

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

| | <u>ALASKA</u> | <u>ALABAMA</u> | <u>ARKANSAS</u> | <u>ARIZONA</u> | <u>CALIFORNIA</u> | <u>COLORADO</u> | <u>FLORIDA</u> |
|---|---------------|----------------|-----------------|----------------|-------------------|-----------------|----------------|
| ADMINISTRATIVE | | | | | | | |
| ASO Gross Annual Receipts? | \$ 34,500 | \$ 30,400 | \$ 150,000 | | \$ 20,000 | \$ 271,600 | \$ 42,000 |
| Fiscal or Calender Year? FY Month? | F Sept | F June | F Aug | F May | F June | C | F June |
| Number of ASO Chapters? Number active? | 3 3 | 4 4 | 6 6 | 6 3 | 4 4 | 6 2 | 6 6 |
| Headquarters Office? | N | Y | Y | N | N | Y | Y |
| Executive Director/Secretary? | Y | Y | Y | Y | Y | Y | Y |
| Exec Director/Secretary an ASO member? | N | Y | Y | N | | Y | Y |
| Contracted with Prof'l Assn. Management firm? | No | | | | | | No |
| Annual cost for Exec Director position? | \$4,200 | \$25,000 | \$15,000 | \$2,500 | \$9,900 | \$30,000 | \$10,200 |
| Month new officers elected? Terms of office? | Sept 1yr | May 1yr | Sept 1yr | June 1yr | Oct 1yr | June 2yr | June 1yr |
| Are you recycling past ASO officers? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Do you have written Administrative Policies? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Do you utilize a formal long-range plan? | No | No | No | No | No | No | No |
| Formal or informal use of Roberts Rules? | Informal | Formal | Informal | Formal | Formal | Informal | Formal |
| Does the NSA State Director serve on your Board? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| NSA State Director have a Board vote? | Yes | Yes | Yes | Yes | Yes | Yes | No |
| NSA State Director have a budget? | Yes | Yes | No | Yes | No | Yes | Yes |
| Reimburse Board members for attending Board meetings? | Yes | No | No | No | Yes | No | No |
| Reimburse anyone attending the NSA Annual Meeting? | Yes | Yes | Yes | Yes | No | Yes | Yes |
| MEMBERSHIP INFORMATION | | | | | | | |
| How many members are in your ASO? | 135 | 252 | 264 | 282 | 140 | 250 | 236 |
| Percent of total ASO members w/ NSA memberships? | 36% | 15% | | | 50%+ | 33% | |
| Number of ASO Members w/ credentials | | | | | | | |
| CPA | 20 | 19 | | 76 | 3 | 6 | 30 |
| EA | 80 | 32 | | 91 | 40 | 6 | 110 |
| ACAT | 25 | 29 | | 36 | 85 | 15 | 120 |
| Other License - PA, Atty, Financial, etc. | 10 | 10 | | | 50 | 15 | |
| Unlicensed | | 162 | | | | 200 | 86 |
| ASO Membership dues by class: | | | | | | | |
| Active | \$96 | \$75 | \$85 | | \$110 | \$169 | \$100 |
| Associate | \$96 | \$35 | \$50 | | \$70 | \$149 | \$15 |
| Student | \$12 | \$35 | | | | | \$15 |
| Vendor | | \$35 | | | | | \$75 |
| Retired | \$0 | \$35 | | | \$50 | | \$25 |
| Other - Life, Honorary, Education, NonResident | \$15 NonRes | | \$15 Affiliate | | \$70 Educ | | \$15 Educ |
| Retention and renewal membership data? | | | | | | | |
| Members of more than 2 years? | 78% | 85% | Don't Know | Don't Know | 90% | Don't Know | 89% |
| First year members? | | 15% | Don't Know | | Don't Know | Don't Know | 75% |
| ASO requires CPE credits in Accounting/Tax/Other? | Y | N | N | Y | Y | Y | Y |
| Required number of hours? | 24/yr | | | 80-2yr | 30/yr | 24/yr | 20/yr |
| Is the CPE verified? | Random | | | Random | N | Y | N |

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|---|---------------|----------------|-----------------|----------------|-------------------|-----------------|----------------|
| <u>TECHNOLOGY</u> | | | | | | | |
| Does your ASO have a website? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Maintained by Host? | | | Yes | Yes | Yes | | Yes |
| Maintained by ASO? | | | | | | Yes | |
| Maintained by Host and ASO? | Yes | | | | | | |
| Annual cost to maintain website? | \$200 | | \$3,500 | | \$240 | | \$960 |
| Can a member register/pay dues/buy products online? | Yes | No | No | Yes | Yes | Yes | Yes |
| Real time online payments, downloadable forms or both? | Pymts | | | Pymts | Pymts | Forms | Forms |
| Member Email addresses in your membership database? | 86% | 30% | Unsure | 95% | 91% | 90% | 97% |
| Does your Board have electronic meetings? | No | | | | | | No |
| Teleconference or On line? | | | Tele | | Tele | | |
| <u>MEMBER SERVICES & PROGRAMS</u> | | | | | | | |
| Number of educational programs your ASO hosts annually? | 2 - 5 | 2 - 5 | 2 - 5 | 2 - 5 | 1 | 6 - 10 | 2 - 5 |
| Seminar Fee schedules: | | | | | | | |
| 1040 Program? Member | \$295 | \$295 | \$300 | \$325 | \$497 | \$350 | \$310 |
| 1040 Program? NonMember | \$370 | \$350 | \$350 | \$375 | \$617 | | \$310 |
| Entity? Member | \$175 | | \$300 | \$325 | | | |
| Entity? NonMember | \$210 | | \$350 | \$375 | | | |
| Other? Member | | | | | | | \$99 |
| Other? NonMember | | | | | | | \$129 |
| Does your ASO sponsor or offer Webinars? | No | No | No | No | No | No | Yes |
| If not, do you have an interest in pursuing this? | | | Yes | | Yes | No | |
| Do you post educational program dates on the NSA website? | Yes | No | Yes | Yes | Yes | Yes | No |
| Membership newsletter published? How often? | None | Qtrly | Mo | 6x | 5x | 6x | 6x |
| Newsletter sent by mail? | Yes | Yes | Yes | Yes | | Yes | Yes |
| Newsletter sent by email? | | | | On Web | Yes | Yes | |
| Do you publish a membership directory? | | | | | | | |
| Available in Hard copy? | | Yes | No | No | | Yes | Yes |
| Available Online? | Yes | | No | No | Yes | Yes | Yes |
| Available to general public? | Yes | | | | Yes | Yes | Yes |
| Relationships with other accounting organizations? | No | Yes | No | Yes | No | | No |
| Contacts/relationships with colleges/universities? | No | Yes | No | No | No | Yes | Yes |
| Does ASO have an internal scholarship program? | Yes | No | Yes | Yes | No | Yes | Yes |
| <u>LEGISLATIVE ACTIVITY</u> | | | | | | | |
| Does ASO have a legislative committee? | Yes | Yes | Yes | Yes | No | Yes | Yes |
| Do you sponsor events for legislators? | No | No | No | Yes | No | No | No |
| Do you employ a lobbyist? | No | No | No | Yes | No | Yes | No |
| Lobbyist annual cost? | | | | | | \$9,000 | |
| Do you monitor the State Board? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Annual cost? | \$3,000 | | \$450 | | \$0 | | |
| Do you have a PAC? | No | No | No | Yes | No | No | No |

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

ANNUAL STATE CONVENTION

| | <u>ALASKA</u> | <u>ALABAMA</u> | <u>ARKANSAS</u> | <u>ARIZONA</u> | <u>CALIFORNIA</u> | <u>COLORADO</u> | <u>FLORIDA</u> |
|---|---------------|----------------|-----------------|----------------|-------------------|-----------------|----------------|
| Do you have a state convention? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| How often? | Annually | Annually | Annually | Annually | Annually | Annually | Annually |
| Convention Month? | Sept | June | Sept | June | Oct | June | June |
| Number of Days? | 3 | 3 | 1 | 3 | 3 | 3 | 3 |
| Attendance: Total? | 25 | 68 | 25 | 65 | 40 | | 60 |
| Members | 17 | 40 | 25 | 55 | 30 | 30 | 50 |
| Nonmembers | 3 | 3 | | 10 | 10 | | 0 |
| Exhibitors/Vendors | 0 | 2 | | | 2 | 3 | 0 |
| Guests | 5 | 25 | | 2 | 20 | | 10 |
| Gross Budget? | | \$7,000 | \$850 | | \$15,000 | \$12,000 | \$15,000 |
| Registration fee for: | | | | | | | |
| Members | \$175 | \$225 | \$0 | \$229 | \$497 | \$255 | \$349 |
| Nonmembers | \$250 | \$245 | \$0 | \$279 | \$617 | | \$399 |
| Spouse/Guest | \$150 | \$90 | \$0 | Meals | \$149 | | \$169 |
| CPE credit hours provided? Number of Hours? | Yes-8+ | Yes-12 | Yes-4 | Yes-16 | Yes-14 | Yes-14 | Yes-12 |
| Officers cost reimbursement for attending? | No | No | No | No | No | No | No |

Preparer of ASO Survey

| | | | |
|----------------|----|-----------|----|
| Exec Dir/Sec | EX | President | PR |
| State Director | SD | Other | O |

| | | | | | | |
|---------|----|---|----|----|----|----|
| PR,SD,O | EX | O | SD | EX | PR | PR |
|---------|----|---|----|----|----|----|

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

| | <u>HAWAII</u> | <u>IDAHO</u> | <u>IOWA</u> | <u>ILLINOIS</u> | <u>INDIANA</u> | <u>KANSAS</u> | <u>MASSACHUSETTS</u> |
|---|---------------|--------------|--------------|-----------------|----------------|---------------|----------------------|
| ADMINISTRATIVE | | | | | | | |
| ASO Gross Annual Receipts? | \$ 311,000 | \$ 199,500 | \$ 81,885 | \$ 160,000 | \$ 90,000 | \$ 174,815 | |
| Fiscal or Calender Year? FY Month? | F June | F May | C | F Mar | F Apr | F Aug | F April |
| Number of ASO Chapters? Number active? | 4 3 | 3 0 | 6 1 | 14 10 | 9 6 | 6 6 | 1 1 |
| Headquarters Office? | N | Y | Y | Y | Y | Y | Y |
| Executive Director/Secretary? | N | Y | Y | Y | Y | Y | Y |
| Exec Director/Secretary an ASO member? | | No | Y | | N | N | N |
| Contracted with Prof'l Assn. Management firm? | | No | | | | | N |
| Annual cost for Exec Director position? | | \$32,760 | \$3,900 | \$27,000 | \$18,500 | \$48,000 | |
| Month new officers elected? Terms of office? | June 1yr | Jun 2yr | Nov 1yr | June 1yr | June 1yr | Sept 1yr | May 3yr |
| Are you recycling past ASO officers? | Yes | Yes | No | Yes | Yes | No | Yes |
| Do you have written Administrative Policies? | Yes | Yes | No | Yes | Yes | Yes | Yes |
| Do you utilize a formal long-range plan? | No | No | No | Yes | No | Yes | Yes |
| Formal or informal use of Roberts Rules? | Formal | Informal | Informal | Informal | Informal | Formal | Formal |
| Does the NSA State Director serve on your Board? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| NSA State Director have a Board vote? | Yes | Yes | Yes | Yes | Yes | Yes | No |
| NSA State Director have a budget? | No | No | No | No | No | Yes | Yes |
| Reimburse Board members for attending Board meetings? | Yes | Yes | No | No | No | No | No |
| Reimburse anyone attending the NSA Annual Meeting? | Yes | Yes | No | Yes | No | Yes | No |
| MEMBERSHIP INFORMATION | | | | | | | |
| How many members are in your ASO? | 425 | 195 | 125 | 544 | 200 | 350 | 370 |
| Percent of total ASO members w/ NSA memberships? | 10% | | | 40% | | | 1% |
| Number of ASO Members w/ credentials | | | | | | | |
| CPA | 300 | 110 | 12 | 121 | | 75 | 295 |
| EA | 30 | 26 | 60 | 214 | | 100 | 35 |
| ACAT | 10 | 20 | 35 | 133 | | 40 | |
| Other License - PA, Atty, Financial, etc. | | 6 | 60 | 12 | | 12 | |
| Unlicensed | 100 | 33 | 46 | 165 | | | 40 |
| ASO Membership dues by class: | | | | | | | |
| Active | \$120 | \$85 | \$125 | \$175 | | \$125 | |
| Associate | \$120 | \$50 | \$125 | \$140 | | \$125 | |
| Student | \$10 | \$20 | \$125 | \$20 | | \$10 | |
| Vendor | | | | | | | |
| Retired | \$0 | \$42 | | \$40 | | | |
| Other - Life, Honorary, Education, NonResident | | | \$0 Life/Hon | \$25-\$85 | | \$0 Life/Hon | |
| Retention and renewal membership data? | | | | | | | |
| Members of more than 2 years? | 98% | Don't Know | 95% | | Don't Know | Don't Know | 90% |
| First year members? | 98% | Don't Know | 75% | Don't Know | Don't Know | Don't Know | |
| ASO requires CPE credits in Accounting/Tax/Other? | N | N | Y | N | Y | Y | N |
| Required number of hours? | | | 120/3yrs | | 120/3yrs | 30/yr | |
| Is the CPE verified? | | | Y | | | | |

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|---|---------------|------------------|-------------|-----------------|----------------|---------------|----------------------|
| <u>TECHNOLOGY</u> | | | | | | | |
| Does your ASO have a website? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Maintained by Host? | Yes | Yes | Yes | Yes | Yes | | |
| Maintained by ASO? | | | | | | | Yes |
| Maintained by Host and ASO? | | | | | | | |
| Annual cost to maintain website? | \$1,000 | \$900 | \$500 | \$1,320 | \$840 | | |
| Can a member register/pay dues/buy products online? | Yes | Yes | Yes | Yes | No | Yes | No |
| Real time online payments, downloadable forms or both? | Forms | Forms | Pymts | Both | | | |
| Member Email addresses in your membership database? | 98% | 93% | 90% | 50% | 75% | 100% | 80% |
| Does your Board have electronic meetings? | | No | | | Yes | | No |
| Teleconference or On line? | | No | | | Tele | | |
| <u>MEMBER SERVICES & PROGRAMS</u> | | | | | | | |
| Number of educational programs your ASO hosts annually? | 6 - 10 | 6 - 10 | 2 - 5 | 2 - 5 | 6 - 10 | 6 - 10 | 20+ |
| Seminar Fee schedules: | | | | | | | |
| 1040 Program? Member | \$345 | \$320 | Varies | \$275 | \$299 | \$250 | |
| 1040 Program? NonMember | \$395 | \$370 | Varies | \$325 | \$339 | \$300 | |
| Entity? Member | | \$320 | Varies | \$275 | | | |
| Entity? NonMember | | \$370 | Varies | \$325 | | | |
| Other? Member | \$229` | \$20 per hr/\$25 | Varies | \$275 | | | |
| Other? NonMember | | | Varies | \$325 | | | |
| Does your ASO sponsor or offer Webinars? | No | No | Yes | No | Yes | No | No |
| If not, do you have an interest in pursuing this? | | Yes | | Yes | | | Yes |
| Do you post educational program dates on the NSA website? | No | No | No | Yes | No | No | No |
| Membership newsletter published? How often? | | 6x | None | 8x | Qtrly | 10x | Qtrly |
| Newsletter sent by mail? | | Yes | | Yes | | | Yes |
| Newsletter sent by email? | Yes | | | Yes | Yes | Yes | Yes |
| Do you publish a membership directory? | | | | | | | |
| Available in Hard copy? | No | | | Yes | Yes | Yes | |
| Available Online? | No | Yes | Yes | Yes | Yes | | Yes |
| Available to general public? | | Yes | Yes | No | Yes | | No |
| Relationships with other accounting organizations? | No | No | No | Yes | Yes | Yes | Yes |
| Contacts/relationships with colleges/universities? | Yes | No | No | Yes | Yes | Yes | Yes |
| Does ASO have an internal scholarship program? | Yes | Yes | No | Yes | No | Yes | Yes |
| <u>LEGISLATIVE ACTIVITY</u> | | | | | | | |
| Does ASO have a legislative committee? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Do you sponsor events for legislators? | No | No | No | No | No | Yes | Yes |
| Do you employ a lobbyist? | No | No | Yes | Yes | Yes | Yes | No |
| Lobbyist annual cost? | | | \$14,000 | \$12,000 | | \$12,000 | |
| Do you monitor the State Board? | Yes | Yes | No | No | Yes | Yes | |
| Annual cost? | \$1,000 | cost of travel | | \$0 | | | |
| Do you have a PAC? | Yes | No | No | Yes | No | No | |

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ANNUAL STATE CONVENTION

| | <u>HAWAII</u> | <u>IDAHO</u> | <u>IOWA</u> | <u>ILLINOIS</u> | <u>INDIANA</u> | <u>KANSAS</u> | <u>MASSACHUSETTS</u> |
|---|---------------|--------------|-------------|-----------------|----------------|---------------|----------------------|
| Do you have a state convention? | Yes | Yes | No | Yes | Yes | Yes | Yes |
| How often? | Annually | Every other | | Annually | 2x/Yr | Annually | Annually |
| Convention Month? | June | June | | June | June & Oct | Sept | Nov |
| Number of Days? | 3 | 2-4 | | 2 | 2-3 | 4 | 2 |
| Attendance: Total? | 90 | | | 50 | 65 | 125 | 300 |
| Members | 75 | | | 40 | 50 | 75 | |
| Nonmembers | 0 | | | 0 | 2 | 50 | |
| Exhibitors/Vendors | 10 | | | 6 | 3 | 5 | |
| Guests | 5 | | | 4 | 10 | 55 | |
| Gross Budget? | \$26,000 | \$17,000 | | \$10,000 | \$15,000 | Varies | |
| Registration fee for: | | | | | | | |
| Members | \$325 | \$300 | | \$200 | \$300 | \$120 | \$295 |
| Nonmembers | \$350 | CPE cost | | \$200 | \$360 | \$120 | |
| Spouse/Guest | \$70 | \$150 | | \$110 | \$50 | \$120 | |
| CPE credit hours provided? Number of Hours? | Yes-16 | Yes-12-24 | | Yes 6-8 | Yes-14 | No | Yes-16 |
| Officers cost reimbursement for attending? | Yes | Yes | | No | No | No | No |
| Preparer of ASO Survey | | | | | | | |
| Exec Dir/Sec | EX | President | PR | | | | |
| State Director | SD | Other | O | PR | EX | EX | EX |

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| | <u>MARYLAND</u> | <u>MAINE</u> | <u>MICHIGAN</u> | <u>MINNESOTA</u> | <u>MISSOURI</u> | <u>MISSISSIPPI</u> | <u>MONTANA</u> |
|---|-----------------|--------------|-----------------|------------------|-----------------|--------------------|----------------|
| <u>ADMINISTRATIVE</u> | | | | | | | |
| ASO Gross Annual Receipts? | \$1.5 million | \$ 112,448 | | \$ 645,000 | \$ 166,973 | \$ 125,000 | \$ 95,000 |
| Fiscal or Calender Year? FY Month? | F June | F June | F Sept | F Apr | F June | F June | F May |
| Number of ASO Chapters? Number active? | 0 0 | 0 0 | 10 3 | 0 0 | 4 3 | 3 1 | 0 0 |
| Headquarters Office? | Y | Y | Y | Y | Y | Y | Y |
| Executive Director/Secretary? | Y | N | Y | Y | Y | Y | Y |
| Exec Director/Secretary an ASO member? | Y | | N | | Y | Y | Y |
| Contracted with Prof'l Assn. Management firm? | | | | | | | No |
| Annual cost for Exec Director position? | | | | \$120,000 | \$11,500 | \$15,000 | \$9,600 |
| Month new officers elected? Terms of office? | June 1yr | June 1yr | Oct 1-3yr | June 1yr | June 1yr | June 1yr | Sept 2yrs |
| Are you recycling past ASO officers? | No | No | Yes | Yes | Yes | Yes | Yes |
| Do you have written Administrative Policies? | Yes | No | Yes | Yes | Yes | Yes | Yes |
| Do you utilize a formal long-range plan? | Yes | No | Yes | Yes | Yes | No | No |
| Formal or informal use of Roberts Rules? | Formal | Formal | Formal | Formal | Formal | Informal | Formal |
| Does the NSA State Director serve on your Board? | No | Yes | Yes | Yes | Yes | Yes | Yes |
| NSA State Director have a Board vote? | | No | No | Yes | Yes | Yes | Yes |
| NSA State Director have a budget? | | No | Yes | Yes | No | No | No |
| Reimburse Board members for attending Board meetings? | Yes | No | Yes | No | Yes | No | Yes |
| Reimburse anyone attending the NSA Annual Meeting? | No | Yes | | Yes | Yes | Yes | Yes |
| <u>MEMBERSHIP INFORMATION</u> | | | | | | | |
| How many members are in your ASO? | 3000 | 189 | 600+ | 757 | 277 | 195 | 85 |
| Percent of total ASO members w/ NSA memberships? | 10% | | | Unknown | 50% | | 50% |
| Number of ASO Members w/ credentials | | | | | | | |
| CPA | 1500 | 78 | | 554 | 44 | 74 | 20 |
| EA | 800 | 39 | | 44 | 129 | 38 | 30 |
| ACAT | | 5 | | 1 | 80 | 23 | 5 |
| Other License - PA, Atty, Financial, etc. | 500 | 8 | | | | 29 | 2 |
| Unlicensed | 300 | 26 | | 135 | | 31 | 28 |
| ASO Membership dues by class: | | | | | | | |
| Active | \$160 | \$60 | \$160 | \$125 | \$222 | \$130 | \$75 |
| Associate | \$115 | \$30 | \$80 | \$125 | \$25 | \$50 | \$75 |
| Student | \$15 | | | \$15 | \$5 | \$50 | \$0 |
| Vendor | | | | \$1,300 | \$1 | | |
| Retired | \$50 | | \$35 | \$15 | \$25 | \$0 | \$50 |
| Other - Life, Honorary, Education, NonResident | \$50 | | \$100 Educ | | | | |
| Retention and renewal membership data? | | | | | | | |
| Members of more than 2 years? | 93% | Don't Know | | 92% | 90% | Don't Know | 90% |
| First year members? | | Don't Know | | Don't Know | 90% | Don't Know | 90% |
| ASO requires CPE credits in Accounting/Tax/Other? | N | N | N | Y | Y | Y | Y |
| Required number of hours? | | | | Flw Credtl | Flw Credtl | 40 | 120-3yrs |
| Is the CPE verified? | | | | | Y | Y | N |

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|---|-----------------|--------------|-----------------|------------------|-----------------|--------------------|----------------|
| <u>TECHNOLOGY</u> | | | | | | | |
| Does your ASO have a website? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Maintained by Host? | | | | | | | Yes |
| Maintained by ASO? | Yes | Yes | Yes | Yes | Yes | Yes | |
| Maintained by Host and ASO? | | | | | | | |
| Annual cost to maintain website? | | | | | \$1,200 | \$600 | \$800 |
| Can a member register/pay dues/buy products online? | Yes | No | Yes | Yes | Yes | No | Yes |
| Real time online payments, downloadable forms or both? | Both | | Both | Pynts | Pymts | | Both |
| Member Email addresses in your membership database? | 65% | | 87% | 90% | 85% | 95% | 80% |
| Does your Board have electronic meetings? | Yes | | Yes | | | Yes | No |
| Teleconference or On line? | Tele | | Web | | | Web | |
| <u>MEMBER SERVICES & PROGRAMS</u> | | | | | | | |
| Number of educational programs your ASO hosts annually? | 20+ | 6 - 10 | 2 - 5 | 16 - 20 | 2 - 5 | 2 - 5 | 2 - 5 |
| Seminar Fee schedules: | | | | | | | |
| 1040 Program? Member NonMember | \$320 \$395 | \$300 | | \$305 \$ 370 | \$250 \$300 | \$250 \$290 | \$225 \$250 |
| Entity? Member NonMember | \$320 \$395 | | | \$305 \$ 370 | \$250 \$300 | | |
| Other? Member NonMember | \$175 \$250 | | | \$190 \$240 | \$295 \$345 | | |
| Does your ASO sponsor or offer Webinars? | Yes | No | No | No | No | No | No |
| If not, do you have an interest in pursuing this? | | | | Yes | No | Maybe | |
| Do you post educational program dates on the NSA website? | Yes | Yes | Yes | Yes | Yes | No | Yes |
| Membership newsletter published? How often? | 6x | Annual | | 9x | 6x | Qtrly | Qtrly |
| Newsletter sent by mail? | Yes | Yes | | Yes | | | |
| Newsletter sent by email? | | | Yes | Yes | Yes | On Web | Yes |
| Do you publish a membership directory? | | | | | | | |
| Available in Hard copy? | | Yes | | Yes | Yes | | |
| Available Online? | Yes | | Yes | Yes | Yes | Yes | Yes |
| Available to general public? | No | | Yes | No | No | No | No |
| Relationships with other accounting organizations? | Yes | Yes | | Yes | No | Yes | No |
| Contacts/relationships with colleges/universities? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Does ASO have an internal scholarship program? | Yes | Yes | Yes | Yes | No | Yes | Yes |
| <u>LEGISLATIVE ACTIVITY</u> | | | | | | | |
| Does ASO have a legislative committee? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Do you sponsor events for legislators? | Yes | No | Yes | No | Yes | No | No |
| Do you employ a lobbyist? | Yes | No | Yes | Yes | Yes | No | No |
| Lobbyist annual cost? | | | | \$20,000 | \$15,000 | | |
| Do you monitor the State Board? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Annual cost? | | \$5,000 | | \$0 | | | |
| Do you have a PAC? | Yes | No | Yes | No | Yes | No | No |

**2009 NSA SURVEY OF
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December 2009

ANNUAL STATE CONVENTION

| | <u>MARYLAND</u> | <u>MAINE</u> | <u>MICHIGAN</u> | <u>MINNESOTA</u> | <u>MISSOURI</u> | <u>MISSISSIPPI</u> | <u>MONTANA</u> |
|---|-----------------|--------------|-----------------|------------------|-----------------|--------------------|----------------|
| Do you have a state convention? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| How often? | Annually | Annually | Annually | Annually | Annually | Every Other | Annually |
| Convention Month? | June | June | Oct | June | June | June | Sept |
| Number of Days? | 4 | 2 | 2 | 2 | 3 | 3 | 1 |
| Attendance: Total? | 100-125 | 50-55 | | 90 | 60 | 60-75 | 25 |
| Members | 60 | | | 40 | 48 | 40-50 | 25 |
| Nonmembers | 40 | | | | 12 | 20-25 | 0 |
| Exhibitors/Vendors | 0 | | | | | 10 | 0 |
| Guests | 25 | | | 50 | | | 0 |
| Gross Budget? | | | | \$7,500 | \$12,000 | \$4,000 | \$ 500 |
| Registration fee for: | | | | | | | |
| Members | Varies | \$300 | | \$100 | \$225 | \$250 | |
| Nonmembers | | \$405 | | | | \$300 | |
| Spouse/Guest | | \$55 | | \$50 | \$100 | \$100 | |
| CPE credit hours provided? Number of Hours? | Yes-6 | Yes-14 | Yes | No | Yes 6-8 | Yes-12 | No |
| Officers cost reimbursement for attending? | No | Yes | Yes | No | Pres | No | No |
| Preparer of ASO Survey | | | | | | | |
| Exec Dir/Sec | EX | President | PR | | | | |
| State Director | SD | Other | O | EX,SD | EX | PR | PR,SD |

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

| | <u>NO CAROLINA</u> | <u>NO DAKOTA</u> | <u>NEBRASKA</u> | <u>NEW JERSEY</u> | <u>NEVADA</u> | <u>NEW YORK</u> | <u>OKLAHOMA</u> |
|---|--------------------|------------------|-----------------|-------------------|---------------|-----------------|-----------------|
| ADMINISTRATIVE | | | | | | | |
| ASO Gross Annual Receipts? | \$ 33,000 | \$ 135,000 | \$ 58,082 | \$ 80,000 | \$ 13,000 | \$ 12,000 | \$ 175,000 |
| Fiscal or Calender Year? FY Month? | F June | F June | F Aug | F June | F Aug | F June | F June |
| Number of ASO Chapters? Number active? | 10 9 | 2 1 | 0 0 | 8 8 | 0 0 | 3 3 | 5 3 |
| Headquarters Office? | Y | Y | Y | Y | N | Y | Y |
| Executive Director/Secretary? | Y | Y | Y | Y | N | N | Y |
| Exec Director/Secretary an ASO member? | N | Y | Y | Y | | | Y |
| Contracted with Prof'l Assn. Management firm? | | | No | | | | |
| Annual cost for Exec Director position? | \$19,000 | \$11,000 | \$8,400 | \$40,000 | | | \$12,000 |
| Month new officers elected? Terms of office? | June 1yr | Oct 1yr | Sept 1-2yr | June 1yr | June 1yr | June 1yr | July 2yr |
| Are you recycling past ASO officers? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Do you have written Administrative Policies? | Yes | No | No | Yes | No | Yes | Yes |
| Do you utilize a formal long-range plan? | Yes | No | No | No | No | No | No |
| Formal or informal use of Roberts Rules? | Formal | Informal | Informal | Formal | Informal | Formal | Informal |
| Does the NSA State Director serve on your Board? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| NSA State Director have a Board vote? | Yes | Yes | Yes | No | Yes | Yes | Yes |
| NSA State Director have a budget? | Yes | No | No | No | No | No | Yes |
| Reimburse Board members for attending Board meetings? | Yes | Yes | No | Yes | No | Yes | No |
| Reimburse anyone attending the NSA Annual Meeting? | Yes | Yes | Yes | Yes | No | Yes | Yes |
| MEMBERSHIP INFORMATION | | | | | | | |
| How many members are in your ASO? | 310 | 45 | 109 | 350 | 35 | 200 | 300-400 |
| Percent of total ASO members w/ NSA memberships? | 50% | 50% | 55% | 40% | 100% | | 60% |
| Number of ASO Members w/ credentials | | | | | | | |
| CPA | 15 | 10 | 20 | 25 | 5 | | 200 |
| EA | 75 | 10 | 24 | 63 | 5 | | 200 |
| ACAT | 150 | 5 | 19 | 86 | 5 | | 300 |
| Other License - PA, Atty, Financial, etc. | | 27 | 5 | 24 | 5 | | 50 |
| Unlicensed | 70 | 5 | 48 | 93 | 10 | | 250 |
| ASO Membership dues by class: | | | | | | | |
| Active | \$132 | | \$60 | \$170 | \$100 | \$60 | \$125 |
| Associate | \$100 | | \$60 | \$125 | \$75 | \$45 | \$100 |
| Student | \$20 | | \$0 | \$25 | \$35 | \$15 | \$25 |
| Vendor | \$100 | | | | | | \$75 |
| Retired | \$30 | | | \$35 | | \$45 | \$10 |
| Other - Life, Honorary, Education, NonResident | \$0 Life/Hon | | | \$50 | | | |
| Retention and renewal membership data? | | | | | | | |
| Members of more than 2 years? | 90% | | 90% | Don't Know | 90% | | 90% |
| First year members? | | 60% | 90% | | 90% | | 90% |
| ASO requires CPE credits in Accounting/Tax/Other? | Y | Y | N | N | Y | N | Y |
| Required number of hours? | 30/yr | 16/yr | | | 24/yr | | 120/3yr |
| Is the CPE verified? | Random | Y | | | N | | |

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

| | <u>NO CAROLINA</u> | <u>NO DAKOTA</u> | <u>NEBRASKA</u> | <u>NEW JERSEY</u> | <u>NEVADA</u> | <u>NEW YORK</u> | <u>OKLAHOMA</u> |
|---|--------------------|------------------|-----------------|-------------------|---------------|-----------------|-----------------|
| <u>TECHNOLOGY</u> | | | | | | | |
| Does your ASO have a website? | Yes | Yes | Yes | Yes | No | No | Yes |
| Maintained by Host? | | | Yes | Yes | | | |
| Maintained by ASO? | Yes | | | | | | Yes |
| Maintained by Host and ASO? | | | | | | | |
| Annual cost to maintain website? | \$0 | | \$500 | \$500 | | | |
| Can a member register/pay dues/buy products online? | No | No | No | Yes | No | No | Yes |
| Real time online payments, downloadable forms or both? | | | | Forms | | | Pymts |
| Member Email addresses in your membership database? | 80% | 99% | 78% | 80% | 90% | 90% | 95% |
| Does your Board have electronic meetings? | | Yes | No | | | | |
| Teleconference or On line? | | Tele | | | | | |
| <u>MEMBER SERVICES & PROGRAMS</u> | | | | | | | |
| Number of educational programs your ASO hosts annually? | 2 - 5 | 2 - 5 | 2 - 5 | 2 - 5 | 1 | 1 | 2 - 5 |
| Seminar Fee schedules: | | | | | | | |
| 1040 Program? Member | \$289 | \$277 | \$270 | \$355 | | | \$259 |
| NonMember | \$339 | \$302 | \$305 | \$395 | | | \$279 |
| Entity? Member | | \$244 | \$185 | | | | \$259 |
| NonMember | | \$269 | \$215 | | | | \$279 |
| Other? Member | | \$164 | | | | | \$180 |
| NonMember | | | | | | | Yes |
| Does your ASO sponsor or offer Webinars? | No | Yes | No | No | No | No | Yes |
| If not, do you have an interest in pursuing this? | | | No | Yes | | | 3rd Party |
| Do you post educational program dates on the NSA website? | Yes | No | Yes | Yes | Yes | No | Yes |
| Membership newsletter published? How often? | Mo | None | 6x | Mo | None | None | 6x |
| Newsletter sent by mail? | Yes | | Yes | | | | |
| Newsletter sent by email? | Yes | | Yes | Yes | | | Yes |
| Do you publish a membership directory? | | | | | | | |
| Available in Hard copy? | Yes | | Yes | | No | | |
| Available Online? | | | | Yes | No | | Yes |
| Available to general public? | | | | No | | | No |
| Relationships with other accounting organizations? | Yes | No | Yes | Yes | No | Yes | No |
| Contacts/relationships with colleges/universities? | Yes | No | No | Yes | No | No | Yes |
| Does ASO have an internal scholarship program? | Yes | No | Yes | Yes | No | No | No |
| <u>LEGISLATIVE ACTIVITY</u> | | | | | | | |
| Does ASO have a legislative committee? | Yes | Yes | Yes | Yes | No | No | Yes |
| Do you sponsor events for legislators? | Yes | No | No | No | No | No | No |
| Do you employ a lobbyist? | Yes | No | Yes | No | No | No | Yes |
| Lobbyist annual cost? | | | \$5,500 | | | | \$31,000 |
| Do you monitor the State Board? | Yes | Yes | Yes | Yes | No | No | Yes |
| Annual cost? | | | \$0 | | | | |
| Do you have a PAC? | No | No | Yes | Yes | No | No | Yes |

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

ANNUAL STATE CONVENTION

| | <u>NO CAROLINA</u> | <u>NO DAKOTA</u> | <u>NEBRASKA</u> | <u>NEW JERSEY</u> | <u>NEVADA</u> | <u>NEW YORK</u> | <u>OKLAHOMA</u> |
|---|--------------------|------------------|-----------------|-------------------|---------------|-----------------|-----------------|
| Do you have a state convention? | Yes | Yes | Yes | Yes | No | Yes | Yes |
| How often? | Annually | Annually | Annually | Annually | | Annually | Annually |
| Convention Month? | June | Oct | Sept | June | | June | July |
| Number of Days? | 2-3 | 1 | 1 | 4 | | 1 | 2 |
| Attendance: Total? | 55 | 10 | 25 | 50 | | 50 | 100 |
| Members | 45 | 10 | 19 | 20 | | | 65 |
| Nonmembers | | | 5 | | | | |
| Exhibitors/Vendors | | | 0 | | | | |
| Guests | 10 | | 1 | 30 | | | 35 |
| Gross Budget? | \$10,000 | \$900 | None | \$40,000 | | | \$15,000 |
| Registration fee for: | | | | | | | |
| Members | \$185 | \$0 | \$50 | \$1,000 | | \$95 | \$150 |
| Nonmembers | | | \$50 | | | | |
| Spouse/Guest | \$130 | | \$15 | | | | \$150 |
| CPE credit hours provided? Number of Hours? | No | No | Yes-4 | Yes-6 | | Yes | No |
| Officers cost reimbursement for attending? | Pres | Yes | No | Yes | | Yes | No |

Preparer of ASO Survey

| | | | |
|----------------|----|-----------|----|
| Exec Dir/Sec | EX | President | PR |
| State Director | SD | Other | O |

| | | | | | | |
|----------|-------|-------|----|------|-------|---|
| EX,PR,SD | PR,SD | EX,SD | EX | PR,O | PR,SD | O |
|----------|-------|-------|----|------|-------|---|

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

| | <u>OREGON</u> | <u>PENNSYLVANIA</u> | <u>PUERTO RICO</u> | <u>SO CAROLINA</u> | <u>TENNESSEE</u> | <u>VIRGINIA</u> | <u>WASHINGTON</u> |
|---|---------------|---------------------|--------------------|--------------------|------------------|-----------------|-------------------|
| <u>ADMINISTRATIVE</u> | | | | | | | |
| ASO Gross Annual Receipts? | \$ 240,372 | \$ 300,000 | \$ 112,000 | \$ 125,000 | \$ 150,000 | \$ 170,000 | \$ 320,983 |
| Fiscal or Calender Year? FY Month? | F June | F June | F Mar | F Aug | F June | F June | F June |
| Number of ASO Chapters? Number active? | 2 2 | 9 6 | 5 5 | 1 1 | 5 5 | 0 0 | 4 4 |
| Headquarters Office? | Y | Y | Y | Y | Y | Y | Y |
| Executive Director/Secretary? | Y | Y | Y | Y | Y | N | Y |
| Exec Director/Secretary an ASO member? | Y | N | N | N | Y | | N |
| Contracted with Prof'l Assn. Management firm? | No | | No | | | Y | |
| Annual cost for Exec Director position? | \$22,200 | NA | \$15,675 | \$12,000 | \$13,500 | | \$54,000 |
| Month new officers elected? Terms of office? | June 1yr | June 1yr | June 1yr | Nov 2yr | June 1yr | June 1yr | June 1-2yr |
| Are you recycling past ASO officers? | Yes | No | Yes | Yes | Yes | Yes | Yes |
| Do you have written Administrative Policies? | Yes | Yes | No | | Yes | Yes | Yes |
| Do you utilize a formal long-range plan? | No | Yes | No | Yes | No | No | Yes |
| Formal or informal use of Roberts Rules? | Informal | Formal | Formal | Informal | Formal | Informal | Informal |
| Does the NSA State Director serve on your Board? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| NSA State Director have a Board vote? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| NSA State Director have a budget? | Yes | No | No | No | Yes | No | Yes |
| Reimburse Board members for attending Board meetings? | Yes | Yes | Yes | Yes | Yes | No | Yes |
| Reimburse anyone attending the NSA Annual Meeting? | Yes | Yes | No | | Yes | No | Yes |
| <u>MEMBERSHIP INFORMATION</u> | | | | | | | |
| How many members are in your ASO? | 329 | 1600 | 221 | 150 | 200 | 353 | 346 |
| Percent of total ASO members w/ NSA memberships? | | 30% | 2% | 25% | 70% | | |
| Number of ASO Members w/ credentials | | | | | | | |
| CPA | | 900 | 1 | 35 | 150 | | 79 |
| EA | | 250 | 1 | 55 | 25 | | 109 |
| ACAT | | | 1 | 20 | 20 | | 168 |
| Other License - PA, Atty, Financial, etc. | | 260 | 200 | 40 | 5 | | |
| Unlicensed | | 200 | 21 | 25 | | | 60 |
| ASO Membership dues by class: | | | | | | | |
| Active | \$75 | \$175 | \$150 | \$100 | \$85 | \$140 | \$150 |
| Associate | \$75 | \$175 | \$100 | \$80 | \$85 | \$110 | \$120 |
| Student | \$15 | \$25 | \$75 | \$25 | | \$50 | \$20 |
| Vendor | | | | | | | |
| Retired | \$15 | \$30 | \$75 | | | \$110 | \$20 |
| Other - Life, Honorary, Education, NonResident | | | | | | \$50 | |
| Retention and renewal membership data? | | | | | | | |
| Members of more than 2 years? | | 90% | Don't Know | 70% | 90% | Don't Know | |
| First year members? | | 75% | | 50% | Don't Know | | |
| ASO requires CPE credits in Accounting/Tax/Other? | Y | Y | Y | Y | Y | Y | N |
| Required number of hours? | | 24/yr | 24/yr | 40 | State Bd | | |
| Is the CPE verified? | | Y | Y | | Y | | |

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

| | <u>OREGON</u> | <u>PENNSYLVANIA</u> | <u>PUERTO RICO</u> | <u>SO CAROLINA</u> | <u>TENNESSEE</u> | <u>VIRGINIA</u> | <u>WASHINGTON</u> |
|---|---------------|---------------------|--------------------|--------------------|------------------|-----------------|-------------------|
| <u>TECHNOLOGY</u> | | | | | | | |
| Does your ASO have a website? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Maintained by Host? | | Yes | | | Yes | Yes | |
| Maintained by ASO? | | | Yes | | | | |
| Maintained by Host and ASO? | | | | | | | Yes |
| Annual cost to maintain website? | | Varies | | \$400 | \$2,500 | \$300 | \$2,500 |
| Can a member register/pay dues/buy products online? | No | Yes | No | Yes | Yes | Yes | Yes |
| Real time online payments, downloadable forms or both? | | Both | | Forms | | Both | Pymts |
| Member Email addresses in your membership database? | | 70% | 95% | 60% | 90% | 90% | 93% |
| Does your Board have electronic meetings? | No | Yes | No | Yes | | Yes | Yes |
| Teleconference or On line? | | Tele | | Tele | | Tele | Both |
| <u>MEMBER SERVICES & PROGRAMS</u> | | | | | | | |
| Number of educational programs your ASO hosts annually? | 6 - 10 | 20+ | 11 - 15 | 2 - 5 | 2 - 5 | 11 - 15 | 6 - 10 |
| Seminar Fee schedules: | | | | | | | |
| 1040 Program? Member | \$269 | \$269 | | \$295 | \$325 | \$295 | \$350 |
| Entity? Member | \$269 | \$269 | \$100 | \$130 | \$295 | \$325 | \$365 |
| Other? Member | | | | \$225 | \$250 | | \$60 |
| NonMember | | | | | | | |
| NonMember | | | | | | | |
| NonMember | | | | | | | |
| Does your ASO sponsor or offer Webinars? | No | Yes | No | No | No | | No |
| If not, do you have an interest in pursuing this? | 3rd Party | Yes | | Maybe | | | Yes |
| Do you post educational program dates on the NSA website? | Yes | No | No | No | No | Yes | Yes |
| Membership newsletter published? How often? | 6x | Qtr | Qtr | Qtr | Qtrly | Qtrly | No |
| Newsletter sent by mail? | Yes | Yes | Yes | Yes | | | |
| Newsletter sent by email? | | On Web | | | Yes | Yes | Yes |
| Do you publish a membership directory? | | | | | | | |
| Available in Hard copy? | Yes | | | | | | Yes |
| Available Online? | | Yes | Yes | Yes | Yes | Yes | Yes |
| Available to general public? | | No | | Yes | Yes | | Yes |
| Relationships with other accounting organizations? | Yes | No | No | Yes | Yes | No | No |
| Contacts/relationships with colleges/universities? | No | Yes | Yes | Yes | No | No | No |
| Does ASO have an internal scholarship program? | Yes | Yes | Yes | Yes | No | Yes | Yes |
| <u>LEGISLATIVE ACTIVITY</u> | | | | | | | |
| Does ASO have a legislative committee? | Yes | Yes | No | Yes | No | Yes | Yes |
| Do you sponsor events for legislators? | No | Yes | No | No | No | No | No |
| Do you employ a lobbyist? | Yes | Yes | No | No | No | No | Yes |
| Lobbyist annual cost? | \$10,000 | \$30,000 | | | | | \$12,760 |
| Do you monitor the State Board? | Yes | Yes | No | Yes | Yes | Yes | Yes |
| Annual cost? | \$500 | \$0 | | | | | \$500 |
| Do you have a PAC? | Yes | Yes | No | No | No | Yes | No |

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

ANNUAL STATE CONVENTION

| | <u>OREGON</u> | <u>PENNSYLVANIA</u> | <u>PUERTO RICO</u> | <u>SO CAROLINA</u> | <u>TENNESSEE</u> | <u>VIRGINIA</u> | <u>WASHINGTON</u> |
|---|---------------|---------------------|--------------------|--------------------|------------------|-----------------|-------------------|
| Do you have a state convention? | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| How often? | Every Other | Annually | Annually | Annually | Annually | Annually | Annually |
| Convention Month? | June | June | June | Nov | June | June | June |
| Number of Days? | 3 | 3 | 3 | 1 | 3-4 | 2 | 4-5 |
| Attendance: Total? | 60 | 100 | 155 | 150 | 20 | 26 | 40-80 |
| Members | 40 | 50 | | 50 | 20 | | 50 |
| Nonmembers | 0 | 0 | | 100 | | | 10-20 |
| Exhibitors/Vendors | 0 | 2 | | 2 - 4 | | | 2/5 |
| Guests | 20 | 50 | | | 15 | | 10 |
| Gross Budget? | \$3,000 | \$30,000 | \$10,000 | \$0 | | \$0 | \$21,000 |
| Registration fee for: | | | | | | | |
| Members | \$325 | | | \$295 | \$275 | \$295 | \$325 |
| Nonmembers | | | | \$325 | | \$295 | \$345 |
| Spouse/Guest | \$225 | | | \$25 | \$90 | Varies | \$160 |
| CPE credit hours provided? Number of Hours? | Yes-12 | Yes-8 | No | Yes-16 | Yes | Yes | Yes 8-12 |
| Officers cost reimbursement for attending? | Yes | Yes | No | No | Yes | No | No |

Preparer of ASO Survey

| | | | |
|----------------|----|-----------|----|
| Exec Dir/Sec | EX | President | PR |
| State Director | SD | Other | O |

| | | | | | | |
|--------|--------------|-------------|-------------|-----------|----------|------------|
| OREGON | PENNSYLVANIA | PUERTO RICO | SO CAROLINA | TENNESSEE | VIRGINIA | WASHINGTON |
| EX | EX | SD | EX | PR | PR | EX |

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

| | <u>WISCONSIN</u> | <u>WYOMING</u> |
|---|------------------|----------------|
| <u>ADMINISTRATIVE</u> | | |
| ASO Gross Annual Receipts? | \$ 210,000 | \$ 21,600 |
| Fiscal or Calender Year? FY Month? | F June | C |
| Number of ASO Chapters? Number active? | 4 2 | 2 1 |
| Headquarters Office? | Y | N |
| Executive Director/Secretary? | Y | N |
| Exec Director/Secretary an ASO member? | Y | |
| Contracted with Prof'l Assn. Management firm? | | No |
| Annual cost for Exec Director position? | \$24,600 | |
| Month new officers elected? Terms of office? | Sept 1yr | Oct 2yr |
| Are you recycling past ASO officers? | Yes | Yes |
| Do you have written Administrative Policies? | Yes | No |
| Do you utilize a formal long-range plan? | No | Yes |
| Formal or informal use of Roberts Rules? | Informal | Formal |
| Does the NSA State Director serve on your Board? | Yes | Yes |
| NSA State Director have a Board vote? | Yes | Yes |
| NSA State Director have a budget? | No | No |
| Reimburse Board members for attending Board meetings? | Yes | No |
| Reimburse anyone attending the NSA Annual Meeting? | Yes | Yes |
| <u>MEMBERSHIP INFORMATION</u> | | |
| How many members are in your ASO? | 267 | 50 |
| Percent of total ASO members w/ NSA memberships? | | 60% |
| Number of ASO Members w/ credentials | | |
| CPA | | 3 |
| EA | | 8 |
| ACAT | | 15 |
| Other License - PA, Atty, Financial, etc. | | |
| Unlicensed | | |
| ASO Membership dues by class: | | |
| Active | \$125 | \$100 |
| Associate | \$90 | \$40 |
| Student | | \$5 |
| Vendor | | |
| Retired | \$25 | |
| Other - Life, Honorary, Education, NonResident | | |
| Retention and renewal membership data? | | |
| Members of more than 2 years? | 90% | 90% |
| First year members? | 75% | 20% |
| ASO requires CPE credits in Accounting/Tax/Other? | Y | Y |
| Required number of hours? | 25/yr | 24/yr |
| Is the CPE verified? | Y | Y |

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

| | <u>WISCONSIN</u> | <u>WYOMING</u> |
|---|------------------|----------------|
| <u>TECHNOLOGY</u> | | |
| Does your ASO have a website? | Yes | Yes |
| Maintained by Host? | Yes | |
| Maintained by ASO? | | Yes |
| Maintained by Host and ASO? | | |
| Annual cost to maintain website? | \$1,000 | \$144 |
| Can a member register/pay dues/buy products online? | Yes | No |
| Real time online payments, downloadable forms or both? | Forms | |
| Member Email addresses in your membership database? | 99% | 75% |
| Does your Board have electronic meetings? | | Yes |
| Teleconference or On line? | | Tele |
| <u>MEMBER SERVICES & PROGRAMS</u> | | |
| Number of educational programs your ASO hosts annually? | 6 - 10 | 2 - 5 |
| Seminar Fee schedules: | | |
| 1040 Program? Member NonMember | \$305 \$365 | \$295 \$295 |
| Entity? Member NonMember | \$165 \$195 | \$75 \$75 |
| Other? Member NonMember | | |
| Does your ASO sponsor or offer Webinars? | No | No |
| If not, do you have an interest in pursuing this? | 3rd Party | |
| Do you post educational program dates on the NSA website? | No | No |
| Membership newsletter published? How often? | No | No |
| Newsletter sent by mail? | Yes | Yes |
| Newsletter sent by email? | Yes | |
| Do you publish a membership directory? | | |
| Available in Hard copy? | | Yes |
| Available Online? | | |
| Available to general public? | | |
| Relationships with other accounting organizations? | Yes | Yes |
| Contacts/relationships with colleges/universities? | Yes | Yes |
| Does ASO have an internal scholarship program? | Yes | Yes |
| <u>LEGISLATIVE ACTIVITY</u> | | |
| Does ASO have a legislative committee? | Yes | Yes |
| Do you sponsor events for legislators? | No | No |
| Do you employ a lobbyist? | Yes | Yes |
| Lobbyist annual cost? | \$5,400 | \$2-4000 |
| Do you monitor the State Board? | Yes | Yes |
| Annual cost? | | \$1,000 |
| Do you have a PAC? | No | No |

**2009 NSA SURVEY OF
AFFILIATED STATE ORGANIZATIONS**

December 2009

| | | | | <u>WISCONSIN</u> | <u>WYOMING</u> |
|---|----|-----------|----|------------------|----------------|
| <u>ANNUAL STATE CONVENTION</u> | | | | | |
| Do you have a state convention? | | | | Yes | No |
| How often? | | | | Annually | |
| Convention Month? | | | | Sept | |
| Number of Days? | | | | 3 | |
| Attendance: Total? | | | | 80-100 | |
| Members | | | | 65-75 | |
| Nonmembers | | | | 5 | |
| Exhibitors/Vendors | | | | 2 | |
| Guests | | | | 15-20 | |
| Gross Budget? | | | | \$26,000 | |
| Registration fee for: | | | | | |
| Members | | | | \$275 | |
| Nonmembers | | | | \$335 | |
| Spouse/Guest | | | | \$85 | |
| CPE credit hours provided? Number of Hours? | | | | Yes-14 | |
| Officers cost reimbursement for attending? | | | | Yes | |
| Preparer of ASO Survey | | | | | |
| Exec Dir/Sec | EX | President | PR | EX | SD |
| State Director | SD | Other | O | | |