



To: ASPT Council  
From: Linda Brown, ASPT Business Office Manager  
Re: 2008-2009 Annual Report, Snowbird, Utah  
Date: 17 July 2009

## FINANCES

The income/expenses for 2008, the 2009 business office budget, and projected budget for 2010 are listed on page three of this report.

As of July 1, the current monthly salary for the Business Office Manager is \$955/month based on an average of 86.7 hours per month (\$11.02 per hour, 1040 hours per year). The business manager's total hours vary from month to month, averaging 108 hours/month in 2008. Beginning with the February 2008 timesheet, any hours over the 86.7 are being paid at the hourly rate.

## REGULAR DUTIES

The daily ASPT Business Office tasks may include: responding to any correspondence from a member, subscriber, subscription agency, Officer, or Council member; responding to *Systematic Botany* claims; processing approved claims and back issue sales; processing database changes for members and institutions; preparing/ mailing annual invoices to members and institutional subscribers; processing new members and new institutional subscriptions; processing charge card purchases and checks for SBM sales; recording outgoing surface mail items in correspondence log; processing History Book and label sales orders; sending periodic electronic directory updates to the Webmaster; backing up Filemaker data, MS Office data, the QuickBooks file, and email files on an external hard drive; and periodic, "frequent file" updates to a CD.

The Business Manager is responsible for: reviewing the monthly Visa procurement charge card statement; reconciling the monthly checking account statement in QuickBooks; reviewing the UW Operations Budget account balance and the monthly postal account statement from UW; mailing items to the current treasurer (investment brochures, checks to sign for payments, etc.); helping the treasurer with quarterly print run estimates for The Sheridan Press; providing our Sheridan Press account manager with periodic information; preparing/sending journal subscription mailing lists to The Sheridan Press; preparing/ mailing page charge invoices for *Systematic Botany*; activating/ updating online subscriptions through the Ingenta site for members and institutions; sending the online subscriber file periodically to Ingenta; arranging and processing the purchase of CD's under the direction of the treasurer (none currently); recording the monthly interest for CD's and interest bearing accounts in QuickBooks (none currently); providing the Publicity Chair and local meeting rep with pre-meeting assistance; updating ASPT's information in free, online directories; and sending periodic mass emails to members upon request from Council members.

## BUSINESS OFFICE POLICY NOTES FOR 2009-2010

1) Beginning with *Systematic Botany* issue 33(1), The Sheridan Press has been sending the overcopies to the Business Office; these are the issues needed for new members and replacement issues for claims. Neil Harriman, who has volunteered his services (and basement) for this task for many years, has agreed to the change now that he has retired. Neil will continue to mail claimed issues from volumes 31 and 32. Issues older than volume 31 will be recycled.

In 2008, Neil shipped five, almost complete sets of *Systematic Botany* to Vicki Funk who distributed them to developing country institutions. Before recycling the leftovers this fall, Neil has offered to ship issues from the remainder of the stock (volumes 1-30) to any member for the cost of postage. Should we make this offer to the current members before recycling?

2) The reduced, developing country rate was approved at the 2006 Council meeting (\$90 for institutional subscribers, \$30 for ASPT memberships). The rate has not changed for three years (2007 - 2009).

After offering the new rate in 2007, 42 members and 4 institutions paid the reduced rate. The number of members and institutions who pay the reduced rate has now grown to 142 members and 18 institutions. These numbers include our sponsored memberships and subscriptions to developing countries.

In 2006, the Council directed me to use the World Bank lists to identify qualifying countries for the reduced rate: **developing countries with low or low-middle income economies**. The list was adjusted in 2008 to include countries with **upper-middle income economies**. Each July 1, the World Bank posts an updated list. I have attached the new list on page 2 and request that the Council approve or make adjustments to the list of qualifying countries for 2010, *Systematic Botany* Vol. 35.

Kosovo was the only new addition in 2009. Countries who are no longer on the list and are now classified as having **high income economies** are Barbados, Croatia, Czech Republic, Equatorial Guinea, Estonia, Hungary, Northern Mariana Islands, Oman, Slovak Republic, Trinidad, and Tobago.

**July 2009, World Bank, Low Income Economies (43)**

Afghanistan	Ethiopia	Madagascar	Somalia
Bangladesh	Gambia, The	Malawi	Tajikistan
Benin	Ghana	Mali	Tanzania
Burkina Faso	Guinea	Mauritania	Togo
Burundi	Guinea-Bissau	Mozambique	Uganda
Cambodia	Haiti	Myanmar	Uzbekistan
Central African Republic	Kenya	Nepal	Vietnam
Chad	Korea, Dem Rep.	Niger	Yemen, Rep.
Comoros	Kyrgyz Republic	Rwanda	Zambia
Congo, Dem. Rep	Lao PDR	Senegal	Zimbabwe
Eritrea	Liberia	Sierra Leone	

**July 2009, World Bank, Lower-Middle Income Economies (55)**

Albania	Egypt, Arab Rep.	Maldives	Solomon Islands
Angola	El Salvador	Marshall Islands	Sri Lanka
Armenia	Georgia	Micronesia, Fed. Sts.	Sudan
			Swaziland
Azerbaijan	Guatemala	Moldova	Syrian Arab Republic
Belize	Guyana	Mongolia	Thailand
Bhutan	Honduras	Morocco	Timor-Leste
Bolivia	India	Nicaragua	Tonga
Cameroon	Indonesia	Nigeria	Tunisia
Cape Verde	Iran, Islamic Rep.	Pakistan	Turkmenistan
China	Iraq	Papua New Guinea	Ukraine
Congo, Rep.	Jordan	Paraguay	Vanuatu
Côte d'Ivoire	Kiribati	Philippines	West Bank & Gaza
Djibouti	Kosovo	Samoa	
Ecuador	Lesotho	São Tomé and Príncipe	

**July 2009, World Bank, Upper-middle-income economies (46)**

Algeria	Dominica	Malaysia	Serbia
American Samoa	Dominican Republic	Mauritius	Seychelles
Argentina	Fiji	Mayotte	South Africa
Belarus	Gabon	Mexico	St. Kitts & Nevis
Bosnia and Herzegovina	Grenada	Montenegro	St. Lucia
Botswana	Jamaica	Namibia	St. Vincent & the Grenadines
Brazil	Kazakhstan	Palau	Suriname
Bulgaria	Latvia	Panama	Turkey
Chile	Lebanon	Peru	Uruguay
Colombia	Libya	Poland	Venezuela, RB
Costa Rica	Lithuania	Romania	
Cuba	Macedonia, FYR	Russian Federation	

	2008	2009	2010
	Business Office Inc/Exp	Business Office Budget	Proposed Budget
<b>Label Sale-Total B Off Inc</b>	<b>\$1,000.00</b>	<b>\$600.00</b>	<b>\$500.00</b>
<b>Clerical Services</b>	<b>\$22,548.21</b>	<b>\$23,725.00</b>	<b>\$24,139.00</b>
<b>Computer Exp</b>	<b>\$352.18</b>	<b>\$400.00</b>	<b>\$400.00</b>
<b>Membership Dues</b>			
<i>Post</i>	\$551.51	\$350.00	\$618.00
<i>Prod</i>	\$357.30	\$325.00	\$375.00
<b>Total Mem Dues</b>	<b>\$908.81</b>	<b>\$675.00</b>	<b>\$993.00</b>
<b>Fed Ex</b>	<b>\$0.00</b>	<b>\$100.00</b>	<b>\$50.00</b>
<b>Hard Copy Directory</b>			
<i>Post</i>	\$113.98	\$1,860.00	\$200.00
<i>Prod</i>	\$96.90	\$1,800.00	\$0.00
<b>Total HC Directory</b>	<b>\$210.88</b>	<b>\$3,660.00</b>	<b>\$200.00</b>
<b>History Book Postage</b>	<b>\$53.50</b>	<b>\$100.00</b>	<b>\$75.00</b>
<b>Institutional Subscriptions</b>			
<i>Post</i>	\$166.94	\$200.00	\$186.00
<i>Prod</i>	\$129.80	\$84.00	\$136.00
<b>Sub Agencies</b>	<b>\$72.62</b>	<b>\$90.00</b>	<b>\$76.00</b>
<b>Total Inst Subs</b>	<b>\$369.36</b>	<b>\$374.00</b>	<b>\$398.00</b>
<b>Label Sale Exp (\$0 if all Elec. Files)</b>			
<i>post</i>	\$0.00	\$25.00	\$25.00
<i>prod</i>	\$0.00	\$130.00	\$130.00
<b>Total Label Sale Exp</b>	<b>\$0.00</b>	<b>\$155.00</b>	<b>\$155.00</b>
<b>Hard Copy Newsletter</b>			
<i>Post</i>	\$665.58	\$1,100.00	\$745.00
<i>Prod</i>	\$1,090.25	\$700.00	\$1,145.00
<b>Total Newsletter</b>	<b>\$1,755.83</b>	<b>\$1,800.00</b>	<b>\$1,890.00</b>
<b>Office Supplies*</b>	<b>\$575.58</b>	<b>\$325.00</b>	<b>\$650.00</b>
<b>Bus Office Postal Charges</b>	<b>\$384.93</b>	<b>\$350.00</b>	<b>\$431.00</b>
SysBot Postal Charges Now Listed as	SB Budget Exp	<b>\$150.00</b>	<b>\$0.00</b>
<b>Secretary Mailings</b>			
<i>Post</i>	\$3,541.12	\$4,500.00	\$3,754.00
<i>Prod</i>	\$3,059.12	\$2,800.00	\$3,212.00
<b>Total Sec Mailings</b>	<b>\$6,600.24</b>	<b>\$7,300.00</b>	<b>\$6,966.00</b>
<b>Total Business Office Exp</b>	<b>\$33,759.52</b>	<b>-\$39,114.00</b>	<b>-\$36,347.00</b>
<b>Total Net Income</b>	<b>\$32,759.52</b>	<b>-\$38,514.00</b>	<b>-\$35,847.00</b>

\* "Office supplies" budget line covers expenses for everything needed to run the Business Office including paper, envelopes, credit card machine, & furniture.

The Business Office budget is slightly higher in odd-numbered years due to the printing & distribution of the hard copy directory.