

# November 1, 2019

## Reports for PSA Board and Members, from Executive Director Lora Bristow

Please contact me at [executivedirector@pacificsoc.org](mailto:executivedirector@pacificsoc.org) with any questions, comments, concerns, etc.

### Mission Statement

The mission of the Pacific Sociological Association is

- to advance scholarly research on all social processes and areas of social life
- to promote high quality teaching of sociological knowledge
- and to mentor the next generation of sociologists.

Consistent with principles of scientific investigation, the PSA endorses engagement of sociologists in areas of social justice and social responsibility. The Association accomplishes its mission by convening an annual meeting (conference) and publishing its journal, *Sociological Perspectives*.

## 1. FINANCES

### 1a. Overview, Over Time

Comments:

- 1) PSA has not yet had an official audit (expense is prohibitive), but the ED regularly consults with a CPA nonprofit specialist on systems setup, financial records, and processes per IRS/CA corporate code.
- 2) Consistent with best nonprofit practices, PSA aims to have 3 years of operating expenses in general funds, so about \$500,000.
- 3) For the close of FY 2018-19, increase in assets is somewhat distorted, because the final expenses for the 2019 conference and support for the new editorial office of *Sociological Perspectives* were paid after July 1. Because of this, projections for FY 2019-2020 are that expenses will be greater than income (net decrease in assets).

After close of prior Fiscal Year	Total Assets	Change in Total Assets	Endowment Fund	Change in Endowment Fund	General Funds	Change in General Funds
July 1, 2019	\$769,911.56	+\$101,857.77	\$256,176.63	+\$3,010.67	\$513,734.93	+\$98,847.10
July 1, 2018	\$668,053.79	+\$74,662.42	\$253,165.96	+\$1,180.00	\$414,887.83	+\$73,482.42
Jan. 1, 2018	\$593,391.37	+\$99,030.70	\$251,985.96	+\$2,620.00	\$341,405.41	+\$96,410.50
Jan. 1, 2017	\$494,360.67	+\$99,870.37	\$249,365.96	+\$2,895.00	\$244,994.91	+\$96,975.57
Jan. 1, 2016	\$394,490.30	+\$39,883.42	\$246,470.96	+\$3,571.00	\$148,019.34	+\$36,312.42
Jan. 1, 2015	\$354,606.88	-\$25,703.10	\$242,899.96	+\$3,204.00	\$111,706.92	

### 1b. Detail of Income and Expenses, Over Time

Comments:

- 1) The PSA changed to a July-June Fiscal Year beginning July 2018; thus, short FY Jan-June 2018 is reported here before complete FY 2018-2019.
- 2) Royalties are paid in March/April of the year following that in which they are earned.

	2014	2015	2016	2017	Jan. to June, 2018	July 2018 to June 2019
<b>Income Total</b>	<b>105,788.02</b>	<b>221,248.21</b>	<b>238,050.59</b>	<b>261,875.29</b>	<b>224,915.53</b>	<b>271,379.43</b>
Membership	29,875.00	34,440.93	32,340.00	33,980.00	27,425.00	40,865.00
Registration Fee (includes for AKD, Grad Fair One Day Pass 2019)	35,720.00	38,505.00	43,300.00	45,835.00	38,360.00	48,225.00
Fundraising (Donations, Auction)	3,204.00	3,571.00	4,248.00	3,777.00	2,465.08	3,500.35
Interest	651.54			314.99	168.06	2,395.56
Journal – submission fees (change in method of collection 2018-19)	2,670.00	2,300.00	2,440.00	1,820.00	40.00	3,760.00
Journal – royalties, publisher payments	33,442.00	126,906.16	145,931.34	175,564.34	153,007.14	172,633.52
Other/Misc.	225.00	15,525.12	9,791.25	583.96	3,450.25	0

	2014	2015	2016	2017	Jan. to June, 2018	July 2018 to June 2019
<b>Expenses Total</b>	<b>131,491.12</b>	<b>181,364.79</b>	<b>138,180.22</b>	<b>162,844.59</b>	<b>150,253.11</b>	<b>169,521.66</b>
<b>Administration</b> mostly credit card processing fees, fundraising expenses	6,520.46	4,961.06	3,966.26	5,972.62 *1400.25 regained	2,878.06	7,163.52
<b>Contract services and employees</b>	ED and assistant: 49,310.75 Legal 5,111.05 Printing, graphics 12,108.61 =66,530.41	ED 50,004.00 Legal 5,735.37 Software 7,950.00 =63,689.37	ED 54,171 Legal 6,392.96 Software 3,400.00 CPA 882.50 =64,846.46	ED 49,377.00 Legal 4,602.40 Software 4400.00 CPA 845.00 =59,224.40	ED 34,612.50 Legal 456.93 Software 720.00 CPA 740.00 =36,529.43	ED 58,583.80 Legal 2,271.15 Software 4,090.00 CPA 1,171.84 Sec 663.20 Payroll taxes 16,659.82 Worker's comp 996.00 = 84,435.81
<b>Stipends</b> (became reimbursements 2019)	records unclear	Treasurer 3,000.00 Secretary 3,000.00 Prog Chair 3,000.00 Vol. Coord. 500.00 Publications Comm 1,527.18 =11,027.18	Treasurer 3,000.00 Secretary 3,000.00 Vol. Coord. 500.00 Publications Comm 3,000.00 =9,500.00	Secretary 3,000.00 Vol. Coord. 500.00 Publications Comm 1,000.00 = 4,500.00	Secretary 3,000.00 Treasurer 3,000.00 Publications Comm 2,000.00 Program Chair 3,000.00 =11,000.00	Secretary, Treasurer, Treasurer Elect, Graduate Student Rep to Board 1,494.16 Publications Comm 2,271.59 = 3,765.75
<b>Tech subscriptions, supplies</b>	unclear	261.02	556.00	2,159.55 mailed ballot on merger	1,048.38	1,599.72
<b>Insurance and misc. costs</b>	500.00	500.00	554.75	1,681.72	773.34	4,060.0,
<b>Conference</b> AV, advertising, printing, food & beverage, staff rooms, supplies, etc.; for 2019, student volunteer and program chair travel reimbursements	40,322.88	67,082.33 (includes 6,750 deposit for 2016, more)	30,909.53 (AV low b/c meeting rooms did not need screens)	54,945.86	63,737.45	27,123.27 (incomplete; see 2019 Conference Report)
<b>ASA Minority Fellowship Program</b>	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
<b>Awards</b> awards, certificates, student travel grants	7,650.00	7,410.63	7,753.06	7,897.59	6,295.76	9,755.00
<b>Journal editorial office support, travel, etc.</b>	5,197.00	2,433.20	18,384.24	23,280.00	26,317.50	25,965.08
<b>Travel</b> ED for PSA business, site visits by Pres/Prog Chair/ED (under Conference in 2019), by Sec/Treasurer to SWS/ASA	3,770.37	Included in other categories	709.92	2,182.85	673.19	4,653.51
<b>INCOME MINUS EXPENSES</b>	<b>-25,703.10</b>	<b>+39,883.42</b>	<b>+99,870.37</b>	<b>+99,030.70</b>	<b>+74,662.42</b>	<b>+101,857.77</b>

### 1c. Executive Director Hours Tracking (from monthly time sheets)

2015			2016			2017			Jan.- June 2018			July 2018-June 2019		
Total hours	Time on Programs	Average hours per week	Total hours	Time on Programs	Average hours per week	Total hours	Time on Programs	Average hours per week	Total hours	Time on Programs	Average hours per week	Total hours	Time on Programs	Average hours per week
1,396	73%	26.8	1,484	61%	28.5	1,653	60%	31.8	1,023	69%	39.3	1,822	78%	35

## 1d. Financial Innovations, Issues, and Projects

- Innovations: Fiscal Year changed to July to June, to better reflect the PSA financial cycle; however, costs for 2019 conference still largely fell after July 1, so in FY 2019-2020 conference costs will appear very high. The best source for conference cost information—to see all costs for a particular conference—is the Conference Report.
- New credit card processing company has lower fees, but costs still depend on amount of purchases processed.
- Change in rules for payment of membership (all presenters must pay) beginning in 2019 resulted in increase in members. In addition, a One Day Pass for non-presenting community college students and community college adjunct faculty was piloted at the 2019 conference, with 73 passes purchased.
- As a result of changes in California rules on Independent Contractor vs. Employee status, PSA Executive Director became an official PSA employee on July 1, 2018.
- Interest on checking and Endowment Fund accounts is put towards Student Travel Grants
- Insurance coverage improved, to better cover all volunteers, board members, and employees as well as the organization.
- Need to work towards investment accounts for Endowment Fund (with oversight by Council)

## 2. MEMBERSHIP AND REGISTRATION

	2015	2016	2017	2018	2019
Membership	831	800	968	925	<b>1,082</b>
% students	51%	51%	51%	52%	<b>56%</b>
Registration	893	918	1,036	1,030	<b>1,088</b>
% students	53%	58%	55%	59%	<b>61%</b>

Membership increased in 2019 largely due to change in rules (so that all presenters must pay membership). Otherwise, membership and registration were similar to recent years. More detailed information on participant demographics is included in the September 2019 newsletter.

The last five years of membership and registration was analyzed for repeat participants. Overall, 70.5% of faculty and 30% of student participants were members for two or more years, while 66% of faculty and 29% of student participants

	Repeat Membership		Repeat Registration	
	Faculty, etc.	Students	Faculty, etc.	Students
5 of 5 years	17.5%	<1%	14%	1%
4 of 5 years	18%	3%	15%	2%
3 of 5 years	18%	8%	17%	7%
2 of 5 years	18%	19%	20%	20%
<b>Overall</b>	<b>70.5%</b>	<b>30%</b>	<b>66%</b>	<b>29%</b>
Of all participants	34%	15%	28.5%	16.5%

were registrants for two or more years. It was not possible to track all participants who transitioned from student to faculty, but at least 20 did so. PSA has a core of faculty who are regular participants—this is great to verify. And although it is not surprising that students have lower

repeat participation, it is great to see that many do return for at least two years.

## 3. GOVERNANCE

**First transition of elected Secretary and Treasurer:** The first elected Treasurer will complete her term in office at the 2020 conference; the Treasurer Elect is learning the ropes and will take over at that time. The second elected Secretary is in office now.

## 4. PROGRAMS

**Conferences:** Planning for the 2020 conference in Eugene is in full swing, while planning for the 2021 conference in San Diego is beginning. Site selection for the 2022 conference is nearly complete (contract in negotiations for Sacramento), and contract for the 2023 conference in Bellevue (East Seattle) is complete.

**Sociological Perspectives:** Transition to new editors is underway, with their first issue slated for February, 2020.

**2018 Awards, Student Travel Grants, Student Registration Waivers:** Awards Committee and Social Conscience Committee are receiving nominations for 2020 awards. Ad hoc committee to consider changes to Student Travel Grants process returned recommendation for no changes; Student Travel Grants and Registration Waiver awardees will continue to be selected by random drawing from among eligible applicants in 2020.

## 5. Next Steps

### Finances

- Invest Endowment Fund
- Conserve operating funds reserve while maintaining support for all programs
- Explore grant funding for some PSA programs—especially in connection with the annual conference

### Governance

- **Committees:** Appointed committees are generally not very active beyond sponsoring sessions. PSA needs to continue to discuss the purpose of committees, expectations for committee members, etc.
- **Email:** Group domain-specific address set up for [secretary@pacificsoc.org](mailto:secretary@pacificsoc.org), [treasurer@pacificsoc.org](mailto:treasurer@pacificsoc.org), [awards@pacificsoc.org](mailto:awards@pacificsoc.org), [socialconscience@pacificsoc.org](mailto:socialconscience@pacificsoc.org), and [socperspectives@pacificsoc.org](mailto:socperspectives@pacificsoc.org).
- **Operational Handbook:** Needs continued work.

### Programs and General Administration

- **Moving to the cloud:** PSA accounting is now cloud-based, as are Executive Director, Secretary, Treasurer files. Cloud-based repository for Council is established; the next steps are to add to the Council repository and create similar repositories for each PSA committee.
- **Website:** Continue updating content and look.
- **Membership and Registration:** Continue to increase membership and registration through ensuring that members/registrants benefit from PSA participation.
- **Sociological Perspectives:** Begin discussion on renewal of publishing contract with SAGE and/or consider other publishers; current contract runs through December 31, 2021.
- **Conferences:** Continue to work on technological supports for an easy experience by presenters and audience members; continue to problem-solve issues with Presiders in sessions and increase return of information forms from sessions; reduce no-shows and last minute cancellations by presenters.