

Affinity Communities Merit Based Funding Reporting Form

Affinity Community Name:

Date:

Submitted by (name, office/position):

Submitted by (e-mail address):

Notes:

- ❖ Even if funding assistance is not sought, each Affinity Community is asked to submit an annual Funding Report Card. The Affinity Communities Operating Board (ACOB) wants feedback on each group's activities for the past year.
 - ❖ To code officers and submit annual reports (including this one), use the ASME Volunteer E-Request Tool (<http://vorequest.asme.org/>). For a brief tutorial on using the tool, see <http://files.asme.org/Volunteer/Unit/14796.ppt>.
 - ❖ Maintaining an up to date officer list and timely submission of an Annual Financial Report and a Merit Based Funding Report are required of each group to maintain active status.
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Governance (2 points maximum)

1. Bylaws –
 - a. Groups less than three years old: Have bylaws been written and approved by the group's membership?
 - b. Established groups (in existence for at least three years): Have bylaws been reviewed and revised as needed?
(½ point)
2. Officers – Has the group updated its officer listings (see instructions in the notes section at the top of the page) for the current year?
(½ point)
3. Annual Financial Report – Has the group submitted its Annual Financial Report (see instructions in the notes section at the top of the page) to the ACOB?
(½ point)
4. Leadership training – Did the group send a delegate to this year's Leadership Training Conference (LTC)? Name the delegate.
(½ point)

Score:

Communications (4 points maximum)

1. Web presence – Does the group have a website or a page on an established site (e.g., LinkedIn, Facebook)? Is the site/page actively maintained and content kept current? Provide addresses for all sites/pages the group has created:
(1 point)

2. Peerlink – Is the group actively engaged on ASME Peerlink? Provide example(s) of interaction on Peerlink.
(1 point)
3. Communication – Does the group communicate via e-mail/phone/etc. regarding its activities/meetings/etc.? How many times per year does the group send out information to its membership?
(1 – 4 communiqués/year – 1 point
5 – 8 communiqués/year – 2 points
9 or more communiqués/year – 3 points)

Score:

Activities (4 points maximum)

1. Meetings – Activities hosted for the benefit of the group’s membership. E.g., socials, technical meetings, tours, webcasts, professional development opportunities.
(1 point per activity)
2. Outreach – Activities hosted for the purpose of attracting new members to the group. E.g., marketing events, information booths, presentations at ASME board or committee meetings.
(1 point per activity)
3. Discussions – Score one half (½) point for every fifteen online discussion postings in a given year (2 points maximum)

Notes:

- Count each event only once. I.e., if an event covers both functions – recruiting and current member interest, do not score 2 points for that activity.
- Each event must have been reported via a Unit Activity Report (<http://forms.asme.org/unitactivity/CreateMeeting.cfm>) to qualify for scoring.

Score:

Growth (3 points maximum)

1. How many members did the group have at the beginning of the program year?
2. How many members has the group added during the year?
3. Percent growth (# of members added / # of members at year start):
(Growth ≤ 20% – 1 point
20% < Growth ≤ 50% – 2 points
Growth > 50% – 3 points)

Score:

Fundraising (2 points maximum)

Has the group raised independent funding (external to the ACOB) to support its activities and goals?

1. Grant money (\$250 or more) obtained from another division or group within ASME
(1 point)
2. Funds (\$250 or more) raised from non-ASME sources
(1 point)

Score:

Scoring

Raw Score: _____ $\times 10 =$ _____ % (**Percentile Score**)

Percentile score $\leq 50\%$ – Not eligible for funding.

$50\% <$ Percentile score $\leq 100\%$ – Qualifies for that percentage of funding.

Percentile score $> 100\%$ – Funded at 100%.

Level of Funding Request

If your group is eligible to receive funding, please briefly describe (in 300 words or less) how you would use that funding. Please provide approximate budget numbers for the described activities. The maximum funding available per group is \$500 per year.

If your group's percentile score was less than 50%, please describe (in 300 words or less) what resources (funding and/or organizational assistance) you may require from the Operating Board to enable your group to achieve a qualifying score next year.

ANNUAL FINANCIAL REPORT

Program Year: July 1, 2010 to June 30, 2011

Revenue

Allocation _____
 Interest _____
 Program/Events _____
 Advertising _____
 Other 1. _____
 2. _____
 3. _____
Subtotal _____

Assets as of July 1, 2010

Bank balance _____
 Other cash _____
Total assets as of July 1, 2010 _____
Current Fiscal Year Revenue _____
Current Fiscal Year Expenditures _____
Surplus/Deficit _____
Current Assets _____

Expenditures

Telephone _____
 Postage _____
 Program/Meeting Expenses _____
 Printed Matter/Reproduction _____
 Miscellaneous _____
Subtotal _____

Assets as of June 30, 2011

Current Bank Balance _____
 Other cash _____
TOTAL ASSETS AS OF JUNE 30, 2011 _____
If Current Assets does not equal Total Assets as of June 30, 2010, please explain

Please fill in the following

Custodial Account Name	
Custodial Account Number	
AFFINITY GROUP NAME:	

TREASURER NAME (& E-MAIL ADDRESS) _____
 AUDITOR NAMES (& E-MAIL ADDRESSES) _____

UNIT OPERATIONS BUDGET

Past Year Summary and This Year's Plan
 Program Year: July 1, 2010 - June 30, 2011

	Budgeted	PAST YEAR Actual	Variance*	THIS YEAR Estimate
Telephone				
<i>Group Administration</i>	_____	_____	_____	_____
<i>Other</i> _____	_____	_____	_____	_____
Subtotal				
Postage & Mailing Expenses				
<i>Group Administration</i>	_____	_____	_____	_____
<i>Newsletters/Meeting Notices</i>	_____	_____	_____	_____
<i>Other</i> _____	_____	_____	_____	_____
Subtotal				
Program/Meeting Expenses				
<i>Executive Committee</i>	_____	_____	_____	_____
<i>Program Committee</i>	_____	_____	_____	_____
<i>Programs & Events</i>	_____	_____	_____	_____
<i>Awards</i>	_____	_____	_____	_____
<i>Meal Payments</i>	_____	_____	_____	_____
<i>Profesional Development/Seminars</i>	_____	_____	_____	_____
<i>Speaker/Meeting Expenses</i>	_____	_____	_____	_____
<i>Other</i> _____	_____	_____	_____	_____
Subtotal				
Printed Matter/Reproduction				
<i>Group Administration</i>	_____	_____	_____	_____
<i>Newsletters/Meeting Notices</i>	_____	_____	_____	_____
<i>Other</i> _____	_____	_____	_____	_____
Subtotal				
Miscellaneous				
<i>Other</i> _____	_____	_____	_____	_____
<i>Other</i> _____	_____	_____	_____	_____
<i>Other</i> _____	_____	_____	_____	_____
Subtotal				
Total Expenditures				
Revenue				
<i>Merit Funding Allocation</i>	_____	_____	_____	_____
<i>Interest</i>	_____	_____	_____	_____
<i>Programs/Events</i>	_____	_____	_____	_____
<i>Advertising</i>	_____	_____	_____	_____
<i>Other</i> _____	_____	_____	_____	_____
<i>Other</i> _____	_____	_____	_____	_____
<i>Other</i> _____	_____	_____	_____	_____
Total Revenue				

AFFINITY GROUP NAME:

*Variance equals the difference between the Budgeted and Actual amounts for the previous year