

Minutes GIFCT-US Board Meeting

Wednesday, December 20, 2023

7pm Eastern/6pm Central/5pm Mountain/4pm Pacific

Voting members present: Sharon Carder-Jackson, Gloria Cissé, Vicky Harris, Mary Hestand, Judith Klefman, Kathy Randolph, Sue Tomaszewski, Steve Tracy. Mary left at 9:20 pm.

Non-voting attendees: Brian Patterson

Voting members absent: Jay Levin, Jim Soder

Welcome–Introductions–Announcements - Sharon Carder-Jackson

- Thank you to all GIFCT-US Board members for the beautiful flowers, cards, and understanding words at the passing of my husband.
- Steve Tracy will act as our timekeeper to help stay on track.

Quorum Established: at 7:05 pm with 8 board members.

Consent Agenda: Kathy made a motion to accept the consent agenda, Steve 2nd, no discussion, vote: 8 yes votes, motion passed.

Reports included in Consent Agenda:

1. November 2023 Minutes – Vicky Harris
2. Counseling Report – Vicky Harris
3. NW Region Reports – Judith Klefman

Old Business: No old business to discuss.

New Business:

I. Executive Director Report – Brian Patterson

- 2000+ books from Carleen were picked up recently and are being stored at Brian's house. He set up an account at Stamps.com. to help with mailing and postage. He spoke with Carleen about sending a free book for those going through basic training. He has class meeting kits, charts (326) and more resources. There are 340 Identity Society books available. He will take some to the conference in July.
- He plans on sending some to Schools. He has books that are signed books by other authors that were sent to Dr. Glasser.
- He has a box of Glasser books in foreign languages he will bring to the international conference.
- Brian is currently working with an instructional designer that develops AI for small businesses and non-profits. The cost is \$50 a month, \$500 upfront fee. He creates posts to put in social media. Brian is considering resurrecting the Mental Health and Wellness app again.
- He has finished his senior faculty certification recently.
- He wants to help faculty members to get through the process.
- Lots of requests for training from other countries and he is forwarding the request to the appropriate people.

- A former student in Nebraska is an attorney and he is helping us with our legal status. We need an attorney in Texas to represent us.
- Coaching certification exam 12/27/2023. NBCC Kim Olver's Academy of Choice.
- Brian wants to strengthen our regions. Kathy Randolph has resigned from the board. Brian has recommended Kylie Callaway as being recommended to fill her position for the Mid-American region representative. (The PPM states the ED handles the replacement).
 - Judith made a motion to accept Kylie Callaway's nomination to the board to finish out Kathy's term. Steve 2nd the motion. Discussion: When will he start? January 2024 board member. Judith asked about who his mentor would be. Sharon stated she will look for a mentor in January. Vote: 8 yes. Motion passed. Brian will contact Kylie about the decision. Many thanks to Kathy for her service and hopes she continues volunteering.
- Has a financial advisor in Kentucky to go through the basic training and how this will work in financial planning. Vicky mentioned she has a couple of people needing basic training and wondered if they could go through the program with his person.

Board Officers Selection – Judith Klefman

Position of Executive Director, President, Treasurer and Secretary of the Board:

Judith recommended Steve Tracy as Treasurer, Vicky Harris as Secretary, Sharon Carder-Jackson as President (not interim), and Brian Patterson as ED. Kathy made a motion to accept Steve, Vicky, Sharon and Brian in their respectful position, Gloria 2nd the motion. Discussion: Sharon asked if Board members wanted the 4 to step away during the vote. Judith stated no. Vote: 8 motion passed.

Steve made a **motion to nominate Rena Hospkins** for the West Region representative. Vicky 2nd the motion. Discussion: Because she is not certified do we need to go through the PPM? Sharon stated the PPM contradicts itself. She is an associate member which means she has attended the basic training. She will be doing a basic practicum in January. She already contributes on a regular basis. She is actively pursuing becoming certified. Steve added to the motion: "She does not meet the certification requirement. She does meet the associate level. The Board waives the requirement that she be certified". Judith 2nd the amended motion. Vote: 8 yes. Motion passed. Steve will notify Rena.

Kathy made a motion to **nominate Marcus Hubbard** to the Board of Directors at Large position and he is not certified at this time due to the Institute cancelling the course. Vicky 2nd the motion. Discussion: He will do the certification when it is available. He is finishing up his dissertation on CT Leadership. Others were excited about his youth coming on to the board. Vote: 8 yes. Motion passed. Brian Patterson will contact Marcus.

Gloria was sent to a zoom room while Mary made a motion to **recommend Gloria Cisse** to the Southeast region, Steve 2nd. Discussion: Judith praised Gloria, discussed her presentation in Ireland, and other programs she is bringing into the organization. Taking the lead on the Glasser Scholar program Vote: 7. Motion passed. Gloria was welcomed back and notified of the board decision.

Mary was sent to a zoom room while Judith made a motion to recommend Mary Hestand to the Sunbelt region for a second term. Sue 2nd the motion. Discussion: retiring after 40 years

and will have more time to devote to Glasser organization. Vote: 7 yes. Motion passed. Mary returned to the meeting and notified of the board decision.

Mountain state is not represented. Will need to look for someone in that region.

November 2023 Treasurer Report: See attached Treasurer Report. Steve introduced Kristen Howe as the new financial manager and has an extensive background in finance.

Marketing Report –

- Steve Tracy & Vicky Harris: Meet 2 times. Rena, Vicky, Jay, are on the committee. Jay made the observation that we have drifted over to operation instead of marketing. Where are the boundaries for the marketing committee? What is the job of marketing committee? A letter was sent to the ED of the W. Clement and Jesie V. Stone Foundation in November and we have not gotten a response yet. Brian will forward a copy of the letter to all board members.
- **Outreach in higher education universities.** Wanting leads from members of the board. Bob Wubbolding would be the best to address this topic. Goal to find out how many colleges and universities.
- **Student and Early (Emerging) Practitioner (Clinicians) chapter** being rekindled. What are the benefits? Students would be assigned mentors, have access to programs, minimal membership fee, and reduced rate to conference. Access to all on-line programs. We will help with research for their projects. Emerging clinicians and mentees. How to include people new to the profession. Offering a discount even a couple of years after school to keep them in the program. Sue suggested expanding it to early practitioners or some way to avoid consistently losing them when they graduate.
- **Steve reports he wants the school committee** invited to join the marketing committee for a meeting on steps to increase the Glasser Quality School numbers. Steve will contact Jim Mishler for this meeting.
- **Steve introduced the concept of a “Glasser Quality Enterprise”:** This is defined as organizations that are Glasser focused and have them to “certified” organizations. Such as non-profits, businesses, government agencies, which would be trained like the QS program. **Had a conversation with Sue this morning about a program in Rhode Island, Justice Assistance. They would have a coach to help the business achieve the distinction, encourage research, and a local philanthropic organization to underwrite the cost.**
- **Conference marketing update: will wait for conference update.**
- **Monthly Dashboard** – Steve Tracy renamed the monthly organizational status dashboard. Just started gathering information so some areas are blank. Need key numbers in front of us to keep us aware of where we are in the organization. Tracking membership, training (conduct at least one training in one year), active family members, QS, GQE, Financial Status, social media, Donations, Higher Education Presence, Glasser Scholars, Affiliate Relationships, Conference Registration. Steve shared a chart/graph that shows statistics. **See attachment.**

Proposed 2024 Budget – Steve Tracy

Steve presented a 2024 budget. Steve made a motion to accept the 2024 proposed budget, Judith 2nd Discussion: Vicky asked about adding money for marketing like Eventbrite and other expenses towards the conference. Board Expenses is \$100. ST. Louis reimbursement was ½

the cost of rooms. This year 2 days of Board meetings, \$221 a night, total of \$2800 to match the budget or GIFCT-US cannot reimburse people. The board meeting is not associated with the conference expenses. Vicky suggested we put the money in or we understand we are paying our own way. Judith asked if anyone was reimbursed. Vicky stated yes, checks should have been mailed out. Mary and Judith stated they did not get a check. Steve stated he received a check. Steve state the St. Louis conference expense was \$2186.00. Vicky provided the break down previously approved by the board that Brian was to reimburse:

Cost of reimbursement for 1/2 room for board members:
Sue Tomaszewski Reimburse \$398.62 for hotel charge for board meeting.
Sharon Carder-Jackson: Reimburse \$398.62 for hotel charge for board meeting.
Mary Hestand: Reimburse \$411 for hotel charge for board meeting.
Steve Tracy: reimburse \$298.65 for the hotel charge for board meetings.
Judith Klefman: Reimburse \$299.00 for hotel charge for board meetings.
Kathy Randolph: no room charges

Vicky states these payments need to be out of the 2023 budget and not showing in 2024 budget. Sue asked who was to be sending the checks. Vicky stated she sent to Brian. Brian stated he would take care of it. Sharon stated some reneged on not wanting the reimbursement. Vicky stated the board has it in the PPM people were not supposed to ask. Brian stated someone asked to donate to the organization instead of getting their check. Vicky asked who these people were. Brain stated they asked to be anonymous. Judith stated she did not ask to donate her money. Sharon suggested everyone gets their check and if they want to donate, they can do that.

The conference budget should include a marketing budget. Vicky stated no money for marketing until registration money comes in. Steve stated that is a cash flow issue and GIFCT-US should front the money and be paid back.

Judith made a motion to add \$3000 to the board expenses. Vicky 2nd. Discussion: Sue asked for clarification on donations. Steve stated how much we are going to spend. Are we happy with a deficit? Vicky reminded board members that the conference 2023 expenses is not part of this discussion and the board had already voted on the reimbursements, passed them, and was expected to get reimbursed. Vote: 3 yes, 4 no, abstain: Kathy. Motion to add \$3000 does not pass. No Further amendments were discussed. Judith asked what the \$100 will pay for and why have it in there. There were many comments not related to this motion. Vote: 6 yes, 2 no, motion passed. Motin passed. Budget stands as presented.

2024 Conference Update – Vicky: See attachment at end of board minutes report.

Has the MOU been signed yet? Waiting on WGI to make their changes.

Is it in the MOU that states who pays what? If there is a deficit, WGI owes GIFCT-US and if there is a profit GIFCT-US will send WGI 1/2 the profit.

Vicky requested we add the transaction fee to PayPal or stripe as using this is a convenience.

Gloria stated if we sent her the conference information, she could list it on OPC and NASW Georgia. Hoping to have marketing information for the conference soon.

Asking everyone to post this information. Sue asked to clarify who purchased the additional 50 books of Jim Roy. Brian has books that he maybe bringing for the conference.

MOU...Steve wants Brian, Sharon to be invited to sign also. Steve does not want Vicky to be alone on this MOU. Steve wants all the board members to have a copy of the MOU. Sue wants to know what other MOU's have done. Japan ran the last conference from another organization. Columbia, Juan Pablo footed the whole bill, \$40,000-\$60,000. There is a learning curve right now with Lynn and Denzyl as this is the first time they have organized a conference and the first time they have worked together. Brain addressed the need for the MOU with Lynn and Denzyl

WGI December Board Meeting Summary – Sharon C-J

- WGI is setting up a FM, registered in TX and they need an accountant in TX.
- WGI wants to establish a purpose driven board, a mission driven board. They are going to have 9 board members and the MO's will be meeting periodically.
- WGI is having a cash flow problem and wants to have MO's pay what they owe.
- What's Buzzing, 2 issues. Nadia composed it and it is very good.

Goals/Commitments for GIFCT-US 2024 :

Mentors were needed for Rena, Kiley and Marcus. Steve volunteered as a mentor to Rena. Brian said he would mentor Marcus. Judith will mentor Kiley.

Sharon wanted to review our assigned committees, assign tasks and due to the lateness of the hour will wait. She wants us to think about what our goals are overall for the board and our individual commitments to our committees.

Wendall stated this was a "quality meeting" and made comments about his view of the meeting: organization, agenda, RRO was followed, clarification, and specificity. Things got accomplished, Reality based, mutual respect. Quality meeting need satisfying. Please let the record reflect I was quiet for 2 hours 35 minutes.

Next Meeting:

- January 17, 2024 at 7 pm.
- Reports due January 13, 2024, by 12 pm E.

TASK: Steve will notify Rena of vote for board member.

TASK: Brian will notify Marcus of vote for board member.

TASK: Brian will notify Kiley of vote for board member.

TASK: Steve is asking the board to define the boundaries of the marketing committee and what the job of the marketing committee should be and what it is not.

TASK: Steve wants to revisit the communication with the Clement Stone Foundation after the holidays.

TASK: Steve wants to reach out to Bob Wubbolding and discuss with him ways to approach this outreach with universities and colleges.

TASK: Steve will reach out to Jim Mishler with an invitation to attend a marketing committee meeting on Jan. 19, 2024 at 2 pm EST.

TASK: Steve will modify the language for Active Faculty members to include those who are OBT and faculty members supervising and mentoring online basic trainings.

TASK: Brian will issue checks to the remaining board members who have not received their reimbursements.

TASK: Vicky will send the MOU to all board members when she gets it back.

TASK: Brian will mentor Marcus.

TASK: Steve will mentor Rena.

TASK: Judith will mentor Kiley.

TASK: Sharon will send out an email in regard to board goals, individual committees, and get ready to discuss at the January board meeting.

TASK: EVERYONE: Reports are due before or on January 13, 2024 by 12 pm.

TASK: Faculty meeting, Sharon and Vicky will talk after the holiday.

TASK: Committee leaders please have goals ready to discuss in January.

Next Faculty meeting: Feb. 1, 2024 8 pm EST by zoom.

Adjournment: Meeting adjourned at 9:40 pm. Gloria 2nd.

2024 WGI International Conference
Hosted by GIFCT-US
Monthly report update

Committee members: Vicky Harris, Lynn Sumida, Denzyl Witbooi, Sonia Munoz, Nadia,
Absent: Melissa Laundry, Sarah Rudling, Jodi Patterson, Gymy Lynn, Fumiko Hamada

Conference Dates:

WGI International Board meeting: Sunday June 30, 2024 through July 3, 2024.

GIFCT-US Board meeting: Tuesday, July 2-Wednesday, July 3, 2024

Conference opening night: Wednesday, July 3, 2023.

Conference sessions start: Thursday-Saturday, July 4-6, 2024.

Conference closing ceremony: Saturday, July 6, 2024.

Faculty Day: Sunday, July 7, 2024

Training: TBD. (will take place prior to the conference, information from WGI soon)

Location: Palmer House A Hiton Hotel, 17 W Monroe St., Chicago, IL 60603

Conference Title: **Harmony Unleashed**

Conference Subtitle: **Embracing Connection, Igniting Innovations, and Celebrating Growth**

Hotel information: Registration site for the host hotel:

WGI and GIFCT-US Global 2024 Conference Hotel Information:

Palmer House

17 W. Monroe St.

Chicago, IL 60603

Link to our registration: <https://book.passkey.com/go/WilliamGlasserConference>

Keynote Speakers: Contracts are currently being signed.

Leadership: David Veech: The Integral Leadership Model: Creating better leaders and gaining better outcomes.

Counseling and Mental Health: Libby Murdoch: Brain Based: Discover the Neurobiology of CTRT

Education: Dr. Don Parker

Call for presentations: Vicky sent the document to Denise on Saturday, 12.16.23 for Denise to design and send out. Denise sent out the information by email on December 28, 2023. <https://www.surveymonkey.com/r/rfp-wgi-2024>

2026 Conference in Australia: Need information for 2026 conference by June to be able to promote at 2024 conference. Who will this come from?

Faculty Day information: WGI is responsible for the event including the registration and collecting the fee. GIFCT-US will have a toggle button on our landing page for people to be linked to the registration and payment information. It is suggested that WGI have a theme and begin marketing this event when we go live with registration for the conference.

Training: GIFCT-US shared the Brochure they used to promote our 2023 US training. Lynn is heading up this topic and stated she is sending out information to the MOs to see who might be interested in training at the international conference. Lynn and her training committee will work on the details of what type of training they want to offer (certification and faculty training was mentioned).

Tax exempt paperwork was mailed certified with a signature 12/2023. The hope is we will receive that designation in the next couple of months. Palmer House **credit application** needs to be completed by mid-January.

Donation of 50 Books from Jim Roy and Vicky purchased another 50 at \$5 a piece plus shipping.

Glasser Tribute team: Vicky discussed 1 minute tribute videos and a tribute presentation to Dr. Glasser at the opening ceremony. Vicky will contact Jean Seville and Nancy Herrick about organizing and spearheading this project.

Sponsorship information: Vicky shared an example of a sponsorship form designed for the 2023 US conference and discussed how Japan had their own at the 2022 conference. Suggested a need to have sponsors to help defray the cost of an international high quality conference. Vicky is currently working with someone on this project and hopes to have more information in January.

12/11/2023 Vicky introduced Brian Patterson who introduced David Penrose. David shared information on AI chatbot information. David explained “conversational marketing” and how to get leads from using our website. Discussed MailChimp and how it works. Chatbot would go into a google report and sends the information to the target person. It can translate and redirect people on the webpage. There is a one-time fee of \$500, monthly package of \$500 a month and because of Brian Patterson will discount to \$50 a month.

Registration platform: Discussed looking into the cost of Eventbrite and WHOVA. Brian, Vicky and Steve have looked into WHOVA. The minimum package is \$2000 and is a one-time event platform. Purchasing Flex 100 or Pro 100 from Eventbrite to start out and as we sell tickets will move up our packages.

Flex 100, \$9.99 per event, pay as you go for full flexibility*, Pay with your event balance for no upfront costs, Host one event with up to 100 tickets, Send 250 marketing emails a day, Access all-in-one event ticketing and marketing tools.

Pro 100, Free for 14 days, then \$29 per month,
Recurring monthly subscription,
Host unlimited events with up to 100 tickets,
Send 2,000 marketing emails a day,
Access all-in-one event ticketing and marketing tools

Flex 250, \$24.99 per event,
Pay as you go for full flexibility*,
Pay with your event balance for **no upfront costs**,
Host one event with up to 250 tickets,

Send 250 marketing emails a day,
Access all-in-one event ticketing and marketing tools

Pro 250, \$79 per month

Save when hosting frequent events*
Recurring monthly subscription
Host unlimited events with up to 250 tickets
Send 6,000 marketing emails a day.
Access all-in-one event ticketing and marketing tools

MOU: Is being signed by Lynn, Denzyl, and Sonia and discussed with Brian and Vicky as the reason why it is necessary. There is an understanding that we are 2 separate organizations. Lynn wants to remove the discount for members section of their PPM and questions how the ED will know training number and new membership numbers due to the conference. It is their PPM they would need to do that.

Rita is working on the microsite information needed. She will use Dr. Glasser's picture, a picture of the hotel, and one of Chicago. Vicky and Rita both need the combined logo. Rita's goal is to have the information to us before Christmas. **We need a registration link to complete the process.**

WGI newsletter: Will go out the week of 12/18 and Vicky set a soft goal to try to have everything completed so all the information will go out in the newsletter.

Placement of conference information: On the home page, a banner is already listed. A Landing page needs to be created to go to with the conference information. Home page: Description of the conference, flavor of the conference, general information. Click here button to go to the landing page. **WGI would like Denise to add a block in between the conference banner and the donation information.** 4 toggle buttons: Call for Presentations, Palmer House Hotel information, Pre-Conference training information, and Conference registration information. Under the toggles, have a button for Chicago and Faculty Day. Lynn suggested the boxes be made in orange.

Marketing:

Illinois Counseling Association: They do offer advertisement opportunities. They would suggest the Spring issue for advertisement because that newsletter is published in April. Our newsletter has about 2,200 copies produced and circulated. It is also available digitally for our members to view as well. Link to the ICA website:
https://www.ilcounseling.org/page/CONTACT_Ads?&hhsearchterms=%22newsletter%22.
Contact person is Kristin Carlson. Pat Robey was the one who reached out for the information.

CUT OFF DATES:

PUBLISH DATE:

SPRING, 15 - FEB
APRIL SUMMER

NEWSLETTER ADVERTISING RATES

FULL PAGE COLOR \$500

8" wide X 10.5" tall

HALF PAGE COLOR\$300

8" wide X 5 1/4" tall

QUARTER PAGE COLOR\$225

4" wide X 5 1/4" tall

CREDIT CARD SIZE COLOR\$50

3 1/2" wide X 1 3/4" tall

BACK COVER INSIDE (HALF PAGE)\$ 75ADDITIONAL CHARGE

BACK COVER OUTSIDE (HALF PAGE) COLOR\$300ADDITIONAL CHARGE

Indiana Counseling Association: Vicky has emailed asking for information of advertising.

Indiana NASW Association: Vicky has emailed the Indiana Chapter asking for information on advertising.

Submitted by Vicky Harris

TREASURER'S REPORT

Glasser Institute for Choice Theory - US

November 2023

Prepared by: Stephen Tracy, Treasurer

Presented: December 20, 2023



Financial Summary for November 2023



Income (page 3)

Income for November of 2023 was \$687.80, down from \$4,763.53 in the previous month.

Expenses (page 4)

Expenses for November of 2023 were \$2,958.13, down from \$8,861.53 in the previous month.

Funds on Hand (page 5): \$29,858

Net Income (page 6):

Net Income for November of 2023 was (\$2,270.30), up from (\$4,098) in the previous month.

Profit & Loss Statement (page 6)

Reconciliation (page 7)

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

Stephen Tracy
Treasurer

Income

November, 2023



Income Source	Quantity	Net Income to GIFCT
Faculty Membership	1	\$ 75.00
Retired Faculty Membership	0	\$ -
Certified Membership	0	\$ -
Associate Membership	0	\$ -
Colleague Membership	0	\$ -
Student Membership	3	\$ 105.00
Basic Intensive Training	6	\$ 480.00
Advanced Intensive Training	0	\$ -
Certification Week	0	\$ -
Online Basic Training	0	\$ -
Living Life with Choice Theory	1	\$ 27.00
Online Products		\$ 40.00
Donations		\$ 360.80
Miscellaneous Income	0	\$ 0.03
Income:		\$ 1,087.83
Less M. Neilson OBT Refund:		\$ (400.00)
TOTAL INCOME:		\$ 687.83

Expenditures

November, 2023



Expenditures	Amount
Board Expenses	\$ 119.78
Conference Travel	\$ 1,366.62
Cloudways	\$ 24.50
Executive Director	\$ 500.00
Google G-Suite	\$ 6.40
Google Voice	\$ 25.07
Mailchimp	\$ 147.11
Merchant Fees	53.91
Quickbooks	\$ 95.94
Telephone	\$ 9.00
Webmaster & Data Manager	\$ 450.00
Zoom Charges (annual)	\$ 159.80
Total Expenditures:	\$ 2,958.13

Allocations & Funds on Hand

November, 2023



Accounts and Obligations	Account Balance	Allocated Funds	Available Funds
Checking	\$ 41,780.50		\$ 41,780.50
Savings	\$ 3,725.39		\$ 45,505.89
Owed to WG Int'l		\$ 456.00	\$ 45,049.89
Affiliate Instructors		\$ 2,800.00	\$ 42,249.89
Royalties to Creators		\$ 79.10	\$ 42,170.79
Glasser Quality Schools		\$ 951.00	\$ 41,219.79
Student Chapter		\$ 710.00	\$ 40,509.79
Habit Cards		\$ 1,235.00	\$ 39,274.79
West Region		\$ 991.11	\$ 38,283.68
Scholarship Fund		\$ 4,375.91	\$ 33,907.77
OBT Instructors/Creators		\$ 4,050.00	\$ 29,857.77
Conference Revenue		\$ -	\$ 29,857.77
			\$ 29,857.77
Total Allocated Funds		\$ 15,648.12	

Profit & Loss for November, 2023

Income	
4060 Membership	180.00
4580 Miscellaneous Income	0.03
4880 Basic Intensive	480.00
4970 Branded Online Courses	-373.00
4975 Online Products	
4976 Online Products Postage	40.00
Total 4975 Online Products	40.00
4979 Donations Received	360.80
Total Income	\$687.83
GROSS PROFIT	\$687.83
Expenses	
5100 Conference Expenses	
5140 Travel Expenses	1,366.62
Total 5100 Conference Expenses	1,366.62
6050 Accounting	95.94
6100 Advertising & Marketing	147.11
6300 Bank Charges	5.00
6350 PayPal Fees	38.29
6352 Stripe Charges	10.62
6450 Website & Apps	24.50
6700 Director's Fees	500.00
7300 Office Expense	166.20
7335 Webmaster & Data Manager	450.00
7900 Telephone	34.07
8000 Board Expenses	119.78
Total Expenses	\$2,958.13
NET OPERATING INCOME	\$ -2,270.30
NET INCOME	\$ -2,270.30



Reconciliation of Accounts

November, 2023



Reconcile Checking Account	
Beginning of Month Checking Balance	44,089.83
Transfers to/from (-/+) Savings	0.00
Deposits to Checking Account	40.00
Income through PayPal	1,022.51
Income through Stripe	271.38
Expenses Paid from Checking	3,643.22
Calculated Ending Month Balance	41,780.50
Checking Balance from Bank Statement	41,780.50

Reconcile Transactions to P&L	
Income	
GIFCT Net Income from Checking Account	40.00
GIFCT Net Income from PayPal	882.51
GIFCT Net Income from Stripe	216.38
Income to Savings	0.03
Expenses	
GIFCT Expenses Paid from Checking	3,409.22
Calculated Net Income for Month	-2,270.30
Net Income from P&L	-2,270.30

These values should be the same if accounts are balanced.



Monthly Organizational Status Dashboard

Presented to the Board of Directors: December 20, 2023

	Item		
1.	Membership: <ul style="list-style-type: none"> • Paid Members (all) • Student Members 	<u>November 2023</u>	<u>November 2022</u>
2.	Training Competed: <ul style="list-style-type: none"> • Legacy • Other 	<u>November 2023</u>	<u>Last 12 Months</u>
3.	Active Faculty Members:	<u>November 2023</u>	<u>November 2022</u>
4.	Glasser Quality Schools: <ul style="list-style-type: none"> • Aspiring • Recognized 	<u>November 2023</u>	<u>November 2022</u>

5.	Glasser Quality Enterprises:	<u>November 2023</u>	
		0	
6.	Financial Status:	<u>November</u>	<u>2023 YTD</u>
	• Income	\$ 688	\$59,326
	• Net Income	(\$ 2,270)	(\$ 8,225)
	• Funds on Hand	<u>November 2023</u>	<u>November 2022</u>
		\$ 29,858	\$39,129
7.	Social Media	<u>November 2023</u>	<u>Last 90 Days</u>
	• Posts	32	
	• Engagements	5	240
8.	Donations	<u>November 2023</u>	<u>2023 YTD</u>
		\$360	\$4,574
			<u>2022</u>
			\$20,171
9.	Higher Education Presence	<u>November 2023</u>	
10.	Glasser Scholars	<u>New in November</u>	<u>Current Total</u>
11.	Affiliate Relationships		
12.	Conference Registrations	<u>2024 Chicago</u>	<u>2023 St. Louis</u>
		N.A.	40

1. Membership:

- Number of paid memberships, in all membership categories.
- Number of paid student memberships

Source of Data: Executive Director

2. Trainings Completed:

- Legacy: Total number of BIT, AIT, Practicum and Certification trainings completed.
- Other: Total other trainings completed

Source of Data: Training Coordinator, Web/Data Manager & Treasurer

3. Active Faculty Members:

- Number of faculty members who have conducted at least one training during the past 12 months.

Source of Data: Training Coordinator

4. Glasser Quality Schools:

- Number of schools in the process of becoming Glasser Quality Schools
- Number of declared/recognized Glasser Quality Schools

Source of Data: GQS Committee Chair

5. Glasser Quality Enterprises:

- Number of businesses, government agencies and non-profit organizations that have adopted Choice Theory principles as a guide their work.

Source of Data: Marketing Committee Chair

6. Finances:

- Total income and net income (income minus expenses), per the monthly Profit & Loss statement.
- Funds on Hand: Total of GIFT-US Checking & Savings Accounts (Chase Bank)

Source of Data: Treasurer

7. Social Media Engagements:

- Number of GIFCT-US social media posts and number of times that individuals “clicked on” or “viewed” those posts.

Source of Data: Web/Data Manager

8. Donations:

- Dollar amount of donations received, per monthly Profit & Loss statement.

Source of Data: Treasurer

9. Higher Education Presence:

- Number of undergraduate and graduate departments (psychology, counseling, social work, education, business) that have confirmed that Choice Theory, Reality Therapy and/or Lead Management is included in their programs of study.

Source of Data: Marketing Committee Chair

10. Glasser Scholars:

Source of Data: Gloria Cisse & Nancy Herrick

11. Affiliate Relationships:

- Number of individuals who have entered into affiliate relationships with GIFCT-US regarding products and publications.

Source of Data: Executive Director

12. Conference Registrations:

- Number of GIFCT-US members/U.S. Residents with paid registrations

Source of Data: Conference Chair



GIFCT-US Budget 2024

Adopted by the Board of Directors
December 20, 2023

	<u>2023</u> <u>Budget</u>	<u>2024</u> <u>Budget</u>
<u>Income</u>		
4060 · Membership	\$ 10,000	\$ 7,020
4580 · Miscellaneous Income	\$ -	\$ 459
4590 · Conference Income	\$ 60,000	\$ 55,000
4595 · Faculty Retreat	\$ 2,000	\$ -
4840 · Cert Weeks	\$ 1,200	\$ 640
4850 · Institute Commission	\$ -	\$ -
4880 · Basic Intensive	\$ 10,800	\$ 10,060
4881 · Advanced Intensive	\$ 480	\$ 1,580

4914 · Faculty Training	\$ -	\$ -
4970 · Branded Online Courses	\$ 7,000	\$ 6,115
4975 · Online Products	\$ 1,000	\$ 171
4978 · Grants	\$ -	\$ -
4979 · Donations Received	\$ 10,000	\$ 4,935
4980 · Counselor Directory	\$ -	\$ -
4985 · Institute Sanctioned Training	\$ 5,000	\$ 6,550
4986 · Mental Health & Happiness		
4986 · MHH Videos	\$ -	\$ -
4987 · Daily Challenge eBook	\$ -	\$ -
4990 · MHH Donations	\$ -	\$ -
Total 4986 · Mental Health & Happiness	<u>\$ -</u>	<u>\$ -</u>
5000 · Affiliate Online Instructor Fee	\$ -	\$ -
5200 · Glasser Quality Schools	\$ 1,800	\$ 323
5201 · GQS Application	<u>\$ -</u>	<u>\$ -</u>
Total Income:	\$109,280	\$92,853

Expenses:

5010 · Affiliate Instructor Payment		\$	-	
5075 · Membership Expenses - Region Dues	\$	-	\$	-
5100 · Conference Expenses	\$	50,000	\$	55,000
5150 · Faculty Retreat Expenses	\$	2,000	\$	-
5910 · Institute Training	\$	4,250	\$	6,250
5916 · Faculty Prog. - O/S Consultant	\$	-	\$	-
6050 · Accounting	\$	2,000	\$	2,000
6100 · Advertising & Marketing	\$	10,000	\$	2,682
6300 · Bank Charges	\$	-	\$	45
6350 · PayPal Fees	\$	1,639	\$	1,455
6352 · Stripe Charges	\$	1,639	\$	538
6355 · Other Miscellaneous Service Cost	\$	-	\$	-
6450 · Website & Apps	\$	5,000	\$	3,827

6700 · Director's Fees	\$	6,000	\$	6,000
6750 · Dues and Subscriptions	\$	700	\$	300
7050 · Insurance	\$	900	\$	1,300
7150 · Legal	\$	-	\$	-
7300 · Office Expense	\$	500	\$	695
7310 · Online Products Commissions	\$	5,000	\$	4,200
7335 · Webmaster & Data Manager	\$	7,800	\$	7,850
7500 · Postage	\$	750	\$	200
7650 · Research	\$	50	\$	-
7660 · MHH Expenses	\$	-	\$	-
7850 · Tax & Licenses	\$	-	\$	-
7900 · Telephone	\$	350	\$	400
7910 · Travel	\$	-	\$	-
8000 · Board Expenses	\$	-	\$	100

Total Expense:

<u>\$ 98,578</u>	<u>\$92,842</u>
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Net Income:

<u>\$ 10,702</u>	<u>\$ 11</u>
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