICATION FOR FUNDING:  
ARCHIVAL PRACTICUM PROGRAMME  
(Please print legibly)**

**PERSONAL INFORMATION**

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ PHONE: \_\_\_\_\_)

(bus)

\_\_\_\_\_ )

(res)

\_\_\_\_\_ POSTAL CODE: \_\_\_\_\_

(city)

(prov)

**INSTITUTIONAL AFFILIATION** (if any): \_\_\_\_\_

**NAME OF INSTITUTION WHERE PRACTICUM IS TO TAKE PLACE:**

\_\_\_\_\_  
Please attach letter from head of institution confirming practicum arrangement.

**NAME OF SUPERVISOR(S) FOR PRACTICUM:**

\_\_\_\_\_

Starting Date: \_\_\_\_\_ Anticipated Completion Date: \_\_\_\_\_

**PRACTICUM DESCRIPTION:** (include description of work to be undertaken)

**ANTICIPATED EXPENSES:**

Travel – Private Vehicle (\_\_\_\_km @ \$0.35/km) \_\_\_\_\_

Accommodation - # of nights \_\_\_\_\_ @ \$ \_\_\_\_\_  
(maximum \$75/night)

Meals - # of days @ \$ \_\_\_\_\_  
(maximum \$40/day)

Other (please specify): \_\_\_\_\_

TOTAL \$ \_\_\_\_\_

AMOUNT REQUESTED: \$ \_\_\_\_\_ (Maximum \$1,000.00)

**APPLICATION FOR FUNDING:  
ARCHIVAL PRACTICUM PROGRAMME**

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| <b>LIST REQUESTS TO OTHER FUNDING SOURCES<br/>AWARDED</b> | <b>AMOUNT</b> |
|---|---------------|
| _____   | _____         |
| _____   | _____         |
| _____   | _____         |

**EDUCATION, ARCHIVAL WORKSHOPS, RELATED EMPLOYMENT OR  
OTHER EXPERIENCE** Please attach copy of transcript and you may attach resume.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I certify that the information provided in this application and attached documents is accurate and complete and I will abide by the conditions specified in the Support Guidelines.

Signature

Date

Forward to: ASA Administrative Coordinator  
P.O. Box 4067 South Edmonton Post Office  
Edmonton, AB T6E 4S8

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For Office Use Only:  
Date recd: \_\_\_\_\_ Amt: \_\_\_\_\_ Date Issued: \_\_\_\_\_ Cheque # \_\_\_\_\_ Init: \_\_\_\_\_

06/00

## ASA Expense Request Travel Data Sheet

Mileage Amounts (in kms)

|                | Banff | Calgary | Edm. | Ft. McM. | Gr. Prairie | Jasper | Lethbg | Med. Hat | Peace | Red Deer |
|----------------|-------|---------|------|----------|-------------|--------|--------|----------|-------|----------|
| Banff          | XXXX  | 128     | 401  | 839      | 679         | 287    | 342    | 419      | 809   | 258      |
| Calgary        | 128   | XXXX    | 294  | 731      | 621         | 412    | 216    | 293      | 748   | 145      |
| Edmonton       | 401   | 294     | XXXX | 438      | 456         | 362    | 509    | 524      | 484   | 148      |
| Ft McMurray    | 839   | 731     | 438  | XXXX     | 754         | 792    | 946    | 931      | 680   | 586      |
| Grande Prairie | 679   | 621     | 456  | 754      | XXXX        | 394    | 934    | 979      | 197   | 584      |
| Jasper         | 287   | 412     | 362  | 792      | 394         | XXXX   | 626    | 703      | 574   | 413      |
| Lethbridge     | 342   | 216     | 509  | 946      | 934         | 626    | XXXX   | 164      | 963   | 360      |
| Medicine Hat   | 419   | 293     | 524  | 931      | 979         | 703    | 164    | XXXX     | 1008  | 410      |
| Peace River    | 809   | 748     | 484  | 680      | 197         | 574    | 963    | 1008     | XXXX  | 613      |
| Red Deer       | 258   | 145     | 148  | 586      | 584         | 413    | 360    | 410      | 613   | XXXX     |

Take mileage and multiply by \$ 0.35 for expense claim amount.

For example: Calgary to Edmonton return

$$(294\text{km} \times 2) \times \$0.35 / \text{km} = \$205.80$$