STATE OF THE ACADEMY

Colleagues, for the past two years, it has been my honor and privilege to serve as AHRD’s ninth president. Throughout my presidency, I have stressed the importance of increasing and sustaining the Member Value Proposition (MVP) of every AHRD member. Over these past two years, together, we have worked very hard and achieved many milestones that I believe have enhanced or sustained our member’s value proposition. I would like to quickly review and comment on those milestones by topical areas.

Budget: Membership Dues and our Conference of the Americas continue to be the two primary sources of revenue/income for our academy. In contrast, the four journals (HRDQ, HRDR, HRDI, and ADHR), the AHRD Main Office, and the Conference of the Americas are our three major expenses/liabilities. In summary, we have two major revenue streams that provide sources of variable income that must offset three major expenses—two of which include fixed costs (journals and main office).

In terms of financial position, over the decade since June 30, 2000, our AHRD retained earnings have grown from $79,117 to $182,224 (as of June 30, 2009). In this report (see page 10), I am providing a five-year financial summary of our AHRD income and expenses. Given our economy during these past five years, this is a remarkable accomplishment. Because we operate on a July 1-June 30 fiscal year, income and expenses for FY 2009-2010 will not be reported until June 30, 2010.

We remain hopeful that AHRD will end the year with a report of positive earnings. However, there have been a number of one-time expenses (e.g., Main Office relocation) that may require AHRD to borrow from our retained earnings as we close the books on FY 2009-2010. But, with the transition and relocation of the main office, this infrastructure improvement will position AHRD for stronger financial growth in the years ahead.

Because our two primary sources of revenue are variable sources (e.g., membership dues, conference fees), accurately projecting our financial future is never easy. For example, when reviewing our monthly operational expenses, our academy regularly experiences considerable monthly cash flow shortages, which require us to temporarily borrow from our retained earnings to operate (see figure 1 for differences in our monthly income to expenses). In fact, for three consecutive years (January 2007-December 2009), during the months of March, April, July, August, September, and October AHRD operates with a cash flow deficit. This budgetary phenomenon is caused by our fixed monthly costs/expenses that must be offset by an inconsistent pattern of income coming from variations in the renewals of regularly memberships and conference revenues. For example, most of our AHRD members renew their memberships in December, January, and February as we near the time of the conference.
Additionally, through considerable improvements in our new AHRD Main Office’s accounting procedures, we have determined that the income from membership dues alone have never been sufficient to off-set the totals of our major operating expenses that include our main office and journals. As a result, the overall operations of our academy require us to heavily depend on the profits generated from our international conferences—another variable source of revenue. In fact, since 2000, our annual conferences (Americas only) have generated about $308,000 in profits which have been used to off-set the shortages not covered by membership dues for main office operations and journal expenses. Furthermore, over the past five years (FY 2004-2005 to FY 2008-2009), profits from the AHRD Conference of the Americas have supplemented membership dues for operating the academy up to 35-45% in any given year. AHRD has been fortunate to experience conference profits that could be used to supplement membership dues.

However, regarding our current budgetary strategy, in the years ahead, future AHRD members, Boards, and Executive Committees must seriously examine whether or not a financial strategy that includes a dependency on two variable sources of revenue (member dues, conference profits) that are capable of considerable annual fluctuations is fiduciary responsible and should continue? For example, how would AHRD financially manage a sudden drop in membership and/or poorly attended conference? Later, I will address this issue further. But, for now, the good news to report is that AHRD remains financially healthy.

**Membership:** As of March 2008, our AHRD membership total was 607 members. As of February 2010, our membership total is 646 members, and unfortunately represents a 10% decrease from 710 members I reported in February 2009. Presently, we are reaching out to 165 members who failed to renew their memberships these past two months (December 2009, January 2010). Had we not experienced this attrition, our membership would be over 800 members. We will keep you apprised of these membership changes in the months ahead.

However, as we more closely examine our current 646 members, we currently have the following membership distributions:

- **International Trial** = 47 members or 7% of our membership (compared to 31 or 4% in Feb 2009)
- **Regular members** = 392 or 61% (compared to 380 or 54% in Feb 2009)
• SIG Only = 2 (none in Feb 2009)
• Student = 173 or 27% (compared to 204 or 29% in Feb 2009)
• Unknown = 32 (compared to 95 in Feb 2009) – Our appreciation to our new AHRD Main Office for tidying up the membership database to remove most of the unknowns.

Our Power of Ten goal has been to reach 1,000 members. However, our present growth pattern fluctuates between cycles of positive and negative trajectories. Similar to many non-profit organizations our size, “membership retention” continues to be one of the major membership challenges we face. Presently, our overall attrition rate is down to 20%, an improvement from 24% a year ago. Based upon our membership structure, the attrition rates are as follows:
• International Trial (39%)
• Regular Members (19%)
• Student Members (22%)
• Unknown/Undeclared (20%)

The highest attrition occurs amongst those who have only been with us for a year (31% never renew). Further, 39% of international trial members never renew after their one-year trial period and 22% of student members annually leave without becoming regular members. However, given the economy over the past several years, being able to maintain a steady stream of growth from 2008 (n = 607) to 2010 (n = 646) is remarkable.

Membership dues continue to be one of two primary sources of revenue for our academy. In terms of good news, at this time, no membership dues increases have been implemented for 2009 or 2010. Dues for regular members will remain $225 and for members who demonstrate they qualify as “students,” their rate will remain $155. International membership dues will also remain at $85. Thank you for your continued commitment in remaining an active AHRD member.

Within the area of membership, over the past year, we have launched nine Special Interest Groups (SIGs) on the following topics: (1) China HRD Research, (2) Critical HRD & Social Justice Perspectives, (3) Cultural Diversity, (4) International HRD, (5) Leadership, (6) Qualitative Inquiry, (7) Scholar Learning & Development, (8) Scholar-Practitioner, & (9) HRD Theory. We launched SIGs because we believed they would provide renewed levels of membership energy and be an exciting opportunity for AHRD members and friends to come together and share ideas on meaningful topics, provide leadership, and build meaningful networking relationships and friendships. Presently, there are 133 AHRD members who have affiliated with SIGs. On a personal level, I greatly appreciate all of the work Martin Kormanik (Board Liaison of Special Interest Groups) and Darren Short (VP of Membership) for all of their hard work and investments made in our membership initiatives.

Finally, our Program Excellence Network (PEN) continues to be an active group of program directors and leaders. Originally conceptualized by Jerry Gilley and Wendy Ruona, PEN now has over 25 institutions and promised to be an exciting growth opportunity for AHRD in the years ahead. Additionally, over the past few years, we have witnessed a number of our academic programs come under fire. Given the current economy, there is no reason to believe that program reviews and audits will cease. Through PEN, we will continue to provide support, encouragement, and advice to program directors and leaders that will enable them to build strong and effective rationales for their academic programs.
AHRD Main Office Transition: The AHRD Main Office function is a significant and strategic part of our organization’s success. For the seven years prior to June 2009, the Academy of Human Resource Development (AHRD) Main Office had been located at Bowling Green State University under the direction of Dr. Kathy Hoff (Managing Director) and Lanette Cornwell (Administrator). During this seven-year period, AHRD experienced considerable growth and significant change, and AHRD has been fortunate to benefit from the efforts of Kathy Hoff and Lanette Cornwell. However, like all healthy maturation processes involving positive growth and change, new and exciting horizons of strategic opportunity arise. Such has been the case for AHRD’s Main Office.

In conversations that began in February 2008 at the AHRD International Conference in Panama City, Florida, the AHRD Executive Committee and Board began extensive conversations about its future and the best ways to reach the strategic goals we now pursue as an organization. From those in-depth conversations, the idea emerged that AHRD should initiate efforts that would expand capacity and enable our AHRD Main Office to serve our academy in a more strategic way.

As a result of this conversation, I appointed a Main Office Task Force that would be chaired by Darlene Russ-Eft (AHRD President-elect) and three AHRD Board Members: Maria Cseh, Andrea Ellinger, and Darren Short. For the many months, these four individuals worked very carefully and deliberately on their “charge” of creating a RFP that would outline a new and strategic direction for our AHRD Main Office. Emerging from their work in addressing this charge, the Main Office Task Force believed and recommended to the AHRD Executive Committee and Board that it was imperative that the “Future AHRD Office” would need to be a multi-functional office capable of strategically supporting the Academy’s growth and development initiatives (e.g., increasing our membership’s value proposition). Specifically, the “Future AHRD Main Office” would need to include the following expanded responsibilities, as well as the basic operational responsibilities:

1) **Strategy and Marketing:** In this expanded role, the AHRD Office would proactively work with the AHRD Executive Committee and Board to build and define strategies and then act interdependently to create campaigns and tactics that will encourage the growth and understanding of AHRD. These campaigns should target individuals, school, businesses, and even the press. *What are our customers getting from AHRD? What’s in it for them?* Critical questions and exciting answers to share with them through the unfolding of a solid marketing plan. The AHRD Office, in conjunction with designated members from the Executive Committee, would serve in the role as a marketing director and primary conference planner for AHRD.

2) **Product Development/Delivery:** In this expanded role the AHRD Main Office would carry the duties of overseeing journals, coordinating relationships between the journal editors and publishers, and coordinating and pursuing other creative achievements created for or by AHRD. This role also serves AHRD in Coordinating Conference Planning, Board Meeting Planning, and other AHRD-related logistics.

3) **Membership Development:** In this expanded role, because communication is the key to building loyalty among current members and is also integral to bringing new members into, and past members back into, the organization, the AHRD Office, under the direction of the AHRD Executive Committee and Board, would serve as an ambassador for AHRD and would ultimately serve as the development officer. Additionally, by building
relationships with students programs (graduate and undergraduate) and showing them the benefits of AHRD, young and lasting membership is brought in and can become the future leadership within the Academy.

4) **Assets Management:** As a continuing role, the Assets Management role requires preparation of the budget, filing IRS and Academy paperwork/reports, securing and maintenance of insurance. Additionally, it oversees on-going maintenance and storage of all AHRD-related assets (e.g., technology, documents, organizational documents and archives, contracts).

5) **Operations:** As a continuing role, the Operations role involves the day-to-day responsibilities of running an office to include supporting the Administration of the Academy as well as offering timely customer service. The AHRD Main Office would perform duties in the role of customer service and general administrative support to the Executive Committee and the Board.

In previous communications with our AHRD membership, I outlined the processes that were used in selecting our new AHRD Main Office—Ewald Consulting. I will not elaborate on those items here. However, I would like to share with you some brief information about Ewald Consulting.

Ewald Consulting, located in St. Paul, Minnesota, is a management association organization that has operated for 27 years, employees 42 staff, and currently serves 35 associations. Their mission states the following: “provides services to associations that help them become powerful and effectively fulfill their mission.” The new AHRD Main Office began officially functioning on June 1, 2009.

Since the relocation in June 2009, our AHRD Executive Committee and Board of Directors have been extremely pleased with the leadership quality, expertise, and commitment of our new Executive Director - Kathie Pugaczewski, CAE, CMP, who has been in association management for over 20 years. Along with her outstanding team (e.g., Amanda Ewald - Accounting, Jessica Gill - Technology/Web, Scott Franzmeier - Conference Planning), AHRD is now positioned for considerable growth and new opportunities. As we move forward, we are excited about the strategic direction and capacities of our new AHRD Main Office. We look forward to benefitting from their considerable expertise in providing enhanced services to members. We welcome our new AHRD Executive Director Kathie Pugaczewski and Ewald Consulting to their new role as our new AHRD Main Office.

Additionally, I want to express my deepest appreciation to the AHRD Main Office Task Force consisting of AHRD President-elect Darlene Russ-Eft (Chair), Maria Cseh, Andrea Ellinger, and Darren Short. In support of their work, I also appreciate the work of AHRD Past-president Jerry Gilley and every member of the AHRD Board of Directors. Finally, I want to thank Kathy Hoff and Lanette Cornwell from BGSU for their professionalism, support, and hard work during our AHRD Main Office’s transition.
The contact information for the new AHRD Main Office and our Executive Director is as follows:

Attn: Kathie Pugaczewski, CAE, CMP
AHRD
1000 Westgate Drive, #252
St. Paul, MN 55114
Phone: 651-290-7466
Fax: 651-290-2266

AHRD Journals: As you are aware, AHRD sponsors/co-sponsors the four premier journals of the HRD discipline (Human Resource Development Quarterly--HRDQ, Human Resource Development Review--HRDR, Advances in Developing Human Resources--ADHR, and Human Resource Development International--HRDI). Over the past two years, we have renegotiated new contractual agreements with Wiley/Jossey Bass (for HRDQ) and SAGE Publishers (for ADHR), with additional contract negotiations forthcoming. Through these contractual agreements, we increased the number of journal issues per volume and secure increased editorial office stipends for our editors.

Central to the mission of AHRD is research. As a result, we have made every effort to enhance the quality and impact of our four journals. Consistent with this goal, on behalf of the AHRD Board of Directors, we have created an AHRD Journal Task Force that will begin exploring how we can further position our journals to be on the leading edge of HRD scholarship. By Fall 2010, this Journal Task Force will have solicited constructive feedback from key players and make grounded recommendations to the AHRD Board of Directors that will shape our future journal strategy as an academy. As one of the three major expense line items in our AHRD budget, rather than view the work of the Task Force as a significant threat to our journals, we need to see this as an exciting time to comprehensively review our overall journal strategies and make decisions that will positively impact the future of the HRD discipline and AHRD. In order for this Journal Task Force to complete its charge, I strongly urge you to help them as they will make critical recommendations to our AHRD Board of Directors about our journals.

International Achievements: Under the leadership coordination of Larry Dooley, our International Chief Operating Officer (2008-2010), our Academy continues to collaborate with others in providing successful research conferences in Asia/Pacific Rim, the Middle East, and Europe.

Concerning Asia, on December 12-15, the 8th Annual AHRD International Research Conference in Asia and the 1st Annual AHRD International Research Conference in MENA (Middle East/North Africa region) was held in Bahrain. Under a conference theme, “Managing & Developing the Workforce during Times of Economic Downturn” this conference was the first presence by the Academy of Human Resource Development in this vibrant and growing sector for HRD. With three pre-conference workshops led by AHRD members and multiple cultural events, this conference began on a very high note. Although this was primarily a practitioner conference, there were still over 40 scholarly papers presented. We are very pleased about this conference’s success.
Looking forward, our 9th AHRD Asia Chapter Conference will be held in Shanghai, China November 11-14, 2010. The theme of this year’s conference will be “Workplace Learning and Sustainable Development for Individual, Organization and Society.” The host institution will be East China Normal University. Please note the call for papers deadline is June 30, 2010 and the paper guidelines follow those required for the AHRD Americas Conference. Please see the AHRD website for more information; the full call for papers will also be located in your conference program for this conference.

In Europe, on June 10-12, 2009, The University Forum for Human Resource Development (UFHRD), The Academy of Human Resource Development, and Newcastle Business School hosted the 10th International Conference on Human Resource Development Research and Practice across Europe at Newcastle Business School, Northumbria University in Newcastle upon Tyne, UK. The venue was Newcastle Business School’s new state of the art campus. The theme of the 10th Conference was HRD: Complexity and Imperfection in Practice. Reports from this conference were extremely positive and exciting.

Looking forward, the University Forum for Human Resource Development (UFHRD) and The Academy of Human Resource Development (AHRD) will sponsor the 11th International Conference on Human Resource Development Research and Practice across Europe, hosted this year by the faculty of Adult Education and HRD of the University of Pécs, Hungary. For the first time in the history of UFHRD/AHRD annual international conferences, the event will be organized in Central Europe, in the historic city of Pécs. Pécs is located in southern Hungary and since Roman times it was a regional centre of culture and education. The first university of Hungary was established here in 1367 and today the University has 31 thousand students. The conference theme this year will be “Human Resource Development in the Era of Global Mobility” Please join your colleagues in Hungary June 2-4, 2010. See the AHRD website for more details.

**AHRD Website & Webcasts:** The dependence and usage of technology for interfacing and delivering membership services to our AHRD members and guests has significantly increased. Probably one of the first major usages of technology in delivering membership services occurred during my term as AHRD’s Program Chair in 2005. As you may remember, prior to 2005, all of our conference submissions for the Conference of the Americas were sent via individual correspondence to our AHRD Main Office and then forwarded individually to the Program Chair and Authors. While this was a significant change in conducting our business—through our online submission technologies, we have greatly improved the quality of interactions between authors, reviewers, and the program chair team.

As an expansion of those early efforts to use technology in delivering membership services, we recently began offering AHRD Webcasts to our AHRD members and guests. Concerning this membership service, I want to express my deepest appreciation to Darren Short—who has served as our VP of Membership and Marketing and organized ten webcasts that originally began in April 2009. Additionally, we are deeply grateful to our webcast presenters (e.g., Tonette Rocco, Julie Gedro, Martin Kormanik, Michael J. Marquardt, Russell Korte, Catherine Lombardozzi, Consuelo Waight, Stephen Garcia, Darren Short, Wendy Ruona, Darlene Russ-Eft, Jennifer Martineau, Marguerite Foxon, Michael Leimbach, Holly Hutchins, Shani Carter, Jason Moats, Marilyn Bird, Christine Stanley, Sue Lynham, Tony O’Driscoll, and Karl Kapp) who have graciously given of their time and energies to present information about their cutting-edge
research and scholarship-based practices. Finally, we are deeply grateful for your participation. To date, we have had a total of 776 users of the webcasts with 237 people attending the sessions live and 539 people being subsequent users through recording.

Finally, the activity and traffic on our AHRD website continues to grow at a considerable pace of 33% per year. While we have not reached our original Power of Ten goal of 10,000 website hits per month, from March 2008 to January 2010, we have had over 75,000 hits (March 2008-January 2009 = 32,202 hits; February 2009-January 2010 = 43,044 hits). If you have not recently reviewed the AHRD website, I strongly encourage you to do so (http://www.ahrd.org/). There are many links and sources of information about membership services, membership news and updates, member memorials, membership communities, conference information, call for papers and leadership opportunities, and many other membership services. In the years ahead, I highly anticipate our website to be the primary source of communication and a key delivery vehicle for membership services.

Conferences: As AHRD members, we all understand the importance of our AHRD conference for sharing our research ideas and studies, experiencing opportunities for professional development, reconnecting with colleagues and friends, and having important discussions about the future direction of our academy. Over the past several years, there has been considerable dialog about our conference model. Numerous hours have been invested in healthy debate and discussions regarding how we should deliver the Town Hall Forum, implement paper tracks, organize meaningful symposia, arrange innovative sessions and food-n-thought luncheons, who we should invite as keynote speakers, provide hard-copy versus electronic proceedings, have manuscript length papers versus abstracts, etc. I am not sure if we will ever arrive at a “perfect formula or solution” for what our conferences should include. However, because conferences will remain one of our key delivery channels for developing and delivering important research, we will continue to make every effort to listen and respond to our membership’s needs. As we come to the 2010 Conference in Knoxville, I want to thank our Conference CEO Jerry Gilley and our Program Chair Team Julia Storberg-Walker, Carroll Graham, and Khalil Dirani. Their work has been invaluable to this year’s conference success. And, in reflecting back on previous conferences during my presidency, I want to thank our former Program Chairs Fred Nafukho and Tom Chermack for their considerable leadership in helping us gradually improve our conference models.

Additionally, over the past two years, we have negotiated an extension of our original Marriott contracts for the AHRD International Conferences in The Americas. Under the direction of Jerry Gilley, our Past-president, we have confirmed agreements for 2011, 2012, and 2013 with the Marriott. On February 22-27, 2011, we will meet in Chicago (Schaumburg), Illinois at the Marriott Renaissance. In 2012 (February 27-March 4), we will meet in Denver Colorado. And in 2013 (February 11-18), we will return to Washington, D.C. In preparation for 2011, I urge you to give the Call for Papers the widest possible dissemination. Please refer interested parties to the Events and Conferences listing on the AHRD web site (www.ahrd.org) and contact the AHRD Main Office for complete contact information.

Looking Into the Future: As we transition our AHRD Executive Committee leadership team at this year’s conference, there are at least three major issues on the horizon that await our attention.
First, we must explore new and alternative ways of generating revenue and controlling costs to offset our operational expenses. Under the present budget formula, as noted earlier, we have two major variable revenue streams (e.g., membership dues and conference profits), which are used to offset three major expenses (e.g., four journals, main office operations, and conferences). Concerning these expenses, the four journals and main office are fixed costs while the conference expenses are variable costs fluctuating from conference to conference.

As we move forward as an academy, in order for strategic planning about our budget to occur, we must explore the creation of new revenue streams that are fixed and stable. For example, some academies similar in size to AHRD, but with membership dues considerably lower than AHRD’s dues, have built their financial model on the significant revenues they receive from their journals. In contrast to these benchmark academies, the publishers, not AHRD, owns our four journals, and as a result, AHRD does not receive revenue/income or large royalties to offset the expenses associated with them. As a result, AHRD must completely absorb all incurred journal expenses through higher membership dues and higher conference fees. By increasing the number of additional revenue streams with sources that are significant and predictable, AHRD would be able to reduce current membership dues, reduce conference fees, and most importantly, meaningfully invest in research—our primary product—through grants, scholarships, and other research-oriented deliverables.

Second, we must continue our efforts to make sure that our four journals receive SSCI recognition. We have received considerable commitments from our publishers to making this happen. However, as the preeminent organization of research and thought leaders of the HRD discipline, it is our responsibility to continue to prepare and submit high quality research and theory that produces high volumes of citations. Citations ultimately drive SSCI decision making.

Third, and probably most importantly, we must rededicate ourselves to our original AHRD vision and mission of being a world-class leader of HRD research and scholarship. The Academy of Human Resource Development was originally founded “to encourage the systematic study of HRD theories, processes, and practices; to disseminate information about HRD to encourage the application of HRD research findings; and to provide opportunities for social interaction among individuals with scholarly and professional interests in HRD from multiple disciplines and across the globe.”

While some have charged that AHRD has departed from this original vision and mission—and in doing so—has “lost its way.” In contrast, more optimistic others would contend that AHRD continues toward excellence in following our original path, but with the caveat, the path has widened. And, in doing so, has welcomed and responded to the considerable interest of others who have identified with our core mission and vision in making this their professional home. Sure, over the years, the AHRD tent has changed and enlarged. And with these changes, we must come together to constructively and productively examine how this new growth and interest can be a source of competitive advantage in making AHRD an “academy of choice” for everyone—not just some. We must realize how important every member’s contributions are to our future.

**Final Remarks:** This is an exciting time to be a member of the Academy of HRD and a participant in the initiatives that are “leading HRD through research.” It is my sincere hope that you will continue to make AHRD your academic and professional home for many years to come.
# FY 2004-FY 2009 Financial Summary

## INCOME

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## EXPENSES

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## ASSETS & LIABILITIES

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<td>130,711.07</td>
</tr>
<tr>
<td>Total Liabilities</td>
<td>100,713.07</td>
<td>100,713.07</td>
<td>100,713.07</td>
<td>100,713.07</td>
<td>100,713.07</td>
</tr>
</tbody>
</table>

**Financials through June 2009 provided by Bowling Green office**