

FATE Budget 2010-11

Final Draft Proposal

Oct 1, 2010 to Sept 30, 2011

This budget attempts to include all board members in decision-making and roles.

- *Officers, current & past* *FLFTE FI Leadership Foundation for Teacher Leadership*
- *At-Large Directors* *The committee that makes the final recommendation to the board. A vote for approval is conducted at the Members' Business Meeting at the Annual Conference.*
- *Region Directors* *Assume responsibility for maintaining up-to-date Region Directory, from which possible members, sponsors and vendors can be identified.*

REVENUE Projected

MEMBERSHIP

Note: The 2009-10 chair, Susan Wegmann, had volunteered only to serve a one-year term. The new chair, a Region Director appointed by the 2010-11 President, will inherit this budget, and will be appointed into the official record in the minutes of the Post-Conference Board Meeting.

- 1 – 3** These lines represent new and renewing members NOT attending the 2010 Annual Conference. Each of the five (5) districts might set a minimum goal of recruiting:
- ten (10) regular members
 - one (1) retired member
 - five (5) student members
- 4** Lifetime Membership is defined in the bylaws as 20 x regular membership. (Currently \$30) Lifetime members receive no special benefits or recognition. Lifetime members simply don't have to pay membership dues annually. I am willing to commit to this membership as a model.
- 5 - 7** These lines represent participation estimates of the 2011 Annual Conference.

AWARDS

Note: The 2009-10 chair, Sophie Paul, had volunteered only to serve a one-year term. The new chair, a Region Director appointed by the 2010-11 President, will inherit this budget, and will be appointed into the official record in the minutes of the Post-Conference Board Meeting.

- 9 - 10** No Revenue plan for 2010-11

PUBLICATIONS

Note: The 2009-10 chair, Valerie Wright, is entering her second year of a two-year term as a result of being elected into office as Secretary.

- 11 - 12** While the work of this committee greatly enhances the ability to create revenue (via the journal, newsletter and Website) there are no proposals to create revenue via this committee. For example, there are no proposals to sell journals or newsletters, or to have a "pay" section of the Website.

EVENTS

- 13 This is the “bottom line” of the 2011 Conference Budget, not counting membership or sponsors. This line assumes that approximately 200 participants will register in various ways.
- 14 This figure is based on sponsorship efforts; 2005 – 2010.
- 15 There might be reason to include a line item “Other” in this category, if region events were considered. However, the revenue generated at these events would likely be classified as Membership, or in the case of the Panhandle Region Silent Auction, awards.

LEADERSHIP

- 16 There are no proposals to create revenue via this committee.
- 17 The Annual Review recommends that a certain amount of assets be kept in interest-bearing accounts. Note that this modest gain might be offset by expenditures such as those detailed in Line Item 48.
- 18 There are no proposals to create revenue via this committee.
- 19 Most educational institutions and organizations have a “foundation” a place where revenue can be collected and used to promote their mission. Since 1982, a group of current and past ATE officers have run the “leadership foundation”, which might serve as the Florida unit model. http://www.ate1.org/pubs/Leadership_Foundat.cfm In this budget proposal, current and past FATE officers would create a similar organization. A primary goal of the foundation might be to identify, recruit and train future organizational leaders.
- 20 **Total Leadership Revenue**
- 21 **TOTAL REVENUE Projection** created mostly by membership, sponsorship and the foundation. Compare to \$14,910 in the 2009-10 *Annual Budget*.

EXPENSES Projected

MEMBERSHIP

- 22 Regions are allotted a base of \$500 for the purpose of promoting teacher education. Allocations above the base might be earned by the Region Awards (proposed). Regions must submit a proposal for above-base funding to the board for approval.
- 23 Membership committees have brainstormed projects for promoting membership. This line item might be offset by projected revenue if merchandise or services were purchased for resale.
- 24 **Total Membership Committee Expenses**

AWARDS

- 25 The *Pre-Service* awards currently include the FFF Scholars. The base allotment for each of the four (4) students is a \$300 scholarship, FATE membership and a plaque. A second award, likely to be presented to a single recipient, is being proposed in this area. This line item reflects the expense of that proposal if approved by the 2010-11 board.
- 26 A *Clinical* award that targets those working with student interns was proposed in 2010. This line item reflects the expense of that proposal if approved by the 2010-11 board.
- 27 The *In-Service* section features the Mary L. Collins “Outstanding Teacher Educator” Award. A second award, likely to be presented to a single recipient, is being proposed in this area. This line item reflects the expense of that proposal if approved by the 2010-11 board.
- 28 FATE awards include the recognition of the outstanding region (proposed; plaque only) and to those who are leaving their term of service on the board.
- 29 **Total Awards Expenses**
A large volume of work was done by this committee in 2009-10 to create potential growth in this area. The budget needs to reflect at least 90% of the total of this program.

PUBLICATIONS

- 30 The *Newsletter* is scheduled to be sent electronically to current members following
- the Annual Conference,
 - the Winter Board Meeting, and
 - the Spring Board Meeting.
- If printed and mailed, the estimated cost would be \$150 per event.
Note: The board voted not to send the *Newsletter* via postal mail in 2009-10.
- 31 The *FATE Journal* is scheduled to be posted to <http://fate1.org/journals.cfm> in December. If printed and mailed to all current members and selected teacher educator leaders, (district superintendents, college deans, etc.) the estimated cost of printing and mailing is \$5.00/copy. The board voted not to send the *Journal* via postal mail in 2009-10.
- 32 Website: Site Registration & Hosting, paid in 2010, through 2014.
- 33 Website: WebMaster 12 months @ \$50
Currently Mannong (Pam) Pang is the only “employee” of FATE. She is full-time staff at the UCF College of Education. Her duties include construction and maintenance of all college websites.
- 34 Website: WebEditor Volunteer
Currently W. Scott Wise conducts the day-to-day requests to edit the site.
- 35 **Total Publications Expenses** are significant when viewed and used as a marketing tool designed to promote the mission and increase membership.

EVENTS

- 36** This 2010-11 Annual Budget draft considers no profit/loss for the *2011 Annual Conference*. Note: The “break-even” point for the Annual conference, when conducted in a conference hotel, is about 150 participants. This projection does not include revenue generated by membership or sponsorship.
- 37** FATE is a unit of ATE. This state unit is also a member of the Southeast Region, SRATE. Opportunities exist to support both of these organizations. In its bylaws, SRATE makes mention of annual dues for each state. However, the amount and procedure is unclear and being investigated. The likely amount is small and can be included in this line item. In the 2009-10 *Annual Budget* an allocation of \$500 allowed FATE to promote the ATE Annual Meeting, which will be coming to Orlando in February, 2011. We were also approached by ATE to sponsor the Student Forum in the amount of \$2000, but were not provided with specific goals, roles, etc. Therefore, no motion was made or acted upon. Because ATE is coming to Florida in 2011, a subcommittee designed to take full advantage of this opportunity might be established. This is particularly relevant since the Florida unit is poised to earn the Sikula “Outstanding Unit Award”.
- 38** **Total Events Committee Expenses**
Note that the *Annual Conference* is not required to “make a profit” from year to year.

LEADERSHIP

Elections

- 39** Printing & Mailing. Most correspondence conducted electronically. This committee might consider requesting funds for projects such as a postal mailout that previews or announces results of the election; highlights candidates, etc. A request might also be made to send by postal mail a “welcome packet” of materials to elected candidates.
- 40** The FATE elections are conducted online and therefore do not generate an expense.
- 41** 2 reps @ \$400
The 2010 SRATE Conference will be held in Nashville, TN. The current FATE President is a member of the SRATE Board of Directors. The recommendation in a policy & procedure manual therefore might be to support the participation of (1) the President and (2) the President-Elect or Executive Director as alternate(s).
- 42** 2 reps @ \$400
The ATE Delegate Assembly is a group of representatives from each unit that conduct the business of the organization during (two-day) sessions at the *Annual Meeting*. Each unit is allowed a number of delegates according to their ATE membership roster. Less than 100 ATE members from Florida; 2 delegates. Over 100 ATE members from Florida; up to 4 delegates. One “requirement” though not strictly enforced is to have delegates that represent both school-based and college/university. The cost of conference registration and membership for the ATE Annual Meeting in Orlando, February 2011, is about \$400. Generally, the cost to participate is about \$1000. Delegates this year will be spared the usual transportation (air fare) costs, however they might choose to pay for accommodations out-of-pocket.
- 43** 2 reps @ \$400
The ATE Summer Conference will be conducted in Philadelphia in August, 2011. Florida leaders and representatives on planning committees for the ATE *Annual Meeting* are likely candidates to be sponsored for this event. Other candidates might be those selected to the ATE Leadership Academy.
- 44** **Total Leadership/Elections Expenses**

Finance

- 45 Printing & Mailing. Most correspondence conducted electronically.
- 46 This might be a reoccurring expense. If so, the cost is minimal and could be regarded as Miscellaneous for 2010-11.
- 47 The organization will file with the IRS for the first time in 2010-11. The board has directed a annual review of the treasury and bookkeeping procedures.
- 48 Uncertain at this time if bank fees are assessed. End-of-year statement available?
- 49 **Total Leadership/Finances Expenses**

Governance

- 50 There are no proposals to create expenses via this committee.
- 51 **Total Leadership/Governance Expenses**

FATE Board of Directors

- 52 ATE Unit dues not requested in 2009-10.
- 53 Council of Unit Presidents (CUP) is an ATE committee that conducts business at the *Annual Meeting*. The current unit presidents and executive directors/secretaries attend.
- 54 ATE LFTE is described on the site http://www.ate1.org/pubs/Leadership_Foundat.cfm
Units are encouraged but not required to support the foundation. Contributing is a component of the Sikula Outstanding Unit Awards program.
- 55 SRATE bylaws states that dues shall be collected from all units. Not requested in 2009-10.
- 56 Allocation for FATE leadership “working lunch” at these annual events.
- 57 Secretary’s Supplies
- 58 Treasurer’s Supplies
- 59 FATE promotions might include the purchase of tablecloth and/or banner.
- 60 Board Liability Insurance.
- 61 Miscellaneous. Less than 10% of FATE Board budget.
- 62 **Total Leadership/Board Expenses**
- 63 **Total Miscellaneous**
Can be spent without special board meeting. About 1.5% of the *Annual Budget*.
- 64 **Total EXPENSES Projected** Compare to \$14,910 in the 2009-10 *Annual Budget*.
- 65 **Revenue less Expenses**
A balanced budget was proposed in 2009-10. Board voted for a deficit of \$2910. Much of the 2009-10 deficit was offset by the cancellation of a hard-copy journal.