

Appendix to December 2022 Meeting Minutes

Approved Consent Agenda

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Minutes of November Meeting

Submitted by Vicky Harris

Minutes

GIFCT-US Board Meeting

Voting members: Sharon Carder-Jackson, Vicky Harris, Jan Moré, Jim Soder, Steve Tracy

Sue Tomaszewski joined 4:20 pm

Mary Hestand joined 4:45 pm

Non-voting attendees: Rita Mercer, Lois DaSilva Knapton,

Excused voting members: (excused) Judith Klefman, Brian Patterson, Kathy Randolph, Jay Levin

Absent voting members: Les Triche, Gloria Cisse

Absent non-voting attendees: Brian Patterson. Shruti Tekwani

Welcome – Introductions – Announcements — Jan Moré

Quorum established at 4:05 pm

Define & Approve Consent Agenda: Steve made a motion to accept the consent agenda, Sharon 2nd the motion, no discussion, vote was 5 yes, motion passed.

Reports included in November Consent Agenda:

Meeting Minutes – Vicky Harris
P&L Report
Executive Director’s Report – Brian Patterson
Committee Reports:
 Governance Committee – Jan Moré
 Fundraising Committee – Jan Moré

Old Business: (items carried over from previous meeting)

1. 2023 Budget, Jan is scheduling a meeting to discuss the 2023 budget at 3:30 pm eastern time, December 1, 2022 for all board members and Jim Mishler. Jan will send a google calendar request.

New Business: (items from consent agenda that need further clarification)

1. Topics to Cover for WGI Summit on Nov. 22 Vicky, Jim, Brian presenting.
2. Jan started a case statement with, “The Intentional Board – Laws 1-3”.
 1st Law: All get on the same page: Case Statement
 2nd Law: Law of the kingpin:
 Did not get to 3rd Law:

Next Meeting:

December 15, 2022
at 4 pm Eastern/3 pm Central/2 pm Mountain/1 pm Pacific

Adjournment: Vicky made a motion to adjourn at 6 pm. Sharon second the motion. Meeting adjourned.

September Treasurer’s Report

Submitted by Steve Tracy

TREASURER'S REPORT

Glasser Institute for Choice Theory - US
September 2022

Prepared by: Stephen Tracy

Presented: November 17, 2022



Financial Summary for September 2022



Income (page 3)

Income for September of 2022 was \$2,485, down from \$5,390 in the previous month.

Expenses (page 4)

Expenses for September of 2022 were \$4,232, up from \$2,386 in the previous month.

Net Income (page 5):

Net Income for September of 2022 was (\$1,747), down from \$3,004 in the previous month.

Reconciliation (page 6)

All income and expenses have been reconciled with the bank and merchant statements.

Budget Tracker (page 7):

This page provides a comparison between budgeted and actual income and expenditures for 2022, by month. The data show that through September of 2022, income has been **\$35,529** below budget while expenditures have come in **\$19,927** below budget. Actual net income for the year through September was **\$7,642**, compared to a budgeted net income of **\$23,244** for the same period – meaning that, from a net income perspective, we were **\$15,602** worse off than we had planned to be at this point in the 2022 budget year.

Stephen Tracy
Treasurer

Income

Income Source	Quantity	Net Income to GIFCT
Faculty Membership	1	\$ 75.00
Retired Faculty Membership	1	\$ 45.00
Certified Membership	2	\$ 160.00
Associate Membership	1	\$ 65.00
Colleague Membership	0	\$ -
Student Membership	0	\$ -
Miscellaneous Income - Savings	0	\$ 0.03
Conferences	0	\$ -
CEUs	0	\$ -
Certification Week	0	\$ -
Basic Intensive Training	15	\$ 1,200.00
Advanced Intensive Training	0	\$ -
Glasser Quality Schools	0	\$ -
Products (Habit Cards, Brain Chart)	1	\$ 10.50
Online Products - Postage	0	\$ 3.50
Branded Online Courses - (LLw/CT)	0	\$ -
Branded Online Courses - Role Play	0	\$ -
Online Basic Training - Profit Share	0	\$ -
To Creator	0	\$ -
Donations	5	\$ 926.12
Total Income:		\$ 2,485.15

Expenditures

Expenditures	Amount
Postage	\$ 3.49
Google Voice	\$ 26.33
Mailchimp	\$ 95.63
	\$ -
Quickbooks	\$ 90.61
Merchant Fees	\$ 100.71
OBT Payments	\$ -
Executive Director	\$ 500.00
Office Expense	\$ 6.39
Webmaster & Data Manager	\$ -
Online Product Commissions	\$ 726.30
Website & Apps	\$ 2,682.50
Total Expenditures:	\$ 4,231.96

Financial Summary for September 2022

Profit and Loss
September 2022

	TOTAL
Income	
4060 Membership	345.00
4580 Miscellaneous Income	0.03
4589 Affiliate Commissions	26.12
Total 4580 Miscellaneous Income	26.15
4880 Basic Intensive	1,200.00
4975 Online Products	14.00
4979 Donations Received	900.00
Total Income	\$2,485.15
GROSS PROFIT	\$2,485.15
Expenses	
6050 Accounting	90.61
6100 Advertising & Marketing	95.63
6350 PayPal Fees	97.51
6352 Stripe Charges	3.20
6450 Website & Apps	2,682.50
6700 Director's Fees	500.00
7300 Office Expense	6.39
7310 Online Product Commissions	726.30
7500 Postage	3.49
7900 Telephone	26.33
Total Expenses	\$4,231.96
NET OPERATING INCOME	\$ -1,746.81
NET INCOME	\$ -1,746.81

Reconciliation of Accounts



Reconcile Checking Account	
Beginning of Month Checking Balance	\$ 50,121.31
Transfers to/from (-/+) Savings	\$ -
Deposits to Checking Account	\$ 26.12
Income through PayPal	\$ 2,696.49
Income through Stripe	\$ 96.80
Expenses Paid from Checking	\$ 5,021.25
Calculated Ending Month Balance	\$ 47,919.47
Checking Balance from Bank Statement	\$ 47,919.47

Reconcile Transactions to P&L	
Income	
GIFCT Net Income from Checking Account	\$ 26.12
GIFCT Net Income from PayPal	\$ 2,281.49
GIFCT Net Income from Stripe	\$ 76.80
Income to Savings	\$ 0.03
	\$ 2,384.44
Expenses	
GIFCT Expenses Paid from Checking	\$ 4,131.25
Calculated Net Income for Month	\$ (1,746.81)
Net Income from P&L	\$ (1,746.81)

These values should be the same if accounts are balanced.

Budget Tracker for September 2022



	Expenses	Expenses		Income	Income		Net
	<u>Budgeted</u>	<u>Actual</u>	<u>Difference</u>	<u>Budgeted</u>	<u>Actual</u>	<u>Difference</u>	<u>Difference</u>
Jan	\$ 2,882.50	\$ 1,387.08	\$ (1,495.42)	\$ 8,090.00	\$ 6,434.30	\$ (1,655.70)	\$ (160.28)
Feb	\$ 9,749.50	\$ 5,466.63	\$ (4,282.87)	\$ 9,590.00	\$ 3,711.03	\$ (5,878.97)	\$ (1,596.10)
March	\$ 9,997.36	\$ 4,123.76	\$ (5,873.60)	\$14,595.00	\$ 9,966.06	\$ (4,628.94)	\$ 1,244.66
April	\$ 5,645.50	\$ 1,540.07	\$ (4,105.43)	\$ 6,340.00	\$ 4,494.53	\$ (1,845.47)	\$ 2,259.96
May	\$ 2,749.50	\$ 6,688.30	\$ 3,938.80	\$ 3,590.00	\$ 3,004.33	\$ (585.67)	\$ (4,524.47)
June	\$ 3,010.03	\$ 4,608.59	\$ 1,598.56	\$ 4,095.00	\$ 4,659.53	\$ 564.53	\$ (1,034.03)
July	\$ 2,999.50	\$ 3,471.52	\$ 472.02	\$ 8,990.00	\$ 1,401.03	\$ (7,588.97)	\$ (8,060.99)
Aug	\$ 7,176.34	\$ 2,385.63	\$ (4,790.71)	\$ 8,490.00	\$ 5,390.03	\$ (3,099.97)	\$ 1,690.74
Sept	\$ 9,620.36	\$ 4,231.96	\$ (5,388.40)	\$13,295.00	\$ 2,485.15	\$ (10,809.85)	\$ (5,421.45)
YTD	\$53,830.59	\$ 33,903.54	\$ (19,927.05)	\$77,075.00	\$41,545.99	\$ (35,529.01)	\$ (15,601.96)
Net Income to date Per Budget:			\$ 23,244.41				
Net Income to date Actual:			\$ 7,642.45				
			\$ (15,601.96)	Net Income to date is \$15,602 less than budgeted.			

October Treasurer's Report

Submitted by Steve Tracy

TREASURER'S REPORT

Glasser Institute for Choice Theory - US

October 2022

Prepared by: Stephen Tracy

Presented: December, 2022



Financial Summary for October 2022



Income (page 3)

Income for October of 2022 was \$5,267, up from \$2,485 in the previous month.

Expenses (page 4)

Expenses for October of 2022 were \$1,836, down from \$4,232 in the previous month.

Net Income (page 5):

Net Income for October of 2022 was \$3,431, up from (\$1,747) in the previous month.

Reconciliation (page 6)

All income and expenses have been reconciled with the bank and merchant statements.

Budget Tracker (page 7):

This page provides a comparison between budgeted and actual income and expenditures for 2022, by month. The data show that through October of 2022, income has been **\$34,502** below budget while expenditures have come in **\$21,590** below budget. Actual net income for the year through October was **\$11,073**, compared to a budgeted net income of **\$23,985** for the same period – meaning that, from a net income perspective, we were **\$12,912** worse off than we had planned to be at this point in the 2022 budget year.

Stephen Tracy
Treasurer

Income

Income Source	Quantity	Net Income to GIFCT
Faculty Membership	1	\$ 75.00
Retired Faculty Membership	0	\$ -
Certified Membership	1	\$ 80.00
Associate Membership	1	\$ 65.00
Colleague Membership	0	\$ -
Student Membership	5	\$ 175.00
Miscellaneous Income - Savings	0	\$ 0.03
Conferences	0	\$ -
CEUs	0	\$ -
Certification Week	0	\$ -
Basic Intensive Training	19	\$ 1,520.00
Advanced Intensive Training	0	\$ -
Glasser Quality Schools	0	\$ 116.00
Products (Habit Cards, Brain Chart)	1	\$ 14.50
Online Products - Postage	0	\$ -
Branded Online Courses - (LLw/CT)	2	\$ 54.00
Branded Online Courses - Role Play	3	\$ 180.00
Online Basic Training - Profit Share	3	\$ 1,020.00
To Creator	0	\$ 17.50
Donations	2	\$ 1,950.00
Total Income:		\$ 5,267.03

Expenditures

Expenditures	Amount
Postage	\$ 17.97
Google Voice	\$ 26.33
Mailchimp	\$ 95.63
	\$ -
Quickbooks	\$ 90.61
Merchant Fees	\$ 146.80
OBT Payments	\$ -
Executive Director	\$ 500.00
Office Expense	\$ 6.40
Webmaster & Data Manager	\$ 930.00
Online Product Commissions	\$ -
Website & Apps	\$ 22.50
Total Expenditures:	\$ 1,836.24

Financial Summary for October 2022



	TOTAL
Income	
4060 Membership	395.00
4580 Miscellaneous Income	0.03
4880 Basic Intensive	1,520.00
4970 Branded Online Courses	1,286.00
4979 Donations Received	1,950.00
5200 Glasser Quality Schools	116.00
Total Income	\$5,267.03
GROSS PROFIT	\$5,267.03
Expenses	
6050 Accounting	90.61
6100 Advertising & Marketing	95.63
6350 PayPal Fees	67.92
6352 Stripe Charges	78.88
6450 Website & Apps	22.50
6700 Director's Fees	500.00
7300 Office Expense	6.40
7335 Webmaster & Data Manager	930.00
7500 Postage	17.97
7900 Telephone	26.33
Total Expenses	\$1,836.24
NET OPERATING INCOME	\$3,430.79
NET INCOME	\$3,430.79

Reconciliation of Accounts



Reconcile Checking Account		Reconcile Transactions to P&L	
Beginning of Month Checking Balance	\$ 47,919.47	GIFCT Net Income from Checking Account	\$ 1,850.00
Transfers to/from (-/+) Savings	\$ -	GIFCT Net Income from PayPal	\$ 1,766.08
Deposits to Checking Account	\$ 1,850.00	GIFCT Net Income from Stripe	\$ 1,989.12
Income through PayPal	\$ 1,766.08	Income to Savings	\$ 0.03
Income through Stripe	\$ 1,989.12		\$ 5,605.23
Expenses Paid from Checking	\$ 1,689.44	Expenses	
		GIFCT Expenses Paid from Checking	\$ 2,174.44
Calculated Ending Month Balance	\$ 51,835.23	Calculated Net Income for Month	\$ 3,430.79
Checking Balance from Bank Statement	\$ 51,835.23	Net Income from P&L	\$ 3,430.79

These values should be the same if accounts are balanced.

Budget Tracker for October 2022



	Expenses	Expenses		Income	Income		Net
	Budgeted	Actual	Difference	Budgeted	Actual	Difference	Difference
Jan	\$ 2,882.50	\$ 1,387.08	\$ (1,495.42)	\$ 8,090.00	\$ 6,434.30	\$ (1,655.70)	\$ (160.28)
Feb	\$ 9,749.50	\$ 5,466.63	\$ (4,282.87)	\$ 9,590.00	\$ 3,711.03	\$ (5,878.97)	\$ (1,596.10)
March	\$ 9,997.36	\$ 4,123.76	\$ (5,873.60)	\$ 14,595.00	\$ 9,966.06	\$ (4,628.94)	\$ 1,244.66
April	\$ 5,645.50	\$ 1,540.07	\$ (4,105.43)	\$ 6,340.00	\$ 4,494.53	\$ (1,845.47)	\$ 2,259.96
May	\$ 2,749.50	\$ 6,688.30	\$ 3,938.80	\$ 3,590.00	\$ 3,004.33	\$ (585.67)	\$ (4,524.47)
June	\$ 3,010.03	\$ 4,608.59	\$ 1,598.56	\$ 4,095.00	\$ 4,659.53	\$ 564.53	\$ (1,034.03)
July	\$ 2,999.50	\$ 3,471.52	\$ 472.02	\$ 8,990.00	\$ 1,401.03	\$ (7,588.97)	\$ (8,060.99)
Aug	\$ 7,176.34	\$ 2,385.63	\$ (4,790.71)	\$ 8,490.00	\$ 5,390.03	\$ (3,099.97)	\$ 1,690.74
Sept	\$ 9,620.36	\$ 4,231.96	\$ (5,388.40)	\$ 13,295.00	\$ 2,485.15	\$ (10,809.85)	\$ (5,421.45)
Oct	\$ 3,499.50	\$ 1,836.24	\$ (1,663.26)	\$ 4,240.00	\$ 5,267.03	\$ 1,027.03	\$ 2,690.29
YTD	\$57,330.09	\$35,739.78	\$ (21,590.31)	\$81,315.00	\$ 46,813.02	\$ (34,501.98)	\$ (12,911.67)
Net Income to date Per Budget:		\$ 23,984.91					
Net Income to date Actual:		\$ 11,073.24					
			\$ (12,911.67)	Net Income to date is \$12,911.67 less than budgeted.			

November Treasurer's Report

Net Income Year-to-Date: \$10,058.09

TREASURER'S REPORT

Glasser Institute for Choice Theory - US
November 2022

Prepared by: Stephen Tracy

Presented: December, 2022



Financial Summary for November 2022

Income (page 3)

Income for November of 2022 was \$2,132, down from \$5,267 in the previous month.

Expenses (page 4)

Expenses for November of 2022 were \$3,102, up from 1,836 in the previous month.

Net Income (page 5):

Net Income for November of 2022 was (\$970), down from \$3,431 in the previous month.

Reconciliation (page 6)

All income and expenses have been reconciled with the bank and merchant statements.

Budget Tracker (page 7):

This page provides a comparison between budgeted and actual income and expenditures for 2022, by month. The data show that through November of 2022, income has been **\$35,110** below budget while expenditures have come in **\$21,238** below budget. Actual net income for the year through November was **\$10,103**, compared to a budgeted net income of **\$23,975** for the same period – meaning that, from a net income perspective, we were **\$13,872** worse off than we had planned to be at this point in the 2022 budget year.

Stephen Tracy
Treasurer



Income

Income Source	Quantity	Net Income to GIFCT
Faculty Membership	0	\$ -
Retired Faculty Membership	1	\$ 45.00
Certified Membership	0	\$ -
Associate Membership	1	\$ 65.00
Colleague Membership	0	\$ -
Student Membership	2	\$ 70.00
Miscellaneous Income - Savings	0	\$ 0.03
Conferences	0	\$ -
CEUs	0	\$ -
Certification Week	0	\$ -
Basic Intensive Training	1	\$ 80.00
Advanced Intensive Training	0	\$ -
Glasser Quality Schools	1	\$ 37.00
Products (Habit Cards, Brain Chart)	0	\$ -
Online Products - Postage	0	\$ -
Branded Online Courses - (LLw/CT)	0	\$ 400.00
Branded Online Courses - Role Play	0	\$ -
Online Basic Training - Profit Share	3	\$ -
To Creator	0	\$ -
Donations	2	\$ 1,434.84
Total Income:		\$ 2,131.87

Expenditures

Expenditures	Amount
Postage	\$ -
Google Voice	\$ 25.92
Mailchimp	\$ 95.63
Conference Expenses	\$ 2,000.00
Quickbooks	\$ 90.61
Merchant Fees	\$ 68.72
OBT Payments	\$ -
Executive Director	\$ 500.00
Office Expense	\$ 166.20
Webmaster & Data Manager	\$ -
Online Product Commissions	\$ -
Bank Charges	\$ 35.00
Website & Apps	\$ 120.00
Total Expenditures:	\$ 3,102.08

Reconciliation of Accounts



Reconcile Checking Account	
Beginning of Month Checking Balance	\$ 51,835.23
Transfers to/from (-/+) Savings	\$ -
Deposits to Checking Account	\$ 25.38
Income through PayPal	\$ 1,267.70
Income through Stripe	\$ 680.13
Expenses Paid from Checking	\$ 3,823.45
Calculated Ending Month Balance	\$ 49,984.99
Checking Balance from Bank Statement	\$ 49,984.99

Reconcile Transactions to P&L	
Income	
GIFCT Net Income from Checking Account	\$ 25.38
GIFCT Net Income from PayPal	\$ 1,267.70
GIFCT Net Income from Stripe	\$ 680.13
Income to Savings	\$ 0.03
	\$ 1,973.24
Less Reserve for WGI	\$ 1,933.24
Expenses	
GIFCT Expenses Paid from Checking	\$ 2,903.45
Calculated Net Income for Month	\$ (970.21)
Net Income from P&L	\$ (970.21)

These values should be the same if accounts are balanced.

Budget Tracker for November 2022

	Expenses	Expenses		Income	Income		Net
	<u>Budgeted</u>	<u>Actual</u>	<u>Difference</u>	<u>Budgeted</u>	<u>Actual</u>	<u>Difference</u>	<u>Difference</u>
Jan	\$ 2,882.50	\$ 1,387.08	\$ (1,495.42)	\$ 8,090.00	\$ 6,434.30	\$ (1,655.70)	\$ (160.28)
Feb	\$ 9,749.50	\$ 5,466.63	\$ (4,282.87)	\$ 9,590.00	\$ 3,711.03	\$ (5,878.97)	\$ (1,596.10)
March	\$ 9,997.36	\$ 4,123.76	\$ (5,873.60)	\$14,595.00	\$ 9,966.06	\$ (4,628.94)	\$ 1,244.66
April	\$ 5,645.50	\$ 1,540.07	\$ (4,105.43)	\$ 6,340.00	\$ 4,494.53	\$ (1,845.47)	\$ 2,259.96
May	\$ 2,749.50	\$ 6,688.30	\$ 3,938.80	\$ 3,590.00	\$ 3,004.33	\$ (585.67)	\$ (4,524.47)
June	\$ 3,010.03	\$ 4,608.59	\$ 1,598.56	\$ 4,095.00	\$ 4,659.53	\$ 564.53	\$ (1,034.03)
July	\$ 2,999.50	\$ 3,471.52	\$ 472.02	\$ 8,990.00	\$ 1,401.03	\$ (7,588.97)	\$ (8,060.99)
Aug	\$ 7,176.34	\$ 2,385.63	\$ (4,790.71)	\$ 8,490.00	\$ 5,390.03	\$ (3,099.97)	\$ 1,690.74
Sept	\$ 9,620.36	\$ 4,231.96	\$ (5,388.40)	\$13,295.00	\$ 2,485.15	\$ (10,809.85)	\$ (5,421.45)
Oct	\$ 3,499.50	\$ 1,836.24	\$ (1,663.26)	\$ 4,240.00	\$ 5,267.03	\$ 1,027.03	\$ 2,690.29
Nov	\$ 2,749.50	\$ 3,102.08	\$ 352.58	\$ 2,740.00	\$ 2,131.87	\$ (608.13)	\$ (960.71)
YTD	\$60,079.59	\$38,841.86	\$ (21,237.73)	\$84,055.00	\$ 48,944.89	\$ (35,110.11)	\$ (13,872.38)
Net Income to date Per Budget:			\$ 23,975.41				
Net Income to date Actual:			\$ 10,103.03				
			\$ (13,872.38)	Net In come to date is \$13,872.38 less than budgeted.			

Glasser Institute for Choice Theory - US

Profit and Loss

November 2022

	TOTAL
Income	
4060 Membership	180.00
4580 Miscellaneous Income	0.03
4589 Affiliate Commissions	25.38
Total 4580 Miscellaneous Income	25.41
4880 Basic Intensive	80.00
4970 Branded Online Courses	400.00
4979 Donations Received	1,409.46
5200 Glasser Quality Schools	37.00
Total Income	\$2,131.87
GROSS PROFIT	\$2,131.87
Expenses	
5100 Conference Expenses	2,000.00
6050 Accounting	90.61
6100 Advertising & Marketing	95.63
6300 Bank Charges	35.00
6350 PayPal Fees	46.85
6352 Stripe Charges	21.87
6450 Website & Apps	120.00
6700 Director's Fees	500.00
7300 Office Expense	166.20
7900 Telephone	25.92
Total Expenses	\$3,102.08
NET OPERATING INCOME	\$ -970.21
NET INCOME	\$ -970.21

Executive Director Report

Submitted by Brian Patterson

December 8, 2022

Collaborating with Vicki on planning for the conference

Corresponding with requests for information

Working with Marcus Hubbard on his dissertation

As usual, we have had a few requests for resources and information from individuals who are in PhD programs. I am supporting, following up, and connecting them with our network. We also have several contacts from outside the US which I refer to Kim.

We have had a few inquiries about the Affiliate Program, too.

There are several other ‘irons in the fire’ but at my day job it is the end of the year and end of the Employee Review cycle, so I am very busy with that! I have lots of Instructor Certifications to do.

WGI Report

Submitted by Shruti Tekwani

- We had some issues with the WGI server and found that people were getting error messages when they would visit the website. We decided to spend the money to upgrade because having a website is extremely important to the organization.
- The board voted on authorizing the executive Director to spend up to \$1000 in time sensitive situations but to let the finance committee know when that happens. Other than that, all financial decisions would be run by the board
- Kim would like to step down as the executive Director but will stay on until her replacement is hired. She announced that she will stay no later than October 1, 2023.
- Kim brought up the concern that we currently have five executive members on the committee and all of us are rotating out, which leave the board with no executive committee for next year. We talked about the possibility of some of us staying on the executive committee but not on the board for next year. When discussing this, there was one member that voted zero so that stop the voting. That member has 30 days to discuss it with the person who moved it and we will revisit at the next meeting.
- We had a Glasser quality school committee report by Bette. She reported that not all strategic planning ideas have been discussed and they are still working on it. They will also be reaching out to Boba to discuss quality schools in Europe. They are also talking about with the membership fee for Glasser quality schools might be.
- We voted on the board election updates and the new MO reps:
Japan: Aiko Kakitani
Australia: Jane Newman
US: Rita Thornton-Mercer
Iran: Zahra Khoshnevisan
- Training policy feedback was talked about. There was feedback received from five different MOs and they are waiting on Australia.
- Sonia reported on the professional development day on October 20. There were 12 people in both sessions
- There is a scheduled summit for November 22nd which the MO's have been emailed about

Committee Reports

1a. Board Search Sub-Committee

Submitted by Judith Klefman

Conducted two interviews. Results will be presented at the December board meeting.

4a. Membership Sub-Committee

Submitted by Judith Klefman

Since the beginning of November, we've held two meetings. The next meeting is scheduled for Wednesday, December 14 at 1:30 p.m. Pacific. We are currently discussing the following:

- +Benefits of membership
- +Retaining current members
- +Re-engaging with recent members who have yet to pay dues

Meetings are recorded: <https://wgi-s-school.thinkific.com/courses/membership>

4b. Marketing Sub-Committee

Submitted by Steve Tracy

The Marketing Committee met on November 14 and 28. Members include Vicki Harris, Rena Haskins, Judith Klefman, Jay Levin, Jan Moré, Michael Rice and Steve Tracy.

The Committee continued to refine its goals for 2023. Our focus is on:

- Increasing membership from 159 to 200;
- Achieving at least 150 “in person” attendees at our 2023 National Conference;
- Increasing the number of people who successfully complete training in CT/RT;
- Growing the number of organizations that adopt CT/RT as a guiding philosophy for their work;
- Increasing the number of higher education programs that include CT/RT in their curricula; and
- Increasing the annual sales of products offered by GIFCT-US.

At our next meeting, we will consider a detailed protocol describing the process by which Choice Theory can be promoted to businesses, schools and non-profit organizations.

We continue to solicit blog posts for use in our social media campaign.

Vicki Harris has conferred regularly with the Committee regarding plans for the 2023 National Conference (July 5 – 8 in St. Louis). Consideration is being given to offering a “virtual” option for those who are unable to attend in person.

The Marketing Committee will meet next on December 12th.

Region Updates

NW Region

Submitted by Judith Klefman

November and December meetings were diverted due to them falling on holiday weekends (Thanksgiving and Christmas). Links to *Difficult Discussions in Diversity* (3rd Saturday of each month) was sent to the mailing list. December’s newsletter will include a survey to determine how people want to proceed.