



CASE CELEBRATES 30 YEARS > BUILDING NETWORKS TO ADVANCE EDUCATION

CASE
CELEBRATES
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WHAT IS CASE?

CASE is a nonprofit membership organization that provides professional development programs, publications, research, standards, and advocacy in the field of educational advancement as practiced at schools, colleges, and universities worldwide. Educational advancement includes the disciplines of alumni relations, communications and marketing, and fund raising, as well as advancement management and advancement services.

WHO ARE CASE MEMBERS?

More than 3,200 independent schools, two- and four-year colleges and universities, as well as affiliated and related organizations, belong to CASE, making it the largest association of educational institutions in the world. CASE member institutions can be found in 50 countries and employ at least 50,000 people in advancement, with nearly half of them

registered as professional members of CASE. In addition, more than 200 for-profit firms involved in advancement are currently CASE Educational Partners.

HOW DOES CASE SERVE MEMBERS?

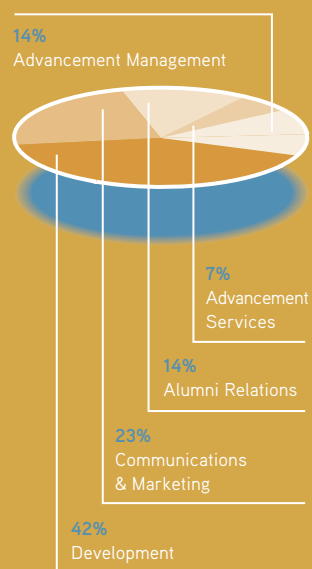
As the leading association for educational advancement, CASE provides nearly 100 conferences, workshops, and online seminars each year at which professionals hone their skills, refresh their knowledge, and broaden their network of colleagues. CASE also shares with members the latest approaches and the best practices in the field through CURRENTS magazine, a catalog of approximately 100 advancement-related books, an extensive annual awards program and a monthly online newsletter. In addition, CASE conducts and disseminates research and benchmarking studies that help institutions and individuals assess and improve the

effectiveness of their advancement offices. An array of other services, such as our matching-gifts offerings and the U.S. Professors of the Year program, are fully described at www.case.org.

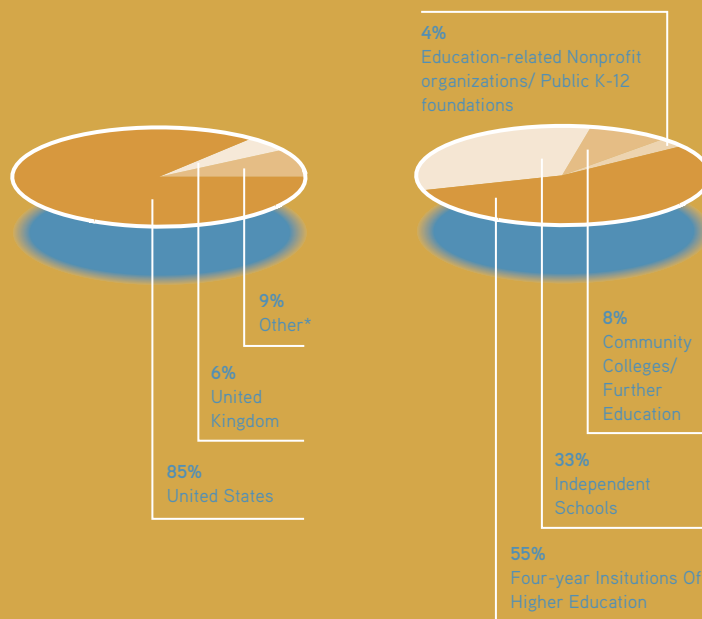
WHY IS ADVANCEMENT IMPORTANT?

Advancement, whether practiced through alumni relations, communications & marketing, or fund raising, is crucial to the long-range success of educational institutions. Advancement professionals help their campuses build lasting and supportive relationships with alumni, donors, advocates, elected officials, community and business leaders, parents, taxpayers, media representatives, prospective students, and others on whom the future of the institution depends. At its core, the field of advancement is dedicated to expanding educational opportunities and extending educational benefits to all those who can be served by them.

WHAT CASE MEMBERS DO



WHERE CASE MEMBERS WORK



* In addition to the United States and the United Kingdom, CASE members work in: AUSTRALIA > BELGIUM > BERMUDA > BOTSWANA > BRAZIL > BULGARIA > CANADA > CHILE > COLOMBIA > COSTA RICA > DENMARK > EGYPT > FINLAND > FRANCE > GERMANY > GHANA > GREECE > HONDURAS > HONG KONG > HUNGARY > INDIA > INDONESIA > ISRAEL > ITALY > JAMAICA > JAPAN > KUWAIT > LEBANON > MALAYSIA > MEXICO > NETHERLANDS > NEW ZEALAND > NORWAY > PAKISTAN > PEOPLE'S REPUBLIC OF CHINA > PHILIPPINES > POLAND > PORTUGAL > REPUBLIC OF IRELAND > REPUBLIC OF SOUTH AFRICA > SINGAPORE > SOUTH KOREA > SPAIN > SWEDEN > SWITZERLAND > TAIWAN > TURKEY > UNITED ARAB EMIRATES

Building Relationships Over Time

This report highlights CASE's activities in the 2004 fiscal year. We attribute these achievements to our bonds with members and our strength as a professional association.

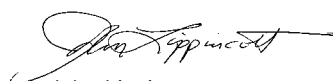
We celebrated our 30th year of existence in 2004, and we also took the opportunity to acknowledge and thank the members of CASE. CASE is particularly proud to connect our members with each other and with valuable information contributing to their professional growth. Many of our members credit CASE with their successes, and we are proud to share in their achievements.

Our mission remains as clear as ever: to advance and support educational institutions by enhancing the effectiveness of the alumni relations, communications, and fund-raising professionals who serve them. As you read this report, we hope you will note the many ways in which we have acted upon and realized that mission recently, from launching our enhanced Web site, the CASE Network, to publishing new book titles and expanding our online speaker series. Going forward, we will continue to uphold our mission by providing members with every opportunity for career development.


This report also includes the audited financial statements for fiscal year 2004. CASE concluded the year in a healthy financial position — a tribute both to our members' satisfaction with their professional organization and our staff's commitment to controlling costs even while expanding products and services.

Educational advancement is based on building relationships over time: reaching out to supporters, keeping connections with alumni strong, sharing information, and engaging new generations of friends on behalf of schools, colleges, and universities. CASE, as an organization, is privileged to be of service in that essential work.




John Lippincott
CASE President




Kent Rollins
Chair, CASE Board of Trustees
and President,
University of Arizona
Medical Center Foundation

About CASE

THE CASE MISSION

The Council advances and supports educational institutions by enhancing the effectiveness of the alumni relations, communications and marketing, and fund-raising professionals who serve them.

THE CASE VISION

As the premier professional association for educational advancement, CASE aspires to be the leading resource for professional development and information, the leading proponent of professional ethics and standards, and the leading advocate for diversity.

CASE VALUES

Fundamental to CASE's success is service to education and members as a primary focus; respect for volunteers and staff as leaders, partners, and shareholders; and a commitment to integrity, ethical behavior, and inclusiveness as key characteristics of leadership.

HOME >

For 30 years, CASE has been a network of information, expertise, professional development, and growth opportunities for the educational advancement professionals we serve. In 2003-04, we continued to focus on connecting members with the tools and resources they needed to serve their institutions and achieve their career goals.

The climate for education and for educational advancement has changed markedly in most nations over the three decades of CASE's existence. Education is viewed almost universally as the foundation for individual and societal achievement, and educational institutions are widely recognized as key mechanisms for transferring knowledge to the economy.

But as the perceived value of education has risen, so has the cost. Today, even countries that traditionally have assumed all or most of the cost of higher education are shifting more fees to students. Independent schools, colleges, and universities are facing higher costs for technology and other educational resources. There is worldwide concern about access to education. For all of

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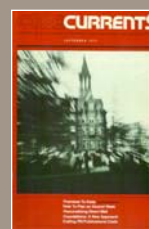
1974



The American College Public Relations Association and the American Alumni Council merge to create the Council for Advancement and Support of Education, a name selected from more than 400 suggestions. The organization's articles of incorporation are signed Nov. 26, 1974, and the headquarters are at One Dupont Circle in Washington, D.C. Edwin Crawford is the first Board chair and Cletis Pride is interim president. CASE has 1,835 institutional members and

7,200 member representatives. "We Will," a 16-commitment pledge adopted by the members of the Joint Study Committee, is sent to members of the dissolving organizations. In September of that year, Alice L. Beeman, then chief executive officer of the American Association of University Women, is chosen as president.

1975



CASE holds its first Annual Assembly, July 8-10, at the Palmer House in Chicago. The membership formally approves the name, the articles of incorporation, and nominations for the Board of Trustees.

CURRENTS magazine debuts in September under Editor Virginia Carter. The Summer Institutes are created.

these reasons, CASE's mission has never been more important.

Campuses are looking to educational advancement professionals to solidify support for institutions among their various constituencies. Educational advancement professionals—whether they work in advancement services, alumni relations, communications and marketing, fund raising, or related areas—have the responsibility of building the relationships that enable institutions to generate the gifts and good will necessary to meet the needs of today's diverse students. If CASE's mission was vital 30 years ago when it was formed from the merger of the American College Public Relations Association and the American Alumni Council, it is even more vital in the 21st century.

This report reviews CASE's accomplishments during the fiscal year July 1, 2003, through June 30, 2004, and sets out priorities for the future. At the heart of CASE's proudest achievements are the relationships and networks that have been built with members and volunteer leaders over time—the key to our success.

CASE's success is also the result of a committed team of

staff members who guaranteed that the organization would stay on course during a fiscal year that saw a leadership transition in December 2003, when Vance Peterson left the presidency and John Lippincott was named as interim president through the second half of the fiscal year. Lippincott's knowledge of CASE as its former vice president for communications and marketing and his calm, collaborative leadership style during the transition persuaded the CASE Board of Trustees to appoint him as president in July 2004.

ABOUT CASE >

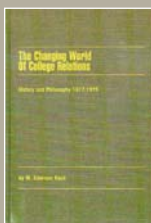
CASE staff members are known for their dedication, but CASE is also well respected among associations for the commitment of volunteers. CASE marked its 30th anniversary in 2004 by acknowledging the many roles volunteers play, whether they serve as authors of CASE Books or CURRENTS articles, speak at conferences, serve as judges for awards programs, or give their time and expertise in other ways.

The CASE Board of Trustees, which sets policy and establishes the budget, is comprised

Hector Wheeler
University of Technology
Kingston 6, Jamaica



1976



CASE publishes its first book, *The Changing World of College Relations: History and Philosophy 1917-1975*, by W. Emerson Reck.

1980



CASE moves from One Dupont to 11 Dupont Circle. In conjunction with the National Association for College and University Business Officers, and with support from an Exxon Foundation grant, CASE begins developing a common cost-reporting standard for fund raising at educational institutions. Under the leadership of CASE President James L. Fisher, the project is completed in 1982.

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of professionals elected by the general membership. The CASE Europe Board of Trustees oversees programming and services for advancement professionals in mainland Europe, Ireland, and the United Kingdom.

Volunteer leaders are also crucial to the structure and functioning of CASE's eight geographical districts in North America, each of which has its own board, holds an annual conference, and provides other professional development opportunities for its members. CASE's three commissions on Alumni Relations, Communications and Marketing, and Philanthropy consist of members who assist CASE in understanding the terrain for educational advancement and proactively responding to emerging issues in each of the disciplines.

WWW.CASE.ORG >

CASE has always connected advancement professionals interested in information sharing, knowledge building, and career development. CASE enhanced its ability to link members with each other and with valuable resources when the Network, the revamped Web site, at www.case.org, was launched in November 2003. The changes were much more than cosmetic. The Network's features, including the opportunities it provides members to receive customized

information according to their interests and needs, make it a tool for finding and organizing resources that cover all of the advancement disciplines and sub-disciplines. The Network has been well received and continues to evolve as CASE regularly updates content, offers new features, and integrates best practices in Web use and navigation.

MEMBERSHIP >

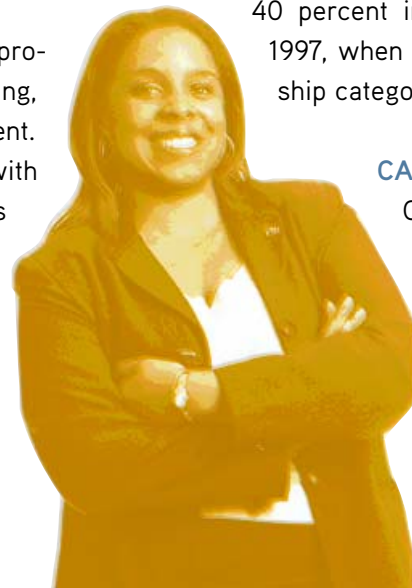
In 2003-04, the number of institutional members climbed to an all-time high of 3,082, reflecting an increase of 45 institutions over 2002-03 and an overall member retention rate of 96 percent. A total of 368 institutional members are from outside the United States and Canada, also a record, and an affirmation of CASE's value and appeal around the world.

Professional membership totaled 22,109, a 40 percent increase over the total in 1997, when the professional membership category was created.

CASE EUROPE >

CASE Europe, headquartered in London, celebrated its 10th anniversary in 2004 and continues

Natalie A. Solomon
University of Pittsburgh
Pittsburgh, PA



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1981

AMERICA'S
ENERGY IS
MINDPOWER

The first "NATIONAL SUPPORT HIGHER EDUCATION DAY" is held July 16, with the slogan "America's Energy is Mindpower." CASE, in conjunction with the Carnegie Foundation for the Advancement of Teaching, creates the U.S. Professor of the Year award program. CASE also creates the Jefferson Medal to salute a college graduate who has made extraordinary contributions to American society.

1982



The July/August issue of CURRENTS includes the first detailed study of advancement professionals, "We the People," based on a survey of CASE members. CASE

cosponsors the first national survey on public attitudes toward higher education.

to provide programs, information, and resources to members in mainland Europe, Ireland, and the United Kingdom. The boards of CASE and of CASE Europe met jointly for the first time in March 2004 and established "The Fontainebleau Principles," a statement of common purpose for all of CASE's international activities. Included are commitments to pursue multiple strategies for global growth and to consider growth opportunities in all parts of the world where interest in educational advancement is high.

NEWSROOM >

Members of the media have shown an increasing interest in educational advancement as advancement activities have become more important to the health and longevity of institutions. CASE was frequently called upon by the media in 2003-04 to explain advancement trends and provide insight into the future of educational advancement. CASE responded to more than 250 media inquiries, helping reporters to better understand the importance of private support as well as the variety and scope of issues involved in building that support for education.

GOVERNMENT RELATIONS >

Educational advancement is affected by a variety of societal and governmental forces, and CASE provides the information that helps professionals

negotiate the ever-shifting terrain. CASE tracks issues that impact advancement, including charitable-giving legislation in the United States and measures in Great Britain and Europe to cultivate private giving.

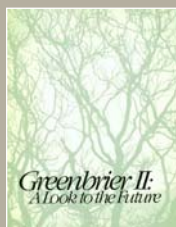
Through such offerings as E-Headlines, the daily posting of news relating to education, BriefCASE, CASE's monthly electronic newsletter, and Issues Watch, a wrap-up of selected issues, CASE keeps members informed about trends that shape their work.

CASE not only tracks relevant issues but also seeks to influence policies that affect educational advancement, often by working through coalitions. In 2004, for instance, CASE partnered with several groups to influence development of legislation in the United States, the United Kingdom, and elsewhere to encourage charitable giving.

BOOKSTORE >

CASE publishes a variety of print and online resources to assist its members at every stage of their careers. Members in 2003-04 purchased more than 15,000 books, including the *Third Edition of CASE Management and Reporting Standards: Standards for Annual Giving and Campaigns in Educational Fund Raising*, CASE's best-selling title.

1985



CASE holds the Colloquium on Professionalism in Institutional Advancement at the Greenbrier resort in West Virginia. The conference, known as "Greenbrier II,"

focuses on ethics, research, and standards in advancement.

1992

CASE reduces its 12 commissions to three focused on alumni relations, communications, and philanthropy, and the concept of advancement's "three-legged stool" is reinforced.

1993



CASE, the American Association of Fund-Raising Counsel, Association for Healthcare Philanthropy, and Association of Fundraising Professionals adopt the "Donor Bill of Rights."

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Other books published in 2003-04 included *Innovations in Annual Giving: 10 Departures That Worked*; *A Dynamic Foundation for Fund Raising: A Guide to Organizing or Reorganizing an Institutionally Related Foundation*; and *Data Mining for Fund Raisers: How to Use Simple Statistics to Find Gold in Your Donor Database*.

CAREER CENTER >

The launch of the CASE Network greatly enhanced the services available for members and others who wish to post positions at their institutions or search for career opportunities. Member institutions and other organizations were able to post more than 1,500 jobs—representing the full range of advancement positions and experience levels across colleges, schools, and a variety of other nonprofit organizations—in the Career Center in 2003-04. Plans include providing sample position descriptions, organizational charts, and other resources to assist members in their own career development, or to provide them with ideas for restructuring or updating advancement offices at their institutions.

CONFERENCES >

Through CASE conferences and institutes, educational advancement professionals can learn from the best. More than 9,000 individuals attended 70 conferences in North America and Europe

in 2003-04, such as the CASE Assembly, Summer Institutes, and CASE•NAIS, for independent schools professionals, and CASE offered several new programs including “Gift Processing Workshops,” “Introduction to Personal Solicitation,” and “Advancement Services: Conversion Workshop.” In addition, record numbers of participants attended some long-time offerings, including “Development for Deans” and the “Editor’s Forum.” For the second year, CASE sponsored the “Advancement Management Institute,” attracting a wide range of participants from all corners of the world.

Nearly 8,500 attendees participated in the 15 programs in CASE’s Online Speaker Series, which was in its second year of existence. The program enables educational advancement officers to benefit from cost-effective professional development opportunities without leaving their campuses.

CASE continued to collaborate with other organizations to provide worthwhile programming. Through a partnership with the Kresge Foundation, CASE provided programming for the Kresge HBCU Learning Institute, which focused on the advancement needs of historically black colleges and universities. CASE collaborated with the American Association of State Colleges and Universities (AASCU) to offer a program for pres-

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1994



long-time recognition programs become known as the Circle of Excellence Awards.

CASE Europe opens its offices in London. CASE creates a home on the World Wide Web at www.case.org and several of the association’s

1995

CASE begins sponsoring the first of its listservs, allowing subscribers to connect with their peers for e-mail based discussions of advancement issues. The District Chairs Council, which brings together chairs from each of CASE’s eight districts, is created.

1996



First issue of EUROCASE, CASE Europe’s newsletter, is published and CASE Europe moves into Suite 21a at Tavistock House North.

idents, and continues to sponsor, with AASCU, the American Association of Community Colleges, and the National Association of State Universities and Land-Grant Colleges, an annual state relations conference for advancement officers who work with state governments and elected officials.

CASE joined with the Carnegie Corporation of New York in 2003-04 to provide a series of workshops for fledgling advancement operations at African universities such as the University of Dar es Salaam in Tanzania.

MATCHING GIFTS >

Our Matching Gifts services support educational and other nonprofit organizations by supplying information to donors and fund raisers about companies that match the charitable donations of their employees. With the assistance of a \$50,000 grant from the Verizon Foundation, CASE in 2003-04 expanded by 15 percent the database of corporations that offer matching programs. The grant allowed CASE to enhance its computer software applications, enabling the Matching Gifts Clearinghouse to support the addition of much more data. A \$10,000 grant from the Exxon Mobil Foundation supported publication of the Matching Gifts DETAILS Directory, which now includes over 8,600 companies.

CASE's Matching Gifts Symposium continues to be the foremost gathering of professionals responsible for administering matching gift programs for companies and educational institutions. In February 2004, the symposium focused on the history and future of the programs in honor of the 50th anniversary of the matching gift concept.

AWARDS & SCHOLARSHIPS >

CASE also serves members by recognizing outstanding work that sets the standard for best practices in the advancement profession. In 2004, institutions submitted more than 3,100 entries to the Circle of Excellence Awards Program. The program's 40 categories covered the scope of institutional advancement programming, including public relations,

B. David Rowe
LaGrange College
LaGrange, GA



1997



CASE purchases new headquarters at 1307 New York Avenue in Washington, with three other associations: the American Association of State Colleges & Universities, the National Association of State Universities and Land-Grant Colleges, and the American Association of Colleges for Teacher Education.

1998

CASE creates the Clarence J. Jupiter Fellowship Program in Institutional Advancement to diversify the profession by providing up to eight professionals of color with learning experiences at member institutions each year. The fellowships are modeled on a program created by CASE District I.

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media relations, periodicals, publications, electronic media, design, and photography. The awards program has been successful over the years because of the commitment of many volunteers; more than 200 CASE members and other supporters served on nearly 50 judging panels in 2004.

In addition, abstracts for the winning programs—including their planning, goals, and outcomes—were placed on the CASE Web site for the first time ever in 2004, providing members with access to new ideas and tips for creating their own first-rate programs. CASE will continue to make the winning abstracts available on the Network so that educational advancement officers can learn from their colleagues' success.

CURRENTS MAGAZINE >

CURRENTS brought thought-provoking, penetrating articles to members in 2003-04, winning awards for design and commentary from the Society of National Association Publications and the Association of Educational Publishers.

The magazine, published nine times a year, worked to further collaboration within advancement by addressing topics from a more cross-disciplinary perspective. Specially focused issues in March 2004 on

campaigns, and in April 2004 on technology examined the pertinent issues of each topic for alumni relations, communications, and development professionals.

CURRENTS in the 2004-05 fiscal year will focus on such issues as volunteer management, community relations, and advancement's role in the lives of faculty, staff, and students.

RESEARCH AND INFORMATION >

The Resource Center provides access to research and other information that enables CASE members to benchmark their programs against those from other institutions.

CASE continues to conduct its annual capital campaign survey, involving independent schools, colleges, and universities, and also expanded its research program in 2003-04 by conducting a survey on the use of e-mail for donor solicitation. A second best-practices survey, on insti-

Glenis Normanton
Manchester Business School
Manchester, United Kingdom



1999



CASE, which by now has a membership of more than 2,900 colleges, universities, and independent schools and serves more than 33,000 individuals around the world, celebrates its 25th anniversary. Membership includes nearly 150 institutions in Europe and the United Kingdom. CASE creates the **Chief Executive Leadership Award**.

2002

The CASE Board of Trustees unanimously adopts a five-year strategic plan that emphasizes strengthening member services, furthering the advancement profession, establishing global leadership in education advancement, and leading change in advancement practice.

tutional practices for recognizing and crediting donors, was conducted in April 2004. Additional surveys are planned targeting such areas as integrated marketing.

CASE's Information Center responded to more than 2,100 requests for information in 2003-04; 98 percent of inquiries were answered within one day. Members asked for and received sample materials ranging from capital campaign case statements to reunion materials and image guides.

AFFILIATED FOUNDATIONS >

The 2003-04 fiscal year was a period of calls for heightened standards, transparency, and accountability across the nonprofit sector. Many affiliated foundations have taken the lead by voluntarily adopting the major provisions of the Sarbanes-Oxley Act, enacted by the U.S. Congress to improve corporate governance and accounting.

CASE's National Center for Affiliated Foundations developed a wide range of Network resources designed for use by foundation professionals and the media. The annual Conference for Institutionally Related Foundations continues to bring foundation executives together with leaders in the fields of governance and finance to strengthen the organizations for the future.

EDUCATIONAL PARTNERS & SPONSORS >

CASE works closely with its Educational Partners—commercial firms that serve institutional advancement—to ensure awareness of developments and new ideas in the products and services our members use. CASE had 208 Educational Partners in 2003-04, a record level of involvement by industry. In addition, more than 50 companies and other organizations sponsored CASE events, awards programs, and other services in 2003-04. (A complete list of partners and sponsors is included at the end of this report.)

CASE created in 2003 the Industry Advisory Council, a cross section of Educational Partners that exists to provide executive counsel on opportunities to better serve CASE's corporate affiliates and to assist CASE in identifying industry trends.

CONTACT US >

For more detailed information about any of CASE's services, please go our Web site, www.case.org.

2003

CASE Network
Resources that work as hard as you do.
www.case.org

CASE begins its Online Speaker Series, a live, interactive professional development program that is delivered via the telephone and the Internet. CURRENTS undergoes the third redesign in its 26-year history, giving the magazine a more contemporary and open look. **The Network**, CASE's revamped, dynamic, personalized Web site, is launched to make more resources and services readily available to Professional Members around the world.

2004

The CASE Board of Trustees and the CASE Europe Board of Trustees hold their first joint meeting, in Fontainebleau, France and adopt the "Fontainebleau Principles," a statement of common purpose. CASE celebrates its 30th anniversary and the 10th anniversary of CASE Europe with a focus on the contributions of its volunteers and members.

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Bridge to the Future

CASE has spent 30 years engaged in the work of advancing educational institutions and communicating the value of education around the world, but our most important work is ahead of us. Our role as an advocate for the work of advancement officers in alumni relations, communications and marketing, development, and related disciplines will become even more essential to the ability of educational institutions to meet the needs of their students and the goals of their communities.

CASE is the largest association of education institutions in the world—with members in the United States, Canada, the United Kingdom, Mexico, and more than 40 other countries. Because of our size, CASE has enormous strength, leverage, and reach, and our potential for networking and collaboration is unlimited. The challenge, however, is to ensure that CASE is relevant both globally—helping the world to understand the need for educational advancement—and locally—assisting our members, wherever they are, by providing them with the resources to function at the highest levels possible.

CASE is also known and respected among associations for providing “cradle to grave” services to members, serving them at every stage of their careers, whether they are just entering their professions or nearing retirement. That very success and effectiveness presents CASE with the ongoing challenge of developing services for senior-level professionals whose needs will continue to evolve as the advancement professions themselves change.

And because CASE is unique in the degree to which members are involved in the life of the organization, staff will continue to partner with volunteers so that the work they do on behalf of CASE makes the best use of their talents, skills, and interests.

Directions for the Future...

I
Strengthen CASE as the premier international resource for professional development and training in educational advancement.

II
Position CASE as the premier international resource for information and research on the issues and trends shaping educational advancement.

III
Develop CASE as an organization responsive to the needs of its professional members, their institutions, and the changing marketplace in which they operate.

CASE Financials

CASE closed the fiscal year ending June 30, 2004, in sound financial condition. The organization showed both a modest surplus in the operating budget and healthy growth in overall assets.

OPERATING BUDGET

Total revenues increased by more than \$1.3 million, or 9.9 percent, over the 2002-03 fiscal year. The growth in revenue is primarily due to strong performances from conferences and publications, as well as an increase of 3.0 percent in membership dues. Membership dues revenue increased by \$177,000, or 3.3 percent, above 2002-03. Conference revenues increased by more than \$725,000, or 13.6 percent, while publications revenue was 14 percent higher in 2003-04 compared with 2002-03, an increase of \$273,000.

Meanwhile, total expenses for CASE increased by only 5.0 percent in 2003-04. Staff members were able to hold costs down despite realizing record revenue numbers in many program areas.

RESERVES AND NET ASSETS

In addition to the operating budget, the changes in net assets reflect non-operating items including building depreciation, "interest swap" figures related to the building financing, venture fund draw-downs for the CASE Network, and long-term investments funding reserves. Long-term investments, which are approximately 70 percent equity and 30 percent fixed income, earned nearly \$770,000 in 2003-04 and contributed significantly to the first overall increase in net assets in six years. The market value of investments was \$5.85 million at the end of June 2004.

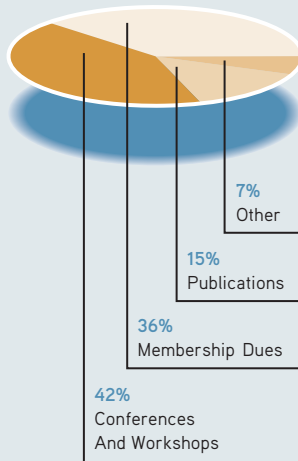
Statement of Financial Position

CASE's financial audit was conducted by Tate & Tryon, certified public accountants and consultants. The full report, including statements of financial position, activities, cash flows, and notes, is available from CASE's Department of Finance and Administration.

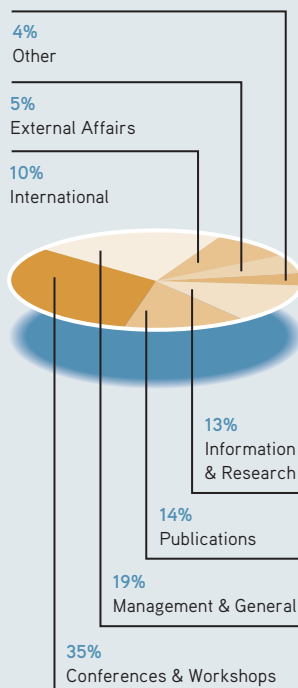
	Year Ending June 30		
	2004	2003	2002
ASSETS			
Current Assets			
Cash & Cash Equivalents	\$1,058,424	(\$108,140)	\$272,104
Accounts Receivable	296,196	280,347	395,157
Publication Inventory	273,492	278,820	331,701
Prepaid Expenses	284,521	1,162,247	552,141
Total Current Assets	1,912,633	1,613,274	1,551,103
Property & Equipment, at cost			
Land	2,304,603	2,304,603	2,304,603
Building & Improvements	6,259,644	6,259,644	6,259,644
Furniture & Equipment	1,264,470	1,235,373	1,214,193
Software	440,724	446,905	446,454
Network System	618,716	0	0
Total Property & Equipment	10,870,157	10,246,525	10,224,894
Less Accumulated Depreciation & Amortization	(2,230,958)	(1,861,649)	(1,530,847)
	8,639,199	8,384,876	8,694,047
Annuity Contract	51,196	114,632	158,166
Long-Term Investments	6,835,057	5,685,709	5,658,599
Pledges Receivable	76,129	418,737	426,419
TOTAL ASSETS	\$17,514,214	\$16,217,228	\$16,488,334
LIABILITIES & NET ASSETS			
Current Liabilities			
Accounts Payable & Accrued Expenses	\$807,808	\$992,975	\$1,178,844
Deferred Revenue	2,911,451	2,630,625	2,470,977
Mortgage Payable, current portion	223,722	223,486	213,250
District Escrow Funds	973,176	652,472	645,010
Total Current Liabilities	4,926,157	4,499,558	4,508,081
Accrued Post-Retirement Benefits	361,463	354,692	349,172
Mortgage Payable, less current portion	6,780,941	7,014,663	7,236,807
Annuity Obligation	51,196	114,632	158,166
Interest Swap Agreements	305,876	613,751	507,439
Total Liabilities	12,425,633	12,597,296	12,759,665
Net Assets			
Unrestricted	4,927,940	3,168,629	3,245,890
Temporarily Restricted	160,641	451,303	482,779
Total Net Assets	5,088,581	3,619,932	3,728,669
Commitments & Contingencies		0	0
TOTAL LIABILITIES & NET ASSETS	\$17,514,214	\$16,217,228	\$16,488,334

Statement of Activities

REVENUE



EXPENSES



CHANGE IN UNRESTRICTED NET ASSETS REVENUE

	2004	2003	2002
Conferences & Workshops	\$6,461,622	\$5,736,355	\$5,706,776
Membership Dues	5,478,960	5,302,429	5,161,438
Publications	2,220,387	1,947,105	1,971,105
Awards	570,192	481,077	461,670
Contributions	81,193	91,273	90,230
Interest From Operations	6,653	14,712	23,592
Total Revenue	14,819,007	13,572,951	13,414,811
Net Assets Released From Restrictions due to satisfaction of program restrictions	352,245	235,582	180,507
Total Unrestricted Revenue and Other Support	15,171,252	13,808,533	13,595,318

EXPENSE

PROGRAM SERVICES

Conferences & Workshops	5,024,695	4,586,816	4,513,897
Publications	2,095,896	1,955,614	1,990,334
Information & Research	1,849,867	1,731,867	1,898,806
International	1,433,461	1,311,317	1,160,395
External Affairs	786,813	840,212	836,013
Awards & Services	278,045	259,448	199,744
District Services	188,535	222,055	97,645
Total Program Services	11,657,312	10,907,329	10,696,834

SUPPORTING SERVICES

Management & General	2,794,105	2,882,979	2,930,744
Fund Raising	52,534	23,858	83,449
Total Supporting Services	2,846,639	2,906,837	3,014,193

Total Expense

14,503,951 **13,814,166** **13,711,027**

Change in Unrestricted Net Assets Before Investments	667,301	(5,633)	(115,709)
Loss on Fair Value of Interest Swap Agreements	307,875	(106,312)	(255,558)
Interest from Long-Term Investments	75,923	90,016	112,531
Investments Gain (Loss), net	708,212	(55,332)	(512,178)
Change in Unrestricted Net Assets	1,759,311	(77,261)	(770,914)

CHANGE IN TEMPORARILY RESTRICTED NET ASSETS

Contributions	56,707	203,519	612,917
Interest & Dividends	4,876	587	599
Net Assets Released from Restrictions	(352,245)	(235,582)	(180,507)
Change in Temporarily Restricted Net Assets	(290,662)	(31,476)	433,009

CHANGE IN NET ASSETS

\$1,468,649 **(\$108,737)** **(\$337,905)**

Net Assets, beginning of Year 3,619,932 \$3,728,669 \$4,066,574

NET ASSETS, END OF YEAR **\$5,088,581** **\$3,619,932** **\$3,728,669**

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