Annual/Midyear/Progress Report

ARLIS/NA Group or Appointment: Treasurer

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- **Leadership Update** (incoming officers names and roles):
  - Doug Litts completed the second year as Treasurer and was reelected to a second 2-year term as Treasurer

- **Activities** during the past year:
  - Acted as Executive Board liaison to the Finance Committee. Solicited input from the committee on investment strategies.
  - Participated in the planning of the St Louis, MO Conference as a member of the Conference Planning Advisory Committee (CPAC), including authoring the conference budget.
  - Changed recording of gifts so that restricted giving accounts lines are kept separate in order to track actual balances. Developed formula for reflecting annual investment profits/loss for each fund.
  - Development Committee chair was added to monthly gift monitoring to get a picture of the Society’s philanthropic giving.
  - Presented 9 submitted special funding requests to the Executive Board
  - Collaborated with the former treasurer, the ARLIS/NA board officers, AEG financial staff, Development Committee chair, and the Conference Planning Advisory Committee for the 2020 St Louis conference on constructing the Society-wide budget for 2020

- **Ongoing projects:**
  - Monitor options and expenditures for Humanities Commons project

- **Preliminary goals** for next year:
- Work to minimize financial ramifications from volatile economy and growing health crisis
- Begin Treasurer training for possible successor

- **Articulate how your activities, projects and goals relate to the ARLIS/NA [Strategic Directions](#):**
  - Since the Society’s fiscal health and funding affects all aspects of the society, the work of the Treasurer provides the means to accomplish all endeavors in all strategic directions. Keeping the Society fiscally healthy through careful monitoring and responsible budgeting enables current and future initiatives.

- **Other** (please share anything else you want the membership to know about your group or your role):