

# archives

SOCIETY OF ALBERTA

**GUIDEBOOK TO  
EDUCATIONAL AND TRAVEL GRANT  
PROGRAMS**

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

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## Introduction

Registered under the Alberta Societies Act in 1992, the Archives Society of Alberta has the following goals and objectives:

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

To meet these objectives, the ASA 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.

This guide to the ASA's education and travel grants programs is comprised of three parts:

- Education and Travel Grants Policies;
- Categories of Programs; and
- Grant Application Forms

Together, these three sections provide the applicant with comprehensive requirements regarding the grant process. Please review them prior to applying for funding to facilitate the application process.

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:

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

## **Part 1: Education and Travel Grants Policies**

### **1.1 Eligibility**

1. Applicants shall be resident Albertans or those whose permanent address is in Alberta.
2. Travel assistance grants are available only to current individual members who are resident in Alberta. Applications for assistance submitted by people who were not current ASA individual members at the time the application is processed will not receive funding. Applicants are responsible for confirming their membership status.

### **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 membership 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 membership year. Consequently, not all applications may receive funding.
3. Applications received more than thirty (30) days after the activity has taken place will not be considered.
4. Successful applicants will be funded only once for a conference 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 the 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 applicant may appeal the decision to the ASA Board of Directors. The decision will be reviewed only if significant additional information is provided within thirty days of the date of rejection.

### 1.4 Reports and Commitments

1. Submission of applicable original 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 narrative report is required of applicants for the PDTA program. For other grants, a report may be required, the format and content of which will be determined by the Treasurer.
4. 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: \$1,500 available per membership year. This sum may be 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 of the amount at the beginning of the first semester of the academic year, and
    - ii) One-half of the amount at the beginning of the second semester, pending submission of proof of continuing enrolment in the program.

## 2.2 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:** \$500.00 available per membership year. 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 currently enrolled in an appropriate course at a post-secondary institution; or applicants have thirty (30) days after completion of the course 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.

### 2.3 Archival Practicum Support Program

- Purpose: To assist current ASA individual members in acquiring practical hands-on experience at established archival institutions in Alberta.
- Use of Grant: Transportation expenses, accommodation, and meals.
- Amount: \$1000.00 available per membership year. 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 members of the ASA, 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.
    - 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 ASA 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. Preference will be given to applicants who wish to take a two-week practicum.
    - v) Expenses will be paid at the rates indicated on the current application form. 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.

## 2.4 Professional Development Travel Assistance

- Purpose:** To assist current ASA individual 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);
- 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:** \$8,000.00 available per membership year based on available funding. Funding may be allocated to represent specific activities, such as the annual ACA conference, and will no longer be on a first come – first served basis.
- Conditions:**
- a) Applicants must be current ASA individual members residing in Alberta (or those whose permanent address is in Alberta).
  - b) Pre-approval is required for all professional development opportunities to be eligible for funding. A completed pre-approval form must be received a minimum of thirty (30) days prior to the event.
  - c) The maximum granted is 50% of actual travel costs.
  - d) Expenses will be paid at the rates indicated on the current application form. Expenses for methods of transportation other than vehicles will be based on actual costs. Preference will be given to those who use the most economical mode of transportation.
  - e) Receipts must be submitted except for transportation by private vehicle.
  - f) Grants will be paid after the completion of the activity and upon submission of receipts within thirty (30) days after the completion of the event.
  - g) Applicants are required to submit a short narrative report outlining the benefit of the professional development opportunity. Consisting of approximately 250 words, the report will include a summary of the professional development experience and its value to the applicant and his/her institution. Selected narratives may be printed in the ASA Newsletter.
  - h) Individual members may be eligible for more than one travel assistance grant to a maximum of \$750.00 per membership year per member.
  - i) Preference will be given to domestic professional development opportunities.

## 2.5 Educational Program Travel Assistance – ASA Workshops

**Purpose:** To assist current ASA individual members attending workshops offered through the ASA Education Program.

Please note that the ASA has a separate assistance program for the ASA Institute under section 2.6. For assistance with education offerings by groups other than the ASA, see section 2.4 (Professional Development Travel Assistance).

**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 available per membership year, based on two workshops per year.

**Conditions:**

- a) **Eligibility:** Applicants must be ASA members, resident Albertans (or those whose permanent address is in Alberta) and complete the workshop.
- b) **Criteria:**
  - i) Expenses will be paid at the rates indicated on the current application form. Receipts must be submitted except for transportation by private vehicle.
  - ii) Grants will be paid after the completion of the workshop and upon submission of receipts.
  - iii) Applications must be made within thirty (30) days after completion of the workshop.
  - iv) The amount allocated per workshop may be pro-rated according to the number of applicants and the total amount requested for travel assistance.

## 2.6 Educational Program Travel Assistance – ASA Institute

**Purpose:** To assist current ASA individual members attending the ASA Institute offered through the ASA Education Program

Please note that the ASA has a separate assistance program for ASA workshops under section 2.5. For assistance with education offerings by groups other than the ASA, see section 2.4 (Professional Development Travel Assistance).

**Use of Grant:** Transportation, accommodation, and meals will be considered. EPTA institute grants are based on a cost-sharing principle and are not designed to fully support attendance at 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) who are ASA members at the time of the Institute and complete the Institute.

b) **Criteria:**

- i) Expenses will be paid at the rates indicated on the current application form. Receipts must be submitted except for transportation by private vehicle.
- ii) Grants will be paid after the completion of the workshop and upon submission of receipts.
- iii) Applications must be made within thirty (30) days after completion of the Institute.
- iv) The amount may be pro-rated according to the number of applicants and the total amount requested for travel assistance.

## 2.7 Conference Travel Grant

- Purpose:** To assist current ASA individual members who wish to attend or are presenting at the ASA bi-ennial conference.
- Use of Grant:** Transportation and accommodation. Conference Travel Grants are based on a cost-sharing principle and are not designed to fully support attendance at the conference.
- Amount:** \$5000.00 available per conference.
- Conditions:**
- a) **Eligibility:** Applicants must be current ASA Individual members, resident Albertans (or those whose permanent address is in Alberta) and attend the conference in its entirety including the Annual General Meeting of the society.
  - b) **Criteria:**
    - i) Those traveling further distances will be given first consideration.
    - ii) Preference will be given to those applicants who have made volunteer contributions to the ASA or the archival community in the past three (3) membership years.
    - iii) Expenses will be paid at the rates indicated on the current application form. Receipts must be submitted except for transportation by private vehicle.
    - iv) Grants will be paid after the completion of the conference and upon submission of receipts.
    - v) Applications must be made within thirty (30) days after completion of the conference.
    - vi) The amount may be pro-rated according to the number of applicants and the total amount requested for travel assistance.