

## Quick Start Guide

### Surveys

- 1 Select **Surveys** from the menu.
- 2 Make a selection from the list of **Your Surveys**.
- 3 Click on **Organization Profile** to begin the survey.

### Assessments

- 1 Select **Assessments** from the menu.
- 2 Make a selection from the list of your **Purchased Assessments**.
- 3 Click on **Organization Profile** to begin the assessment.

### Benchmarking

- 1 Select **Benchmarking** from the menu.
- 2 Make a selection from the list of your **Free Reports** or **Purchased Reports**.
- 3 If you select an interactive report, set your filters, and click **View Report**.





## User Guide

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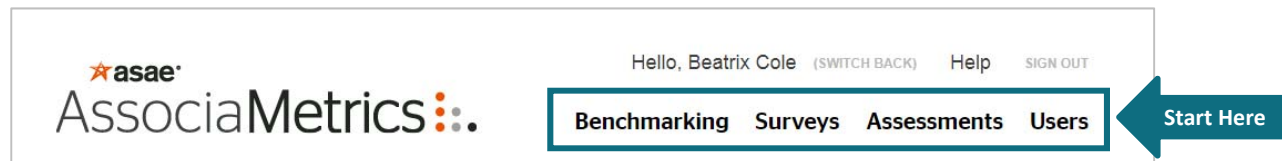


# User Guide

## Welcome to AssociaMetrics

ASAE is pleased to introduce AssociaMetrics, a new one-stop gateway to accessing and using association benchmarking data. With benchmarks and assessments from AssociaMetrics, you'll have the information and context to inform decisions—and to support board presentations and organizational challenges ranging from staffing choices to realizing operational efficiencies.

## Site Navigation/Menu



### Benchmarking

Click to access organizational benchmarks.

### Surveys

Click to access our current benchmarking surveys.

### Assessments

Click to access organizational assessments.

### Users

If this menu option is visible, you have the ability to enable survey access for other staff at your organization.

# 1 Benchmarking

Accessing Benchmarking Reports

Prepared vs. Customized Reports

Running Customized Reports

Region Filters



## Reports

Thank you for participating in our survey. Access your free reports.

- [Compensation by Position](#)
- [Key Ratios](#)

## Available Reports

### Full Access

[2016 Compensation and Benefits](#)

[2016 Operating Ratios](#)



## Purchased Reports

[2016 Compensation and Benefits](#)

[2016 Operating Ratios](#)



## Accessing Benchmarking Reports

This page lists the ASAE benchmarking reports that are currently available through AssociaMetrics.

### Free Reports

If your organization participated in one of our benchmarking surveys, you can access free participant reports on this page.

### Available Reports

These reports can be purchased through the ASAE Marketplace. All reports in this category have a “buy now” button next to the product description.

### Purchased Reports

The check box next to the name indicates that you have purchased access to these datasets.

## Prepared vs. Customizable Reports

### ASAE-Prepared Reports

These are static reports prepared by the ASAE Research department. They typically include any publications or supplemental reports associated with your purchased dataset.

### Customizable Reports

These reports let you define comparison groups and view aggregated data for them. These reports can be exported to other formats (Excel, Word, or PDF) for use in presentations.

1 **Report Filters**

2  Show My Data for Comparison

3 **VIEW REPORT** *Apply filters to improve your reports; however the more you apply the less data they'll return.*

4

**Key Ratios**

Filters used: organization type equal to Trade Association (members are organizations/institutions), and membership scope equal to National.  
 Survey Data: 22 organizations returned.  
 IRS Data: 447 organizations returned.

**PROFITABILITY**

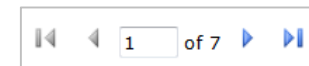
	# Orgs	Median	Mean	25th%	75th%	My Data
Net Profitability as Percentage of Total Revenue	447	3.05 %	2.66 %	-1.92 %	8.86 %	

## Running Customized Reports

- 1 Set your report filters.** Select the search parameters for your comparison group.
- 2 Show your data.** If you participated in the survey associated with the report, you'll have the option of viewing your data along side the aggregated benchmarking data. Check this box to view your survey data.
- 3 View Report.** Click here to view the report. Keep in mind that applying more filters means less data. Information will not be displayed for fewer than 5 organizations.
- 4 Navigate and Export Reports**

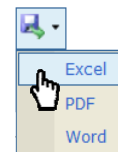
### Page Navigation

Use the arrows to navigate multiple page reports.



### Export

Click here to export and download a copy of the report.



## Region Filters

### Northeast Region

- *New England Division*: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont
- *Middle Atlantic Division*: New Jersey, New York and Pennsylvania

### Midwest Region

- *East North Central Division*: Illinois, Indiana, Michigan, Ohio and Wisconsin
- *West North Central Division*: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota

### South Region

- *South Atlantic Division*: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia
- *East South Central Division*: Alabama, Kentucky, Mississippi and Tennessee
- *West South Central Division*: Arkansas, Louisiana, Oklahoma and Texas

### West Region

- *Mountain Division*: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming
- *Pacific Division*: Alaska, California, Hawaii, Oregon and Washington

View map: [https://www2.census.gov/geo/pdfs/maps-data/maps/reference/us\\_regdiv.pdf](https://www2.census.gov/geo/pdfs/maps-data/maps/reference/us_regdiv.pdf)

## 2 Surveys

Accessing Surveys

Navigating Surveys

Saving and Editing Surveys

Tracking Progress





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Hello, Beatrix Cole      Help      SIGN OUT

Benchmarking   **Surveys**   Assessments   Users

## Accessing Surveys

This page lists all of the ASAE benchmarking surveys that are currently open for data collection.

### Your Surveys

Your organization has been invited to participate in these surveys. Depending on your permissions, you may or may not have individual access to these surveys.

#### How to access Your Surveys:

- Click on any hyperlinked survey name to get started.
- If the survey is not hyperlinked, click **Request Access** to find out which person at your organization has been asked to participate. This person can grant access.
- [Contact ASAE Research](#) if this person is no longer at your organization.

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Benchmarking   Surveys   Assessments   Users

### Your Surveys

Survey	Status	Progress	Action
2016 - Association Compensation & Benefits Survey	Open	—	REQUEST ACCESS
<a href="#">2016 - Operating Ratio Report Survey</a>	Open	0%	MANAGE USERS

### Available Surveys

These are other open surveys for which your organization may be eligible but to which no one at your organization has been invited to participate.

#### Request Access to Available Surveys:

- [Contact ASAE Research](#)

REQUEST ACCESS

**Request Access**

2016 - Association Compensation & Benefits Survey

You may request access from:

[Lewena Goebel - Finance Director](#)

### Available Surveys

Survey	Action
2016 - Association Compensation & Benefits Survey	REQUEST ACCESS

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**AssocioMetrics**

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 Benchmarking Surveys Assessments Users

## 2016 - Association Compensation & Benefits Survey

Survey Progress

0%

**Organization Profile**

START Organization Profile **Start Here**

**Chief Executive Officers**

START CEO Compensation & Benefits

START CEO Employment Policies

**Employee Compensation**

START Salary Details

**Employee Benefits**

START Salary Administration

START Organization Retirement Programs

START Employee Benefits (Insurance and Other Benefits)



Click this button within the survey to access the same navigation menu.

## Navigating Surveys

Every survey home page contains a menu with links to each section of the survey. The buttons for each section indicate its status. This is especially useful if more than one person is working on the survey.

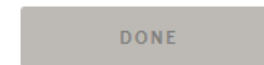
### Data Entry Status



The section has no saved data.



The section contains saved data, but has not been completed.



The section has been marked complete. The **progress bar** is linked to the number of completed survey sections.

### Protected Data

A padlock icon means the survey section contains protected data.



You have permission to access this data.



You do not have permission to access this data.

### Survey Submission

The submit button appears in the menu after you begin your survey.



Lets us know your survey is complete.



Reopen and edit your survey **before it closes**.

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Surveys User Permissions

2016 - Operating Ratio Report Survey 0%

MARK THIS PAGE 'COMPLETE' SAVE

MENU

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Surveys User Permissions

2016 - Operating Ratio Report Survey 0%

MARK THIS PAGE 'COMPLETE' SAVE

MENU

Organization Profile

Answers to all of the questions below are required to produce accurate reports. Please answer all questions.

1. Full Organization Name

AssociaMetrics Test Association 1

2. City

This question is required.

Please complete the required fields to mark the part as complete.

## Saving and Editing Surveys

### Save your data in each survey section.

You must save your work after you enter data in each section, otherwise you may lose it. You can save your work and return to revise it as necessary while the survey is open.

### Mark each section “Complete” when you’re done.

This lets you keep track of which sections no longer require data entry or editing.

### Any section containing errors cannot be marked complete.

You’ll receive an error message when this happens.

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Surveys User Permissions

2016 - Operating Ratio Report Survey

17%

THIS PAGE IS COMPLETE EDIT

Survey part marked complete.  
Hello, Beatrix Cole

## Tracking Progress

If the section is error free, marking it complete generates a confirmation message at the top of the screen and a change in the progress bar.

Click “Edit” to make changes to any completed sections.

## Move on to the next section.

Move to the next section by clicking “Save and Continue” or using the navigation menu. If you’re at the end of the survey, you’ll see “Save and Go To Submit”.

THIS PAGE IS COMPLETE EDIT

< GO BACK SAVE AND CONTINUE >

3

## Assessments

Accessing Assessments

Navigating Assessments

Saving and Editing Assessment Answers

Tracking Progress

Assessment Results





## Accessing Assessments

This page is the gateway to ASAE's organizational assessments.

### Completed Assessments

You or someone else at your organization completed these assessments on the date shown.

### Purchased Assessments

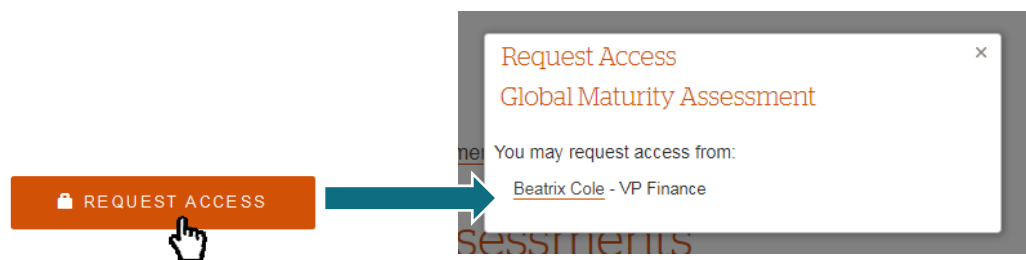
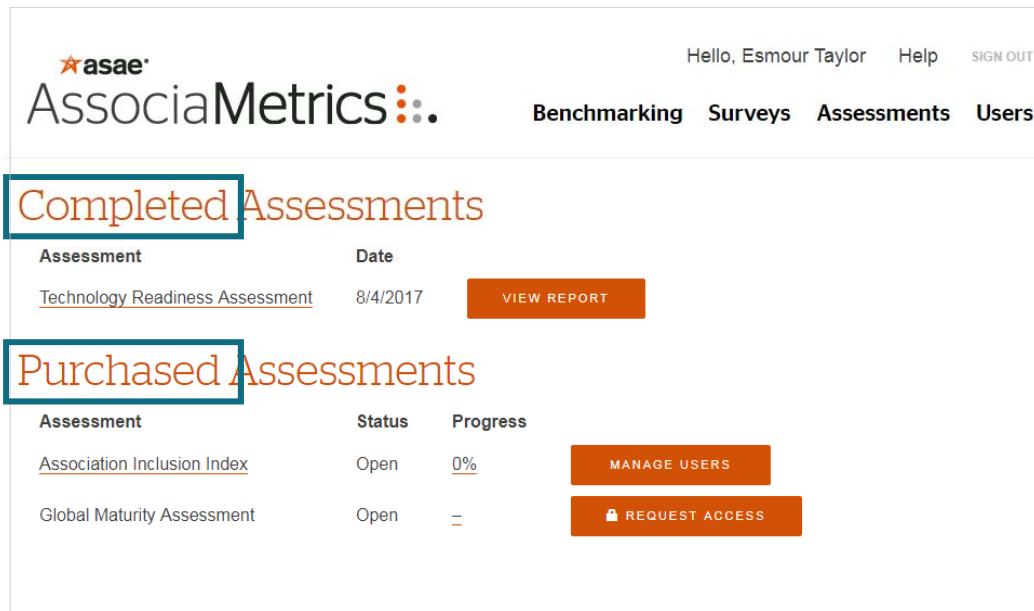
You or someone at your organization purchased these assessments, but they are not yet complete. The **Manage Users** button allows you to set access/permissions for other staff at your organization.

### Available Assessments

These assessments are available for purchase. If your organization has already completed one of these assessments, you'll see the **Buy Again** button.

### How to Access Your Assessments:

- Click on any hyperlinked assessment name to either get started or view your final results.
- If the assessment is not hyperlinked, click **Request Access** to find out which person at your organization can update user permissions. [Contact ASAE Research](#) if this person is no longer at your organization.



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 Hello, Beatrix Cole Help SIGN OUT  
 Benchmarking Surveys Assessments Users

# Technology Readiness Assessment

Assesment Progress  
 20%

**Organization Profile**  
 DONE [Organization Profile](#) 

**Association Data**  
 UPDATE [Association Data](#)

**Management and Strategy**  
 START [Management and Strategy](#)

**Infrastructure**  
 START [Infrastructure](#)

**Digital Presence**  
 START [Digital Presence](#)

SUBMIT [Submit your assesment](#)

## Navigating Assessments

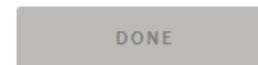
Every assessment home page contains a menu with links to each section of the questionnaire. The buttons for each section indicate its status. This is especially useful if more than one person is working on the survey.



The section has no saved data.



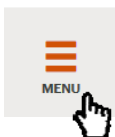
The section contains saved data, but has not been completed.



The section has been marked complete. The **progress bar** is linked to the number of completed assessment sections.



Click Submit to generate your assessment scores. **You cannot submit an incomplete assessment.**



Click this button within the assessment to access the same navigation menu.

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Benchmarking Surveys Assessments Users

Technology Readiness Assessment 0%

MARK THIS PAGE 'COMPLETE' SAVE

## Saving and Editing Assessment Answers

### Save your data in each section.

You must save your work after you enter data in each section, otherwise you may lose it.

You can save your work and return to revise it as necessary **prior to submitting your answers.**

### Mark each section "Complete" when you're done.

This lets you keep track of which sections no longer require data entry or editing.

Any section containing errors cannot be marked complete.

You'll receive an error message when this happens

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Hello, Beatrix Cole Please complete the required fields to mark the part as complete.

Benchmarking Surveys Assessments Users

Technology Readiness Assessment 0%

MARK THIS PAGE 'COMPLETE' SAVE

Organization Profile

1. Full Organization Name  
Associametrics Test Association 1

2. City  
This question is required



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Benchmarking Surveys Assessments Users

Technology Readiness Assessment

20%

Assesment part marked complete.

THIS PAGE IS COMPLETE EDIT

THIS PAGE IS COMPLETE EDIT

< GO BACK SAVE AND CONTINUE >

## Tracking Progress

If the section is error free, marking it complete will generate a confirmation message at the top of the screen. You'll also see a change in the progress bar.

**Click "Edit" to make changes to any completed sections.**

**Move on to the next section.**

Move to the next section by clicking "Save and Continue" or using the navigation menu. If you're at the end of the survey, you'll see "Save and Go To Submit".

## Technology Readiness Assessment

### Results

- [Technology Readiness Assessment](#)



### Additional Resources

- [9 Forces Shaping the Future of IT](#)
- [Association & Nonprofit Leaders: Are You Ready for Digital Transformation?](#)
- [Business Leaders: What You Must Do Today to Be Better Prepared Tomorrow](#)
- [IT Customer Service: Does Your Team Have the Right Mindset?](#)
- [Marketing IT: Sell Services Internally, Win Respect](#)
- [Tech Success for Associations: Balancing IT Maturity, Readiness, and Expectations for a Satisfying, Sustainable Future](#)
- [The Digital Future](#)
- [The DNA of the Association CIO](#)
- [Your Association Must Have CIO-Level Skills to Achieve Digital Transformation](#)

## Assessment Results

Click the link under “Results” to view your assessment scores.

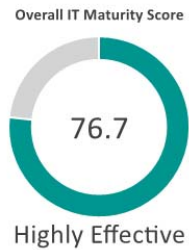
## Technology Readiness Assessment



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### Technology Readiness Assessment Results for AssociaMetrics Test Association 1 (8/4/2017)

Your scores:

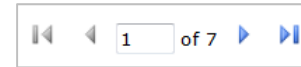


## Assessment Results

### Navigate and Export Reports

#### Page Navigation

Use the arrows to navigate multiple page reports.



#### Export

Click here to export and download a copy of the report.



## 4 Users

User Permissions: Surveys

User Permissions: Assessments



## User Permissions: Surveys

You can control which staff members participate in your surveys and their level of involvement. ASAE sets default survey permissions based on information in our database, including position level and functional area. Once you set your organization's permissions for each survey, they will override the default permissions set by ASAE.

! Edit these settings to control who has access to your surveys. The information on this page comes from our membership database. We rely on you to provide updated information, so please contact [ASAE Research](#) to request any changes to your staff listing.

1 Survey Template  
Operating Ratio Report Survey

SAVE 4

2 Name	Title	Survey Access	Protected Data	User Management	Submit Survey
Cole, Beatrix	VP Finance	3 <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Goebel, Lewena	Finance Director	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vawdrey, Matilda		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taylor, Esmour		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## How to set User Permissions:

1 **Select a survey template.** You may have the ability to manage users for more than one survey. Use the survey template dropdown menu to make your selection.

2 **Review the users and permissions for your organization.** You can sort on names or search for specific individuals by clicking the filter icon in the Name column. Sort on permissions to see how they are currently assigned.

3 **Edit permissions.** Use the check boxes to select /deselect the following permissions as necessary:

**Survey Access** Enter data to any unprotected portion of the survey.

**Protected Data** Access portions of the survey that include sensitive or confidential information. \*\*At this time, only the Salary Details section of the Compensation & Benefits Survey is classified as protected.

**User Management** Set user permissions for your organizations. Only users with this permission can access the User Permissions page.

**Submit Survey** Submit completed surveys to ASAE.

4 **Save your changes!**

## How to Update Organization Contacts:

- **ADD individuals:** If you don't see the staff person to whom you want to assign permissions, have that individual create a user account linked to your organization. [asaecenter.org/login](https://asaecenter.org/login)  
\*\*Information will update within 24 hours.
- **REMOVE individuals:** [Contact ASAE Research](#)

## User Permissions: Assessments

You can control which staff members participate in your assessments and their level of involvement.

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Benchmarking Surveys Assessments **Users**

### User Permissions

**!** Edit these settings to control who has access to your surveys.  
The information on this page comes from our membership database. We rely on you to provide updated information, so please contact [ASAE Research](#) to request any changes to your staff listing.

**1** Survey Template  
Association Inclusion Index **SAVE** **4**

<b>2</b> Name	Title	Survey/Report Access	User Management
Cole, Beatrix	VP Finance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Goebel, Lewena	Finance Director	<input type="checkbox"/>	<input type="checkbox"/>
Vawdrey, Matilda		<input type="checkbox"/>	<input type="checkbox"/>
Taylor, Esmour		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**3**

### How to set User Permissions:

- 1 Select a template.** You may have the ability to manage users for more than one assessment. Use the survey template dropdown menu to make your selection.
- 2 Review the users and permissions for your organization.** You can sort on names or search for specific individuals by clicking the filter icon in the Name column. Sort on permissions to see how they are currently assigned.
- 3 Edit permissions.** Use the check boxes to select /deselect the following permissions as necessary:

**Survey/Report Access** Access the assessment questions and view your organization's results.

**User Management** Set user permissions for your organizations. Only users with this permission can access the User Permissions page.

- 4 Save your changes!**

### How to Update Organization Contacts:

- ADD individuals:** If you don't see the staff person to whom you want to assign permissions, have that individual create a user account linked to your organization. [asaecenter.org/login](https://asaecenter.org/login)  
\*\*Information will update within 24 hours.
- REMOVE individuals:** [Contact ASAE Research](#)

## **Additional Information**

Operating Ratio Report Formulas



## ORR Formulas

Key Ratios	source	Formula
<b>Profitability</b>		
Net Profitability as % of Total Revenue	990	$= \text{Net profitability} \div \text{Total Revenue} \times 100$ $= (\text{Total Revenue} - \text{Total Expenses}) \div \text{Total Revenue} \times 100$ $= \{ [\text{Pt VIII-12(A)}] - [\text{Pt IX-25(A)}] \} \div [\text{Pt VIII-12(A)}] \times 100$
<b>Productivity and Efficiency</b>		
Operating Efficiency Ratio: Total Revenue/Total Assets	990	$= \text{Total Revenue} \div \text{Total Assets}$ $= [\text{Pt VIII-12(A)}] \div [\text{Pt X-16(B)}]$
Average collection Period (in days)	990	$= 365 \div \{ [\text{Total Revenue} - \text{Total Contributions} - \text{Investment Income} - \text{Income from Investment of Tax-Exempt Bond Proceeds} - \text{Royalties} - \text{Net Rental Income}] \div [\text{Pledges and Grants Receivable} + \text{Accounts Receivable}] \}$ $= 365 \div \{ ( [\text{Pt VIII-12(A)}] - [\text{Pt VIII-1h(A)}] - [\text{Pt VIII-3(A)}] - [\text{Pt VIII-4(A)}] - [\text{Pt VIII-5(A)}] - [\text{Pt VIII-6d(A)}] ) \div ( [\text{Pt X-3(B)}] + [\text{Pt X-4(B)}] ) \}$
Total Revenue per Employee (\$)	990	$= \text{Total Revenue} \div \text{Total Number of Employees}$ $= [\text{Pt VIII-12(A)}] \div [\text{Pt V-2a}]$
Total Expenses per Employee (\$)	990	$= \text{Total Expenses} \div \text{Total Number of Employees}$ $= [\text{Pt IX-25(A)}] \div [\text{Pt V-2a}]$
Benefits Costs per Employee (\$)	990	$= \text{Other Employee Benefits} \div \text{Total Number of Employees}$ $= [\text{Pt IX-9(A)}] \div [\text{Pt V-2a}]$
Pension Costs per Employee (\$)	990	$= \text{Pension Plan Contributions} \div \text{Total Number of Employees}$ $= [\text{Pt IX-8(A)}] \div [\text{Pt V-2a}]$
Benefits Costs as a % of Compensation Costs	990	$= \text{Other Employee Benefits} \div [ (\text{Compensation of Current Officers, Directors, Trustees, and Key Employees}) + (\text{Compensation to Disqualified Persons} + \text{Other Salaries and Wages}) ] \times 100$ $= [\text{Pt IX-9(A)}] \div \{ [\text{Pt IX-5(A)}] + [\text{Pt IX-6(A)}] + [\text{Pt IX-7(A)}] \} \times 100$



<b>Key Ratios (continued)</b>	<b>source</b>	<b>Formula</b>
<b>Leverage</b>		
Leverage Ratio: Total Liabilities/Total Fund Balance	<b>990</b>	= Total Liabilities ÷ Net Assets or Fund Balances  = [Pt X-26(B)] ÷ [Pt X-33(B)]
Financial Stability Ratio: Expendable Fund Balance/Total Expenses	<b>990</b>	= [Total Net Assets - Land, buildings, & equipment (net) ] ÷ Total Expenses  = { [Pt X-33(B)] - [Pt X-10c(B)] } ÷ [Pt IX-25(A)]
<b>Investment</b>		
Investment Income as a % of Total Revenue	<b>990</b>	= Investment Income ÷ Total Revenue x 100  = [Pt VIII-3(A)] ÷ [Pt VIII-12(A)] x 100
Total Investments as a % of Total Assets	<b>990</b>	= Total Investments ÷ Total Assets x 100 = [ Publicly Traded Securities + Other Securities + Program Related Investments ] ÷ Total Assets x 100  = { [Pt X-11(B)] + [Pt X-12(B)] + [Pt X-13(B)] } ÷ [Pt X-16(B)] x 100
<b>Other Ratios</b>		
Membership Dues Revenue as a % of Total Revenue	<b>survey</b>	= Total Dues Revenue ÷ Total Revenue x 100
Membership Dues Revenue as a % of Total Expenses	<b>survey</b>	= Total Dues Revenue ÷ Total Expenses x 100
UBIT Revenue as a % of Total Revenue	<b>survey</b>	= Total Gross Unrelated Business Revenue ÷ Total Revenue x 100
Occupancy Expense as a % of Total Revenue	<b>990</b>	= Occupancy Expenses ÷ Total Revenue x 100  = [Pt IX-16(A)] ÷ [Pt VIII-12(A)]
Conferences/Conventions/Meetings Exp. as a % of Total Revenue	<b>990</b>	= (Conferences, Conventions, and Meetings Expenses) ÷ Total Revenue x 100 = [Pt IX-19(A)] ÷ [Pt VIII-12(A)] x 100

**ORR Data Sources**

**Revenue**

Survey	990	
Total Revenue	Total Revenue	Pt VIII-12(A)
Total Program Service Revenue	Total Program Service Revenue	Pt VIII-2g(A)
Contributions/Gifts/Grants (less dues)	Other Revenue	
Federated Campaigns	Investment Income	Pt VIII-3(A)
Fundraising Events	Royalties	Pt VIII-5(A)
Related Organizations	Net Rental Income (or loss)	Pt VIII-6d(A)
Government Grants	Net Income (or loss) from Sales of Assets	Pt VIII-7d(A)
All Other Contributions	Net Income (or loss) from Fundraising Activities	Pt VIII-8c(A)
	Net Income (or loss) from Gaming Activities	Pt VIII-9c(A)
Program Service Revenue	Net Income (or loss) from Sales of Inventory	Pt VIII-10c(A)
Dues	Other Misc. Revenue	Pt VIII-11e(A)
Regular & Primary Members		
Associate & Supplier Members		
Other Dues		
Meetings/Educational Programs		
Meetings/Convention Reg.Fees		
Exhibit/Trade Show Booth Fees		
Exhibit/Trade Show Reg. Fees		
Meetings Sponsorship Revenue		
Meetings Revenue--Other		
Educational Program Fees		
Cert./Accred./Stds./Eval. Revenue		
Publications/Periodicals		
Periodical Subscriptions		
Periodical Advertising		
Website Advertising		
Periodical--Other		
Non-Periodical Publication Sales		
Royalties from Publication Sales		
Other Program Service Revenue		

## Expenses

Survey	990	
Total Expenses	Total Expenses	
Staffing Expenses	Staffing Expenses	
Salaries--Exempt Staff	Pension Plan Contributions	Pt IX-8(A)
Salaries--Non-Exempt Staff	Other Employee Benefits	Pt IX-9(A)
Salaries--Temporary Staff	Payroll Taxes	Pt IX-10(A)
Personnel Training and Development		
Professional/Consultant Expenses	Professional/Consultant Expenses	
Membership Management	Legal	Pt IX-11b(A)
Meetings Management	Accounting	Pt IX-11c(A)
Publications Management	Lobbying	Pt IX-11d(A)
Government Relations	Professional Fundraising Services	Pt IX-11e(A)
Payroll	Investment Management Fees	Pt IX-11f(A)
Human Resources		
IT Functions		
Information Technology Expenses	Grants	
Hardware - Servers	Grants & Oth Assist. to U.S. Governments/Orgs	Pt IX-1(A)
Hardware - Desktops/Laptops	Grants & Oth Assist. to U.S. Individuals	Pt IX-2(A)
Hardware - Mobile Devices	Grants & Oth Assist. to Non U.S. Gov/Orgs/Ind	Pt IX-3(A)
Hardware - Network Equipment		
Hardware - Misc. Equipment	Other Functional Expenses	
Software - Server	Benefits Paid to or For Members	Pt IX-4(A)
Software - Desktop	Advertising and Promotion	Pt IX-12(A)
Software - Misc.	Office Expenses	Pt IX-13(A)
Website Design/Maintenance	Royalties	Pt IX-14(A)
Internet Service Provider	Occupancy	Pt IX-15(A)
Cloud Hosting Services	Interest	Pt IX-16(A)
SAAS Application Services	Payments to Affiliates	Pt IX-21(A)
	Depreciation, Depletion, and Amortization	Pt IX-22(A)
	Insurance	Pt IX-23(A)
	All Other Expenses	Pt IX-24a-f(A)

**Expenses (continued)**

**Survey**

Travel Expenses

Travel--Staff

Total Travel Expenses

Meeting Expenses

Meetings--Meals Provided at Events

Meetings--Entertainment

Meetings--Equipment Rental

Meetings--Facilities Rental

Meetings--Speaking Fees

Meetings--Other

Dues, Subscriptions & Publications

Association Property Insurance

Taxes--Federal Income Taxes

Taxes--State & Local Taxes

Expenses by Project & Activity

Certification, Accred., Standard. & Eval.

Computers & Technology

Education Programs/Seminars

General & Administrative (not elsewhere)

Government Affairs (includes lobbying/PACs)

Group Insurance Program

Trade Shows/Expositions

Conventions

Membership (including marketing & services)

Non-Periodical Publications

Periodical Publications

Public, Consumer & Industry Promotion

Research & Information Services

Volunteers/Governance/Boards/Committees

Other Programs & Services

## Balance Sheet Data

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### Balance Sheet

Cash--Non-Interest Bearing	Pt X-1(B)
Savings & Temporary Cash Investments	Pt X-2(B)
Pledges and Grants Receivable, Net	Pt X-3(B)
Accounts Receivable, Net	Pt X-4(B)
Receivables from Current and Former Officers, Directors, Key Employees, and Trustees	Pt X-5(B)
Receivables from Other Disqualified Persons	Pt X-6(B)
Notes and Loans Receivables, Net	Pt X-7(B)
Inventories for Sale or Use	Pt X-8(B)
Prepaid Expenses & Deferred Charges	Pt X-9(B)
Land, Buildings & Equipment: Basis, Net	Pt X-10(B)
Investments--Publicly Traded Securities	Pt X-11(B)
Investments--Other Securities	Pt X-12(B)
Investments--Program-Related	Pt X-13(B)
Intangible Assets	Pt X-14(B)
Other Assets	Pt X-15(B)

### Liabilities

Accounts Payable & Accrued Expenses	Pt X-17(B)
Grants Payable	Pt X-18(B)
Deferred Revenue	Pt X-19(B)
Tax-Exempt Bond Liabilities	Pt X-20(B)
Escrow Account Liability	Pt X-21(B)
Payables to Current and Former Officers, Directors, Trustees, Key Employees, Highly Compensated Employees and Disqualified Persons	Pt X-22(B)
Secured Mortgages and Notes Payable	Pt X-23(B)
Unsecured Notes and Loans Payable	Pt X-24(B)
Other Liabilities	Pt X-25(B)

### Net Assets or Fund Balances

Unrestricted	Pt X-27(B)
Temporarily Restricted	Pt X-28(B)
Permanently Restricted	Pt X-29(B)
Capital Stock/Trust Principal/Current Funds	Pt X-30(B)
Paid-in or Capital Surplus or Land/Bldg/Equip.	Pt X-31(B)
Retained Earnings/Accumulated Revenue/Oth	Pt X-32(B)