

Continuity and Priorities

As I write this report, I am reflecting on how things have changed since last year. Even though much has changed, we have continuity and ASOR continues to carry out its mission and work. Indeed, we are poised to move to new heights.

When I wrote my report last year, I thought that we would stay in Boston or move to the University of New Hampshire. Both of those options felt comfortable to me.

During the EC and Board Meetings, it became clear that our trustees were committed to a “grownup” ASOR. As one trustee put it (to paraphrase), “After 117 years, it’s time for ASOR to have its own house after 117 years.”

Jim Strange spoke passionately about how ASOR would be here after we were gone, and he said that we needed to make a bold move. Little did we know that Jim would be even more prophetic than usual. This year we will miss his deep, passionate voice that often shared wisdom and conviction. Hopefully, we still have his dream and vision.

Last year, I left that Board meeting inspired, but not comfortable. I thought that we would stay in Boston, but I wasn’t sure how. After Selma decided to take a full-time position at Boston University, and after we realized how expensive downtown Boston really was (is), it seemed that we should really consider what location would allow us to carry out our mission best. In this regard, I do not need to repeat what Susan Ackerman has reported in her President’s report on Location.

The Executive Committee and then Board took bold steps, and I’m convinced that the move to Alexandria, Virginia was the right decision—indeed, it looks like even Amazon is following ASOR to Northern Virginia!

As we reflect on this year of transition, I want to begin with a report on **continuity**.

Continuity—ASOR is stable and our core work continues

Finances. ASOR remains solvent, and is in good financial shape. This may not be the most important thing, but it makes our work much easier. I’m extremely pleased that we finished Fiscal Year 2018 (ended June 30, 2018) with an increase of \$112,000 in unrestricted assets available for operations—sometimes called our “rainy day fund balance.” This was very important because the board approved a budget for FY19 that may use up to \$100,000 of unrestricted assets for relocation expenses (including incentive pay for employee, relocation allowances, and one-time office expenses). I hope that we will come in under that budgeted amount, but we have much needed flexibility with our small surplus from FY18 to manage these (one-time) costs in a responsible manner.

Our finances are also **sustainable**. The contract that we signed with University of Chicago Press ensures that we will have a stable income from institutional subscriptions for the next five years. I hope that we will see that income grow, but it extremely important that we can budget on sustainable subscription revenue. We also can rely on that income in spite of losing an extremely talented employee in Inda Omerefendic.

Our membership revenue has leveled out since the Boston Annual Meeting, but we are poised to move past the 2,000 level for the first time in our history. With the move of our journals to UCP (see below), we can also focus on membership growth—the area of our budget that has seen consistent growth in terms of revenue over the past 7 years. We have just hired a new membership manager (Felice Herman). She comes to ASOR with eight years of experience in non-profits, with a focus on member services for the last four years. I'm confident that she will work with the Membership and Outreach Committee to see our membership services and programs reach new heights. Felice will be working with Marta Ostovich (another recent hire from March who has relocated to Alexandria. Marta is our Manager of Programs, and she will oversee the development of programs (other than publications) that serve our members.

Finances give our members and donors confidence. Some of us remember that days when we couldn't assume a balanced budget. As I will point out below, we are making great strides with fundraising—for the Annual Fund, for the Building Fund, and for other designated categories. Much, if not all, of that rests on our members and donor seeing ASOR as being good (and frugal) stewards of our resources. They also need to see us operating in the black. Our members pay their dues knowing that they are put to good use. Our donors contribute with the knowledge that their gifts advance our mission rather than pay off debts.

Publications and member services. Most of our members do not think about where ASOR is located because we provide services that are not tied to our office. Our publications, e-newsletters, scholarships, dig support, and advocacy are delivered to their mailboxes—either electronic or postal.

Journals. Little did we know last year how wise it would be to explore a publishing partnership. We undertook a thorough search process, and we ended up with the University of Chicago Press as our consensus choice. That choice has ended up being even wiser than we thought. UCP graciously took over distribution of “claims” (journals that are not delivered in the first bulk mailing) as of July 1st, and they have worked with Inda and the rest of our staff to take over institutional billing sooner than we had contracted. Moreover, they have agreed to continue the journal exchange program for a phaseout period to ensure that the Research Centers could adjust to any changes. They have taken pride in setting up an online portal for ASOR members, and they going to great lengths to ensure that mail delivery to members continues without a hitch. In short, Kari Roane and everyone at UCP have exceeded our expectations, and this promises to be an excellent partnership. It also means that our members will not see any disruption in our journal production and distribution even though we have moved offices twice since our last Annual Meeting and even though our journals are now physically located in Chicago instead of Boston.

Books. This is a story of continuity but not growth. While I think that UCP will help ASOR carry out the goals in our strategic plan even more than we did in the past two years, books will be in “continuity” mode for the next 12-24 months. ISD continues to distribute our books, and we continue to publish quality books. However, we are not meeting the ambitious goals in our strategic plan with regards to online access and sales. At the same time, we have had to set priorities, and books is a category that can continue at our current pace until we are settled into our offices in Alexandria (see below under my suggestions for priorities). The editors of our the ASOR-ARS and AASOR continue to produce excellent books, and we should continue to be proud of what we are doing. I also think that we can advance this area more in FY2020 after our move into a new office is completed. For now, our members will see continuity and no disruption in service—that is very important given all of our changes.

Annual Meeting. After journals, this is perhaps our most visible program area. Fortunately, this is also an area without any major staff changes. Arlene Press has worked remotely in Indiana since she began as Meetings Manager. She was recently promoted to Director of Meetings, and she is hitting her stride in her job. She excels in supporting the Program Committee and in managing the Annual Meeting. With the appointment of Marta Ostovich as Programs Manager, Arlene will increase the level of effort that she allocates to the Annual Meeting and other meetings. ASOR has hired a part-time contractor (Will Berkery) who will assist both Arlene and Marta. Once ASOR moves into a new office, we will also allocate part of time of the Office Assistant to the Annual Meeting and other meetings. In this way, we plan to see the Annual Meeting continue to grow and accomplish the goals laid out in the strategic plan in spite of all of the transitions.

Website and e-newsletters. I think that our new website (which isn’t all that new anymore) has some of the best “bones” of any website of a learned society. The photos (many thanks go to Susan Ackerman and others who have donated images) are simply stunning. We have completed moving *ANE Today* to the new website, and *News@ASOR* consistently shares updated content. We also have an ever-changing news folder. This is an area where Marta and Felice will work to develop more and more resources so that we can serve our members and recruit more members and Friends (of ASOR). In addition, Will Berkery is going to implement a Friends of ASOR resource page in 2019. Finally, we plan to complete the move of the ASOR Blog to the new website in 2019.

The website will benefit from continuity with Cynthia Rufo continuing as a half-time employee. Jared Koller (a BU graduate student and our website designer) now lives in the DC area (Maryland), and he will continue to provide oversight of the website design. Ina Omerehendic has been the primary staff person in charge of *News@ASOR*, so her responsibilities will begin moving to Marta and Felice in December.

Advocacy. This an area that has reached new levels during the past five years, and it is connected to our important work in cultural heritage. One way that we support this program area is through the increased capacity and infrastructure in our website and e-newsletters. The

Ancient Near East Today is entering its seventh year, and we have over 15,000 subscribers. ASOR has once again become known as a real *player* in the humanities and in the North African and Middle East (MENA regions).

This program area is one where our move to Alexandria is already starting to pay dividends. I have been to attend one conference and two gatherings with other executive directors in the two months that some of the ASOR staff have been based in the DC area. I have several meetings with officials at NEH, Homeland Security, the State Department, and the Department of Justice tentatively planned for December and January.

Financial reporting. This is an area where we have continuity, but we also have some challenges. I cannot overemphasize the amazing job that Britta Abeln has done in learning a new job. She has exceeded expectations as Financial Specialist. ASOR continues to carry out the basic tasks needed for tracking our finances, paying our bills, and processing our payroll (which has grown very large with all of our grants and projects). At the same time, the loss of Selma Omerefendic as Assistant Director and Financial Administrator has created challenges. Treasurer Heather McKee has outlined some ideas about how to restructure our reporting methods and how we can streamline our QuickBooks entries. I will not repeat her comments here, but this (streamlining our reporting) is a critical improvement needed for calendar year 2019.

I am very pleased to report that Britta Abeln will continue as Financial Specialist for at least Calendar Year 2019. Britta will be working remotely, and we have already started to move all of our journal entries to an online version of QuickBooks. We are in the process of aligning our QB journal categories with our budget categories, and this will make tracking our finances (and completing our audit) much easier next fiscal year.

Board members will notice that we do not have a bound audit in time for this Fall Meeting. The reason is that our auditors (Romeo and Wiggins) had to spend more time checking the details and balance sheet without Selma's able work in creating spreadsheets of our accounts (temporary restricted, permanently restricted, and unrestricted). I am very pleased that the balance sheet has been audited and approved. We are in the black—in fact all categories (unrestricted, restricted, and temporarily restricted) experienced very healthy if not extraordinary growth. This challenge is somewhat expected with the departure of Selma, but we are putting measures in place so that we do not have these challenges next year.

Fundraising. I am impressed with and humbled by the generous support of our members. Last fiscal year we exceeded all of our goals and previous records in terms of participation. We had more than 450 members and friends make a contribution over and above their membership dues. I am pretty confident that ASOR has the highest level of per capita giving of any learned society (there are not good figures to compare, but I think that we are the highest). As a means of comparison, ASOR has about the same number of donors as the American Academy of Religion (AAR), and they have almost 10,000 members! Moreover, the aggregate level in dollars

of gifts and non-federal received as more than four times the amount raised by AAR. The comparisons are similar for most other learned societies.

You may have noticed that you have not seen an Annual Fund appeal letter year this fiscal year. The reason is that we haven't mailed one. There are two reasons: 1) We have had staffing challenges that made getting the hard-copy letter in the mail difficult. 2) We have been focusing our energies on the so-called "quiet phase" of our building campaign. In consultation with Ed Wright (Development Chair), we have been hoping that we could take that campaign public when we send out a letter in December. We have received \$636,000 in gifts and pledges, so we are indeed very close to being able to go public. Hopefully we'll receive a couple large pledges during the Annual Meeting and be able to send out the Annual Appeal letter with that announcement. Stay tuned!

In terms of dollars raised, we are way ahead of last year. This is primarily due to several large gifts for the building fund that have already been received. Last year we received almost \$500,000 in gifts and non-federal grants. I think that we will match that level this fiscal year, but we will need work especially hard to attract gifts to the Annual Fund (we still need that unrestricted support, and many of our most generous donors are giving large gifts to the building fund). FY19 will be a year where a balance between building gifts and unrestricted gifts will be especially important.

Priorities—Where do we go next?

In what I have written above, I have stressed that ASOR is stable and doing well. That is certainly true. At the same time, the move to Alexandria and two or three office moves in the past 18 months have stretched our staff and our capacities.

It is the Board's responsibility to set priorities, so I hope that the following words are taken as food for thought rather than being prescriptive advice from the Executive Director.

In the above pages, I have outlined what I think are the most important priorities for continuity of our services and products. I also have outlined ways that we can maintain and grow our resources and revenue.

Yet, there is one thing that is missing, and I am finding it increasingly challenging to oversee advancement of our other goals with that one thing—*we need to raise the funds for a new building as soon as we can so that we can move into a new office*. We do not have space at Virginia Theological Seminary to hire the number of staff need to run ASOR (including ASOR Cultural Heritage Initiatives).

I am thrilled (and humbled) at the progress that has been made to date. We have received \$625,000 in pledges and gifts. That amount is amazing. In speaking with our past treasurer Sheldon Fox this past week, he commented the ASOR he knew when he started as treasurer in 2007 would not have raised that amount of money so quickly.

As I think about what we need to do at the end of 2018 and at the beginning of 2019, raising the additional funds need is a the highest of my priority lists. Please know that I have been working tirelessly on doing what I can to promote this cause, and my travel schedule will continue to be intense until we reach our goal.

I am very pleased that discussions about the building and our fundraising are prominent on the EC and board agendas. I look forward to continuing to work with Sharon Herbert (Chair of the Building Campaign Cabinet), Susan Ackerman, and the rest of the Campaign Cabinet on soliciting gifts. I also want to conclude my Executive Director's report with an appeal for help and participation. I do not see anything else as more important and more critical to ASOR's success in the near and long term. I hope that each of you will consider what you might give or pledge. Just as important, I hope that you will work with the Campaign Cabinet and me to identify other non-Trustee donors who might help us in the quiet phase of our campaign.