

**GUIDELINES FOR ANNUAL STATUS REPORTING
OF ASA REGIONAL AND STUDENT CHAPTERS
(revMarch2018)**

As soon after 1 January as possible, but no **later than 31 March**, each chapter shall submit an Annual Status Report for the previous year. The Financial Status Report shall be submitted with original documentation even if no reimbursement is requested. Submit the entire report to ASA Headquarters:

David Feit, ASA Treasurer
Acoustical Society of America
Suite 1N01
2 Huntington Quadrangle
Melville, NY 11747-4502

An electronic copy of the report and documentation is to be sent to the co-chairs of the Regional and Student Chapters. Committee. See CRSC website for current co-chair contact information:

<http://asachapters.org/>

THE ANNUAL CHAPTER REPORT CONTAINS THREE PARTS:

- 1. THE ANNUAL FINANCIAL STATUS REPORT
(including items mentioned below, such as receipts, signed attendance lists, etc.)**
- 2. A LIST OF CURRENT EXECUTIVE BOARD MEMBERS (OFFICERS) AND THEIR ASA MEMBERSHIP STATUS**
- 3. A LIST OF CHAPTER ACTIVITIES**

1. THE ANNUAL FINANCIAL STATUS REPORT

i. The Chapter Account

The general Chapter Account contains funds for all chapter operations except for those funds acquired for special circumstances (rare). Each new calendar year the Chapter Account may be reimbursed by the ASA up to \$2000 but not to exceed an account balance of \$2000.00 including those funds on hand as of 31 December of the previous year. Chapters with more active programs that require a higher operating budget may request a higher yearly cap. Funds acquired under special circumstances (for example: Memorial Funds where money may have been donated to host meetings in remembrance of past members or Scholarship funds where funds are held for scholarships) are kept separate from the general Chapter Account and shall be brought to the attention of the Chair of Regional and Student Chapters, the ASA Office Manager, and the Treasurer.

ii. Financial status reports prepared by Regional Chapters are for the calendar year. If the fiscal year of a chapter is other than the calendar year, reports submitted to ASA Headquarters must be on a calendar year basis, unless local laws require otherwise. The annual chapter financial status report form shall be annotated.

iii. The annual financial status report shall include the following information annotated on the Financial Status Reporting Form (separate word document):

- 1 Funds on hand on 31 December of the previous year.
2. Expenses for the previous calendar year, with receipts.
3. Signed attendance lists from each chapter meeting held during the previous year. (Please use small font and double sided copies when possible – save a tree.)

- iv. Upon receipt of the annual financial status report from a Regional Chapter, funding for the following year will be provided. The following are items that are reimbursable as detailed in the ASA Rules and By-Laws:
- i. Operational and administrative expenses; \$500 per year plus \$5 per attendee at each chapter meeting; **alcoholic beverages are NOT reimbursable.**
 - ii. Honoraria, travel expenses for Speakers; 80% up to \$500 per year
 - iii. University student participation; awards, travel expenses, etc.; travel to national meetings are NOT reimbursable (this can be found in other ASA resources); awards can NOT include payment of ASA dues; \$500 per year
 - iv. High School student awards; Science Fairs, etc; up to \$200 per year
 - v. Talks and technical demonstrations at local schools; up to \$500 per year
- v. A payment from ASA Headquarters will be made only to the account of a Regional Chapter. This account must be clearly identified on the annual financial status report of the chapter. The reimbursement shall not cause the account balance to exceed \$2000.00 unless other prior arrangements have been made. Information regarding the chapter treasurer/contact and account information must be clearly provided.

vi - Special Initiatives / Chapter Development Funding

This category of support requires **prior approval** from the Treasurer of the Society upon recommendation of the Committee on Regional and Student Chapters. A proposal containing the objective, background, approach, and plans with a budget shall be brought to the Committee for consideration. A financial report of income and expenditures with receipts shall be presented at year end.

2. A LIST OF CURRENT EXECUTIVE BOARD MEMBERS (OFFICERS) & MEMBERSHIP STATUS

Provide a **list of all current chapter executive board members** (including the Chapter Liaison to National), their contact information, and **indicate if they are an ASA member**. (An updated list shall be provided after Chapter elections as well.)

3. A LIST OF CHAPTER ACTIVITIES

Provide a list of Chapter Activities which shall include the date of the event, # of attendees, type of event (technical and/or business), if it was a technical meeting include the topic w/ speaker.