

# A Financial Survey for Area 9

Nov 15, 2019 thru Jan 1, 2020  
The Results





# A Financial Survey for Area 9 - A Brief Overview

The 10 question survey was developed after discussion with the Officers to see if there might be a need for additional oversight on the financial practices of Area 9 (Florida-North). We wanted to get feedback on this from the membership of Area 9.

The survey was posted in the Chairperson's Nook under the Members tab as was noted on the email sent out by our Chairperson, Diane, on Friday, November 15, 2019, along with the link to take you to it - (thanks Pat!)

A reminder about the survey was included in Diane's email to the Panel on December 31st which jogged a couple of members that the survey was still open and waiting for their responses.



## Survey Question 1

Would you support an internal audit task force of the Area's finances (income & expenses)?

There were 37 total responses. Of those, **24 Yes**, **6 No**, and then the other responses: I would need to know why this was being requested; I don't see a need; unsure - would like to hear debate; I trust the treasurer; I'm not sure it's necessary. It's a confidence builder for some though.

I would take some of those other responses as a Yes / No, but it seems as if YES wins.



## Survey Question 2

Do you think the cost of registration for our Area Assemblies (\$15) is too high or too low?

37 responses to this question: 2 too high; 8 too low; 25 just right and 2 with comments: That depends on cost of Assembly and number of attendees; What does it cover and what is needed to cover those expenses. There was one comment on the too high - because they were a smaller meeting, they would need a scholarship-even one time per year is too expensive for that group.



## Survey Question 3

What do you feel is the right amount for Assembly registration?

25 of the 37 responses were for the current \$15 which tied back to Question 2, but there were comments with some of those: \$15 seems reasonable, unless we have a short fall; as long as it is covering expenses for Assembly; appropriate, re-evaluate with the next Panel; we do not need hospitality room. Other amounts suggested: \$8 - 1, \$20 - 1, \$25 - 4, \$20-\$25 - 1, \$30 - 2.

Comments made/question asked - “what does this fee cover?”; No opinion other than it has to be enough to help cover the usual costs for it [the Assembly]; appropriate based on information from what is needed to cover the expenses registration is needed.



## Survey Question 4

What do you think the reimbursement amount should be for food? (It is currently \$10, \$15 and \$20.)

Majority of the 37 responses (19) felt that the current amounts are either reasonable or good; however, we might want to re-evaluate yearly - maybe even increase by \$5 each meal as costs seem to be rising. Other amounts offered were \$15/day (2); \$20/day (5); \$25/day (1); changes to \$12/\$17/\$25 (1); \$15/\$20/\$25 (3); \$15/\$20/\$30 (1); \$20/\$25/\$30 (1). Other comments included ...just say total meals for one day is X amount; These amounts no longer cover the restaurants in the area or at the hotel. They need to be raised in accordance to those amounts and I do not go to fancy places; this is generous!; these amounts are very fair and attendees need only be reimbursed for actual amounts spent with these amounts being maximum allowed.



## Survey Question 5

What do you think the reimbursement amount should be for lodging? (In 2020 it will be \$120 before tax.)

The respondents feel, for the most part (25) that the reimbursement amount should cover the actual cost of the hotel room including tax with the understanding that sharing a room is expected. Others felt that \$100 (1) was reasonable while \$125 before tax (2) and \$130 (1) also were noted.

Comments acknowledged that it would depend on the location of the hotel; negotiate the best price for the location; more understanding by all members would surely make this understood, that is, that Assembly is very expensive; there are lodging expenses?, we don't have a horse in the race because we are too small of a meeting to be able to afford this



## Survey Question 6

What do you think the reimbursement amount should be for travel? (It is currently the cost of gas & tolls.)

37 responses - 28 are okay with the current set-up as they feel it covers their cost and is fair. Other options noted were mileage at a stated rate of \$.58/mile (2); mileage at the stated rate of \$.58/mile + tolls (1); mileage + actual tolls (no rate suggested) (1); reimburse at IRS mileage rate (1); reimburse at IRS mileage rate + tolls (1)

Other thoughts/comments: I think gas and tolls will work out to be cheaper for the area; that is generous; no real opinion.





## Survey Question 7

Would it be more accurate to reimburse for mileage instead of gas? (IRS mileage reimbursement is 58 cents a mile in 2019.) Tolls would still be reimbursed at actual cost.

The straight Yes/No answers were almost even on this one: **Yes - 12**; **No - 14**, but then we have the comments: Possibly more accurate but significantly more expensive; my gas cost is much less than the mileage cost would come out to. Mileage cost would be easy to figure based on any mapping company; gas; actual costs; Yes and not reimburse for tolls; No, since gas prices fluctuate so much on a daily basis & in different locations across Florida, it's better to reimburse for the cost of gas. The mileage of "one size fits all" may not be able to keep up with how erratic gas prices typically are; I have always calculated mileage with tank size, how much gas used and price per gallon. Don't know which would be more prudent; Yes, because there is actual wear and tear on the vehicle; leave it actual cost; give choice



## Survey Question 8

What recommendations do you have for improvements to Area finances?

While many responses had no recommendations, there were others that did:

- Literature sales at AWSC and Assembly; Fundraisers; Quarterly Appeal and encouragement of personal donations
- We need to examine Al-Anon principles when it comes to requesting offset donations. Are we putting pressure and applying shame? Not everyone has same ability to repay.
- I believe a Finance Committee/Task Force would be helpful in delegation of duties and accountability. Personally, I have no issues with our Treasurer's integrity; however, it just makes good business sense to have a committee...



## Survey Question 8

What recommendations do you have for improvements to Area finances? **Continued**

- All members should pay \$2 per meeting.
- We appreciate your asking us. Please include more details in your survey questions; ie. what costs actually cover
- The Area can be more transparent about costs - especially meals for Area meetings. I think if more members knew what the Area is paying, they would be willing to pay more as individuals.
- As a whole we should remind ourselves that the monies we have are for the work of Al-Anon. While cost cutting and financial evaluation is always a good thing to do, I do not feel the Area spends money inappropriately or is wasteful
- I did not know they needed improving. What is the issue?



## Survey Question 8

What recommendations do you have for improvements to Area finances? **Continued**

- Llew and the current officers and BOD are doing an outstanding job.
- I see nothing wrong with the current practices.
- Remind members that first financial priority is their group and member needs, then District, then Area, then World
- I would like to see more detail regarding expenses at the Area level and reimbursements from Districts.
- Have more help for the Treasurer.
- I think the Area does a great job with our finances.



## Survey Question 9

If you have interest in participating in the Area financial task force or future oversight committee, contact the Area Chairperson at:

[chairperson58@afgarea9.org](mailto:chairperson58@afgarea9.org) (If you have a financial background, we'd love to have you involved!)

As you can see, this wasn't a "normal" survey question...but it worked. Several members did indeed reach out to our Area Chairperson expressing an interest in this service opportunity.

More to be revealed.



## Survey Question 10

If you'd like to be contacted directly, please leave your name and contact information (optional).

Again, not a “normal” survey question; however, a few names and numbers were left.



## **A Financial Survey for Area 9 - A Brief Conclusion**

After reviewing the responses from the those members who took time from their day to give their opinion in this survey, I discussed the findings with our Chairperson and it does seem that the majority would support an Internal Audit Task Force of our current books and records. An audit is a methodical examination and review. We trust but we verify. It will reinforce the views expressed by some of the respondents that we are doing a good job. In fact, our CPA firm, who prepares our tax return and quarterly financial statements, recommended an internal audit at our first Board meeting. Other areas in the AI-Anon structure have these internal audit committees in place so we don't have to re-invent the wheel. As we look at our Traditions and Concepts of Service, especially Concepts 7 and 8 with regard to handling the business end of the Area Treasury, I feel that this definitely is a Good Business Practice.