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Letter to AALL leaders regarding AALL funding of projects, March 8, 1988

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March 8, 1988

TO: Chairs, Special Interest Sections
Chapter Presidents
Standing, Special and Advisory Committees

SUBJECT: GUIDELINES FOR AALL FUNDING OF PROJECTS

Attached is a copy of the "Guidelines for AALL Funding of Projects" that was adopted by the Executive Board at the January, 1988 meeting.

These policies will apply for all future requests for the funding of projects, which will need the approval of the Executive Board for use of Association funds. The attached should be self-explanatory, but please feel free to contact me if you have any questions.

Cordially yours,

WILLIAM H. JEPSON
Executive Director

WHJ:lp
cc: Scott Pagel, Chair, Special Interest Sections Council
Ms. Maryruth Storer, Coordinator, Council of Chapter Presidents
GUIDELINES FOR AALL FUNDING OF PROJECTS

GENERAL POLICY

In the interests of supporting projects that will benefit the Association and its members, the American Association of Law Libraries may provide funds for the development and completion of various projects which qualify under the criteria and factors specified below. These criteria are to be applied on a case by case basis, within the described procedures, and the approval or disapproval of any particular proposal may be determined by the availability of funds. Funding may be in the form of a grant, loan or combination thereof.

CRITERIA

The following are minimum criteria for the provision of funds by AALL in support of a proposed project.

1. Project Manager
   The project manager(s) must be a member of the Association, as defined by the Constitution and Bylaws.

2. Amount of Request
   Funding ordinarily will not be provided for projects in excess of $35,000 for a single project.

3. Expected Date of Completion
   The expected date of completion or conclusion of the project must be within two years of the date on which funding is approved by the AALL Executive Board. In special circumstances, the expected date of completion may be more than two years, if warranted by the nature of the project and approved by the Board.

FACTORS TO CONSIDER

If the above criteria are met, the following factors will then be considered in determining whether to grant a request for funding.
1. **Subject Matter**

The Association will consider funding projects which relate to AALL directly, to the needs or interests of law librarians in general, or to aspects of legal information, legal bibliography, or legal research. Innovations in library technology, creative service approaches, library cooperative efforts and the like that might serve as models for other law libraries are considered. The potential utility of the project whether it duplicates already existing programs are facets that are considered. Note: the required justification for the use of Association funds must include some significant and identifiable benefit to the large segment of the AALL membership.

2. **Financial Considerations**

The amount of the request will be considered, as well as the willingness of the entity to reimburse the Association for the funds provided. The likelihood of project completion should AALL not supply funds is a relevant factor to investigate. The access to funds from other sources will be reviewed and may affect the amount provided by AALL. In any case, the provision of financial support is subject to the availability of funds within the Association.

3. **Quality**

While predicting the quality of an incomplete project is difficult, the following questions should be investigated:

a. What are the credentials of the project manager(s), especially as they relate to the specific work in question?

b. How much of the project has been completed at the time the request is submitted to the Association?

c. Is there any indication from the work done to date or other appropriate factors likely to predict success of the completed project.

**GENERAL PROCEDURES**

The Association will follow the general procedures outlined below in determining whether to grant a request for financial support of a special project.
1. Submission of Request

A written proposal should be submitted to the President of the Association. The proposal must include the requested information detailed on the attached form, a detailed outline or description of project proposed, a copy of the project manager's resume, and a proposed budget. It should specifically address the minimum criteria described previously in these Guidelines. Additionally, proposals should include information on distribution of project results, marketing expectations, anticipated income, etc.

2. Initial Screening

The President and/or Executive Board conducts an initial screening of the proposal, considering the minimum criteria and assessing the likelihood of the proposal's ultimate acceptance. The proposal may be denied at this point by the President and/or Executive Board.

3. Referral to Committee

If the proposal passes the initial screening, the matter may be referred to the appropriate AALL Committee for recommendation or to an outside consultant for independent review. The committee or consultant will review the proposal in light of the "factors to consider" listed above soliciting any additional information needed and/or submitting it to an expert in the field for review if necessary.

4. Recommendation to the Board

After reviewing the proposal the committee or consultant will make a recommendation to the Executive Board as to whether the Association should grant the request to provide funding for the proposed project.

5. Final Decision

The Executive Board makes the final decision on the Association's participation, if any, in financially supporting the proposed project. The decision to offer financial support may include the terms for reimbursement of funds provided.
6. **Distribution of Funds**

Unless otherwise specified by the Executive Board, the total amount of funds approved for support of the proposed project will be distributed to the project manager within thirty days of acceptance of the terms for reimbursement by the project manager.

7. **Accounting**

At regular intervals as specified by the Executive Board but no less than annually, the project manager shall submit to the Executive Board an accounting which details the expenditures made from funds provided by the Association. At the completion of the project, a final accounting must be submitted within sixty days. Any funds provided by AALL which have not been used must be returned to the Association at this time.

8. **Report**

A final report summarizing the project must be distributed to the Executive Board and made widely available to the AALL membership within six months after completion of the project. All publicity about the project shall include a statement recognizing AALL's contribution.
APPLICATION FOR AALL FUNDING OF PROJECT

Brief title or subject matter of project:

Project manager:
  Library affiliation:
  Address:

Telephone number:

Amount of funding requested:
  Grant:
  Loan:

Reimbursement period:

Abstract describing project:

Proposal submitted by:

Date: