

INFORMS COMMUNITY OFFICER GUIDE



THANK YOU FOR JOINING OUR INFORMS COMMUNITY

Congratulations on your election as a community officer within INFORMS! We appreciate your willingness to devote time and expertise to this position. Our communities provide valuable and important contributions to our members and INFORMS so we want to do all we can to help you in your new position.

We have prepared this interactive Officer Guide as your go-to resource and link to other resources. The first part of the Guide includes specific operations or tasks that are part of your responsibilities, which are separated into basic and advanced. You can click on the "Link to Section" to view the operation or task of interest for a description and guidance.

Should you have any additional questions about the responsibilities of your position that are not covered in this Officer Guide or have suggestions for improvement, please contact the Community Relations Coordinator at informs@informs.org or 443-757-3500.

Please note that INFORMS requires all community officers be members of INFORMS. If you are not currently a member or your dues payment has lapsed, then initiate or renew your membership now at www.informs.org.

From all of us at INFORMS, thank you for your service. We know your efforts, and those of your fellow officers, will ensure the success of your community.

We are looking forward to working with you!



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REVIEW OFFICER GUIDE & COMPLETE OFFICER TRANSITION

Roles of elected Section Officers should be detailed in the Section or Society bylaws. Here is an example of officer roles.

1. The Chair (or President) is not directly elected but succeeds his/her post after a year or two as Vice Chair. The Chair is the chief administrative officer of the Section. He/she (a) calls and organizes meetings of the Section, (b) appoints ad hoc committees as required, (c) appoints chairs and members of standing committees, (d) manages the affairs of the community between meetings, and (e) presides over Section Board and Business meetings. The Chair is responsible for the development and execution of a Section program of services.

2. The Vice Chair (or Vice President) is the principal assistant administrative officer of the community and acts as chair in the Chair's absence. The Vice Chair shall have such other duties as the Chair or the Board assigns. Typically, the Vice Chair chairs a planning committee to develop the group's future program and required budget for the year when he/she will be Chair.

3. Some communities will combine the offices of Secretary and Treasurer into one role. A separate Treasurer could be justified if the community has activities, such as sponsorships, workshops, or conference that carry funds forward from year to year and result in the accumulation of a fund balance. In those cases, the Treasurer shall assume only those responsibilities that relate to the control of these Section funds and shall provide annual status reports for the Section's annual financial report to the Officers/Board/Membership. Program matters outside these areas shall remain with the Secretary.

   The Secretary-Treasurer, under the guidance of the Chair, shall conduct correspondence, keep the minutes and records of the Community, maintain contact with INFORMS, receive reports of activities from Section committees, be responsible for the administration and disbursement of Section funds, and coordinate stages of the election process. He or she will process the budget for submission to INFORMS, prepare and distribute reports on the financial status, and perform other duties usual to the office of an organization Secretary-Treasurer, including Officer Transition: For a community to be successful, it is important that its officers not "reinvent the wheel." Valuable information and resources are lost each year due to an ineffective transition process. To assist in this process, click here for the Officer Transition Checklist.

Examples of Appointed positions

- Webmaster
- Publications Committee
- Newsletter Editor
- Meetings Committee
- Awards Committee
- Planning Committee
- Membership Committee
- Professional Relations Committee

REVIEW THE OFFICER CALENDAR WITH IMPORTANT DATES & DEADLINES

INFORMS staff will send out email reminders and Connect posts to remind you of important deadlines throughout the year. Please review the calendar at the beginning of the year.

COMMUNITY BUDGET & CALENDAR

Creating a Balanced Budget

Community officers need to plan financial needs in advance. This will help prevent problems from occurring, such as not having adequate funds toward the end of the year. First, the Officer should create a list of events or activities that they would like to implement throughout the budget time frame. INFORMS staff sends monthly financial statements to Officers that provide revenue and expenses that have accrued for the Community. Please click here for an example of a monthly financial statement

Once the Officers have developed a list of notes, they should begin to create a budget proposal. The Officers should take into account the following information:

- Previous Officer's budget and actual expenditures
- Officer Goals
- Community Mission and Vision

Creating a Balanced Calendar

A balanced calendar provides the group with a solid programming schedule, versus a schedule dominated by one area of operations. It is also important for all members to know their commitments well in advance to increase attendance. In preparation, each officer and appointed position should be prepared with possible dates for their events and/or programs. After deciding the priorities, spread the events, newsletters, and programs evenly throughout the term.

Officer Conference Calls & Communication

INFORMS encourages all Officers to meet once a month via phone to discuss the activities and initiatives of the Community. This can be a 30-60 minute monthly call. INFORMS can provide you with a web conferencing service (Zoom) and tools such as Doodle that can schedule calls for the Community. An example of a call agenda can be found in the appendix.

It is important to communicate with your community membership at all times through INFORMS Connect (http://connect.informs.org/home). Instructions and more information on the benefits of Connect are within this Officer Guide as well as on the Connect home page under the FAQ section.

It is also important to save as many documents as possible not just for your term but for subsequent terms. INFORMS Connect offers a dedicated library within your community where documents can be stored and kept for all to see in future years.

UPDATE & REVIEW COMMUNITY BYLAWS

A Community's bylaws are central to the governance of the group and can go a long way toward defining its personality. Preparation of bylaws is necessary for any new Community. Even existing communities may need to amend bylaws to change the roles of officers, add or modify the role of the board, change the timing of officer elections, etc. Communities are encouraged to minimize the details included in their bylaws, and instead to maintain separate procedural documents that can be modified without formal Bylaw review by the Subdivisions Council. Examples of items more appropriate for a subdivision-internal procedural document include discussion of committees, awards, key dates, etc.

Community bylaws and changes to existing bylaws must be reviewed by the INFORMS Community Relations Coordinator, as the first step in the review process. INFORMS staff may require or recommend revisions to the proposed bylaw changes, typically to conform to the appropriate 'Model Bylaws' template (see links below). These Model Bylaws contain elements that have been approved by INFORMS staff, Subdivisions Council, and INFORMS legal counsel. All bylaws must be in accordance with the INFORMS Constitution and Bylaws and cannot conflict in any way. Proposed bylaws or bylaw amendments are then submitted to the appropriate committee (Chapters & Fora or Sections & Societies) for review. This review might also lead to recommended changes. Once approved by one of these two committees, the bylaws (or bylaw amendments) are ready for formal approval by community members. This approved version is then presented to the Subdivisions Council for final review and approval. It is unusual for additional changes to be required at that point.

Here is the detailed, step-by-step process for bylaw changes:

1. Community proposes amendments to its bylaws initiated by action of the community board **OR** Petition to the Community President/Chair signed by 10% of the community membership or 15 members, whichever is larger.

2. Proposed amendments are shared with and reviewed by the INFORMS Community Relations Coordinator. The INFORMS Communities Director may assist in this process.

3. Proposed amendments as modified are shared with the Sections & Societies Committee (the purpose of which is to advise the INFORMS VP of Sections and Societies).

4. The Sections & Societies Committee provides feedback to the Community on proposed amendments if needed.

5. Community iterates with the Sections & Societies Committee to arrive at mutually agreed upon changes.

6. The Sections & Societies Committee advises the INFORMS VP of Sections and Societies to approve changes that will be voted on by community members.

7. The community Secretary distributes copies of the proposed changes to all members by electronic mail or in written form at least three weeks before the Annual Meeting.

8. The Community conducts an open discussion of proposed amendments to the bylaws online through its Connect group and at the next membership meeting of the Community.

9. Not more than two months after the discussion of the proposed amendments, the community Secretary distributes to all members copies of the proposed bylaw changes along with mail ballot, defined as written or electronic transmission.

    - No ballot shall be counted unless marked by a Section member to indicate his/her choice, returned to the official tellers bearing the voter's name, and received by the tellers no later than a date to be specified upon the ballot form—a date no earlier than two weeks from the date of distributing the ballot forms to the community membership.

    - The adoption of the proposed amendment shall require an affirmative vote by at least two-thirds of the voting members, as tallied by tellers appointed by the President (typically INFORMS staff). The tellers shall report the tally to the President within one week of the date specified for receipt of the ballots. The result of the balloting shall be announced to the membership by the Secretary.

10. Community leader (President/Chair or Secretary) notifies the INFORMS VP of Sections and Societies that the proposed bylaw amendments have been approved by the community membership.

    - Model Bylaws for Sections/Societies
    - Model Bylaws for Chapters
    - Model Bylaws for Student Chapters
    - Model Bylaws for Fora
    - INFORMS Constitution and Bylaws
    - INFORMS Policies and Procedures Manual

INTRODUCE COMMUNITY OFFICERS & APPOINT LIAISON

INFORMS houses more than 100 communities. Forming relationships and collaborations with other groups can be key to future success. INFORMS believes in partnerships and looks for ways to solidify organizations and improve the assistance offered from one community to another.

The Chair or President is the primary contact person between communities. It is important to serve as a liaison between officers of different groups for instances of new opportunities or questions from the community as a whole.

Here is a link to the listing of communities within INFORMS including contact information. If you cannot locate the contact information of a community officer, please contact the Community Relations Coordinator at informs@informs.org.

- Community listing

UTILIZE & PROMOTE INFORMS CONNECT

INFORMS Connect is a tremendous tool for our communities to easily communicate with their membership. Within Connect, communities can save documents for transitions, post event details, post meeting minutes, and more.

Current officers of sections, societies, chapters, and fora are automatically subscribed to the INFORMS Community Officers group as a Daily Digest subscriber. Each day, officers will receive an email summary of the previous day's messages. If you prefer to receive messages in real time, you have the option of changing your subscription once you have signed in to the INFORMS Connect community.

We encourage you to take 10 minutes to visit INFORMS Connect now at http://connect.informs.org/home. Log in using your INFORMS Self Service username and password. In case you have forgotten your password, you can reset it at https://myaccount.informs.org.

Once logged in, take the following quick steps to get started:

1. Please click the following link to the Connect FAQ: INFORMS Connect FAQ

2. Visit your Profile page (select the drop down arrow in the upper right-hand corner) and update as much of the information as possible. Information is populated with details from your INFORMS profile in the Self Service Center. Any changes you make will reflect in INFORMS Connect.

3. Adjust and customize your email preferences and your community notifications by clicking My Account from the tab on your profile page. You can opt to receive messages via email in real time, as a daily digest, or no emails.

4. Want to only receive emails and not display in the membership directory or the community roster? You now have the power to set your Privacy Settings in greater detail - modify your profile information to display what you want to be seen by your contacts, members only, or only you.

5. Visit the Community page(s) you are subscribed to by selecting My Communities from the Communities tab in the main menu of the homepage. INFORMS Connect is an evolving community. We look forward to your feedback and suggestions on how we can make INFORMS Connect an important member benefit for you. If you are not receiving any messages from the community and you have confirmed that messages have been posted, please send an email to informs@informs.org.

Please check these important links and webinars!

- Sample Webpage
- How to Edit Your Page
- Admin Abilities

WORK WITH INFORMS STAFF TO COMPLETE ACTIVITY REPORT

The annual Activity Report required by INFORMS is key to long-term success as it collects key data and information for the INFORMS staff, Subdivisions Council, and Board of Directors. This report allows INFORMS to better serve you as Officers in the upcoming year and work to set up sustainable success and growth among all communities. The Activity Report is typically disseminated annually through Survey Monkey at the end of November or early December – the staff will send out the link. Please ensure that you fill this out as soon as possible. Below is a link to a past Activity Report to illustrate what is expected. If you have any questions, please contact the Community Relations Coordinator.

- Activity Report Sample

UTILIZE THE INFORMS SELF SERVICE CAPABILITIES

Accessing and Downloading Community Membership Rosters

For your most recent Community Membership roster, please contact the Community Relations Coordinator at informs@informs.org

SCHEDULE
COMMUNITY ELECTIONS

All community elections will be conducted by INFORMS staff in collaboration with the officers and in accordance with the bylaws. INFORMS utilizes survey software for all elections. There is an administrative fee for each election. INFORMS staff is responsible for the following:

1. Creation and composition of the survey
2. Communication to members about the survey
3. Reminders as the survey is being conducted
4. Collection of results shared with community officers upon completion of election

Prior to contacting INFORMS regarding an upcoming election for your community:

1. Give INFORMS at least three business days' notice before the requested start date of an election.
2. Provide INFORMS with the following information:
    - Names of candidates and the positions for which they are running
    - A start and end date for the election
    - A short introduction (see below) explaining instructions for members when they open the survey
    - A Position Statement and Biography for each candidate (must be under 4,000 total characters)
    - Please note all officers must be INFORMS and community members in good standing.

> Dear (Community) Members,
>
> It is time to elect officers for 20XX. Open positions are Vice Chair/Chair Elect, Security, Treasurer, and Board Member. Please read the position statements of the candidates and vote by Friday, October 2, 12noon EST.
>
> Thank you,
> Chair or President Name

Links to additional important information and templates:

- Sample Community Election Survey
- Sample Call for Nominations from the Membership

PREPARE FOR THE ANNUAL MEETING

The INFORMS Annual Meeting in the fall covers the broad landscape of O.R. and advanced analytics research and practice. Numerous events organized by INFORMS communities and committees are also held during the meeting. Please visit the following link to learn more about dates and locations of upcoming meetings: Annual Meeting Details.

Awards

All award orders for plaques, certificates, and cash prizes must be submitted to INFORMS staff at least two months prior to the Annual Meeting to allow sufficient time for orders to be placed and shipped to the meeting location. Complete and submit an awards request form. Any award order for the Annual Meeting that does not have an awards request form will not be processed. INFORMS staff will provide proofs for review and approval before the awards are created and shipped. Please visit the following links for all materials required to successfully organize and order awards.

- Award Request Form
- Certificate & Plaque Template

Business Meeting/Reception Logistics

Prior to the Annual Meeting you will receive an initial email from INFORMS staff asking for confirmation of basic meeting logistics. Annual Meeting staff communication begins in May.

Food & Beverage Orders/AV Requests

Communities offer food and beverages at their Annual Meeting event. Prior to the meeting you will receive the menu and order form from INFORMS staff. Communicate AV needs (laptops, projector screen, microphones) to INFORMS. Please keep your food, beverage, and AV requests within your budget.

New Member Opportunities

INFORMS hosts a new member breakfast for new members and community officers to network. Reserve your spot so you don't miss the opportunity to meet and recruit new members to your community.

Opportunities to Network with Community Officers

The Subdivisions Council hosts a lunch at the Annual Meeting. One or two officers from each community may attend to meet and talk with the current Vice Presidents, network with other officers, meet INFORMS staff, and learn more about what INFORMS offers in terms of support to its officers.

CREATE SMART GOALS FOR THE COMMUNITY

Goal setting is a method of developing a plan to meet your objectives as a community within INFORMS and your responsibilities as a leader. A goal is more effective when stated in terms that follow the SMART approach:

Specific: _____ Not vague or general

Measurable: _____ Establish concrete criteria for measuring progress

Attainable: _____ Create a plan

Realistic: _____ Are you willing and able to work toward the goal?

Timely: _____ Reasonable deadline for action with a specific time frame

Nonspecific & ineffective goal: _ "Let's increase membership this year."

Specific & more effective goal: _____ "By the end of the year, let's increase membership by 10%."

Because the revised goal is more specific and measurable, it helps you determine if the goal was met. And without a specific timeline, it is too easy to say, "Someday, we'll achieve this goal."

Create SMART short-term goals that will be completed by the end of your term:

Goal #1:	
Goal #2:	
Goal #3:	

How can SMART goals be used to assess progress? Be SMARTER!

Making your SMART goals SMARTER will help your group set more effective goals, and will help maintain continuity, even after you leave office. To accomplish this, SMART goals should also undergo the following:

Evaluate _____ Assess the progress of goal

Revise _____ Modify goal as needed

FACILITATE A PLANNING WORKSHOP TO DISCUSS LONG-TERM GOALS

It is very important to have the ability to think past the current term of officers. As a current leader within the community you have the amazing opportunity to sit down every one or two years and create a lasting legacy.

A strategic plan is a written living document that should guide all actions of the community. Strategic planning requires the group to clearly identify top priorities. Once the Community has identified and clearly defined its core priorities, the officers and members will utilize these as guideposts in future decision making. As officers make decisions from this point forward, ask: Is this action in line with the strategic plan? Will it help us move closer to achieving one of our strategic goals? If the answer to these questions is "No," then you should reconsider the action.

Strategic planning is NOT an attempt to make a future decision today, nor is it an attempt to blueprint the future in a static, unchanging model. Strategic planning is a reiterative process. Your strategic plan is a living document that is meant to be guiding, but also engaging (much like the group's constitution and bylaws).

Even the best vision for success won't gain footing without buy-in from the key stakeholders of the Community, including the active membership, student members, and the Institute. Including these different groups in the long-term planning process will only benefit the Community in the long run.

A strategic planning workshop is meant to focus on the future. Strategic planning is the process by which you will envision the future of your group and identify the areas on which you want the current and future Committees to focus. This vision helps give direction and the potential energy to begin moving forward.

Simple Framework for Strategic Planning Workshop

3. Assess Current State of the Community

- What are our priorities based on where we spend the most time and money?
- Are there immediate needs of the Community to satisfy before thinking about long-term goals?

4. Future Planning

- What do we want the Community to look like in three years?
- What are the main priorities we need to focus on to make this dream a reality?
- What internal and external barriers will we face in accomplishing these goals?
- How will the Community combat these barriers?

STRUCTURE & IMPORTANCE OF THE SUBDIVISIONS COUNCIL

Overview:

The Subdivisions Council is charged with establishing effective communication between the communities and the INFORMS Board. Council members are elected/appointed by Community members. The Chapters/Fora Committee provides support to the VP Chapters/Fora and the Sections/Societies Committee provides support to the VP Sections/Societies. Below is a general list of responsibilities for the Subdivisions Council and the Sections/Societies subcommittee.

Subdivisions Council:

- Encourage communities and guide in their development.
- Facilitate policy development to respond to the needs of communities.
- Act as a liaison between individual communities and INFORMS Committees.
- Assist members in the formation of communities. Review and approve all requests to form new communities.
- Monitor the activities and performance of the communities.
- Review and approve changes in bylaws of communities.
- Assist in the conversion of Sections to Societies as well as the introduction of new Societies to INFORMS.
- Consider any Community business that is brought before it.
- Create quarterly report for the Board and present formal motions for activities requiring Board approval (updated bylaws, new communities, disbanding communities, budget items).

Sections/Societies Committee:

- Encourage Sections and Societies and guide in their development.
- Assist members in the formation of Sections and in the evolution of Sections into Societies.
- Monitor the health and performance of Sections and Societies, including taking action when Sections and Societies appear to be inactive or have other management difficulties.
- Make recommendations to the Subdivisions Council regarding the establishment, governance, operation, and disestablishment of Sections and Societies.
- Provide advice to Sections and Societies pertaining to their activities.
- Inform the Board of Section and Society activities and report on their well-being.

- Maintain model bylaws for INFORMS Sections and INFORMS Societies.
- Consider any Section or Society business that is brought before it.

Chapters/Fora Committee:

- Encourage Chapters, International Chapters, Student Chapters, and Fora and guide in their development. Recognize outstanding Chapters and Chapter volunteers. Manage the Moving Spirit and Judith Liebman Awards.
- Assist members in the formation of new Chapters, Student Chapters, and Fora, and reactivation of dormant Chapters and Fora. It is recommended that Chapters should be based in a city or small geographic area.
- Monitor the health and performance of Chapters, Student Chapters, and Fora. This includes taking action when subdivisions appear to be inactive or have other management difficulties.
- Annually recertify active Chapters, Student Chapters, and Fora. This includes the solicitation and compilation of annual chapter activity reports from all INFORMS communities. A summary of these reports must be provided to the Board annually.
- Make recommendations to the INFORMS Board regarding the establishment, governance, operation, and disestablishment of Chapters, Student Chapters, and Fora.
- Facilitate Chapters and Fora in the creation of budgets and procedures for general operations, special meetings, or publications issues.
- Provide financial support to active Student Chapters. Financial support consists of $150 per year to each active chapter. An active chapter is one that has completed the appropriate financial, activity, and officer report in a given calendar year.
- Provide advice to Chapters, Student Chapters, and Fora pertaining to their activities wherever needed, including linkage of activities to the INFORMS strategic plan.
- Inform the Board of Chapter, Student Chapter, and Fora activities and report on their well-being. Provide the Board with current events and other information of pertinence to the special interests represented by the Fora.
- Maintain model bylaws for INFORMS Chapters, Student Chapters, and Fora.
- Maintain handbook for Chapters, Student Chapters, and Fora.
- Consider any Chapter/Fora business that is brought before it.

For more information and a list of current Council members, please click on the following link:

- Subdivisions Council and Committees

PROMOTE INFORMS PRIZES & AWARDS

INFORMS has a long history of bestowing prizes and awards for outstanding achievement by academic members, practice members, and students. INFORMS Communities also offer their own awards based on achievement in more narrowly focused areas.

Each year, INFORMS grants several prestigious Institute-wide prizes and awards for meritorious achievement. Generally conferred at each year's Annual Meeting, these prizes and awards celebrate wide ranging categories of achievement from teaching, writing, and practice to distinguished service to INFORMS and the profession, and contributions to the welfare of society.

For more information on each award and its respective application deadline, please click here.

SOLICIT & COLLECT SPONSORSHIPS FOR COMMUNITY ACTIVITIES

Sample letter to potential Sponsors as follows:

Dear **Company/Person**,

Our annual **name of event** will take place on **fill in date** at **fill in location**. This year's theme is **fill in theme**. Our goal is to raise **fill in amount** dollars that will be used for **fill in purpose**. To meet this goal, we are asking for sponsorships from local businesses and individuals like you.

By giving to this annual event you'll be supporting the **fill in name of organization** and helping us provide assistance to those in our community. We ask that you consider a sponsorship donation of $ **fill in amount**. Your donation will be recognized at our event in several ways. As a sponsor, your name will be placed on all materials and banners that publicize the event as well as announced verbally during the event.

We hope that we can count on you to help support our cause. You will be contacted in the next several days. If you have any questions or concerns in the meantime, please feel free to contact us at the above number.

Thanks in advance for your consideration!

Sincerely,
Type Your Name Here, Insert Title

TEMPLATES & CRITICAL INFORMATION

Additional Important Items:

- Best Practices Guide for Sections & Societies
- Best Practices for Chapters
- Best Practices for Student Chapters

Officer Conference Call Sample Agenda:

The Community Officer call is scheduled for this Friday, October 2, at 12noon EDT.

Agenda:

1. Review and Approval of Minutes from Previous Officer Call
2. Review Action Items from Previous Officer Call
3. Upcoming Events/Important Items
4. Strategic Goal Review (Progress Report)
5. Officer Updates
    - President:
    - Vice President:
    - Treasurer:
    - Secretary:
    - Webmaster:
    - Appointed Positions (Awards, etc.)
6. New Business
7. Old Business
8. Strategic Goal Review (Progress Report)
9. Adjourn

Transition Checklist

It is your duty to ensure that the officer who succeeds you is prepared to hold the office. All good work and knowledge that you gained while serving should be passed on in its entirety to the next officer. Make sure that all necessary knowledge to be successful is conveyed. For a Community to be successful, it is important that its officers don't "reinvent the wheel." Valuable information and resources are lost each year due to an ineffective transition process. It is recommended that both the incoming and outgoing officer review the checklist before the actual transition occurs.

1. **Duties and Responsibilities**
    - What are my officer duties and responsibilities?
    - Approximately how much time do I spend on each?

2. **Officer Manual**
    - Do you have a copy of the officer manual?
    - Are there any sections of the manual that are difficult for you to comprehend?

3. **Officer Reports**
    - Are there any reports for which I am responsible?
    - If so, when, by whom, and how do they need to be completed?

4. **Constitution, Policies, and Bylaws**
    - Are there any policies that directly relate to this office?
    - Are there any policies that I am responsible for enforcing?

5. **Committees**
    - What committees am I on?
    - What do I need to know?

6. **Officer Goals**
    - What were your goals?
    - Which goals were met and which ones were not? Why?
    - Brainstorm and develop new goals

7. **Programs and Events**
    - What programs, projects, and/or events were effective during the year? Why?
    - What programs, projects, and/or events were not effective during the year? Why?

8. **Annual Calendar**
    - When did you schedule your events? When should I?
    - Are there any deadlines I should know about?

SAMPLE FINANCIAL STATEMENT

Profit & Loss Summaries					
Revenue & Expense Summaries	**10/02/2020**	**10/02/2019**	**Difference**	**2018**	**2017**
Revenue					
Contributions					$24,000
Dues Revenue	21,000	20	900	24,000	26,000
Interest Revenue				269	190
Sponsorship/Contributions/Seed					19,000
Other Revenue					6,000
Contra - Comp	-5,000		-4,000		
Sponsorships	13,000	-4,000	18,000		7,000
Meeting Revenue	4,000	-70	4,000	3,000	10,000
Total Revenue	**33,000**	**-4,050**	**17,948**	**27,269**	**92,190**
Expenses					
Balloting Expense					
Elections				15	30
Labor - Administration General					210
Subtotal Balloting Expense				15	240
Annual Meeting Expense					
Audio Visual	1,200	300	900	300	1,200
Food & Beverage	1,600	2,000	-350	5,000	5,000
Internet Access		200	-200	200	
Sponsorship				5,000	
Subtotal Annual Meeting Expense	2,800	2,500	388	10,500	6,200
Local Meeting Expense					
Travel/Hotel	500		500		
Subtotal Local Meeting Expense	500		539		
Membership Expense					
Bank/CCD Fees General	600	200	400	400	700
Labor & Fringe Benefits	400		400		
Telephone - Conference Calls	20		20		
Subtotal Membership Expense	1,020	200	951	400	700
Award Expense					
Awards - Cash	9,500	900	400	9,000	5,000
Awards - Registration					2,000
Food & Beverage					2,000
Labor & Fringe Benefits	700	30	700	50	200
Postage	50	10	50	10	75
Subtotal Award Expense	10,250	940	1,197	9,060	9,275
Meeting Expenses	11,000	2,000	9,000	2,000	20,000
Total $					
Total Expense	25,570	5,640	11,941	21,975	36,415
Net Gain/Loss	7,430	-9,690	6,007	5,294	55,775
Fund Balance - Beginning of Year	105,000	101,000	5,000	101,000	43,000
Fund Balance - Period Ending	112,430	91,310	11,146	106,294	98,775
Deferred - Subdiv Dues Revenue	4,000	600	2,000	7,000	10,000
Total Deferred Revenue	4,000	600	2,695	7,000	10,000

OFFICER NOTES