

# ASPA-HR Chapter

## Fiscal Year History Checklist for Archives

1. The Secretary, together with the Treasurer, bears responsibility to properly archive the history documents of the chapter through *preparing and issuing an annual report of activities and finances*. Overall responsibility lies with the President. From the Constitution:  
*Constitution*  
*III. Officers; Section 3. The Secretary shall be responsible for preparing and issuing an annual report of activities and finances to all members of the Chapter*
2. At the conclusion of the Chapter's fiscal year (June 30 concludes the FY), the Secretary coordinates with the Treasurer (and President), either outgoing or incoming, to capture the documents and information listed in this Checklist, place in the History notebook and review with the President as to completeness.
3. Ordinarily, upon submission of the annual financial report to national-ASPA, this will be the last item needed to complete compilation of the FY history. The completed history should be brought to the next Council meeting in the history notebook, for review by leadership and adoption into the record/minutes.
4. The History notebook(s) are to be secured in the possession of the Chapter Historian, who is appointed by the President each year. The president maintains possession of the most recent History notebook during his/her year in office as a reference. A History notebook may contain the more important documents of the Chapter's history for as many as 5-years, or so.
5. Contents of the *History* (tabbed-notebook sections):
  - a) Contents
  - b) Summary of the FY's events and related information (form attached). If no event was held, state why not.
  - c) Annual report to ASPA-National (signed by President and distributed to membership by Secretary)
  - d) Marketing: Event flyers, programs, newsletters, media articles, photographs
  - e) Council minutes/notes
  - f) Treasurer's reports from each Council meeting
  - g) End of year membership roster
  - h) Financial records subject to audit by IRS
  - i) Copy of the annual member survey and analysis of the results/ recommendations for action.
  - j) Other
6. The Historian incorporates the summary information into the Chapter summary spreadsheet for posting on the Chapter Web page.
7. When a notebook is filled, labeled the notebook for the FY's contained within. A new notebook for the next FY is to be begun when the prior notebook is filled.
8. Four (4) general membership events, minimum, each year is required by the Constitution, including the annual meeting in May. This generally would not count mixers or holiday parties – these are essentially marketing tools.
9. Refer to the Constitution and By-laws for any additional guidance.

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FY: \_\_\_\_\_

### *Contents*

1. Summary of the FY's events and related information
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recommendations for action.
9. Other

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# ASPA - Hampton Roads

## Chapter History

Summary of Events for

**Fiscal Year 2010/2011**

Prepared by: \_\_\_\_\_ Date Completed: \_\_\_\_\_

### ***I. Officers:***

President:

President-elect:

Secretary:

Treasurer:

### ***II. Chairs and other:***

Membership Chair:

Marketing Chair:

Webmaster:

Newsletter Editor:

Historian:

Symposium Chair:

Student Forum Chair:

Nominations Committee Chair:

Awards Chair:

Scholarship Chair:

#### **Membership: End-of-FY**

Total (number):

Full members (number):

Student members (number):

**Dues Rebate:** \$ \_\_\_\_\_ Profit/<Loss> for FY: \$ \_\_\_\_\_

Chapter Awards received:

### ***III. Events:***

Event: General Membership Program Meeting

Date: September

Chair:

Location:

Time:

Theme:

Speaker(s)/Topics:

Attendance/Meals Served:

Venue cost:

Member fee:

Costs: Total event expenditures (\$ \_\_\_\_\_ ) - Total event revenues (\$ \_\_\_\_\_ ) = Net gain or loss (\$ \_\_\_\_\_ )

Comments:

Event: Student Forum  
Date: October  
Chair:  
Location:  
Time:  
Theme:  
Speaker(s)/Topics:  
Attendance/Meals Served:  
Venue cost:  
Member fee: \$  
Costs: Total event expenditures (\$) - Total event revenues (\$) = Net gain or loss (\$ )  
Comments:

Event: General Membership Program Meeting  
Date: November  
Chair:  
Location:  
Time:  
Theme:  
Speaker(s)/Topics:  
Attendance/Meals Served:  
Venue cost:  
Member fee: \$  
Costs: Total event expenditures (\$) - Total event revenues (\$) = Net gain or loss (\$ )  
Comments:

Event: General Membership Program Meeting  
Date: January  
Chair:  
Location:  
Time:  
Theme:  
Speaker(s)/Topics:  
Attendance/Meals Served:  
Venue cost:  
Member fee: \$  
Costs: Total event expenditures (\$) - Total event revenues (\$) = Net gain or loss (\$ )  
Comments:

Event: Mixer  
Date: February  
Chair:  
Location:  
Time:  
Theme:  
Speaker(s)/Topics:  
Attendance/Meals Served:  
Venue cost: \$  
Member fee: \$  
Costs: Total event expenditures (\$) - Total event revenues (\$) = Net gain or loss (\$ )  
Comments:

Event: Annual Symposium  
Date: March  
Chair:  
Location:  
Time:  
Theme:  
Speaker(s)/Topics:  
Attendance/Meals Served:  
Venue cost:  
Member fee: \$  
Costs: Total event expenditures (\$) - Total event revenues (\$) = Net gain or loss (\$ )  
Comments:

Event: Mixer  
Date: April  
Location:  
Chair:  
Time:  
Theme:  
Speaker(s)/Topics:  
Attendance/Meals Served:  
Venue cost: \$  
Member fee: \$  
Costs: Total event expenditures (\$) - Total event revenues (\$) = Net gain or loss (\$ )  
Comments:

Event: Annual Meeting and Awards  
Date: May  
Chair:  
Location:  
Time:  
Theme:  
Speaker(s)/Topics:  
Attendance/Meals Served:  
Venue cost: \$ ;(Awards/Trophies @ \$ )  
Recipients name, title and affiliation):  
• Hirst:  
• House:  
• Pindur:  
• Scholarship and amount(s):  
Member fee: \$  
Costs: Total event expenditures (\$) - Total event revenues (\$) = Net gain or loss (\$ )  
Comments: