



Western Division American Fisheries Society

President Julie Carter, President-Elect Tim Copeland, Vice-President Amber Steed, Secretary-Treasurer Laura Burckhardt,
Past-President Eric Fetherman, Student Representative Meredith Journey

Advancing fisheries and aquatic science and professionals in western North America

Executive Committee Call: Saturday, December 7, 2024

Start Time: 9:00 am MT

In-person at the Westin Westminster

Meeting Link: meet.google.com/rze-ynsy-htt (or enter through calendar invite)

Phone: +1 240-794-2554 PIN: 103 980 890#

Roll call & Introductions

Participants:

- Julie Carter, WD President
- Eric Fetherman, WD Past President
- Tim Copeland, WD President-Elect
- Amber Steed, WD Vice President
- Laura Burckhardt, WD Secretary/Treasurer
- Joe Kozfkay, ID AFS Chapter President-elect
- Jens Swensen, UT AFS Chapter President
- Zach Beard, AZ/NM AFS Chapter President
- Peter Brown, MT AFS President
- Christina Parker, CA/NV AFS President
- Michele Weaver, OR AFS Chapter President
- Sean Simmons, WA/BC AFS Chapter President
- Tim Grabowski, Pacific Islands AFS President
- Andy Seitz, AK AFS Chapter Vice President
- Stev Vigil, CO/WY AFS Chapter President

Determination of quorum (majority of elected officers, 1/3 Chapters)

A quorum was present.

Additions/changes to agenda and purpose of midyear meeting

Primary business meeting and for Chapters to review and provide feedback on budget, committee chair reports.

Colloquium budget request increase

Approval of October monthly call notes and November officer call notes (Attachments A and B)

Tim Copeland moved and Zach seconded. Minutes approved.

WDAFS purpose and ExCom roles and responsibilities (Attachment C)

Roles and responsibilities document was explained. The Executive Committee goals:

- Request that all Chapters are on the monthly calls, at the mid-year meeting, and in attendance of the Western Division annual meeting.
- Planning to continue the Best of the West symposium. Can the Chapters support a student to attend?
- Can a best student poster be recognized? Oregon will be sending both and would like to recognize the poster.
 - Consider having a ribbon or callout by the poster. Consider having a second poster displayed at the Symposium. **Bring this to the Poster Session committee and Tim C. will discuss with Meredith.**
- AZ/NM partially supports the student's travel
- PI: WD meeting overlaps the finals weeks so they have not heard back if students can attend.
- Share ideas and lessons learned so Chapters can be successful in implementing their plan of work.
 - Julie has started a spreadsheet where they can share information on what worked and didn't work at annual meetings.
- Contribute content quarterly to the Tributary:
 - The website takes 2 weeks from posting to be available to be viewed. No one is quite sure how this could be fixed. So the newsletter was sent out as an attachment. Our list serve now allows us to send it as an attachment. Julie would like to add info to the January issue about the chapter meeting dates. **Laura will send out link to meeting table for Chapters to put in links (if they exist).**
 - **If Chapters want to highlight articles from their newsletters or other information, please send it to Julie by January 6.**
 - **Please provide new logos to Julie**
- #6, Pursue leadership
 - **Not everyone is getting the Mind-set Monday emails. Focus on growth, leadership, etc. Julie will forward them and everyone can ask to be included.**
 - **Fishy Friday – You can subscribe. Julie will send the link out to everyone to subscribe.**

WDAFS Mission and Vision statements and President's Plan of Work (Julie, All; Attachment D; Miguel Garcia's Plan of Work, Attachment E)

- ***WDAFS President Plan of Work*** – Julie reviewed her plan of work. Highlights are to assist with planning of the CO/WY WDAFS meeting, continue to support the PI Chapter, Miguel's Plan of work, DEI initiatives, membership
- **Support membership initiatives and messaging developed by the Society's Membership Committee- a presentation and recommendations were given at the Governing Board meeting. WDAFS and Chapters are encouraged to embrace the initiative. Tim C. or Amber will get draft of the membership committee presentation/recommendations and send it out. Consider inviting Leanne to a meeting to discuss the plan**
 - Questions: How are we measuring success of initiatives? Do we have examples of successful strategies for increasing membership?
- Potential changes to Excom meeting:
 - Every other Excom meeting we do written updates and have longer time for deeper discussions
 - Or, having an add on at the end of the meeting and keep written updates
 - Invite Committee members to attend the meetings periodically (perhaps quarterly), or every meeting
- Develop pathways for increased communication with the WDAFS and Society Committees
- Improve communication between WD Chapter Presidents, WD Officers, and WD committee members
 - Develop information sharing platform (spreadsheet) for Chapter Presidents
 - **WDAFS distributes the information and collects information to feedback. We want Chapters to provide feedback to WDAFS and the Society.**
 - Develop an onboarding process for new Chapter Presidents. Considering a focused call.

into a fellowship award to broaden how can participate in the award. Chapter Survey will be discussed later in the meeting by Amber.

- Budget request is \$2,200- \$1,000 for mentorship award and \$1,000 for committee member to attend the meeting. Add another \$200 for event support.
- **Financial Sustainability Committee** – The investment account was established in 2001. The investment account holds WDAFS and Units funding. We now have two accounts, WDAFS and Units. Investments include ETFs and Stocks.
 - WDAFS return is 24% YTD, generally lag the S&P which is at 29%. We usually hold cash in money market or CDs. WDAFS has gained \$113K this year.
 - Units account was setup in June but the account has gained 12% YTD. Idaho Chapter and Utah Chapter contributed and Fish Culture made a withdrawal.
 - Do Chapters need to have 2 years of operating budget available vs. just 1 year?
 - With the liquidity of the Schwab account, we have freedom to sell. The plan is pretty conservative and the second year of reserve can be viewed as insulation.
 - Be disciplined about thinking about funds and what you want to achieve
 - OR plan makes available 50% of the gains each year to their membership.
 - Society may be making a request for help. Today things are looking good for the Society. Honolulu meeting was successful, membership is up, and investment account is doing well. In 2019, AFS made an investment internally but they need to choose how to manage assets more wisely moving forward. Total asset value is \$7 million but only 70% is available to them. Contract for Oxford is not as lucrative as the Wiley contract, perhaps 60% less. Going to be making less off membership, may have small meetings the next could of year, and membership is down. AFS was drawing on their line of credit during COVID. AFS got personnel funding from COVID relief, payroll protection and employee retention. Affiliate membership is a huge potential revenue source for AFS. Moving from affiliate members to AFS members could be significant revenue to the Society.
 - MT FWP recently got approval for State Support
 - Would it be valuable to take extra fees from meeting registration for non-members and put it towards membership fees or make a donation to the Society?
 - In CA, there is a Union that negotiates reimbursement of the majority of the professional society membership fees. Christina will send out language in their contract about professional society dues reimbursement by the State.
 - Professional certification may also be a revenue source. Society could encourage requirements for CFP and continuing education.
 - How much of the Society donations come from Federal Agencies? And will they get eliminated? Honolulu meeting had large donations from Federal Agencies.
 - There was a lot of interest by chapter presidents in this discussion with Troy and we will invite him to join one of our Excom calls for further discussion.

Resource Policy and Environmental Concerns – Topic carried to future meeting

Treasurer Report

Laura reviewed the November balance sheet.

FY25 Budget

Julie reviewed the budget in detail

Reduced registration rates for Tribal members or Tribal employees:

- WDAFS would offer reduced registration (\$250) for up to 20 registrations on a first come first serve basis. WDAFS would reimburse COWY for the difference between the reduced rate and regular

registration. Applicants will contact Laura and they will be given a registration code for the discounted rate.

- Discussion – WA/BC is looking at having a cap for both students and tribal. May need to symposium or draw to encourage participation. Would this apply for Pacific Islanders too? Who would this cover? Anyone that has interest in attending.
- OR – Fish out of water waiver (registration waiver) and they had no applicants. Then opened to anyone and all 20 were used. Last year OR invited symposia but that didn't come together. Registration software is complicated and burdensome to the secretary/treasurer. A discount code is easier to do.
- WA/BC – When they focused on a focal point / pain point for the tribes/first nation then participation increased.
- AK waives fees for Tribal and high school student but they then use that information for donations.
- Based on topics, there may not be a large draw of Pacific Islanders. Cost is likely prohibitive for Western Division meeting.

Awards- plaques already have been purchased. Travel funding for award winners will be permanently removed

Grants & Sponsorship – Peter motion to increase double funding for all travel grants and committee will have freedom to choose if it's more than one award. Stev seconded. Motion passed.

Colloquium – Proposal to raise by another \$500. Laura motioned to double colloquium budget and adding participation by undergraduates. Peter seconded. Motion approved

Small Project Grants – Andy motioned to increase funding to \$4,000. Jen seconded. Add language to the announcement and grant award letter that we do not pay overhead. Motion approved.

Undergraduate scholarship – Future of Fisheries - \$2,500. Excom support was present.

Eric moved to approve the budget, Jen seconded the motion. Motion approved.

Discussion - Chapter needs from AFS and WDAFS

- What do you need from AFS and WDAFS to perform your AFS leadership role the best you can?
- What do AFS and WDAFS need to improve upon?
- How can we increase and communicate the relevancy of WDAFS with chapter membership? Topic carried over to future meeting.

Membership – Modernization is needed

- MAKE SURE EVERYONE GETS THE EMAILS THAT SOCIETY SENDS OUT
- Society is going to try and stop Affiliate Memberships.
Needs from the Society:
 - Feedback is that Chapters need help to educate on benefits to Society membership.
 - Need tools for communication. Chapters do not want to lose participation at the Chapter level.
 - Communicate how the membership fees structure and benefits at the Chapter level.
- Message on the value of being an AFS member.
- Get Jeff's membership messaging out to individuals who attend meetings
- Chapters need to have the tools to educate their members.
 - Having a message come from the Chapter level may have more impact than messaging from WDAFS or National.
 - Last year a message was sent to Presidents and that was very helpful.
- Need to make sure everyone knows that AFS is more than trout/salmon/bass.
 - On the ground scientists – Focus on trout/salmon/bass in journals and PI chapter doesn't see the applicability to their issues. Do not see them as avenues for publication or presentation at the Society level.
 - PI Chapter – Why go to AFS vs other meetings

- CA/NV does a member highlights on Social media. What AFS means to them and what they do in their careers?
- Has the Society hired a Marketing company to develop messaging and a plan?
- Thank Employer's and encourage support of participate in AFS leadership
- It is hard to track membership and lifetime members fall out of being Chapter members. Can EXCOM members get real-time access to membership and
- Ability to enforce a Chapter member if you're already a Society member?
- Do any Chapters have lifetime Chapter memberships? OR lifetime membership option for lifetime AFS members. Individuals pay OR Chapter directly.

Other Topics

- Can we increase the timeliness of responses on Student Subunit and Website? And also call out the exceptional benefits of Shawn's conference planning
- Is there a way to strengthen "silo stitching" between the different levels at AFS
- Officer onboarding mentor/mentee opportunities

Information Sharing

- As a group find a way to negotiate individual costs of WHOVA (startup, transaction, credit card fees).
 - Could someone at AFS maintain these contracts?
- Build a resource that we share that allows Chapters to divert time somewhere else.

Website:

- Society hosted website is clunky and hard to use
- It is not mobile friendly
- Why have an AFS hosted – branding and common feel
- Highlight the Mission statement / make it stand out more

Chapter Business – Highlight news, initiatives, and/or benefits (scholarships, grants, awards) each chapter offers to their members

- Alaska – Very student focused Chapter. Has a retired agency employee that gifted \$180K to student awards endowment. They have another family that will setup student travel endowment. Andy would like to get more Agency people involved in AFS. Chapter charges for workshops and put the funds into the student travel fund.
- AZ/NM- Have 2-\$1,000 scholarships. Have \$50 awards for best student paper and presentation. Student mentor luncheon at the meeting where they team students with professionals (paid lunch). Mock interview workshops for students, resume and finding jobs was topics too. Piscicide applicator continuing education workshop. Have done electrofishing and age/growth courses sponsored by the chapter. Student subunit sustainability fund, they provide \$500/year and want a report of what they did with the funds. Also has a small grant award, ~\$2,000.
- CA/NV- Travel grants, awards for best talk and poster. Directly support student travel to the meeting. Free attendance at the meeting for exchange for a certain number of volunteer hours. Provides \$200 for subunit activities. Small grants program. Offset membership costs for events they host. Working on a virtual lecture series for members only. Clear Lake Native Fishes Retreat that will be free for members.
- CO/WY- Four student subunits and provide \$500/year. Four travel grants – Best of West, Student, and two Professional. Scholarships at two subunits. Another donation was made at the Society level to setup

scholarships at the other two Universities. Free continuing education. Mentoring committee – which includes funding for travel and other expenses. Student socials.

- Idaho- Struggling with venues in Idaho and the Chapter size is making it difficult to move around the state. Have been fortunate with professor mentorship at the student subunits. Comp two rooms for each subunit at the annual meeting. Have grants for graduate, undergraduate, high school, and two memorial scholarships. Plenary session at the meeting will be on Rotenone treatments. Aquaculture workshop, redoing communication workshop, water rights, and communicating with Tribal entities. Charge for the workshops to cover costs, fee structure is different by membership.
- Montana –Pushing to get rid of affiliate membership and restructuring small grants into something utilized more by the membership. They are interested in the idea of the Fish out of water. Looking to lower registration fees for members who are involved in the meeting. Roll the awardee recognition into the meeting costs, such as landowner awards. Have student scholarships, registration is free in exchange for volunteering.
- Oregon- Struggling with meeting locations in Oregon and needing to plan 3-years in advance. Internal Director found a person who coordinates with Hotel venues for OR and the hotel pays her 10% of room revenue. OR has 4 student scholarships (Associate through PhD). Have a DEI endowment fund. Have a fish culture endowment fund. The addition of the endowment funds adds complexities. Reduced registration rates and free lodging for volunteering. Workshop on how to get a job. Two travel awards/ registration waivers. 20 for ECP or Tribal that are free registration and lodging. 20 Assistance waivers that reduces registration to the student rate. Awards – best paper and poster. The number 1 winners get to go to WDAFS meeting. K through 12 student grants (\$20K) for fisheries programs. Will reimburse people who want to get professional certification. Native fish workshop each year (free). Hired a legislation liaison.
- Pacific Islands – Set dates of the first annual meeting, May 7-9. Student subunit has started doing fish surveys at a fish pond. Will be transition to a new President, Mary Donovan. University of Hawaii Fisheries Graduate Program was approved and four positions would be filled in 2025.
- Utah – Has started an Instagram account. Offer a student travel scholarship. Last year had 16 students that were awarded. Invited SEU students to attend the AFS meeting and hope to grow the number of subunits. Have a small project grant that isn't utilized as much as they would like. Has sought feedback from the membership and will be incorporating the feedback into the meeting. Bear River restoration and tribal history will be incorporated in a symposium. Theme is removing barriers and bridging the gap.
- WA/BC – Chapter has worked hard to rebuild after COVID. Have been trying to focus on passion points in the group and developed working groups – meet 1 hour a month to build a symposium at the next year's conference. Has developed a lot of momentum. Fish passage is one of the largest working groups and have quarterly webinars. Salmon prize for who best predicts the returning salmon runs. Student subunits are building. Leading lunch and learns for students. Continuing education Into the Workforce. Two student awards. Free attendance for students with four hours of service. Competition between BC and WA for who would get the most members. How to get students most interested – what students are the best anglers.

Denver/ Westminster Budget Information Sharing

- Stev reviewed the budget.
- What is the hotel attrition? Number of rooms depends on the night. Sunday is 50, Monday 90, Tuesday & Wednesday is 170. Friday is 50.

- How to communicate importance of room block:
 - WA/BC is advertising to book early at reduced rates.

Comping rooms & registration for plenary is built in under Complimentary Rooms.

Eric motioned to approve the budget as shown today and to stay within the budget as best we can. Tim seconded. No objections. Motion approved.

Future Meetings (Attachment M)

In 2028, Society meeting will be held in conjunction with the JASM meeting in May. Honolulu was selected as the preferred choice. AFS is the hosting group and the meeting will feel like an AFS meeting.

- Which means it could be a Western Division meeting and would sift all the meetings down a year.
- MOU would need scrutiny.
- A joint meeting of that size can be very difficult and WDAFS could choose to do their own meeting.

Nominating Committee

Have one person considering running for Secretary-Treasurer, Vice President, and Student Representative. **If Chapters know of leaders within their chapter that may be interested in a WDAFS officer position, please send their name and email to Eric Fetherman so he can make contact with them.**

Awards

Encourage Chapters to apply for Best Chapter Awards, likely due in February

DEI Survey of Chapters

How many Chapters have committees and what support could WD provide? Half of the Chapters responded and seven of the nine websites appeared to have a committee. **Amber will send out the results of the survey.**

Membership Summary

Tim handed out membership summary and discussed the data. **Tim will send out the information.**

Eric motioned to adjourn and Andy seconded. Meeting adjourned at 5:15pm.



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President Julie Carter, President-Elect Tim Copeland, Vice-President Amber Steed, Secretary-Treasurer Laura Burckhardt,
Past-President Eric Fetherman, Student Representative Meredith Journey

Advancing fisheries and aquatic science and professionals in western North America

Meeting Location

The Westin Westminster
10600 Westminster Blvd, Westminster, CO 80020
Meeting Room: Windsor

Virtual Meeting Information:

Meeting ID

meet.google.com/rze-ynsy-htt

Phone Numbers

(US)

+1 240-794-2554

PIN: 103 980 890#

AGENDA

WDAFS Officers, representatives from AK, AZ/NM, CA/NV, CO/WY, ID, MT, OR, PI, UT, WA/BC, WDAFS ELMA, and representatives from WDAFS committees

- 9:00 AM Roll call / Introductions – name, WDAFS/Chapter role, day job (All)
 - Determination of quorum (majority of elected officers, 1/3 of Chapters)
- 9:10 AM Additions/changes to agenda and purpose of midyear meeting (Julie)
- 9:15 AM Approval of October monthly call notes and November officer call notes (Attachments A and B)
 - Motion: Approval of notes
- 9:20 AM WDAFS purpose and ExCom roles and responsibilities (Attachment C)
- 9:30 AM WDAFS Mission and Vision statements and President's Plan of Work (Julie, All; Attachment D; Miguel Garcia's Plan of Work, Attachment E)
- 9:45 AM Student activities and colloquium (Julie for Meredith)
- 10:00 AM BREAK
- 10:15 AM Committee review (Officer liaisons and/or Committee Chairs; active committee members and chapter representation, Attachment F)
 - Financial Sustainability (Troy Brandt)

- Early Career Professionals (Audrey Harris and Tawni Riepe)
- Native Fishes (Luke Schultz and Tim D'Amico)
- Resource Policy and Environmental Concerns (Eric)
- Diversity and Inclusion (Emily)
- Nominations (Eric)
- Awards & Scholarships (Julie and Eric)
- Communications (Eric and Amber)
 - Tributary Publication Dates and content (Julie) – Jan/April/July 15th,
Deadlines 1st week of the month
- Membership (Tim and Amber)
- 11:00 AM Discussion - How to recruit and engage chapter representatives to serve on WD committees; how WD committees can engage with similar chapter committees (all)
- 11:15 AM Facility tour (45 minutes)
- 12:00 LUNCH (on your own)
- 1:15 PM Treasurer's briefing (Laura; Attachment G; Financial Sustainability Plan [for reference], Attachment H)
 - Balances report
 - Investment account; account split
- 1:30 PM Proposed 2024-2025 annual budget review and approval (Julie; Attachment I)
 - Funding requests
 - Black Bass 2025 (\$500; Attachment J)
 - Future of Fisheries Scholarship (\$2,500; Attachment K)
 - ECP (increase of \$500)
 - Native Fish Committee (\$800; Attachment L)
 - D&I committee expenses (increase of \$200)
 - Motion: Approval of budget
- 2:00 PM Old Business
 - Future WDAFS Meetings (Julie; Attachment M)
- 2:15 PM Discussion - Chapter needs from AFS and WDAFS (all)
 - What do you need from AFS and WDAFS to perform your AFS leadership role the best you can?
 - What do AFS and WDAFS need to improve upon?
 - How can we increase and communicate the relevancy of WDAFS with chapter membership?
- 3:15 PM BREAK
- 3:30 PM Chapter Business (5 min/Chapter) – Highlight news, initiatives, and/or benefits (scholarships, grants, awards) each chapter offers to their members
 - Alaska
 - AZ/NM
 - CA/NV

- CO/WY
- Idaho
- Montana
- Oregon
- Pacific Islands
- Utah
- WA/BC
- 4:30 PM New Business
 - Denver budget approval and meeting planning update (Julie and Stev; Attachment N; 15-20 minutes)
 - Motion: Approval of draft Denver budget
 - Chapter information spreadsheet sharing for CE workshops, DEI initiatives, annual meetings, student events, grants/scholarships, membership, etc.
 - Honolulu Meeting debrief – what worked, what didn't, takeaways for future WD meetings (e.g., volunteer time tracking, socials)
- 5:15 PM Flex/adjourn
 - Motion: Approval to adjourn

Dinner reservations 6:30pm at BJ's Restaurant and Brewhouse, 10446 Town Center Dr., Westminster, CO 80021 (walking distance from hotel). After dinner, let's head to Dave and Buster's 10667 Westminister Blvd, Westminister, CO 80020 for some games and fun.

Attachments:

- A. WDAFS October Monthly Call Notes
- B. WDAFS November Monthly Call Notes (officer only)
- C. WDAFS Excom Roles and Responsibilities
- D. Carter President's Plan of Work
- E. Garcia President's Plan of Work
- F. Active Committee Members
- G. Treasurer's Briefing
- H. Financial Sustainability Plan
- I. Proposed Budget (2024-2025)
- J. Black Bass 2025 Sponsorship Request
- K. New Scholarship Proposal
- L. WNFC Budget Request
- M. Future WDAFS Meetings
- N. WDAFS CO-WY Meeting Budget

Please review the WD Bylaws and Procedures Manual [HERE](#)



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Past-President Eric Fetherman, Student Representative Meredith Journey

Advancing fisheries and aquatic science and professionals in western North America

Executive Committee Call: Monday, October 21, 2024

Start Time: 9:00 am HT / 11:00 am AKT / 12:00 pm PT / 1:00 pm MT/ 3:00 pm ET

Meeting Link: meet.google.com/vvp-yatx-xbe (or enter through calendar invite)

Phone: 208-606-0553 PIN: 271 578 150#

Roll call & Introductions

Participants:

- Julie Carter, WD President
- Eric Fetherman, WD Past President
- Tim Copeland, WD President-Elect
- Amber Steed, WD Vice President
- Laura Burckhardt, WD Secretary/Treasurer
- Meredith Journey, WD Student Representative
- Lauren Andrews, ID AFS Chapter President
- Jens Swensen, UT AFS Chapter President
- Zach Beard, AZ/NM AFS Chapter President
- Peter Brown, MT AFS President
- Christina Parker, CA/NV AFS President
- Michele Weaver, OR AFS Chapter President
- Sean Simmons, WA/BC AFS Chapter President
- Tim Grabowski, Pacific Islands AFS President
- Erik Schoen, AK AFS Chapter President
- Stev Vigil, CO/WY AFS Chapter President

Determination of quorum (majority of elected officers, 1/3 Chapters)

A quorum was present.

Motion: Approve September Excom meeting minutes

One revision was received from Michele. Eric motioned to approve and Erik seconded. Minutes approved.

Treasurers Report

Laura reviewed the September balance sheet. Profits from the HI meeting should be released in November. The Laura provided an overview of the Financial sustainability committee meeting on October 15th. Laura explained that to withdraw funds from the "Units Account", email in your request along with your bank account information where we should transfer the funds. This should be accomplished within 1 week of the request. To add money, we just had to transfer funds to the Wells Fargo account then to Charles Schwab but we're hoping to streamline that more and have a request into Charles Schwab.

Lauren Andrews requested to be part of the Financial Sustainability Calls.

AFS Level Committees

AFS Management Committee & Governing Board– Honolulu was a profitable meeting. The JASAM and AFS Society Meeting will be in May of 2028 and may be in Honolulu. AFS is working through selling their office building. Miguel Garcia is the new president and Jeff Kopaska is going to be conducting Unit Leader interviews. Meeting in St. Louis in September.

Questions from Jeff:

1. What do you need from AFS to perform your AFS leadership role the best you can?
2. What does AFS need to improve upon?

Membership Committee – No update

WDAFS Committees

RPECC – No update, Eric will be reaching out to the committee. Looking for a representative from AZ/NM Chapter

Native Fishes – No update, Eric will be reaching out to the committee.

Early Career Professionals – No update

Diversity and Inclusion – No update, meeting October 25.

Division Membership Committee – No update

Student Activities

Students enjoyed the service projects. Student coffee hour was held on the first day and went well with ice breakers. Mentor/mentee mixer and dinner was mixed results. People who registered had a hard time knowing if they were registered. Having a ticket or wrist bank would be easier to keep track of the numbers. People could also be return tickets if they couldn't attend.

Chapter Updates

- **AK** – Lots of Alaskans attended the HI meeting and felt it was a great meeting.
- **AZ/NM** – Meeting is Feb 6-8 in Albuquerque. Working on planning for 2025 and 2026 meeting. The Wildlife Society is hosting the 2025 meeting.
- **CA/NV**- Not meeting in 2025. Small networking events are coming up. Visited a venue in Lodi for a student/early career event and business meeting. Planning a retreat in January to finalize plan for events.
- **CO/WY** –Planning for 2025 meeting, May 11-15th. Call for Symposium will be mid-November and ending in December. Monthly meetings will start soon.
- **ID**- Excom retreat was held. A graduate scholarship has been established and funds transferred into the Units account. Annual meeting will be in Boise
- **MT** – Working to revive the newsletter. If any Chapters have great newsletters please contact MT. Meeting is Feb 10th in Bozeman.
- **OR** – In the initial stages of planning the 2025 meeting. Contract is under review for 2026 meeting in Hayden Island. Has submitted letter of support for Rules making for jet boat use on the Roque River. Submitted bylaws and have not heard back. Eric stated that the management committee discussed and approve the bylaws in June.

- **PI** – Planning the first meeting, date will be finalized soon. Tim requests that other Chapters send their award criteria to the Chapter. State agency wants to give money to AFS and wonders how to make that happen.
 - **MT** – Asking State Agency to pay dues.
 - **CO/WY** has had federal partners pay for program printing or other meeting expenses directly.
 - **WDAFS** has the ability to accept donations via PayPal.
 - “Strategic Partner” of AFS (<https://fisheries.org/membership/meet-our-members/strategic-partners/>)
- **UT** – Chapter is planning the next meeting in Logan UT Feb 10-12. Working to finalize the venue. Excom retreat will be in Logan soon. They are planning an ice fishing activity
- **WA/BC** – Chapter is working to rebuild and focusing on 15 new working groups have been started. Launched a call for symposia in August, have 30 so far. Going to be trying out a Stakeholder Engagement day. Will have a citizen strategy on the Frazier River. Retreat will be in November with Strategic Planning and Conference planning in Vancouver.

New or Other Business

- Mid-year meeting – Saturday meeting all day and group dinner. Facility tour will occur on Saturday. Sunday there will be a 700 person conference at the facility.

Next meeting Mid-year meeting December 7 @ 1 pm MST

Attachments:

1. Monthly financial statement / balances
2. September meeting notes

Meeting Ended at 2:02 MST pm

WDAFS Officers Meeting Agenda (2:00-3:00 PM MT)

WDAFS Officers to stay on the video conference

- 2025 Meeting
 - Website & Artwork – Stev will ask Dan B. about the website. Artwork can be developed with a contest after the theme is developed. Recommend that the Chapter develops the theme.
 - Symposium – Considering using google forms for symposia submission. Contract has a table that outlines what rooms are available and capacity in each. Could save on costs if you don't have to switch out rooms frequently.
 - AV Support needs to be ironed out
 - Continuing Education workshop – ideas were discussed. Eric agreed to be part of the committee.
- Officer committee assignments – Julie is working on a list
- ScCS reimbursement process – The SCCS reimbursement process was discussed. Julie will be sending out letters to all the committees and Laura will help with language for the Native Fishes committee.
- Nonprofit shipping costs- There is a \$350 fee for nonprofit shipping and WDAFS isn't feeling that there is a true benefit for this because we don't do bulk mailings.
- Travel grants – There is value at the Western Division level. List should be given to the volunteer coordinators so that the coordinators reach out to the travel grant awardees. Consider streamlining the award letter.
 - Is there a real-time volunteer sign up sheet?
- Awards and grants due in February. Symposium due in November
- Chapter meeting visits – Work out details at November meeting



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Past-President Eric Fetherman, Student Representative Meredith Journey

Advancing fisheries and aquatic science and professionals in western North America

Executive Committee Call: Monday, November 18, 2024

Start Time: 12:00 pm MST

Meeting Link: meet.google.com/bhi-xuhw-vgo (or enter through calendar invite)

Phone: +1 442-900-4128 PIN: 924 147 466#

Roll call & Introductions

Participants:

- Julie Carter, WD President
- Eric Fetherman, WD Past President
- Tim Copeland, WD President-Elect
- Amber Steed, WD Vice President
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- Zach Beard, AZ/NM AFS Chapter President & Leadership Mentee
- Stev Vigil, CO/WY AFS Chapter President

Officer attendance at chapter meetings

- Discussed who would attend each meeting, pending approval by employers

Denver meeting planning

- MOU was signed
- Schedule –
 - Continuing education is May 12
 - Breakout rooms 13-15
- Draft budget has been sent out to the Chapter.
 - AV Budget is \$22,000
 - Main ballroom will be setup for entire meeting – theater style
 - Four breakout rooms currently planned. Should plan for six rooms with smaller capacity. Stev will confirm seating capacity.
- Meeting website should be ready by the end of the week
- Request for Symposia & Continuing Education – Will setup a google form and email it out?
- CO/ WY Newsletter will come out soon
- Plenary speakers – Stev is still working on plenary speakers

Volunteer instructions letter

- Discussed draft document and asked for edits.

Excom committee assignments

- Julie started a spreadsheet of committees.
- Discussed the need for an audit committee
- RCPP will be the past-president. Revise procedures manual.
- Communications committee will be revised to Vice-President
- Membership committee – discussed having a committee to pass on importance of AFS membership

Mid-year meeting

- Group dinner on the 12th – Stev and Eric will get ideas together
- Will discuss WDAFS participation at the Chapter meetings
- Tim will submit the Best of the West symposium

Nominating committee

- For the Society, this is the President and a 2-year term.



President- Julie Carter, President-Elect-Tim Copeland, Vice President-Amber Steed , Secretary-Treasurer- Laura Burckhardt, Past President-Eric Fetherman, Student Representative- Meredith Journey
Advancing fisheries and aquatic science and professionals in western North America and the Pacific Islands

June 17, 2024

Dear _____,

We are pleased to inform you that the Western Division has awarded you \$500 to assist with your travel to the 2025 Annual Meeting of the American Fisheries Society in Westminster, Colorado. Rules for using these funds are outlined below and you must agree to and complete these terms to receive the grant:

- 1) Award winners are responsible for paying for all travel and meeting costs in advance and will be reimbursed after attending the meeting.
 - a. Reimbursable expenses include registration, transportation (airfare, ground transportation costs, vehicle mileage, parking fees), and lodging costs. Receipts associated with these expenses are required.
 - b. Students and Early Career Professionals may claim per diem (at the current federal M&IE per diem rate minus meals that are provided).
 - c. Reimbursement requests must be submitted by September 15. Send the WD Expense Claim Form, attached to this email, volunteer time sheet, and receipts to secretarytreasurer@wdafs.org. Please note that reimbursement will not be made if you do not attend the meeting or if you do not complete the volunteer requirements.
- 2) Complete four (4) hours of volunteer service at the meeting:
 - a. Upon award, contact the volunteer coordinators, [Brian Missildine \(Brian.Missildine@dfw.wa.gov\)](mailto:Brian.Missildine@dfw.wa.gov) and [Laurie Earley \(pastpresident@wdafs.org\)](mailto:pastpresident@wdafs.org), to get your assignment for the meeting.
 - b. Upon award, create an account on the Voluntime app (event title: WDAFS Denver 2025) to track and confirm volunteer hours.
 - c. Attend the mandatory volunteer meeting on Sunday, [May 11, 2025 at xx pm.](#)
- 3) Although not required, we ask that award recipients also try to bring an item with them that can be included in the silent auction or raffle at the meeting.

Please agree to the terms of this travel grant by providing your initials at the bottom of the page and returning it to me via email by [xx date](#). If you have questions, please contact me by email (vicepresident@wdafs.org). Congratulations and we look forward to seeing you in Denver!

Sincerely,

Amber Steed
Vice-President, Western Division AFS
Chair, 2025 WDAFS Travel Grant Committee

I agree to the terms and conditions of the WDAFS Travel Grant _____

Committees/Boards	Officer Position	Notes	Proposed Changes
Diversity & Inclusion (WD)	Vice President	Chair and at least 2 members	Update to Chair and a representative from each chapter
Early Career Professionals (WD)	President Elect, Student Representative	Not in Procedures Manual under president elect duties; Chair and at least 2 members	Need to update under president elect duties. Would recommend update to chair and a representative from each chapter
Resource Policy & Environmental Concerns (WD)	Vice President	Past President is also a member	Make Past President primary officer position
Native Fishes	Past President		Update to Chair and a representative from each chapter
Membership (Society & WD)	Vice President		Consider updating to remove the WD membership committee - would require a change to the bylaws. Could change the function of the committee in the procedures manual as an alternative.
Communication Committee (Society)	Past President	*New	Vice President to be the officer position
Nominating Committee (WD)	Past President	Chair and at least 2 members	Members = running thoughts and approval by WDAFS officers?
Nominating Committee (Society)	Past President	Need to update per new guidelines	President every other year; two year position; new two year term starts with Tim; see bylaws, Section III, 2C for rotation
Chapter Awards (WD)	Past President		
Awards (WD)	Past President	Chair and at least 2 members	
Arrangements Committee (WD)	?	Chair and at least 3 members	
Audit Committee (WD)	?	Chair and at least 2 members	
Financial Sustainability (WD)	President & Secretary Treasurer	Chair and at least 2 members	
Archivist (WD)	?	One division member	

Management Committee (Society)	President	Those elected in an even-numbered year and serving as president-elect in an odd-numbered year will serve 2 years on the MC - one as president-elect and one as president. If elected in an odd-numbered year and serving as president elect in an even-numbered year will serve on the MC for one year as president. If the latter, that position can be nominated to serve as an at-large member of the MC by the GB.	
Governing Board (Society)	President & President Elect		
Certification Board of Appeals (Society)	President	Must be a certified FP to serve in this role	
Hutton Award (Society)	President	Unless another representative is appointed	
Student Subsection (Society)	Student Representative		
Program Committee	President Elect	Co-chair of program committee for WD meetings; Vice President is a member	
Best of the Western Division Student Symposium	Varies		

WDAFS Executive Committee

Roles and Responsibilities

Executive Committee (EXCOM) from Bylaws and Procedures Manual

Per Division Bylaws, Section V.,

“A. The Division Executive Committee shall consist of the five elected officers (President, President-Elect, Vice President, Past President, and Secretary-Treasurer), the President of each Chapter within the Division, and the Student Representative.

B. It is authorized to act for the Division between meetings and transact necessary business.

C. A quorum for an Executive Committee meeting shall consist of a majority of the elected officers and one-third of the Chapter Presidents (including Student Representative). If unable to attend an Executive Committee meeting, a Chapter President may appoint one of the Chapter officers to represent the Chapter, with full voting rights. If such substitution is made, the Division Secretary shall be notified prior to the meeting.

D. The Executive Committee meets in conjunction with the annual Division meeting and approximately midyear between annual meetings. Such meetings are open to Division members.”

EXCOM Decision Making

The Division EXCOM is authorized to act for the Division between business meetings and to perform other appropriate functions. This decision-making activity may be executed through meetings, conference calls, or email votes. If a Chapter President cannot attend an EXCOM meeting or conference call, the Chapter President may appoint one of the other Chapter Officers to represent the Chapter with voting privileges. Certain issues, such as Bylaw changes, must be brought by the EXCOM before the Division membership for membership approval.

September 2024 - September 2025 Executive Committee Goals

- 1) Full representation of Chapters in monthly EXCOM calls, mid-year meeting, Division EXCOM meeting, WDAFS annual meeting and business meeting, and votes (proxies are permissible);
- 2) Represent the chapters at the WDAFS Meeting – Best of Western Division Symposium plus Chapter representation in symposia organized by WDAFS committees;

- 3) Continue to share ideas and lesson learned so Chapters can be successful in implementing their plan of work (add information to this [spreadsheet](#));
- 4) Contribute content quarterly to The Tributary (e.g., mine content from Chapter newsletters; highlight fisheries news, work, or other activities of interest to WDAFS members);
- 5) Pursue growth in leadership roles within your Chapter and foster the development of future leaders within the Chapter;
- 6) Pursue opportunities within your Chapter to:
 - a) recruit and invest in diverse emerging leaders; and,
 - b) advance diversity and inclusion objectives of the WDAFS;
- 7) Review website and suggest updates throughout the year (e.g., awards) and send corrections to the webmaster (Dan Brauch) with cc's to the President;
- 8) Effectively prioritize work to focus on what is most important and delegate where appropriate.

Draft President's Plan of Work
Julie Carter
September 2024 – September 2025

Preamble

The WDAFS president's plan of work should be consistent with the American Fisheries Society (AFS) and Western Division (WD) AFS mission and vision (provided below).

AFS MISSION:

The mission of the American Fisheries Society is to improve the conservation and sustainability of fishery resources and aquatic ecosystems by advancing fisheries and aquatic science and promoting the development of fisheries professionals.

AFS VISION:

To address our mission, AFS needs to advance fisheries knowledge and strive to be the home society for all fisheries disciplines. In that pursuit, AFS seeks to be recognized as the pre-eminent organization providing fisheries information to decision makers in all arenas. While fulfilling our vision, we will recruit and develop new fisheries professionals by offering learning and training opportunities crucial to maintaining a well-trained profession, support programs and efforts to increase diversity and inclusion, and enhance the value of AFS professional certification.

WDAFS MISSION:

The mission of the WDAFS is to: 1) improve the conservation and sustainability of unique fishery resources and aquatic ecosystems in western North America by advancing fisheries and aquatic science and promoting the development of fisheries professionals, and 2) serving as an effective bridge between the Society and chapters within the WD, promoting communication among and support of the Chapters and membership, and being the AFS's representative to the public in western North America.

WDAFS VISION:

The WDAFS seeks to be recognized as the pre-eminent organization providing fisheries information to decision makers in all arenas of western North America. While fulfilling our vision, we will recruit and develop new fisheries professionals by offering learning and training opportunities crucial to maintaining a well-trained profession, support programs and efforts to increase diversity and inclusion, and enhance the value of AFS professional certification.

Draft President's Plan of Work
Julie Carter
September 2024 – September 2025

1. Assist the Colorado-Wyoming (CO-WY) Chapter of AFS in executing a successful Chapter and WDAFS annual meeting in Westminster, CO, May 11-15, 2025.
 - a. Participate in the meeting planning as the General Meeting Co-chair and have WDAFS officers co-chair important sub-committees to share the workload and support the CO-WY chapter during planning efforts;
 - i. Co-organizer of the plenary and meeting theme related symposium;
 - ii. Assist the CO-WY to improve student volunteer opportunities and participation tracking for this and future WDAFS meetings;
 - iii. Ensure the CO-WY Chapter is able to integrate important parts of their annual meeting programs with the WDAFS meeting; and,
 - b. Encourage all WDAFS committees and chapter officers to participate in the annual meeting.
2. Provide continuity and work towards the WDAFS mission and objectives by continuing to work on various aspects of the previous President's Plans of Work.
 - a. Continue to support the establishment and growth of the Pacific Islands Chapter;
 - b. Through annual budgeting and working with the WD's Financial Sustainability Committee, continue to ensure the WD provides opportunities to our members;
 - c. Continue to be an effective bridge between the Society and the WD chapters and align with Miguel Garcia's Plan of Work including supporting efforts to increase efficiency of communications about activities among AFS units and better convey the value of the Society to its members and their employers and supporting the continuation/implementation of the Strategic Positioning initiative;
 - d. Continue to build on the DEIJA initiatives of the WD, Society, Chapters, and Equal Opportunities Section;
 - i. Incorporate DEI criteria into awards nominations and scoring;
 - ii. Review procedures manual with a DEI lens;
 - iii. Work to nominate leaders from outside Nominating Committee's immediate network; and,
 - e. Support professional growth through travel grants, small grant program, and scholarships.
3. Encourage participation and membership in the AFS by providing new membership benefits and opportunities, and through targeted messaging towards students and early career professionals and chapters offering chapter-only memberships.
 - a. Find ways to personalize benefits of membership by highlighting experiences of student or early career professional members in the newsletter; and,
 - b. Support membership initiatives and messaging developed by the Society's Membership Committee.
4. Continue to find ways to improve the relevancy of WDAFS to members, and improve communication between WD chapter presidents, WD officers, and WD committee members.
5. Evaluate committee charges and find ways to improve communication to and with the committees.

- a. Encourage WDAFS committees to include active members from each chapter, if possible, and/or establish a meeting or two a year to provide updates on committee work to chapter leadership;
 - b. Provide support and resources to chapter-level committees that overlap with WDAFS committees and establish a meeting or two a year with such committees;
 - c. Ensure the WD committees have sufficient funding to conduct business, events, and initiatives;
 - d. Ensure the WD has representatives for Society committees, and develop pathways for communicating Society committee activities or initiatives back to WDAFS members, EXCOM, and WD committee leadership; and,
 - e. Find opportunities for the committees to engage with WDAFS EXCOM more frequently.
6. Continue to find ways to improve the relevancy of WDAFS to members, and improve communication between WD chapter presidents, WD officers, and WD committee members.
 - a. Effectively use listserv to send timely communications to Division members;
 - b. Highlight chapter news in the WD newsletter or listserv, as appropriate;
 - c. Promote and encourage the participation of WD officers in various activities when attending chapter meetings;
 - d. Develop information sharing platform for chapter presidents;
 - e. Develop an onboarding process for new chapter presidents; and,
 - f. Communicate effectively and provide feedback from chapters to the Society through the Management Committee and Governing Board, and vice versa.
7. Participate in the strategic planning efforts of the Society and implement initiatives developed by the Strategic Positioning Committee and AFS Governing Board within the WD.

Presidential Plan of Work for the American Fisheries Society

Miguel “toño” García-Bermúdez

September 2024-August 2025

PLAN OF WORK OBJECTIVES

1. Help to lead AFS towards a more international/ethnic society, by attracting members from a broader geography baiting them with relevancy.
2. Keep cultivating and strengthening Fisheries Science and Practice, including engagement with other fisheries focused and aquatic societies.
3. Support the continuation/implementation of the Strategic Positioning initiative and teaming with new Executive Director as he guides the Society into the future.
4. Increase levels of communication between all AFS units and better convey the relevance of Society to its members and their employers. (Continuation from Jennings POW)
5. Keep and enhance support to diversity initiatives within the Society as well as improve message to membership about the value of diversity of all kinds. (Continuation from Jennings POW)

Specifics – Objective 1. A more international/ethnic society

Become actively involved with the “most important” fisheries focused organization in Central and South America and initiate dialogue of collaboration focusing on What do they need from us....?

Keep working in the development of a Latin American and Caribbean Fisheries Unit.

Keep supporting the development of the new Pacific Islands Chapter to serve fishery professionals as well as increase the Society’s presence and influence in the area beyond the 2024 annual meeting.

Take a leading role in the World Council of Fisheries Societies and work in the preparation of the next to World Fisheries Congress (2028).

Increase direct involvement with AFS International Fisheries Section

Collaborate with and support the Executive Director and AFS staff on Society activities related to this objective (From Jennings POW).

Specifics – Objective 2. Strengthening Fisheries Science and Practice)

Keep spreading the Society’s mission seeking to attract professionals and their potential and current employers within and beyond the traditional fisheries program. This messaging should be nimble to adjust to diverse perceptions of what is considered “fisheries” work and who is a “fisheries” professional, including other practitioners.

Continue to engage with CASS on the future of the organization, including organizational structure, business model, and planning future joint meetings (From Jennings POW).

Specifics – Objective 3. Strategic Positioning initiative and teaming with new Executive Director

Continue the work with the Strategic Positioning Committee (Marlis Douglas, Joe Conroy: Co-chairs) to complete and start implementing our current strategic positioning process.

Support with the help of other Officers and staff the new Executive Director development.

Specifics – Objective 4. Communication between all AFS components

Have direct communication (preferably face –to face) with every Society’s component to determine how are we doing ? What can be done better? in terms of the flow of information

Promote forward-thinking approaches to sharing information with and among units of the Society and staff-lessons learned from the Pandemic

Infiltrate partner agencies (e.g. USFWS, NRCS, state agencies, NGO’s) seeking better communication to determine how relevant the Society is for them and identify opportunities to better serve constituents.

Devise communication strategies to remediate any misconceptions about what AFS does and better inform partners about the value the Society provides to the agencies and their employees (From Jennings’ POW)

Specifics – Objective 5. Maintain/improve diversity

Communicate with membership on the links between DEIA and the benefits of reflecting societal diversity in our fisheries research and management staff and programs (From Jennings’ POW)

Continue collaboration between the Hutton Program and university fisheries programs (possibly through the Education Section and NAUFWP) to provide information to all Hutton applicants regarding university fisheries programs and careers in fisheries science (From Jennings’ POW)

Continue targeted outreach to students and faculty of minority serving institutions (e.g., Historically Black Colleges and University, Tribal Colleges and University, and Hispanic Serving Institute students) based on availability of underrepresented populations local to a meeting or other Society event site (From Jennings’ POW).

***Work with members, staff and officers for the most
WELCOMING Society***

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Larissa Lee	Washington- British Columbia	larissa.lee@noaa.gov	
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Amber Steed	Montana	asteed@mt.gov	
Kelly Mistry	Washington- British Columbia	kelly.r.mistry@gmail.com	
Laurie Early	Previously California-Nevada. Now	laurieearley@outlook.com	
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Rob van Kirk	Idaho	rob@henrysfork.org	
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Liasons			
Eric Featherman	Colorado-Wyoming		
Julie Carter	Arizona-New Mexico		
Tim Copeland	Idaho		
Lian Guo	California-Nevada		

Name	Chapter	Email	
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Dave Lentz	CA/NV	davelentz29@gmail.com

Chair

Name	Chapter	Email
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Co-chair
Co-chair

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Western Division American Fisheries Society

President Eric Fetherman, President-Elect Julie Carter, Vice-President Tim Copeland, Secretary-Treasurer Laura Burckhardt, Past-President Laurie Earley, Student Representative Meredith Journey

Advancing fisheries and aquatic science and professionals in western North America

Secretary/Treasurer Report – September 30, 2024

Account Balances by Month

Table 1. Bank Account Balances

Account	9/30/2023 Balance	10/31/2023 Balance	11/30/2023 Balance	12/31/2023 Balance	01/31/2024 Balance	02/29/2024 Balance	03/31/2024 Balance	04/30/2024 Balance	5/31/2024 Balance	6/30/2024 Balance	7/31/2024 Balance	8/31/2024 Balance	09/30/2024 Balance
Bank Accounts													
Wells Fargo Checking	\$ 72,571.39	\$ 65,429.94	\$ 61,783.82	\$ 61,125.62	\$ 31,988.52	\$ 20,381.72	\$ 12,386.67	\$ 6,268.35	\$ 18,858.66	\$ 12,183.54	\$ 35,276.08	\$ 35,513.48	\$ 18,686.66
Charles Schwab - Investments	\$ 606,818.77	\$ 583,160.44	\$ 643,496.38	\$ 678,636.31	\$ 705,838.77	\$ 740,497.01	\$ 765,106.92	\$ 735,224.94	\$ 773,179.19	\$ 785,380.30	\$ 779,442.61	\$ 793,162.44	\$ 803,343.10
Western Division Assets - Account Ending in 600	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 404,049.84	\$ 388,327.54	\$ 395,319.71	\$ 402,777.44
Other Assets - Account Ending in 329	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 381,330.46	\$ 391,115.07	\$ 397,842.73	\$ 400,565.66
OVERALL TOTAL	\$ 679,390.16	\$ 648,590.38	\$ 705,280.20	\$ 739,761.93	\$ 737,827.29	\$ 760,878.73	\$ 777,493.59	\$ 741,493.29	\$ 792,037.85	\$ 797,563.84	\$ 814,718.69	\$ 828,675.92	\$ 822,029.76

Investment Account

Table 2 displays the Unit ownership in the Investments portion of the Charles Schwab account, prior to the account split on June 17, 20214. Table 3. Shows the percent ownership of each Unit within the Other Assets account ending in 329.

Table 2. Unit Balance and Ownership in Investments within the Charles Schwab Account

Unit	09/30/2024 Balance
Account Value	\$ 400,565.66
AZ/NM Chapter	\$ 31,904.29
CO/WY Chapter	\$ 92,522.45
Idaho Chapter	\$ 65,366.70
Utah Chapter	\$ 37,821.27
WA-BC Chapter	\$ 58,243.88
Fish Culture Section	\$ 114,707.06
Unit	Percent Ownership
AZ/NM Chapter	7.96%
CO/WY Chapter	23.10%
Idaho Chapter	16.32%
Utah Chapter	9.44%
WA-BC Chapter	14.54%
Fish Culture Section	28.64%

Wells Fargo Checking Account Transaction

The following table displays the reporting period opening balance, transactions by current budget category, the fiscal year that the transaction was budgeted in, and if the transaction has cleared the account or not.

Table 3. Checking Account Transactions

Date	Num	Description	Memo	Category	Tag	Clr	Amount
9/30/2024		Burlington Int'l ...	Early Parking	02 AFS WD Annual Meeting:02.0...FY24		c	-72.00
9/27/2024		Paypal Transfer	Auction proceeds	1 WD Meeting Profits		c	979.88
9/27/2024	2042	Cal Poly Humboldt	Olmo Small Project Grant	05 Grants:05.08 Small Grants Pr...		FY24	-1,224.00
9/27/2024	2043	Liz Krone	Mentorship Award and Travel Reimbursement	07 Committees:07.02 Diversity a...		FY24	-1,500.00
9/27/2024	2044	Lauren Yancy	Student Travel Grant	06 Student Support:06.05 Travel ...		FY24	-1,000.00
9/27/2024	2045	Marika Kirstin ...	International Travel Grant	05 Grants:05.01 Travel Grant Int...		FY24	-750.00
9/27/2024	2046	Harmony Wayn...	Indigenous Travel Grant	05 Grants:05.04 Travel Grant Ind...		FY24	-1,000.00
9/27/2024	2047	Regan Doss	Student Travel Grant	06 Student Support:06.05 Travel ...		FY24	-1,000.00
9/26/2024		Eric Featherman	Personal Parking Fee	02 AFS WD Annual Meeting:02.0...FY24		c	39.00
9/24/2024	2036	...Emily Chen		--Split--		--Split--	-1,500.00
9/24/2024	2037	Rachael Valeria	Student Travel Grant	06 Student Support:06.05 Travel ...		FY24	-1,000.00
9/24/2024	2038	University Of Al...	Esquible Indigenous Travel Grant	05 Grants:05.04 Travel Grant Ind...		FY24	-1,000.00
9/24/2024	2039	Zach Beard	Professional Travel Grant	05 Grants:05.03 Travel Grant Pr...		FY24	-750.00
9/24/2024	2040	William Samuel	ECP Travel Grant	07 Committees:07.01 Early Care...		FY24	-500.00
9/24/2024	2041	Tawni Reipe	Reimbursement for per diem	07 Committees:07.01 Early Care...		FY24	-470.50
9/24/2024		Eventbrite	SCCS meeting registration	1 SCCS Meeting Registration	SCCS	c	2,033.11
9/23/2024		Hilton	Copeland Hawaii Hotel Deposit	02 AFS WD Annual Meeting:02.0...FY24		c	-1,668.04
9/23/2024		Lyft	Earley transportation	02 AFS WD Annual Meeting:02.0...FY24		c	-29.64
9/23/2024		Starbucks	Fetherman	02 AFS WD Annual Meeting:02.0...FY24		c	-14.89
9/23/2024		Tst*deck.	Fetherman meal	02 AFS WD Annual Meeting:02.0...FY24		c	-78.54
9/23/2024		Kayak Cafe	Earley Meal	02 AFS WD Annual Meeting:02.0...FY24		c	-24.88
9/23/2024		Hawaiian Air	Carter	02 AFS WD Annual Meeting:02.0...FY24		c	-40.00
9/23/2024		Kamukura Ram...	Fetherman meal	02 AFS WD Annual Meeting:02.0...FY24		c	-24.64
9/23/2024		Starbucks	Fetherman	02 AFS WD Annual Meeting:02.0...FY24		c	-15.26
9/23/2024		Doubletree	Early Lodging	02 AFS WD Annual Meeting:02.0...FY24		c	-1,677.48
9/23/2024		Laura Burckhardt	Reimbursement for mileage	02 AFS WD Annual Meeting:02.0...FY24		c	-156.78
9/23/2024		Eric Featherman	Reimbursement for parking	02 AFS WD Annual Meeting:02.0...FY24		c	-140.80
9/23/2024		Munch N Brunc...	Carter meal	02 AFS WD Annual Meeting:02.0...FY24		c	-19.79
9/23/2024		Poke Waikiki H...	Fetherman meal	02 AFS WD Annual Meeting:02.0...FY24		c	-23.82
9/23/2024		Lyft	Earley Transportation	02 AFS WD Annual Meeting:02.0...FY24		c	-40.48
9/23/2024		Hilton	Copeland Hawaii Hotel Deposit	02 AFS WD Annual Meeting:02.0...FY24		c	-40.00
9/23/2024		Laura Burckhardt	HI Meeting Per Diem	02 AFS WD Annual Meeting:02.0...FY24		c	-1,099.00
9/23/2024		Apcoa Bill Billin...	Burckhardt Parking	02 AFS WD Annual Meeting:02.0...FY24		c	-90.00
9/23/2024	2034	Alyssa MacDon...	Reimbursement for shipping of auction item	08 Miscellaneous Expenses:08.0...FY24			-119.05
9/23/2024	2035	Kadie Heinle	Student travel grant	06 Student Support:06.05 Travel ...		c	-1,000.00
9/20/2024		Munch N Brunch	Carter meal	02 AFS WD Annual Meeting:02.0...FY24		c	-19.79
9/20/2024		Santouka Kahe...	Earley meal	02 AFS WD Annual Meeting:02.0...FY24		c	-47.93

Table 3 continued. Checking Account Transactions

Date	Num	Description	Memo	Category	Tag	Clr	Amount
9/20/2024		Starbucks	Fetherman meal	02 AFS WD Annual Meeting:02.0...FY24		c	-15.26
9/19/2024		Honolulu Coffee	Earley meal	02 AFS WD Annual Meeting:02.0...FY24		c	-13.53
9/19/2024		Tacos Don Che...	Carter meal	02 AFS WD Annual Meeting:02.0...FY24		c	-16.21
9/19/2024		Honolulu Coffee	Fetherman meal	02 AFS WD Annual Meeting:02.0...FY24		c	-34.22
9/19/2024		Starbucks	Fetherman meal	02 AFS WD Annual Meeting:02.0...FY24		c	-19.61
9/19/2024		Tst*sunnys Local	Earley meal	02 AFS WD Annual Meeting:02.0...FY24		c	-21.44
9/18/2024		Lyft	Carter transportation	02 AFS WD Annual Meeting:02.0...FY24		c	-10.71
9/18/2024		Kamukura Ram...	Fetherman meal	02 AFS WD Annual Meeting:02.0...FY24		c	-28.85
9/18/2024		Starbucks	Carter meal	02 AFS WD Annual Meeting:02.0...FY24		c	-16.39
9/18/2024		Honolulu Coffee	Earley meal	02 AFS WD Annual Meeting:02.0...FY24		c	-32.68
9/18/2024		Starbucks	Fetherman meal	02 AFS WD Annual Meeting:02.0...FY24		c	-15.26
9/17/2024		Arancino Beach	Earley meal	02 AFS WD Annual Meeting:02.0...FY24		c	-112.58
9/17/2024		Hi Steaks	Earley meal	02 AFS WD Annual Meeting:02.0...FY24		c	-23.56
9/17/2024		Hi Steaks	Fetherman meal	02 AFS WD Annual Meeting:02.0...FY24		c	-26.69
9/17/2024		Starbucks	Carter meal	02 AFS WD Annual Meeting:02.0...FY24		c	-18.96
9/17/2024		Starbucks	Fetherman meal	02 AFS WD Annual Meeting:02.0...FY24		c	-15.26
9/17/2024		Eventbrite	SCCS Meeting Registration	1 SCCS Meeting Registration	SCCS	c	514.43
9/17/2024		Arancino Beach	Fetherman meal	02 AFS WD Annual Meeting:02.0...FY24		c	-114.41
9/16/2024		Chiba-ken Hon...	Carter, Meals HI AFS	02 AFS WD Annual Meeting:02.0...FY24		c	-40.72
9/16/2024		Chiba-ken Hon...	Fetherman, Meals HI AFS	02 AFS WD Annual Meeting:02.0...FY24		c	-49.57
9/16/2024		Lyft	Earley, transportation	02 AFS WD Annual Meeting:02.0...FY24		c	-28.34
9/16/2024		Afrc Hale Koa ...	Fetherman, meal	02 AFS WD Annual Meeting:02.0...FY24		c	-71.04
9/16/2024		Waikiki Brewin...	Fetherman, meal	02 AFS WD Annual Meeting:02.0...FY24		c	-45.00
9/13/2024		Lyft	Carter, Transport	02 AFS WD Annual Meeting:02.0...FY24		c	-28.57
9/13/2024		Lyft	Burckhardt, Transport	02 AFS WD Annual Meeting:02.0...FY24		c	-48.85
9/12/2024		Ala Moana Hotel	Fetherman, Lodging	02 AFS WD Annual Meeting:02.0...FY24		c	-2,431.17
9/12/2024		Ala Moana Hotel	Fetherman, parking	02 AFS WD Annual Meeting:02.0...FY24		c	-39.00
9/10/2024		AFS	Earley, Registration HI AFS Meeting	02 AFS WD Annual Meeting:02.0...FY24		c	-800.00
9/9/2024		Hawaiian Air	Carter baggage fee	02 AFS WD Annual Meeting:02.0...FY24		c	-40.00
9/6/2024		CTE Awards	Riparian Challenge Awards	04 Awards:04.02 Riparian Challe...		c	-160.00
9/3/2024		Eventbrite	SCCS Meeting Registration	1 SCCS Meeting Registration	SCCS	c	2,123.77
8/28/2024		Dan Brauch	Reimbursement for fundraiser auction items	08 Miscellaneous Expenses:08.0...FY24		c	-812.55
8/23/2024		United	Earley Flight to Hawaii	02 AFS WD Annual Meeting:02.0...FY24		c	-1,214.08
8/19/2024	2033	Amber Steed	Reimbursement for shipping	08 Miscellaneous Expenses:08.1...FY24		c	-15.73
8/16/2024		Eventbrite	SCCS Meeting Registration	1 SCCS Meeting Registration	SCCS	c	2,567.75
8/14/2024		Bay Photo Lab	Photo prints for Auction	08 Miscellaneous Expenses:08.0...FY24		c	-445.30
8/7/2024		Ups	Shipping costs	08 Miscellaneous Expenses:08.1...FY24		c	-14.56
8/2/2024		Eventbrite	SCCS Meeting Registration	1 SCCS Meeting Registration	SCCS	c	1,034.56

Table 3 continued. Checking Account Transactions

Date	Num	Description	Memo	Category	Tag	Clr	Amount
7/22/2024		Van Bind	Awards	04 Awards:04.01 AFS Plaques	FY24	c	-772.91
7/17/2024	2032	Tawni Reipe	Reimbursement for flight to Hawaii	07 Committees:07.01 Early Care...	FY24	c	-570.40
7/15/2024		Eventbrite, Inc.	SCCS Meeting Registration	1 SCCS Meeting Registration	SCCS	c	405.21
7/12/2024		Schwab Broker...	Transfer of Money from Schwab account	WDAFS Investment	FY24	c	25,000.00
7/11/2024		Namecheap	Website fee	08 Miscellaneous Expenses:08.0...	FY24	c	-15.16
6/20/2024		Hawaiian Air	Carter Flight to Hawaii	02 AFS WD Annual Meeting:02.0...	FY24	c	-712.40
6/13/2024	2031	Meredith Journey	Reimbursement for student colloquium	06 Student Support:06.04 Stude...	FY24	c	-1,816.89
6/11/2024	2030	Matea Djokic	Eugene Maughn Scholarship	06 Student Support:06.02 Maugh...	FY24	c	-2,500.00
6/10/2024	2026	Tim Copeland	Reimbursement for OR site visit flight	02 AFS WD Annual Meeting:02.0...	FY24	c	-336.20
6/10/2024	2027	Pablo Dominqu...	Reimbursement for travel to student colloquium	06 Student Support:06.04 Stude...	FY24	c	-505.08
6/10/2024	2028	Arif Jan	Reimbursement for travel to student colloquium	06 Student Support:06.04 Stude...	FY24	c	-439.09
6/10/2024		Eric Featherman	Reimbursement for flight to Hawaii	02 AFS WD Annual Meeting:02.0...	FY24	c	-1,002.40
6/10/2024	2029	Claire Vaage	Eugene Maughn Scholarship	06 Student Support:06.02 Maugh...	FY24	c	-2,500.00
6/3/2024		Eventbrite, Inc.	SCCS Meeting Registration	1 SCCS Meeting Registration	SCCS	c	1,320.05
5/31/2024		American Fishe...	2024 Website Fees	08 Miscellaneous Expenses:08.0...	FY24	c	-240.00
5/16/2024		Eventbrite, Inc.	SCCS Meeting Registration	1 SCCS Meeting Registration	SCCS	c	517.28
5/9/2024		American Fishe...	2023 Dues Rebate	AFS Membership Dues Rebate	FY23	c	13,683.00
5/7/2024		Centennial Hot...	Burckhardt Meal ID/WA/BC Lodging	03 Other Excom Travel:03.02 Ch...	FY24	c	-797.44
5/7/2024		American Fishe...	Carter WDAFS Meeting Registration	02 AFS WD Annual Meeting:02.0...	FY24	c	-650.00
5/3/2024		United	Burckhardt Luggage Fee ID/WA/BC	03 Other Excom Travel:03.02 Ch...	FY24	c	-40.00
5/3/2024		Shawn Odonnel	Burckhardt Meal ID/WA/BC AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-23.16
5/2/2024		Main Market C...	Burckhardt Meal ID/WA/BC AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-25.78
5/1/2024		Eventbrite, Inc.	SCCS Meeting Registration	1 SCCS Meeting Registration	SCCS	c	271.01
5/1/2024		Sushi Com	Burckhardt Meal ID/WA/BC AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-32.29
5/1/2024		Gander And Ry...	Burckhardt Meal ID/WA/BC AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-48.33
5/1/2024		Emran Llc	Burckhardt Meal ID/WA/BC AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-23.98
4/30/2024		Elway's	Burckhardt Meal ID/WA/BC AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-33.62
4/30/2024		United	Burckhardt Luggage Fee ID/WA/BC	03 Other Excom Travel:03.02 Ch...	FY24	c	-40.00
4/29/2024		My Fresh Bask...	Burckhardt Meal ID/WA/BC AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-52.09
4/29/2024		Uber.com	Burckhardt Travel ID/WA/BC AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-3.73
4/29/2024		Uber.com	Burckhardt Travel ID/WA/BC AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-24.92
4/25/2024	2023	Meredith Journey	Hawaii Flight Reimbursement	02 AFS WD Annual Meeting:02.0...	FY24	c	-1,325.40
4/22/2024		Nelson And As...	Tax Preparation	08 Miscellaneous Expenses:08.1...	FY24	c	-1,850.00
4/15/2024		Hampton Inn	Earley Lodging CA/NV AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-321.75
4/15/2024		Aeroports De ...	Earley Parking CA/NV AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-162.28
4/15/2024		United	Earley Food CA/NV AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-22.00
4/15/2024		International P...	Earley Food CA/NV AFS	08 Miscellaneous Expenses:08.0...	FY24	c	-4.86
4/12/2024		The Bantam R...	Earley Food CA/NV AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-22.80

Table 3 continued. Checking Account Transactions

Date	Num	Description	Memo	Category	Tag	Clr	Amount
4/11/2024		Great Amer Ba...	Earley Food CA/NV AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-13.29
4/10/2024		Hilton	Copeland Hawaii Hotel Deposit	02 AFS WD Annual Meeting:02.0...	FY24	c	-238.28
4/10/2024		International P...	Earley Food CA/NV AFS	08 Miscellaneous Expenses:08.0...	FY24	c	-0.76
4/10/2024		United	Earley Food CA/NV AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-25.48
4/9/2024	2025	Tim Copeland	Reimbursement Hawaii Flight	02 AFS WD Annual Meeting:02.0...	FY24	c	-686.40
4/1/2024		Harbor 360 Hotel	Fetherman AK AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-714.84
4/1/2024		Enterprise Rent...	Fetherman AK AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-575.82
3/26/2024		Zotero	SCCS Zotero Annual fee	08 Miscellaneous Expenses:08.0...	SCCS	c	-120.00
3/21/2024		United	Feterman Flight to CA/NV	03 Other Excom Travel:03.02 Ch...	FY24	c	-685.49
3/15/2024	2024	Laura Burckhardt	Reimbursement for Lodging for HI Meeting	03 Other Excom Travel:03.02 Ch...	FY24	c	-1,734.00
3/12/2024		Zelle To Fether...	Fetherman MT AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-128.50
3/11/2024		Hilton	Burckhardt HI Room Deposit	02 AFS WD Annual Meeting:02.0...	FY24	c	-289.00
3/11/2024		Hyatt	Fetherman Lodging GB & WFC Meeting	03 Other Excom Travel:03.03 AF...	FY24	c	-1,762.92
3/11/2024	2022	Jennifer Waldo	Small Project Grant	05 Grants:05.08 Small Grants Pr...	FY23	c	-500.00
3/11/2024		Hyatt	Carter Lodging GB & WFC Meeting	03 Other Excom Travel:03.03 AF...	FY24	c	-2,056.74
3/11/2024		Return Authoriz...	Burckhardt HI Room Deposit Refund	02 AFS WD Annual Meeting:02.0...	FY24	c	289.00
3/6/2024		Pike Place Cho...	Fetherman GB & WFC	03 Other Excom Travel:03.03 AF...	FY24	c	-29.95
3/6/2024		Garden State D...	Earley OR AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-29.35
3/5/2024		Return Authoriz...	Earley OR AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	31.17
3/4/2024		Riverhouse On ...	Earley OR AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-293.17
3/4/2024		Riverhouse On ...	Earley OR AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-24.00
3/4/2024		Harbor 360 Hotel	Fetherman AK AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-178.71
3/4/2024		Lyft	Carter GB & WFC	03 Other Excom Travel:03.03 AF...	FY24	c	-78.39
3/1/2024		Alaska AFS	Fetherman AK AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-370.00
3/1/2024		Riverhouse On ...	Earley OR AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-35.00
2/27/2024		Zelle To Fether...	Fetherman MT AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-218.17
2/26/2024		Return Authoriz...	Carter Flight for Governing Board & World Fishe...	03 Other Excom Travel:03.03 AF...	FY24	c	19.99
2/22/2024		Stetsons	Fetherman MT AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-8.00
2/22/2024		Stetsons	Fetherman MT AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-20.50
2/21/2024		Stetsons	Fetherman MT AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-20.50
2/21/2024		Stetsons	Fetherman MT AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-34.50
2/21/2024		Delta	Fetherman AK AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-939.90
2/20/2024		Yogo Inn	Fetherman MT AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-626.00
2/20/2024		Postemerd.com	Earley Poster Printing	03 Other Excom Travel:03.02 Ch...	FY24	c	-46.17
2/14/2024	2020	Jack McClaren	Meeting Reimbursement: Reissue check that w...	02 AFS WD Annual Meeting:02.0...	FY23	c	-422.55
2/14/2024	2021	Pacific Island C...	Donation to Chapter and Student Subunit	AFS Donation	FY23	c	-8,500.00
2/10/2024		Best Western	Carter UT AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-249.66
2/8/2024		Hilton	Burckhardt HI Room Deposit	02 AFS WD Annual Meeting:02.0...	FY24	c	-289.00

Table 3 continued. Checking Account Transactions

Date	Num	Description	Memo	Category	Tag	Clr	Amount
2/8/2024		ID AFS	Burckhardt ID/WA/BC AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-350.00
2/5/2024		Enterprise Rent...	Copeland AZ/NM AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-324.39
2/4/2024		Lyft	Earley Transportation	02 AFS WD Annual Meeting:02.0...		c	-61.82
1/29/2024		Posternerd.com	Fetherman Poster Printing MT AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-50.55
1/19/2024		OR AFS	Earley Registration OR AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-341.00
1/19/2024		Air Canada	Earley Flight CA/NV AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-715.09
1/19/2024		CA NV AFS	Earley Registration CA/NV AFS	03 Other Excom Travel:03.02 Ch...	FY24	c	-400.00
1/11/2024		Schwab Broker...	Transfer of Money to Schwab account			c	-30,000.00
1/10/2024		Laurie Earley	Earley payment for personal purchases			c	47.50
1/9/2024	2019	Lauren Zatkos	WDAFS Logo Contest Award	08 Miscellaneous Expenses:08.0...	FY23	c	-25.00
1/8/2024		Return Authoriz...	Carter Flight for GF & WFC (cancelled)	03 Other Excom Travel:03.03 AF...	FY24	c	462.80
1/8/2024		Alaska Air	Carter Flight for Governing Board & World Fishe...	03 Other Excom Travel:03.03 AF...	FY24	c	-526.19
1/3/2024	2018	Burke Strobel	WDAFS Logo Contest Award	08 Miscellaneous Expenses:08.0...	FY23	c	-25.00
1/3/2024	2009	Claire Vaage	WDAFS Logo Contest Award	08 Miscellaneous Expenses:08.0...	FY23	c	-25.00
1/3/2024	2010	Colton Finch	WDAFS Logo Contest Award	08 Miscellaneous Expenses:08.0...	FY23	c	-25.00
1/2/2024	2008	Emily Chen	WDAFS Logo Contest Award	08 Miscellaneous Expenses:08.0...	FY23	c	-150.00
12/21/2023		Southwest Airli...	Carter Flight for GF & WFC (cancelled)	03 Other Excom Travel:03.03 AF...	FY24	c	-462.80
12/18/2023		Alaska Air	Copeland flight to AZNM Meeting	03 Other Excom Travel:03.03 AF...	FY24	c	-577.80
12/15/2023		United	Earley Flight to OR AFS Meeting	03 Other Excom Travel:03.02 Ch...	FY24	c	-831.72
12/14/2023		Lyft	Earley Personal Purchase			c	-5.00
12/13/2023		Lyft	Earley Personal Purchase			c	-17.84
12/12/2023		AFS	Balimore meeting profit share	AFS Meeting Profits	FY23	c	4,000.00
12/12/2023		Mailchimp	Mailchimp	08 Miscellaneous Expenses:08.0...	FY24	c	-85.42
12/8/2023		Lyft	Earley Personal Purchase			c	-24.66
12/2/2023		Quicken	Quicken Annual Fee	08 Miscellaneous Expenses:08.0...	FY24	c	-62.28
11/28/2023	2017	Brook Thompson	Reimbursement for small project grant expense	05 Grants:05.08 Small Grants Pr...	FY23	c	-504.45
11/25/2023		United	Fetherman Flight GB Meeting	03 Other Excom Travel:03.03 AF...	FY24	c	-328.65
11/14/2023		Eric Featherman	REIMBURSEMENT FOR WDAFS TEMPE MEE...	01 WD Mid-Year Excom Meeting...	FY24	c	-230.69
11/14/2023		Officemax Dep...	PURCHASE RETURN	08 Miscellaneous Expenses:08.0...	FY24	c	45.57
11/11/2023		Mailchimp	Mail Chimp	08 Miscellaneous Expenses:08.0...	FY24	c	-80.32
11/8/2023		Residence Inn	Earley Hotel mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-533.85
11/8/2023		Residence Inn	Fetherman Hotel and Parking, mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-385.90
11/8/2023		Residence Inn	Burckhardt Hotel mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-355.90
11/8/2023		Residence Inn	Journey Hotel mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-355.90
11/8/2023		Residence Inn	Carter Hotel mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-177.95
11/8/2023		Lyft	Burckhardt Travel, mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-13.97
11/8/2023		Lyft	Earley Travel, mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-45.39
11/7/2023		Residence Inn	Meeting Room	01 WD Mid-Year Excom Meeting...	FY24	c	-675.63
11/7/2023		Zona Cocina	Earley Food Expense for mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-31.06
11/7/2023		Uber.com	Burckhardt Travel	01 WD Mid-Year Excom Meeting...	FY24	c	-49.65
11/7/2023		Emerald City S...	Earley Food Expense for mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-14.86
11/7/2023		Phoenicia Cafe...	Officer meal, mid year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-77.76
11/7/2023		Varsity Tavern	Officer Meal Mid-Year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-119.32
11/7/2023		Mdw Beechers ...	Earley Food Expense for mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-11.84
11/7/2023		Culinary Dropout	Officer meal mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-139.32
11/7/2023		Connections C...	Burckhardt Food Expense for mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-7.73
11/7/2023		Mht/laz Wc	Earley Travel mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-56.00
10/26/2023		Officemax	Power outlets for mid-year meeting	08 Miscellaneous Expenses:08.0...	FY24	c	-45.57
10/19/2023		United	Laura Burckhardt, Flight for mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-796.85
10/17/2023	2016	Meredith Journey	Reimbursement: Flight for Mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-815.63
10/11/2023		Mailchimp	monthly service fee	08 Miscellaneous Expenses:08.0...	FY24	c	-80.32
10/5/2023	2015	Westin Westmi...	Facility Deposit for 2026 Meeting	WD Meeting Loan	FY24	c	-5,000.00
10/3/2023		Amway Grand ...	Eric Fetherman, Grand Rapids Meeting	03 Other Excom Travel:03.01 GB...	FY23	c	54.72
10/1/2023	2014	Tim Copeland	Reimbursement: Flight for Mid-year meeting	01 WD Mid-Year Excom Meeting...	FY24	c	-457.80

Fiscal Year 2024 Budget Overview

The following table displays the FY24 budget categories, opening balances, and transactions during the reporting period by category.

Table 4. Fiscal Year 2024 budget and transactions.

Date	Description	Memo	Clr	Amount
INCOME				979.88
1 WD Meeting Profits				979.88
9/27/2024	Paypal Transfer	Auction proceeds	c	979.88
EXPENSES				25,229.27
01 WD Mid-Year Excom Meeting				3,372.00
01.01 Facility or Other Expense				749.37
10/1/2023	Opening Balance			1,425.00
11/7/2023	Residence Inn	Meeting Room	c	-675.63
01.03 Excom Travel Expenses				2,622.63
10/1/2023	Tim Copeland	Reimbursement: Flight for Mid-year meeting		-457.80
10/1/2023	Opening Balance	Reimbursement: Flight for Mid-year meeting	c	7,300.00
10/17/2023	Meredith Journey	Reimbursement: Flight for Mid-year meeting	c	-815.63
10/19/2023	United	Laura Burckhardt, Flight for mid-year meeting	c	-796.85
11/7/2023	Mht/laz Wc	Earley Travel mid-year meeting	c	-56.00
11/7/2023	Connections Conc B	Burckhardt Food Expense for mid-year meet...	c	-7.73
11/7/2023	Culinary Dropout	Officer meal mid-year meeting	c	-139.32
11/7/2023	Mdw Beechers Hn...	Earley Food Expense for mid-year meeting	c	-11.84
11/7/2023	Varsity Tavern	Officer Meal Mid-Year meeting	c	-119.32
11/7/2023	Phoenicia Cafe Inc	Officer meal, mid year meeting	c	-77.76
11/7/2023	Emerald City Smoo...	Earley Food Expense for mid-year meeting	c	-14.86
11/7/2023	Uber.com	Burckhardt Travel	c	-49.65
11/7/2023	Zona Cocina	Earley Food Expense for mid-year meeting	c	-31.06
11/8/2023	Lyft	Earley Travel, mid-year meeting	c	-45.39
11/8/2023	Lyft	Burckhardt Travel, mid-year meeting	c	-13.97
11/8/2023	Residence Inn	Carter Hotel mid-year meeting	c	-177.95
11/8/2023	Residence Inn	Journey Hotel mid-year meeting	c	-355.90
11/8/2023	Residence Inn	Burckhardt Hotel mid-year meeting	c	-355.90
11/8/2023	Residence Inn	Fetherman Hotel and Parking, mid-year mee...	c	-385.90
11/8/2023	Residence Inn	Earley Hotel mid-year meeting	c	-533.85
11/14/2023	Eric Fetherman	REIMBURSEMENT FOR WDAFS TEMPE M...	c	-230.69
02 AFS WD Annual Meeting				13,603.20
02.01 Excom Meeting				500.00
10/1/2023	Opening Balance			500.00
02.02 Business Meeting				7,000.00
10/1/2023	Opening Balance			7,000.00
02.03 Officer Travel				6,439.40
10/1/2023	Opening Balance			22,000.00
2/8/2024	Hilton	Burckhardt HI Room Deposit	c	-289.00
4/9/2024	Tim Copeland	Reimbursement Hawaii Flight	c	-686.40
4/10/2024	Hilton	Copeland Hawaii Hotel Deposit	c	-238.28
4/25/2024	Meredith Journey	Hawaii Flight Reimbursement	c	-1,325.40
5/7/2024	American Fisheries...	Carter WDAFS Meeting Registration	c	-650.00
6/10/2024	Eric Featherman	Reimbursement for flight to Hawaii	c	-1,002.40
6/20/2024	Hawaiian Air	Carter Flight to Hawaii	c	-712.40
8/23/2024	United	Earley Flight to Hawaii	c	-1,214.08
9/9/2024	Hawaiian Air	Carter baggage fee	c	-40.00
9/10/2024	AFS	Earley, Registration HI AFS Meeting	c	-800.00
9/12/2024	Ala Moana Hotel	Fetherman, parking	c	-39.00
9/12/2024	Ala Moana Hotel	Fetherman, Lodging	c	-2,431.17
9/13/2024	Lyft	Burckhardt, Transport	c	-48.85

Table 4 continued. Fiscal Year 2024 budget and transactions.

Date	Description	Memo	Clr	Amount
9/13/2024	Lyft	Carter, Transport	c	-28.57
9/16/2024	Waikiki Brewing C...	Fetherman, meal	c	-45.00
9/16/2024	Afrc Hale Koa Food	Fetherman, meal	c	-71.04
9/16/2024	Lyft	Earley, transportation	c	-28.34
9/16/2024	Chiba-ken Honolul...	Fetherman, Meals HI AFS	c	-49.57
9/16/2024	Chiba-ken Honolul...	Carter, Meals HI AFS	c	-40.72
9/17/2024	Arancino Beach	Fetherman meal	c	-114.41
9/17/2024	Starbucks	Fetherman meal	c	-15.26
9/17/2024	Starbucks	Carter meal	c	-18.96
9/17/2024	Hi Steaks	Fetherman meal	c	-26.69
9/17/2024	Hi Steaks	Earley meal	c	-23.56
9/17/2024	Arancino Beach	Earley meal	c	-112.58
9/18/2024	Starbucks	Fetherman meal	c	-15.26
9/18/2024	Honolulu Coffee	Earley meal	c	-32.68
9/18/2024	Starbucks	Carter meal	c	-16.39
9/18/2024	Kamukura Ramen	Fetherman meal	c	-28.85
9/18/2024	Lyft	Carter transportation	c	-10.71
9/19/2024	Tst*sunnys Local	Earley meal	c	-21.44
9/19/2024	Starbucks	Fetherman meal	c	-19.61
9/19/2024	Honolulu Coffee	Fetherman meal	c	-34.22
9/19/2024	Tacos Don Chema	Carter meal	c	-16.21
9/19/2024	Honolulu Coffee	Earley meal	c	-13.53
9/20/2024	Starbucks	Fetherman meal	c	-15.26
9/20/2024	Santouka Kaheka	Earley meal	c	-47.93
9/20/2024	Munch N Brunch	Carter meal	c	-19.79
9/23/2024	Apcoa Bill Billings Mt	Burckhardt Parking	c	-90.00
9/23/2024	Laura Burckhardt	HI Meeting Per Diem	c	-1,099.00
9/23/2024	Hilton	Copeland Hawaii Hotel Deposit	c	-40.00
9/23/2024	Lyft	Earley Transportation	c	-40.48
9/23/2024	Poke Waikiki Hono...	Fetherman meal	c	-23.82
9/23/2024	Munch N Brunch H...	Carter meal	c	-19.79
9/23/2024	Eric Featherman	Reimbursement for parking	c	-140.80
9/23/2024	Laura Burckhardt	Reimbursement for mileage	c	-156.78
9/23/2024	Doubletree	Early Lodging	c	-1,677.48
9/23/2024	Starbucks	Fetherman	c	-15.26
9/23/2024	Kamukura Ramen	Fetherman meal	c	-24.64
9/23/2024	Hawaiian Air	Carter	c	-40.00
9/23/2024	Kayak Cafe	Earley Meal	c	-24.88
9/23/2024	Tst*deck.	Fetherman meal	c	-78.54
9/23/2024	Starbucks	Fetherman	c	-14.89
9/23/2024	Lyft	Earley transportation	c	-29.64
9/23/2024	Hilton	Copeland Hawaii Hotel Deposit	c	-1,668.04
9/26/2024	Eric Featherman	Personal Parking Fee	c	39.00
9/30/2024	Burlington Int'l A S...	Early Parking	c	-72.00
02.04 Meeting Site Visit				-336.20
6/10/2024	Tim Copeland	Reimbursement for OR site visit flight	c	-336.20
03 Other Excom Travel				5,386.25
03.02 Chapter Meetings				1,720.25
10/1/2023	Opening Balance			9,900.00
12/15/2023	United	Earley Flight to OR AFS Meeting	c	-831.72
1/19/2024	CA NV AFS	Earley Registration CA/NV AFS	c	-400.00
1/19/2024	Air Canada	Earley Flight CA/NV AFS	c	-715.09

Table 4 continued. Fiscal Year 2024 budget and transactions.

Date	Description	Memo	Clr	Amount
1/19/2024	OR AFS	Earley Registration OR AFS	c	-341.00
1/29/2024	Posternerd.com	Fetherman Poster Printing MT AFS	c	-50.55
2/5/2024	Enterprise Rent-a-...	Copeland AZ/NM AFS	c	-324.39
2/8/2024	ID AFS	Burckhardt ID/WA/BC AFS	c	-350.00
2/10/2024	Best Western	Carter UT AFS	c	-249.66
2/20/2024	Posternerd.com	Earley Poster Printing	c	-46.17
2/20/2024	Yoqo Inn	Fetherman MT AFS	c	-626.00
2/21/2024	Delta	Fetherman AK AFS	c	-939.90
2/21/2024	Stetsons	Fetherman MT AFS	c	-34.50
2/21/2024	Stetsons	Fetherman MT AFS	c	-20.50
2/22/2024	Stetsons	Fetherman MT AFS	c	-20.50
2/22/2024	Stetsons	Fetherman MT AFS	c	-8.00
2/27/2024	Zelle To Fetherma...	Fetherman MT AFS	c	-218.17
4/1/2024	Enterprise Rent-a-...	Fetherman AK AFS	c	-575.82
4/1/2024	Harbor 360 Hotel	Fetherman AK AFS	c	-714.84
4/10/2024	United	Earley Food CA/NV AFS	c	-25.48
4/11/2024	Great Amer Bagel	Earley Food CA/NV AFS	c	-13.29
4/12/2024	The Bantam Reddi...	Earley Food CA/NV AFS	c	-22.80
4/15/2024	United	Earley Food CA/NV AFS	c	-22.00
4/15/2024	Aeroports De Mont...	Earley Parking CA/NV AFS	c	-162.28
4/15/2024	Hampton Inn	Earley Lodging CA/NV AFS	c	-321.75
4/29/2024	Uber.com	Burckhardt Travel ID/WA/BC AFS	c	-24.92
4/29/2024	Uber.com	Burckhardt Travel ID/WA/BC AFS	c	-3.73
4/29/2024	My Fresh Basket S...	Burckhardt Meal ID/WA/BC AFS	c	-52.09
4/30/2024	United	Burckhardt Luqqaqe Fee ID/WA/BC	c	-40.00
4/30/2024	Elway's	Burckhardt Meal ID/WA/BC AFS	c	-33.62
5/1/2024	Emran Llc	Burckhardt Meal ID/WA/BC AFS	c	-23.98
5/1/2024	Gander And Ryegr...	Burckhardt Meal ID/WA/BC AFS	c	-48.33
5/1/2024	Sushi Com	Burckhardt Meal ID/WA/BC AFS	c	-32.29
5/2/2024	Main Market Co-op	Burckhardt Meal ID/WA/BC AFS	c	-25.78
5/3/2024	Shawn Odonnel	Burckhardt Meal ID/WA/BC AFS	c	-23.16
5/3/2024	United	Burckhardt Luggage Fee ID/WA/BC	c	-40.00
5/7/2024	Centennial Hotel, Llc	Burckhardt Meal ID/WA/BC Lodging	c	-797.44
03.03 AFS GB Mid-year meeting				3,416.00
10/1/2023	Opening Balance			4,500.00
12/18/2023	Alaska Air	Carter Flight for Governing Board & World Fi...	c	-577.80
12/21/2023	Southwest Airlines	Carter Flight for GF & WFC (cancelled)	c	-462.80
1/8/2024	Alaska Air	Carter Flight for Governing Board & World Fi...	c	-526.19
1/8/2024	Return Authorized ...	Carter Flight for GF & WFC (cancelled)	c	462.80
2/26/2024	Return Authorized ...	Carter Flight for Governing Board & World Fi...	c	19.99
03.04 Student Representative Colloquium				250.00
10/1/2023	Opening Balance			250.00
04 Awards				-482.91
04.01 AFS Plaques				-522.91
10/1/2023	Opening Balance			250.00
7/22/2024	Van Bind	Awards	c	-772.91
04.02 Riparian Challenge				40.00
10/1/2023	Opening Balance			200.00
9/6/2024	CTE Awards	Riparian Challenge Awards	c	-160.00
05 Grants				3,526.00
05.01 Travel Grant International Travel				0.00
10/1/2023	Opening Balance			750.00

Table 4 continued. Fiscal Year 2024 budget and transactions.

Date	Description	Memo	Clr	Amount
9/27/2024	Marika Kirstin Gale	International Travel Grant		-750.00
05.02 Travel Grant Emeritus Travel				750.00
10/1/2023	Opening Balance			750.00
05.03 Travel Grant Professional Travel				0.00
10/1/2023	Opening Balance			750.00
9/24/2024	Zach Beard	Professional Travel Grant		-750.00
05.04 Travel Grant Indigenous People				0.00
10/1/2023	Opening Balance			2,000.00
9/24/2024	University Of Alaska	Esquible Indigenous Travel Grant		-1,000.00
9/27/2024	Hamony Wayner	Indigenous Travel Grant		-1,000.00
05.08 Small Grants Project				2,776.00
Other 05 Grants:05.08 Small Grants Project				2,776.00
10/1/2023	Opening Balance			4,000.00
9/27/2024	Cal Poly Humbolt	Olmo Small Project Grant		-1,224.00
06 Student Support				-1,511.06
06.02 Maughan Scholarships				0.00
10/1/2023	Opening Balance			5,000.00
6/10/2024	Claire Vaage	Eugene Maughn Scholarship	c	-2,500.00
6/11/2024	Matea Djokic	Eugene Maughn Scholarship	c	-2,500.00
06.04 Student Colloquium				-1,511.06
10/1/2023	Opening Balance			1,250.00
6/10/2024	Arif Jan	Reimbursement for travel to student colloqui...	c	-439.09
6/10/2024	Pablo Dominquez-...	Reimbursement for travel to student colloqui...	c	-505.08
6/13/2024	Meredith Journey	Reimbursement for student colloquium		-1,816.89
06.05 Travel Grant				0.00
10/1/2023	Opening Balance			5,000.00
9/23/2024	Kadie Heinle	Student travel grant	c	-1,000.00
9/24/2024	Rachael Valeria	Student Travel Grant		-1,000.00
9/24/2024	Emily Chen	Student Travel Grant		-1,000.00
9/27/2024	Regan Doss	Student Travel Grant		-1,000.00
9/27/2024	Lauren Yancy	Student Travel Grant		-1,000.00
07 Committees				1,959.10
07.01 Early Career Professional				459.10
10/1/2023	Opening Balance			2,000.00
7/17/2024	Tawni Reipe	Reimbursement for flight to Hawaii	c	-570.40
9/24/2024	Tawni Reipe	Reimbursement for per diem		-470.50
9/24/2024	William Samuel	ECP Travel Grant		-500.00
07.02 Diversity and Inclusion				0.00
10/1/2023	Opening Balance			2,000.00
9/24/2024	Emily Chen	Reimbursement for travel		-500.00
9/27/2024	Liz Krone	Mentorship Award and Travel Reimbursement		-1,500.00
07.03 Native Fish SCCS				750.00
10/1/2023	Opening Balance			750.00
07.05 Resource Policy & Enviro Concerns				750.00
10/1/2023	Opening Balance			750.00
08 Miscellaneous Expenses				-623.31
08.01 Bank Charges				44.38
10/1/2023	Opening Balance			50.00
4/10/2024	International Purch...	Earley Food CA/NV AFS	c	-0.76
4/15/2024	International Purch...	Earley Food CA/NV AFS	c	-4.86
08.02 Web Site Maintenance				4.84
10/1/2023	Opening Balance			260.00

Table 4 continued. Fiscal Year 2024 budget and transactions.

Date	Description	Memo	Clr	Amount
5/31/2024	American Fisheries...2024 Website Fees		c	-240.00
7/11/2024	Namecheap Website fee		c	-15.16
08.04 Merch (cost)				-1,257.85
8/14/2024	Bay Photo Lab Photo prints for Auction		c	-445.30
8/28/2024	Dan Brauch Reimbursement for fundraiser auction items		c	-812.55
08.07 Mailchimp				96.94
10/1/2023	Opening Balance			343.00
10/11/2023	Mailchimp monthly service fee		c	-80.32
11/11/2023	Mailchimp Mail Chimp		c	-80.32
12/12/2023	Mailchimp Mailchimp		c	-85.42
08.09 Other Supplies				268.67
10/1/2023	Opening Balance			450.00
10/26/2023	Officemax Power outlets for mid-year meeting		c	-45.57
11/14/2023	Officemax Depot R... PURCHASE RETURN		c	45.57
12/2/2023	Quicken Quicken Annual Fee		c	-62.28
9/23/2024	Alyssa MacDonald Reimbursement for shipping of auction item			-119.05
08.10 Past President Honorarium				250.00
10/1/2023	Opening Balance			250.00
08.12 Other				-30.29
8/7/2024	Ups Shipping costs		c	-14.56
8/19/2024	Amber Steed Reimbursement for shipping		c	-15.73
08.13 Tax Preparation				0.00
10/1/2023	Opening Balance			1,850.00
4/22/2024	Nelson And Assoc ... Tax Preparation		c	-1,850.00
WD Meeting Loan				0.00
10/1/2023	Opening Balance			5,000.00
10/5/2023	Westin Westminister Facility Deposit for 2026 Meeting.		c	-5,000.00
TRANSFERS				25,000.00
Charles Schwab				25,000.00
7/12/2024	Schwab Brokerage... Transfer of Money from Schwab account		c	25,000.00
OVERALL TOTAL				51,209.15

Fiscal Year 2024 SCCS Budget Overview

WDAFS holds funds on behalf of SCCS in the Wells Fargo Checking Account. Current balance is \$10,667.17

Fiscal Year 2024 Pacific Islands Chapter

WDAFS held \$8,000 on behalf of Pacific Islands Chapter and \$500 on behalf of the Pacific Islands Student Sub-unit in the Wells Fargo Checking Account. Note that the funds for the student sub-unit cannot be used for membership fees. These funds were paid to the Chapter on 02/14/2024.



Western Division American Fisheries Society

President Julie Carter, President-Elect Tim Copeland, Vice-President Amber Steed, Secretary-Treasurer Laura Burckhardt,
Past-President Eric Fetherman, Student Representative Meredith Journey

Advancing fisheries and aquatic science and professionals in western North America

Secretary/Treasurer Report – November 30, 2024

Account Balances by Month

Table 1. Bank Account Balances

Account	09/30/2024 Balance	10/31/2024 Balance	11/30/2024 Balance
Bank Accounts			
Wells Fargo Checking	\$ 18,686.66	\$ 5,635.44	\$ 13,976.36
Charles Schwab - Investments	\$ 803,343.10	\$ 856,113.66	\$ 901,489.02
Western Division Assets - Account Ending in 600	\$ 402,777.44	\$ 404,383.13	\$ 413,423.02
Other Assets - Account Ending in 329	\$ 400,565.66	\$ 451,730.53	\$ 488,066.00
OVERALL TOTAL	\$ 822,029.76	\$ 861,749.10	\$ 915,465.38
Overall Western Division Total	\$ 421,464.10	\$ 410,018.57	\$ 427,399.38

Investment Account

Table 2 Shows the percent ownership of each Unit within the Other Assets account ending in 329.

Table 2. Unit Balance and Ownership in Investments within the Charles Schwab Account

	9/30/2024	10/3/2024	10/4/2024	10/20/2024	10/20/2024	11/20/2024	11/20/2024
Account Value	\$ 400,565.66	\$ 402,429.23	\$ 387,429.23	\$ 402,240.72	\$ 462,240.72	\$ 464,458.00	\$ 479,458.00
AZ/NM Chapter	\$ 31,904.29	\$ 32,052.72	\$ 32,052.72	\$ 33,278.10	\$ 33,278.10	\$ 33,437.73	\$ 33,439.90
CO/WY Chapter	\$ 92,522.45	\$ 92,952.90	\$ 92,952.90	\$ 96,506.50	\$ 96,506.50	\$ 96,969.43	\$ 96,975.70
Idaho Chapter	\$ 65,366.70	\$ 65,670.81	\$ 65,670.81	\$ 68,181.42	\$ 128,181.42	\$ 128,796.28	\$ 128,804.61
Utah Chapter	\$ 37,821.27	\$ 37,997.23	\$ 37,997.23	\$ 39,449.87	\$ 39,449.87	\$ 39,639.10	\$ 54,639.10
WA-BC Chapter	\$ 58,243.88	\$ 58,514.85	\$ 58,514.85	\$ 60,751.89	\$ 60,751.89	\$ 61,043.30	\$ 61,047.25
Fish Culture Section	\$ 114,707.06	\$ 115,240.72	\$ 100,240.72	\$ 104,072.94	\$ 104,072.94	\$ 104,572.16	\$ 104,578.92
Percent Ownership	9/30/2024	10/3/2024	10/4/2024	10/20/2024	10/20/2024	11/20/2024	11/20/2024
AZ/NM Chapter	7.96481%	7.96481%	8.27318%	8.27318%	7.19930%	7.19930%	6.97452%
CO/WY Chapter	23.09795%	23.09795%	23.99223%	23.99223%	20.87798%	20.87798%	20.22611%
Idaho Chapter	16.31860%	16.31860%	16.95040%	16.95040%	27.73045%	27.73045%	26.86463%
Utah Chapter	9.44196%	9.44196%	9.80753%	9.80753%	8.53449%	8.53449%	11.39601%
WA-BC Chapter	14.54041%	14.54041%	15.10337%	15.10337%	13.14291%	13.14291%	12.73255%
Fish Culture Section	28.63627%	28.63627%	25.87330%	25.87330%	22.51488%	22.51488%	21.81191%
Account Activity							
10/4/2024	Fish Culture Section transferred \$15,000 Charles Schwab to their bank account. A total of \$15,000 was deducted from their account on 10/4/2024. Percent ownership was recalculated on 10/4/2024						
10/20/2024	Idaho Chapter transferred \$60,000 to the Charles Schwab account via WDAFS. Percent ownership was recalculated on 10/20/2024						
11/20/2024	Utah Chapter transferred \$15,000 to Charles Schwab account. Percent ownership was recalculated on 11/20/2024						

Wells Fargo Checking Account Transaction

The following table displays the reporting period opening balance, transactions by current budget category, the fiscal year that the transaction was budgeted in, and if the transaction has cleared the account or not.

Table 3. Checking Account Transactions

Date	Num	Description	Memo	Category	Tag	Clr	Amount
11/22/2024	2050	Equal Opportunity Section Of AFS	Auction proceeds	1 WD Meeting Profits	FY24	c	-1,013.65
11/21/2024		Schwab Brokerage Moneylink	Transfer ID funds from Schwab account	WDAFS Investment	FY25	c	10,000.00
11/20/2024	2060	Julie Carter	Reimbursement for flight for midyear meeting	01 WD Mid-Year Excom Meeting...	FY25	c	-377.96
11/18/2024		Julie Carter	Payment for Lyft purchase			c	34.92
11/15/2024		Federal Express	shipment of award plaques	08 Miscellaneous Expenses:08.0...	FY25	c	-61.25
11/15/2024		Federal Express	shipment of award plaques	08 Miscellaneous Expenses:08.0...	FY25	c	-61.25
11/15/2024		Federal Express	shipment of award plaques	08 Miscellaneous Expenses:08.0...	FY25	c	-24.50
11/15/2024		Usps	shipment of award plaques	08 Miscellaneous Expenses:08.0...	FY25	c	-22.50
11/4/2024		Lyft	Carter personal purchase			c	-34.92
10/30/2024	2058	Amber Steed	Reimbursement for Flight for midyear meeting	01 WD Mid-Year Excom Meeting	FY25	c	-358.96
10/29/2024	2059	Bruce Kokie	Early gift	08 Miscellaneous Expenses:08.1...	FY24	c	-410.00
10/28/2024	2057	Nicole Ring	Small Project Grant	05 Grants:05.08 Small Grants Pr...	FY24	c	-1,400.00
10/28/2024		Usps	Shipment of award plaques	08 Miscellaneous Expenses:08.0...	FY25	c	-42.90
10/28/2024	2055	Willow Brook Farm	Catering expenses	SCCS Meeting Expenses	SCCS	c	-2,466.00
10/24/2024	2054	Pacific Island Chapter	Auction proceeds	1 WD Meeting Profits	FY24	c	-1,535.18
10/22/2024		Schwab Brokerage Moneylink	Transfer ID funds to Schwab account	WDAFS Investment		c	-60,000.00
10/21/2024	2052	AFS	Auction proceeds	1 WD Meeting Profits	FY24	c	-2,302.77
10/18/2024		Idaho AFS	Deposit for Schwab account	WDAFS Investment		c	60,000.00
10/14/2024	2053	Rollin Huts	SCCS Meeting Expense	SCCS Meeting Expenses	SCCS	c	-3,000.00
10/14/2024	2051	John Crandall	SCCS meeting expenses	SCCS Meeting Expenses	SCCS	c	-1,875.41
10/14/2024	2056	Printmade	SCCS hats	SCCS Meeting Expenses	SCCS	c	-1,578.75
10/10/2024		Paypal	Auction Proceeds	1 WD Meeting Profits	FY24	c	5,212.62
10/10/2024		United	Burckhardt Flight	02 AFS WD Annual Meeting:02.0...	FY25	c	-451.81
10/9/2024	2049	Julie Carter	reimbursement for parking	02 AFS WD Annual Meeting:02.0...	FY24	c	-106.57
10/2/2024		Julie Mida Hinderer	payment for auction item	1 WD Meeting Profits	FY24	c	36.00
10/1/2024 - 11/30/2024							-1,840.84
TOTAL INFLOWS							75,283.54
TOTAL OUTFL...							-77,124.38
NET TOTAL							-1,840.84

Fiscal Year 2025 SCCS Budget Overview

WDAFS holds funds on behalf of SCCS in the Wells Fargo Checking Account.

Date	Description	Memo	Category	Amount
BALANCE 9/30/2024				12,615.14
10/14/2024	Rollin Huts	SCCS Meeting Expense	SCCS Meeting Expenses	-3,000.00
10/14/2024	Willow Brook Farm	Catering expenses	SCCS Meeting Expenses	-2,466.00
10/14/2024	John Crandall	SCCS meeting expenses	SCCS Meeting Expenses	-1,875.41
10/14/2024	Printmade	SCCS hats	SCCS Meeting Expenses	-1,578.75
10/1/2024 - 10/31/2024				-8,920.16
BALANCE 10/31/2024				3,694.98
TOTAL INFLOWS				0.00
TOTAL OUTFLOWS				-8,920.16
NET TOTAL				-8,920.16

WESTERN DIVISION OF THE AMERICAN FISHERIES SOCIETY
FINANCIAL SUSTAINABILITY PLAN AND INVESTMENT POLICY



Western Division of the American Fisheries Society

Executive Committee

7 October, 2020

Western Division of the American Fisheries Society

- Financial Sustainability Plan -

1. Introduction

The Western Division (Division) is one of four geographic subdivisions of the American Fisheries Society (Society) within North America. Each North American member of the Society is automatically a member of one Division, as described in the Society's Constitution. Divisions represent an important level of participation for many Society members because the Divisions carry out many of the activities of the Society, but Divisions are oriented more closely to the area within each Division's boundary. Divisions often serve as training grounds for members interested in Society activities. Several of the Society committees, for example, have Division representation.

Established as the first Division of the Society in 1948, the Western Division now includes 9 Chapters representing Society members residing in the States of Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming in the United States of America (U.S.); U.S. associated entities in the West Pacific Ocean (including the independent nations of the Marshall Islands, Palau, and Federated States of Micronesia: islands of Midway, Baker, Jarvis, Wake, Palmyra, and Howland; Johnston Atoll; Commonwealth of the North Mariana Islands; and Territories of Guam and American Samoa); the Provinces of British Columbia and the Yukon Territory in Canada; Mexico; and individuals residing in other Society Divisions who elect to be members of the Western Division. A number of Chapters also include Student Subunits from universities within their boundaries.

This Financial Sustainability Plan and accompanying Investment Policy were prepared by the Division's Executive Committee (ExCom) and Financial Sustainability Committee (FSC). This plan is intended to guide the ExCom and its Division membership in managing and spending the Division's financial assets. The ExCom is responsible for ensuring that the guidelines in this plan are followed to the extent practicable. Unforeseen events will arise, and the ExCom shall have the flexibility to make decisions about the Division's financial resources, or consult the Division membership, as warranted.

2. Financial Sustainability Goals Statement

The long-term financial goal of the Division is to be economically solvent while using Division resources for various membership services, and to encourage scientific exchange and enlightened management of the Western United States' aquatic resources. To these ends, the Division may use its financial resources to support continuing education and information exchange among aquatic resource professionals, student participation in Division events, and special projects that are compatible with the Division's mission. It is desirable, but not imperative, that each Division activity or event yield a net asset (i.e., revenue less expenses). However, to maintain financial solvency within any fiscal year, it is critical that the Division balance its financial obligations with its revenue base, including adapting to variable investment returns and proceeds from Division activities. Because of investment returns and proceeds are uncertain, this Financial Sustainability Plan is intended to provide general policy guidance and is not meant to be a specific spending plan.

3. Annual Budget

The Division fiscal year begins October 1 and ends the following September 30. The annual budget, updated each fiscal year, includes two parts: Operating Budget and Annual Meeting Budget.

1. The Operating Budget includes all expenditures in pursuit of the core Division goals and operations. The Operating Budget is funded by revenue from membership dues, AFS member rebates, donations, other activities, and revenue from the Division's and Society's Annual General Meetings. The Operating Budget expenditures typically should not exceed a three-year average of income (all sources), but they may also be based on a three-year average of expenditures. A three-year average is appropriate to account for annual variation in revenue and expenses as income can vary substantially with annual meeting revenue and program expenses. Items in the Operating Budget should be accompanied by corresponding items in the Work Plan that outline and explain the expenditures. The Division should also prepare a legacy document that explains how/why/when Operating Budget line items were created and include an expiration date if applicable, or the Division should include such notes in the budget balances-by-month documentation containing the ExCom-approved Operating Budget.
2. The Annual Meeting Budget includes all expenditures for the Division's Annual Meeting and the revenue from registrations, sponsorships, raffle and auction, and other sales generated by the Annual Meeting. This budget is often developed in conjunction with the host Chapter, has revenue and expense details outlined in a memorandum of understanding (MOU), and is often managed by the host Chapter's treasurer.

Revenue

Most Division revenue is generated by the Annual Meeting net profit. Other sources of Division revenue include: profit-sharing from the Society's Annual Meeting, workshop registration fees, Division member dues, AFS member rebate (AFS pays the Division 10% of member dues for each regular member who lists a mailing address in the Division's geography), donations, and interest and dividends from checking, savings, and investment accounts. Increases in revenue occur when Society-level annual meetings are hosted by the Division (about once every 3 to 5 years) because host divisions receive a higher percentage of meeting profits (~5%) than non-hosting divisions (~1.5%) as outlined in a profit-sharing model developed by the Society.

Expenses

Expenses predominately include travel grants, small project grants, scholarships and awards, ExCom member travel, costs associated with hosting the Annual Meeting.

Budgeting

The annual budget, which is updated each fiscal year, includes three parts: Operating Budget, Annual Meeting Budget, and the Designated/Restricted Funds Budget.

1. The Operating Budget includes all expenditures in pursuit of the core Division goals and operations. The three-year average of income sources should be used as a basis for the Operating Budget for the upcoming fiscal year, but a three-year average of expenditures should be considered as well. As outlined in the Procedures Manual, the Operating Budget for the upcoming fiscal year will be reviewed and approved by ExCom prior to the start of that fiscal year (October 1) or the fall mid-year ExCom retreat (typically in October). The following guidance should be considered in preparing the Operating Budget.
 - A three-year average of income should be used to develop the Operating Budget, and a three-year average of expenditures should be considered as well. If a three-year average is used, the Operating Budget should also account for the potential for an annual meeting to have low net profit due to meeting location or some other factor, and variance in other income sources should be anticipated also.
 - The current Operating Budget amount should be based, in part, on the recent three-year average¹ operating expenditures, and should be maintained in the Division checking account (or split between checking, savings, or other liquid accounts if appropriate). From FY2016-18, the three-year average operating expenditure was: \$57,500 (range: \$46,100 – \$65,800).
 - The Operating Budget should be at or below the recent three-year operating expenditures unless justified by the Division President, and with approval by ExCom.
 - The three-year average of Division member dues and AFS member rebates should be considered when creating the Operating Budget. Using the three-year average accounts for fluctuating membership levels and related revenue. From FY2016-18, the three-year average of dues and rebates was: \$13,800 (range: \$12,800 – \$15,400).
 - A three-year, or longer, average of Division Annual Meeting proceeds should be considered when creating the operating budget. The average should include a timeframe that incorporates at least one Society-level meeting hosted by the Division. From FY2016-18, the three-year average of annual meeting proceeds was: \$28,134 (range: \$8,599 – 57,379).
 - Received and/or expected revenues from Society-level meetings should be considered while constructing the Operating Budget for the upcoming fiscal year. These meetings occur every 3 to 5 years and may be less profitable to the Division in the future due to changes in Society meeting management and profit-sharing model.

Items in the Operating Budget should be accompanied by corresponding items in the Work Plan that outline and explain the expenditures. ExCom should also maintain a legacy document that explains how/why/when Operating Budget line items were created and include an expiration date if applicable.

¹ The Oregon Chapter and Montana Chapter both use a 3-year average.

2. The Annual Meeting Budget projects all expenditures and revenues associated with the Division's Annual Meeting. The Annual Meeting Budget should be approved by ExCom in advance of the upcoming Annual Meeting and adhered to throughout the meeting planning process. Net profit should be projected for several expected attendance levels with the goal to meet or exceed the total expenditures in the current year Operating Budget.
3. The Designated/Restricted Funds Budget includes all expenditures for which there is a specific, designated, and guaranteed source of funding. These expenditures (and their funding sources) may be recurring or single-term and the funding may be realized or anticipated. Recent examples have included funds received and earmarked for Travel Awards.

4. Financial Sustainability Plan

The Financial Sustainability Plan includes three parts: 1) One Year Operating Budget Reserve, 2) Second Year Operating Budget Reserve, and 3) Division Investment Account.

One Year Operating Budget Reserve

Funds to support a One Year Operating Budget should be maintained in the Division's checking account. The One Year Operating Budget Reserve covers the expenditures associated with the annual Operating Budget. As of 2020, a typical OYOB allocation is approximately \$57,500.

Second Year Operating Budget Reserve

Additional funds for anticipated extraordinary expenses will be deposited into the Second Year Operating Budget Reserve. One goal for the Second Year Operating Budget Reserve is to maintain liquid funds that earn a moderate return more than the funds in a checking account. A second goal is to hold two years of operating funds (in combination with the One Year Operating Budget) so that funds need not be removed from the investment account when the financial markets are in recession; in other words, the Second Year Operating Budget Reserve helps the Division buffer major and minor stock market fluctuations.

1. The Second Year Operating Budget Reserve should be approximately equal to the One Year Operating Budget (\$57,000²)
2. The Second Year Operating Budget Reserve should be maintained in a savings account, CDs, or money market funds for easy, low-cost transfers to maximize financial return with minimum risk while also maintaining fluidity between checking, savings, and CD accounts.

Investment Account

² The Oregon Chapter and Montana Chapter both use a figure that is equivalent to the One Year Operating Budget.

Funds exceeding the One Year and Second Year Operating Budget Reserves (\$114,000 total³) should be invested in the Division's investment account.

1. An investment account was established with PAX Funds in the 1990s to invest funds that had been maintained in a Division's savings account. The funds were transferred to a Charles Schwab account in 2009.
2. The investment account is managed by the Division's FSC. Investment account management seeks to achieve long-term growth with moderate risk. The FSC may elect to recommend to ExCom an increase of distributions from the Investment Account to support programs if distributions come from account appreciation and not principal. It is recommended that this be evaluated and completed at least annually at the end of the fiscal year as the incoming president is formulating the annual budget (September 30th). This should be done jointly between the FSC, the Secretary-Treasurer, and President. Disbursements from the investment account should be done in the first quarter of the calendar year per the Investment Policy (below).
3. Funds exceeding the One Year and Second Year Operating Budget Reserves (\$114,000) should be transferred from the Division checking/savings accounts into the investment account. It is recommended that this be evaluated and completed at least annually at the end of the fiscal year as the incoming president is formulating the annual budget (September 30th). This evaluation should be done jointly between the FSC, the Secretary-Treasurer, and President. Deposits into the investment account should be done in the first quarter of the calendar year.
4. New programs/grants/scholarships/awards should be accompanied by a legacy document indicating the purpose, origination, timeline, and end date (if applicable).
5. The investment account is not intended to provide financial relief to the Operating Budget Reserves. If the Operating Budget Reserves begins to trend downwards, the FSC should engage the ExCom to review Division revenues and expenses and adjust operations accordingly. In times of financial distress, the Division may use investment account funds to support the Operating Budget to achieve the Division's mission.

³ The Oregon Chapter and Montana Chapter both use a figure that is One Year + Reserve operating budgets.

Western Division of the American Fisheries Society

- Investment Policy –

1. Investment Policy Goals Statement

The goals of the Division's investment account are to maximize returns within acceptable risk parameters, safeguard principal, and generate capital. The Division's Financial Sustainability Committee (FSC) will facilitate regular evaluation and quarterly reporting to the Division Executive Committee (ExCom) on investment account performance.

2. Unrestricted and Restricted Long-Term Reserve Funds

The purpose of the Unrestricted Long-Term Reserve is to provide a reserve to protect the ability of the Division to carry out its functions in times of economic adversity, to enable it to take advantage of special opportunities for increased service to its members, to enhance the purchasing power of funds held for future expenditure, and to maintain the financial stability of the Division.

Restricted Long-Term Reserves may occasionally be established, for example, by an AFS Unit establishing a new position in the investment account, for a scholarship fund, or for long-term program building. When such programs are established, the circumstances of their formation are to be formalized in the Division's records and archives. The reason for the program's origin, the originators, any financial contribution in the name of the program, and the program's term are to be defined.

3. Disbursements from the Investment Account

In recognition that the investment account's purpose is to benefit Division members, funds will be directed towards supporting the Division's mission. The spending policy for the Unrestricted Long-Term Reserve and any Restricted Long-Term Reserves will be approved annually by ExCom with input provided by the FSC on request. Restricted Long-Term Reserves are comprised of investments held by the Division for Division programs (e.g., Student Travel Fund), and for other AFS Units (e.g., Chapter, Sections). Restricted fund disbursements are at the discretion of the AFS Unit that owns the funds. A record of unit ownership is maintained by the Division Treasurer and the ownership percentages are updated to reflect contributions or withdrawals to the investment account.

The Division's Unrestricted Long-Term Reserve percent ownership of the investment account on January 31, 2020, was 40.55%. The Division's Restricted Long-Term Reserves allocated to the Student Travel Fund, comprised 5.46%. Together, the other seven invested units accounted for 53.99% of the account ownership.

Generally, the spending policy will be based on the accumulation of dividends, bond coupons and redemptions, account appreciation, or sales that generate capital in excess of the principal. Target payouts from the Unrestricted Long-Term Reserve will be up to 5% of the account value at the end of

the preceding calendar year, or half of the investment account's appreciation in the calendar year. The chosen calculation is also based on the Division's percentage ownership of the account value and ExCom should consider investment account disbursements in the first quarter of the subsequent calendar year. Other units invested in the account may withdrawal funds per the respective unit's guidelines.

Payouts from Restricted Long-Term Reserves will be to cover expenses related to the charter that established the specific restricted reserve. ExCom and the FSC may review the spending policy on an annual basis considering market conditions, investment account performance, and Operating Budget needs.

Portfolio Objectives – Unrestricted and Restricted Long-Term Reserve Fund Performance

The objectives of the investment account are to maximize returns without exposure to undue risk, as defined herein. The investment strategy assumes up to a 5-year holding period, with limited potential for withdrawals from appreciation on a short-term basis according to the Disbursement Policy. It is understood that fluctuating rates of return are characteristic of the securities markets. The primary concern should be long-term appreciation of assets and consistency of total return from the portfolio. Recognizing that short-term market fluctuations may cause variations in the account performance, the portfolio is expected to achieve the following objectives over a five-year⁴ moving time period:

1. The account's total return from the equity portion of the portfolio will be compared with that of the Standard & Poor's (S&P) 500 Total Return Index. On a quarter-to-quarter basis, the actual returns will fluctuate and can be expected to exceed the target about half the time and about half the time the returns are expected to be below the target. The equity portion of the account may consist of stocks, mutual funds, exchange traded funds, closed end funds, and other investments that seek to achieve total return.
2. The account's total return from the fixed income portion of the portfolio will be compared to the total return in proportion to the index the investments track (e.g., The Barclay Capital Aggregate Bond Index). On a quarter-to-quarter basis, the actual returns will fluctuate and can be expected to exceed the target about half the time and about half the time the returns are expected to be below the target. The fixed income portion of the portfolio may be comprised of bonds, bond funds, high yield stocks and stock funds, and other high yield instruments.
3. The portfolio may include assets with short-term (up to 18 months) expectations for income with limited risk, as well as assets with long-term appreciation (10 years or more) in which a higher degree of risk and volatility can be expected, accompanied by a higher expectation of return. When ExCom anticipates extraordinary expenditures, according to the Disbursement Policy, funds to meet those expenditures will be redeemed from longer term investments and maintained until needed in investment options with ultra-short income or guarantees of principal, for example in the savings account..

⁴ The Oregon Chapter and Montana Chapter both use a 5-year average.

Portfolio Objectives – Restricted Long-Term Reserve Funds Management

The objective of Restricted Long-Term Reserve Funds is to cover expenses related to programs and endowments and grow payouts over time without exposure to undue market risk. Current programs and endowments are maintained by AFS Units including WDAFS Chapters and Sections. It is understood that fluctuating rates of return are characteristic of the securities markets. Dividends and asset value appreciation over time, are expected to be the primary sources of gains in the investment account. The following guidelines should be followed for managing Restricted Long-Term Reserve Funds.

1. Deposits and withdrawals to and from the investment account, respectively should not be more frequent than semi-annually. When a transaction is completed, the investment account ownership ledger is updated.
2. Percent ownership in the investment account is calculated based on the proportion of the contribution relative to the investment account's value at the time of the contribution. The ownership percentage for all invested Units is updated whenever a contribution or withdrawal is completed.
3. Gains and losses are distributed across the investment account according to the AFS Units' proportional ownership of the investment account's value.

Detailed Investment Guidelines

For the Unrestricted and Restricted Long-Term Reserves, the investment policies and restrictions presented in this statement serve as a framework to achieve the investment objectives at the level of risk deemed acceptable using a "moderate" investment model for income and growth. These policies and restrictions are designed to minimize interference with the efforts to attain the overall objectives, and to minimize the probability of excluding appropriate investment opportunities.

The following investments and investment activities are prohibited:

1. Private placements;
2. Restricted stock;
3. Derivatives. However, to the extent that mutual funds are used, the mutual funds may buy or sell derivatives for the purpose of managing portfolio risk;
4. Commodities or commodity contracts, except insofar as they are part of a highly diversified mutual fund;
5. Short sales;
6. Margin transactions; and
7. Any highly speculative investment activities.

Types of Investment: The FSC does not exclude any specific companies or sectors of the market other than those noted above. It is expected that mutual funds or exchange traded funds (ETFs) will be used to take advantage of professional money management and a broad diversity of holdings at low

cost. However, unmanaged, index-based funds may be considered as appropriate for some of the core holdings and to reduce costs, and individual stock or bond holdings are not excluded. Investments should also consider the Division's mission statement and minimize exposure to investments that conflict with the Division's mission statement. Similarly, the Division, as recommended by the FSC and approved by ExCom (per Procedures Manual), may invest in funds which follow sustainable environmental, social, and governance (ESG) criteria.

Target Asset Mix: The portfolio shall be comprised of the asset classes listed in the table below. The target weight is the desired weight for each asset class. The minimum and maximum weights are to allow for normal market fluctuations and periodic changes in market conditions or organizational needs.

Table 1. Asset class representation in the investment account.

Asset Class	Minimum Weight	Target Weight	Maximum Weight
Equity ⁵	60%	70%	80%
Fixed Income ⁶	20%	30%	40%

The FSC shall review the balance of the portfolio according to the target weights no less often than semi-annually, after the end of the fiscal year and 6 months later. At such time, the rebalancing or substitution of funds shall be authorized, as recommended, to meet the investment objectives and guidelines, as well as potential spending needs. The FSC will report to ExCom on changes to the investment portfolio following portfolio changes.

Equity Asset Class: Large, midsized and small company stocks and international holdings may be represented, depending on market conditions. At least 40% of the Equity Asset Class will be in large company stocks of both the U.S. and other developed countries, no more than 20% in small company, and no more than 15% in international emerging markets stocks.

The equity mutual fund selections will be made to include both value-oriented managers and growth-oriented managers in a proportion that reflects market conditions. Equity mutual funds/ETFs will be selected with the objective of exceeding a nationally recognized index measuring the performance of the designated sector over a five-year moving time period, net of fees.

Fixed Income Asset Class: A diversity of fixed income securities should be represented from short to long term, depending on market conditions, as well as no more than 20%⁷ international bond funds within the Fixed Income Asset Class, and no more than 10%⁸ high yield, lower than investment grade, bonds. These investments will be reviewed on an as-needed basis, but no less often than twice a year,

⁵ Oregon Chapter policy has equity: 60, 70, 80%; Montana Chapter: 30, 50, 70%

⁶ Oregon Chapter policy has fixed income: 20, 30, and 40%; Montana Chapter: 30, 50, and 70%

⁷ Following the Montana Chapter. The Oregon Chapter specifies 25%

⁸ Following the Montana Chapter. The Oregon Chapter specifies 15%

for consideration of rebalancing and bond mutual fund changes to pursue opportunities presented by changes in interest rates, credit ratings, and maturity premiums.

Selection Criteria for Mutual Funds and ETFs: Selecting mutual funds based on research, analyst's recommendations, Morningstar scores, and performance relative to benchmarks and comparable funds. It is acknowledged that past performance is no guarantee or prediction of future performance. Stability of fund management and the degree to which a fund adheres to its declared investment style category will also be taken into consideration. Changes in fund selections will also be considered when there is a fund management change.

Investment Timing: The FSC should invest available funds periodically, and when possible, purchase equities when market sentiment and market value is low. Dollar cost averaging or purchasing equities that are unreasonably out of favor provide opportunities to spread risk over time.

Periodic Review of Portfolio Performance

The Unrestricted and Restricted Reserve Fund portfolios will be evaluated at least semi-annually, at the end of the Fiscal Year and 6 months thereafter, on a total return basis, net of fees. Returns and risk levels will be compared to the Standard and Poor's 500 Total Return Index, the Barclay Capital Aggregate Bond Index, and/or similar indices comparable to portfolio allocations. Comparisons will show semi-annual Fiscal Year, year-to-date, and multi-period results, using available financial software, such as that provided by Morningstar Associates.

A written report will be prepared by the FSC for presentation at the next regularly scheduled ExCom meeting associated with the Division's Annual Meeting. The report will summarize the evaluation of Total Returns above and provide a breakdown of realized and unrealized gains. The FSC is also expected to advise of any extraordinary circumstances in the securities markets and recommended changes, and to respond to reasonable market and portfolio queries at least quarterly outside of the scheduled evaluation schedule.

Investment Advisor's Role

The FSC may choose to retain an Investment Advisor to provide periodic review of the portfolio holdings, performance, and to offer suggestions on rebalancing the portfolio. It will be at the FSC's discretion to research and select an Investment Advisor. The FSC may retain an Investment Advisor based on credentials in investment strategies, years in the business, experience with similar organizations, types of portfolios used, and fee levels. Equally important is the Investment Advisor's ability to evaluate and rebalance the portfolio. The Investment Advisor should be able to explain the need for rebalancing, market conditions and forecasts, and to relate well to FSC members and the ExCom.

Investment portfolio management will be the purview of the FSC. An Investment Advisor should be compensated based on a fee for service structure as the investment portfolio will not require frequent trades and intensive Investment Advisor participation in the day-to-day portfolio management is not

expected. Because fees reduce returns on investments, Investment Advisor selection should take into consideration not only the assistance expected, but also the costs.

Financial Sustainability Committee Membership

The FSC membership is open to interested Division members. The Division President and Treasurer, or their designees, are also to participate on the Committee. Participation between the President and Treasurer and the FSC is necessary for ensuring continuity and communication between ExCom and the FSC. Committee members should include a majority of individuals with investment experience. Long-term (3-5 years) engagement of FSC members is preferable for ensuring continuity and institutional knowledge.

Principles of WDAFS budget 10/1/2021-9/31/2022

Align expenditures with WDAFS priorities and performance so that investments achieve the best suite of desi

Consider funding of specific items from investment funds to utilize these investments to support WDAFS prog

The budget should be consistent with the Financial Sustainability Plan

Set up budgets to be stable year to year by looking at 3 year averages (per Financial Sustainability Plan)

Evaluate officer travel to chapter annual general meetings relative to health and financial risks

Acknowledge savings in travel budgets will most likely occur due to cost savings, agency or organizational su

Prioritize expenditures that advance WDAFS mission (benefits the many) while also having the possibility to g

red outcomes
ograms (suggest scholarships and student travel)

pport, or local representation.
enerate income

**Western Division AFS FY2025 Budget Expenditures
October 1, 2024 to September 30, 2025**

COMPLETE AFTER MIDYEAR MTG

CATEGORY AND DESCRIPTION	FY 2023	FY 2024	FY 25 Budget
INCOME			
Annual Meeting Income	\$34,736.00	\$ 28,263.00	\$ 29,606.00
Non-Division Hosted Meeting Proceeds	\$3,990.00	\$ -	\$ 3,900.00
Dues Rebate	\$ 13,710.00	\$ 15,600.00	\$ 15,600.00
Interest income	\$ -	\$ -	
Seed Money Repaid	\$ 3,792.62	\$ -	\$ 5,000.00
WDAFS 2023 colloquium rollover	\$ -	\$ 1,500.00	
Publication royalties	\$ -	\$ -	
Special projects	\$ 3,500.00	\$ -	
Logo/Merchandise Sales	\$ -	\$ -	
Checking, endowment, or CD	\$ -	\$ 10,000.00	\$ 29,831.88
TOTAL INCOME	\$ 59,728.62	\$ 55,363.00	\$ 83,937.88
EXPENSES			
WD Mid-Year Excom Meeting			
Facility/other expenses	\$310.30	\$ 675.63	\$800.00
Excom travel expenses	\$5,299.08	\$ 4,677.37	\$5,900.00
Subtotal	\$5,609.38	\$ 5,353.00	\$6,700.00
Current WD Annual Meeting			
WDAFS Excom meeting	\$0.00	\$ -	\$500.00
WDAFS Business meeting	\$5,360.00	\$ -	\$6,000.00
WDAFS Seed money	\$0.00	\$ -	
WDAFS Officer travel to WD Meeting	\$9,418.80	\$ 15,560.60	\$10,500.00
WDAFS Officer site visit	\$0.00	\$ -	
Subtotal	\$14,778.80	\$ 15,560.60	\$17,000.00
Future WD Annual Meeting			
WDAFS Seed money	\$0.00	\$ 5,000.00	\$0.00
WDAFS Site visit	\$1,741.92	\$ 336.20	\$0.00
Subtotal	\$1,741.92	\$5,336.20	\$0.00
Other Excom Travel			
Travel expenses to Chapter meetings (All officers)	\$8,420.14	\$ 8,179.75	\$12,500.00
Travel expenses for AFS GB mid-year meeting (Tim)	\$3,220.01	\$ 1,084.00	\$2,000.00
Travel expenses to Society GB Meeting	\$2,244.65	\$ -	\$5,000.00
Travel expenses for Student Representative-Colloquium (Meredith)	\$0.00	\$ 250.00	\$1,300.00
Subtotal	\$2,244.65	\$9,513.75	\$20,800.00
Awards			
AFS Plaques: 7 WDAFS, 2 Chapter, 1 Student and 1 D&I	\$0.00	\$ 772.91	\$0.00
Riparian Challenge award plaques	\$85.00	\$ 160.00	\$160.00
Travel award for winners (\$500 per winner)	\$907.00	\$ -	\$0.00
Subtotal	\$992.00	\$932.91	\$160.00
Grants			
Travel Grant: International travel to WDAFS Meeting	\$0.00	\$ 750.00	\$1,000.00
Travel Grant: Emeritus travel to WDAFS	\$425.00	\$ -	\$1,000.00
Travel Grant: Professional travel to WDAFS	\$0.00	\$ 750.00	\$1,000.00
Travel Grant: Indigenous people to WDAFS	\$1,000.00	\$ 1,000.00	\$2,000.00

Travel Grant Early Professional travel to WDAFS Meeting	\$500.00	\$ 500.00	\$2,000.00
Travel Grant D&I travel to WDAFS Meeting	\$0.00	\$ -	
Reduced rate of registration for tribal members (up to 20 - we pay back CO-WY \$250 per registration			\$5,000.00
Sponsorship for other AFS meetings	\$500.00	\$ -	\$500.00
Sponsorship for other conferences	\$500.00	\$ -	
Book projects	\$0.00	\$ -	
Small Grants Program	\$1,999.48	\$ 3,848.00	\$4,000.00
Subtotal	\$4,924.48	\$6,848.00	\$16,500.00

Student Support			
Registration fees	\$0.00	\$	-
Maughan scholarships	\$5,000.00	\$	5,000.00
William Trachtenberg Memorial Scholarship Fund	\$0.00	\$	-
Student colloquium	\$0.00	\$	3,011.06
Travel Grant: Student travel to WDAFS 2025	\$5,316.30	\$	5,000.00
Student development and outreach	\$0.00	\$	-
Future of Fisheries Scholarship			\$2,500.00
Subtotal	\$10,316.30	\$13,011.06	\$16,500.00
Committees (travel awards, awards, other initiatives)			
ECP Committee	\$500.00	\$	1,040.90
D&I Committee	\$0.00	\$	2,000.00
Native Fish Committee	\$0.00	\$	-
Financial Sustainability Committee	\$0.00	\$	-
Resource Policy and Environmental Concerns Committee	\$0.00	\$	-
Misc. Committee Expenses	\$0.00	\$	-
Subtotal	\$500.00	\$3,040.90	\$3,500.00
Miscellaneous Expenses			
Bank charges	\$38.64	\$	5.62
Tax Prep	\$1,850.00	\$	1,850.00
Web site maintenance	\$255.16	\$	255.16
Branding and logo items	\$300.00	\$	-
Grants funding investment (funds into investment)	\$0.00	\$	-
Conference Calls	\$157.27	\$	-
Mailing Software Service	\$782.96	\$	246.06
Insurance	\$0.00		
Other Supplies	\$598.41	\$	30.29
Past President Gift	\$185.45	\$	410.00
Contingency for Chapter Professional Certification	\$0.00	\$	-
Contingency for other	\$8,710.49	\$	-
Subtotal	\$12,878.38	\$2,797.13	\$2,777.88
AFS Virtual Meeting Sponsorship	\$0.00	\$	-
SUBTOTAL EXPENSES - GRANTS	\$7,241.30	\$7,500.00	\$21,500.00
SUBTOTAL EXPENSES - EXCOM TRAVEL	\$18,704.45	\$30,087.92	\$37,200.00
SUBTOTAL EXPENSES - COMMITTEES (*potentially inclu	\$500.00	\$3,040.90	\$3,500.00
SUBTOTAL EXPENSES - SCHOLARSHIPS	\$5,000.00	\$5,000.00	\$7,500.00
SUBTOTAL EXPENSES - AWARDS	\$992.00	\$932.91	\$160.00
SUBTOTAL EXPENSES - Non-travel expenses and misc.	\$21,548.16	\$10,331.82	\$14,077.88
TOTAL EXPENSES	\$53,985.91	\$62,393.55	\$83,937.88
TOTAL INCOME (less B15: amount to balance budget)	\$59,728.62	\$55,363.00	\$83,937.88
NET GAIN OR LOSS	\$5,742.71	-\$7,030.55	\$0.00

CASH ON HAND AT START OF FISCAL YEAR

Checking
Savings
CDs
Endowment Fund
Subtotal

Start

LOANS OUTSTANDING

Deposit for CO/WY and WDAFS Meeting

\$5,000.00

Subtotal

\$5,000.00

FUNDS AVAILABLE AT START OF FISCAL YEAR

\$0.00

TOTAL FUNDS INCLUDING AMOUNT OWED TO WDAFS

\$5,000.00





Make open to undergraduates

Proposed to leave this as contingency for CO-WY WDAFS meeting

EXCOM TRAVEL FY 2024-25

Most often travel budget is significant

AFS Governing Board Midyear Meeting (St. Louis, 2025)

President - Julie Carter (Eric attending as proxy)	Budgeted	\$1,000.00
President-Elect - Tim Copeland(Attend as GB and MC member)		\$2,000.00
		\$3,000.00

AFS Annual Meeting - (San Antonio, August 2025)

President - Julie Carter (Attend as GB and MC member)	\$2,500.00
President-Elect - Tim Copeland (Attend as GB member)	\$2,500.00
	\$5,000.00

AFS / WDAFS Annual meeting (Westminister, CO, May 2024)

President - Julie Carter	Budgeted	\$2,200.00
President-Elect - Tim Copeland		\$2,200.00
Vice President - Amber Steed		\$2,200.00
Past President - Eric Fetherman		\$300.00
Secretary-Treasurer - Laura Burckhardt		\$1,800.00
Student Representative - Meredith Journey		\$1,800.00
		\$10,500.00

WD Midyear Excom Meeting - (Westminister, CO, December 24)

President - Julie Carter	Budgeted	\$1,100.00
President-Elect - Tim Copeland		\$1,500.00
Vice President - Amber Steed		\$1,500.00
Past President - Eric Fetherman		\$300.00
Secretary-Treasurer - Laura Burckhardt		\$1,500.00
Student Representative - Meredith Journey		\$0.00 Not attending
		\$5,900.00

WDAFS Student Colloquium

Student Representative, Meredith Journey	Budgeted	\$0.00 Reduced to 0 (colle
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Chapter	Dates	Location
Alaska	March 17-21	Ketchikan AK
AZ/NM	February 6-8	Albuquerque NM
CA/NV	No Meeting in 2025	
CO/WY/ WD	May 11-16	Westminister CO
ID	April 1-4	Boise ID
MT	Feb 11- 14	Bozeman MT
OR	February 25-28	Bend OR
UT	Feb 10-12	Logan UT
WA/BC	March 10-13	Vancouver BC
PI	May 7-9	Honolulu HI

Chapter Meeting Travel

Total for all meetings (not including Westminister)	Budgeted	12500	Actual
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GRAND TOTAL

Total For Travel	Budgeted	\$38,400.00
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likely underspent due to local coverage, agency or organizational support, or other savings.

equium at same time and sufficient funding for WD meeting)

ExCom Designee	
Julie	2000
Amber (maybe)	1500
--	
All Officers	
Julie	1500
Meredith (maybe); Tim	1500
Tim	1500
Eric	1500
Eric	1500
TBD (maybe Meredith)	1500

Difference

Financial Sustainability Plan Benchmarks

** Pull values from historical budget spreadsheet

Year Range	Fiscal Yea	Income	Expenses	3 yr mean expenses	3 yr mean income	Meets
2015-2016	FY 2016	\$ 74,942.00	\$ 65,779.00			
2016-2017	FY 2017	\$ 36,494.00	\$ 46,066.00			
2017-2018	FY 2018	\$ 29,876.00	\$ 70,639.00	\$ 60,828.00	\$ 47,104.00	
2018-2019	FY 2019	\$ 58,992.00	\$ 55,923.00	\$ 57,542.67	\$ 41,787.33	Pre-Covid 19
2019-2020	FY 2020	\$ 28,876.91	\$ 24,356.13	\$ 50,306.04	\$ 39,248.30	
2020-2021	FY 2021	\$ 33,572.00	\$ 14,595.76	\$ 31,624.96	\$ 40,480.30	
2021-2022	FY 2022	\$ 83,540.62	\$ 56,701.25	\$ 31,884.38	\$ 48,663.18	
2022-2023	FY2023	\$ 59,728.00	\$ 66,761.34	\$ 46,019.45	\$ 58,946.87	
2023-2024	FY2024	\$ 55,363.00	\$ 60,849.15	\$ 61,437.25	\$ 66,210.54	
3 year Mean		\$ 66,210.54	\$ 61,437.25			
Proposed						

One year operating budget reserve goal in cash \$ 61,437.25
 Second year operating budget reserve in CD \$ 61,437.25

Request to AFS Divisions for Support for BB2025

Title: Support for the Black Bass 2025 Symposium

Requesting Member: David P. Philipp

Contact: David P. Philipp, Director, Fisheries Conservation Foundation
Co-organizer, Black Bass 2000 Symposium
305 Wheaton Ave.
Champaign, IL. 61820
Cell: 217-369-2952
Fax: NA
Email: philipp@illinois.edu

Project: The 2025 Black Bass Symposium is the third in a series of major symposia covering all aspects of black bass biology, management and conservation. The first was held in September 1975 in Tulsa, OK, the second in 200 in St Louis, MO – 2025 is 25/50 years on down the road and time for the next iteration. A number of us proposed to AFS several years ago to organize the BB2025 in conjunction with their 2025 annual meeting – even before it was slated to be held in San Antonio...and they accepted that proposal. We have a 23-member Planning Committee that has been working hard for well over a year to make this iteration way broader than the other two, with special sessions designed to attract anglers, angler groups, and the fishing industry. There will be scientific papers of course, but also BB2025 Plenary sessions designed to identify key issues and work toward the solutions we need for a sustainable future. There will even be (by invitation only) a Bass Summit designed to facilitate entrepreneurial solutions to key issues, even awarding seed money to the best ideas for actually developing new initiatives. We expect there to be 3-500 participants for the BB2025, which will be run on an expected budget of a little over \$150K, much of which will be dedicated to travel support for students and early career scientists to attend the BB2025. To fund this activity, we are asking corporate entities with deep pockets to become substantial financial sponsors. To demonstrate the depth and strength of the fisheries profession across North America, we are also asking AFS subunits (Divisions, Sections, Chapters) as well as state, provincial, and federal F&W agencies with shallower pockets to contribute as Partners. Such a network of sponsors and partners would provide the diverse participant set needed to make real progress in addressing issues. The findings of the BB2025 will be published both open access on line and in hard copy print format.

The requested funds would be used to help support student and early career professional travel.

Time to completion: The symposium will be held August 10-14, 2025

Funding Requested: We are suggesting a donation of \$2,000, but the array of various recognition levels is listed here:

Partners recognition levels:

Top Level - >\$5,000 (Name TBD)

- All benefits from previous level plus the following benefits:
- Three invites to the Black Bass Summit
- Six Complimentary Black Bass 2025 Registrations

Next Highest Level - \$2,000 - \$4,999 (Name TBD)

- All benefits from previous level plus the following benefits:
- Two invites to the Black Bass Summit
- Four Complimentary Black Bass 2025 Registrations

Mid-Level - \$1,000-\$1,999 (Name TBD)

- All benefits from previous level plus the following benefits:
- One invite to the Black Bass Summit
- One large BB2025 exhibitor booth
- Two Complimentary Black Bass 2025 Registrations

Lowest Level - < \$1,000 (Name TBD)

- Certificate of appreciation
- Link and logo on meeting website and Facebook page
- Partnership acknowledged publicly at meeting and in meeting program
- Partnership acknowledged in AFS *Fisheries* publication and media releases

Partner Acknowledgement:

The Partner will be recognized in the following ways:

Certificate of appreciation

Link and logo on meeting website and Facebook page

Partnership acknowledged publicly at the meeting and in meeting program

Partnership acknowledged in AFS *Fisheries* publication and media releases

A donation of \$2,000 will also get the Division four complimentary BB2025 registrations, as well as invitations for four WD designees to participate in the Black Bass Summit on the last day of the Conference.

Other Funding Sources:

We expect to raise well over \$150K from corporate sponsors, AFS subunits, and state, provincial, and federal F&W agencies. We are very early in this endeavor (as per AFS tradition to delay that exercise until the current 2024 AFS meeting is underway), so we have \$3K in the bank and around \$10K pledged...but we haven't even hit any corporate entities.

Dissolution of unspent funds:

We do not plan to have any funds unspent, because we can award more travel grants and Bass Summit seed prizes. If we end up raising well above our target figure, we would return what is left over to all AFS subunits that supported the BB2025 prorated based on the size of their donation.

WDAFS New Scholarship Proposal (2024-2025)

Proposed Name: Future of Fisheries Scholarship

Proposed Amount: \$2,500

Eligibility: Undergraduates in fisheries, aquatic sciences, or closely related field

Description: The Future of Fisheries Scholarship fund provides up to \$2,500 annually to an undergraduate student working towards a degree in fisheries, aquatic sciences, or a closely related field. The new scholarship is intended to promote the future of the fisheries profession by increasing the undergraduate's participation in the American Fisheries Society and providing funding that can help supplement the needs of the student's coursework (e.g., tuition, books, etc.) as they progress towards a job in the field. Selection criteria include demonstration of:

1. Excellent scholarship as evidenced by course work during their undergraduate studies.
2. Significant progress (i.e., two semesters or four quarters) towards attaining a degree in fisheries, aquatic sciences, or a closely related field.
3. Potential for future contributions to the profession through active involvement in AFS and other activities (volunteering; work/technician positions; contributing to diversity, equity, and inclusion; etc.), and need for the scholarship to help attain scholastic or career goals.

Application Criteria and Process:

- Applicants must be a member of the American Fisheries Society (AFS member number should be on application). To become a member, or to update your membership status, please visit <https://fisheries.org/membership/join/>.
- Applicants must have completed two semesters or four quarters in an undergraduate degree program at a university within the geographic boundaries of the Western Division.
- Applicants must have a major field of study that is related to fisheries, aquatic sciences, or a closely related field.
- Applicants must submit an application package that contains each of the following:

A letter to the award committee that includes:

1. A brief description of the student's degree program and the anticipated date of completion.
2. A statement of the applicant's career goals and need for the scholarship (up to 200 words).
3. A statement of academic and extracurricular activities (e.g., volunteering; technician positions; contributing to diversity, equity, and inclusion initiatives) relevant to their goal (up to 200 words).
4. Involvement with AFS or anticipated future involvement if just getting started (e.g., how does the applicant anticipate interacting with AFS as they move forward; up to 200 words).

Copies of a resume (including professional or volunteer activities, AFS involvement, etc.) and transcripts.

At least one letter of reference from a faculty member (professor in a class or undergraduate advisor) that can attest to the student's academic performance and commitment to the fisheries or aquatic sciences profession. A second letter can be included from an individual with whom the student has participated in volunteer activities or technician positions. Letters may be sent separately by the individual providing the reference.

Item	Amount	Description
Outreach	\$ 200	Posters, films, clips, social media
Travel	\$ 500	Symposium support
Database maintenance	\$ 100	Donation to DataBasin
TOTAL	\$ 800	

Narrative

The Western Native Fishes Committee had traditionally (until ~2022) had a minor, mostly discretionary budget for advancing the mission of the Committee. While that budget was seldom utilized extensively, it allowed flexibility and mobility to quickly respond to issues as a committee. For instance, if personnel were needed to host symposia, additional travel grants could be awarded to planners or participants (particularly undergraduate researchers). We also typically made a donation to DataBasin, which houses the Western Native Fishes dataset on behalf of the group, for free.

In 2024-25 we are again asking for line items to be available to the Committee to respond similarly. We have specifically identified outreach as an area we would like to grow into the future. Native Fish posters and short, native fishes focused films (e.g., <https://www.youtube.com/watch?v=YNA Ae QOugsw>), and other opportunities as they arise. We are also trying to elevate our engage with a broader audience on our existing social media platforms and potentially engage with additional platforms. While we don't anticipate many expenses with the ladder, it fits within the broader outreach effort we're pursuing.

We annually host a western native fishes symposium at the annual Western Division meeting. While we often have personnel within the Committee that are able to attend to host the symposium, we would like the flexibility to provide travel grants to students and professionals to attend meetings and host/present. This both promotes our mission and helps recruit new members to the Committee.

Lastly, we would like to again donate some funds to DataBasin for all of their support of the western native fishes database over the last 15+ years.

American Fisheries Society

Membership Recruitment & Retention Action Plan

Version 9-8-24

Introduction

A survey was conducted in 2022 to identify current perceptions and preferences regarding the value of American Fisheries Society (AFS) membership and its associated benefits, assess the effectiveness of AFS initiatives and communication efforts, provide insight into the role of AFS in career development, and document motivations for membership in other societies. The membership survey included participation from current AFS members as well as non-members with interests in the fisheries profession. The survey received 2,285 responses. Members who served on the Membership Committee in 2021-2023 analyzed this data and presented it to the members of the 2023-2024 Membership Committee. The goal of the analysis was to identify global trends among all respondents as a means to improve the overall experience for society members through value-added membership benefits and initiatives. These results will be shared with all AFS members via an article in Fisheries to be published in late 2024.

The main task of the 2023-2024 Membership Committee has been to translate the analyzed survey results into recommendations for action. The Committee has been meeting monthly and inviting AFS Committees and Sections to review and discuss the results that most pertain to their work. Detailed input has been received from International Fisheries, Equal Opportunities, Fisheries Administration, and Fisheries Management Sections, the Communications Committee, and the Strategic Positioning Committee. Requests were also made to past members of the Membership Committee and the Governing Board to review the results and comment on what actions should be taken. Co-Chairs Abigail Archer & Lian Guo and AFS staff member Membership Coordinator Kelly Kotche assembled this input into a draft document called the Membership Recruitment & Retention Action Plan. The plan has four sections with recommendations for action for 1) The whole society 2) Membership Categories, 3) Employment Sectors and Geographic Regions, and 4) Organizational Units. At the 2024 Mid Year Governing Board meeting in March 2024, Co-Chair Lian Guo led the members and staff through an exercise to place the major recommendations from these four sections into an Effort vs Impact Grid. The results of this activity were then reviewed and refined by the Membership Committee members and used to create the prioritized order of specific tasks within the major sections.

Note: Numbered items are in order of priority

Section I: Society Wide Recommendations

A. Assess the technical, logistical & financial feasibility of revamping the membership joining and renewal processes

1. Assess changing membership from a fixed 12 month calendar to lasting 365 days from the join date.
2. Create an auto renewal option for increments of time such as 2 or 5 years or beyond years.
3. Streamline the registration process for new members. Initial membership purchase should be quick and intuitive with a mobile-first design. Users can be asked to fill out demographic information or select potential Section memberships at a later time.
4. Develop joint society membership opportunities with, and/or offer discounted rates to, other related professional organizations (e.g., Consortium of Aquatic Science Societies, Native American Fish & Wildlife Society, National Military Fish & Wildlife Association).

5. If continuing with calendar year membership, consider reduced cost membership for those joining later in the year.

B. Assess the technical, logistical & financial feasibility of implementing more targeted and effective membership recruitment and retention practices

1. Use email technology that would allow AFS to send personalized emails at set intervals prior to and/or following expiration (For example, "Hi Eric, Did you know that your membership in AFS expired last month? If not, be sure to renew today to . . ."). This is especially important if AFS moves towards membership plans that last 365 days from the purchase date.
2. Develop SMS distribution lists and the capacity to deliver push notifications to better interface with mobile users.
3. Assess and adaptively manage outreach materials by using Urchin Tracking Modules (UTM) in conjunction with Google Analytics on the AFS website to assess the effectiveness of various approaches.
4. Conduct research on membership recruitment & retention initiatives at other professional societies to guide AFS efforts and identify opportunities to partner.
5. Coordinate renewal campaigns in conjunction with partnering professional organizations if joint membership opportunities are offered.

C. Refine, improve and create messaging and messaging products

High impact, low effort:

1. Networking with other members was rated 'high' as a reason for joining AFS. Highlight networking opportunities in all membership messaging.
2. Highlight the AFS membership benefits of continuing education opportunities, webinars, travel grants, networking opportunities more than the membership benefit of free journal access. Many institutions already provide free access to AFS journals.
3. Emphasize the role of subject-matter Sections and how they can be used to 'find a home' within AFS.
4. Clarify and make plain, through a graphic and through talking points for AFS unit leaders, the relationships among the student subunits, and the Chapters, Divisions, and the parent society.
5. Develop clear messaging on how AFS is different from other fish and wildlife societies.

High impact, medium effort

6. Better communicate the value generated by paying dues.
7. Create different messaging to the different membership groups to clearly show how AFS can meet their particular needs at the student, early career, regular, and retired membership levels.
8. Create digital content that features personal stories from current members on how membership has helped their careers.

High impact, high effort

9. Early career and regular members can be employed by a broad range of entities. Craft membership messaging and initiatives that appeal specifically to employees of academic institutions, state agencies, federal agencies, Tribal natural resources departments, extension/communications/outreach professionals, consulting companies, and vendors.

Low impact, medium effort

10. Focus communications by member type and consistently demonstrate value to each segment, offering access to professional resources when members need them. For example, when you visit [fisheries.org](https://www.fisheries.org), it's tough to find member resources by type and community.

D. Strengthen Policy Advocacy

1. Communicate policy updates and relevant decisions effectively to both our members and to the public so they know what AFS means and stands for.
2. Assist Chapters and Divisions with trainings and written materials on how to be effective in policy advocacy.
3. Engage members in advocacy activities and assist them through training opportunities to be effective advocates for aquatic resources.
4. Communicate that federal policy advocacy is a valuable service for members and how.

E. Continue and expand the current Diversity, Equity, Inclusion, Justice, and Accessibility efforts at Society, Division, and Chapter levels

1. Membership Committee should interact regularly with Equal Opportunities Section (EOS) & with Diversity Equity & Inclusion Committees at the Division level. Empower the latter to interact with their Chapters.
2. Work with EOS to inventory existing DEI efforts at the Chapter and Division levels so members are aware of activities, opportunities, and progress towards goals.
3. Set expectations/protocols for local and international leadership on sharing and enforcing the Code of Conduct (COC). Be transparent about and amplify the COC, how past incidences have been handled, and how to anonymously report incidences (e.g. asking people to sign, reading the COC, etc).
4. Regularly survey membership to ask about inclusion and experiences at local or national events.
5. Broaden recruitment and outreach to more communities such as Historically Black Colleges and Universities and community colleges. This includes Divisions collaborating to set up new collaborations or student subunits.
6. Increase recruitment of underrepresented groups through an expanded and targeted outreach effort; for example leveraging conference attendees for programs across host cities' institutions and public schools.
7. Create and maintain affinity groups for identifying support and/or networking within underrepresented groups. This can also translate into online support groups through Facebook, Slack, or email listservs (e.g., Women in Fisheries).
8. Host/develop annual trainings for members (e.g., Unconscious Bias), as well as opportunities for ally education.
9. Create fellowship/grant/internship opportunities specific to Black, Indigenous, and People of Color (BIPOC) and other marginalized groups. This could also include partial travel awards (e.g. housing during conference).
10. Design social events at meetings to reduce cliques and help everyone meet new people. Encourage increased non-alcohol centric socials as well as enforce appropriate behavior when alcohol is involved.
11. Select conference locations which will be safe for all attendees and send out guidelines and precautions at meetings. Devise ways for members to report misconduct, let others know about problems areas, ask for help, etc.

F. Other Suggestions (Unranked)

- Focus on targeted public outreach efforts. In particular, target the highest levels of management of agencies and companies, the angling public, related NGOs, and fishing related industries. Our secondary target should be the general public with an emphasis on what our science means in plain and non-technical language.
- Increase the profile of publications and continuing education.
- AFS has a lot of content (meeting recordings, decades of journals articles, gray literature data) and may benefit from an instructional designer to help turn these resources into alternate member content. AFS Chapters and Divisions and Sections offer sessions and continuing education that often is not shared outside of that particular unit. Determine how to track and catalog this content that allows better access for AFS members and for outside entities that could benefit from this education to enact policy changes.
- Evaluate discontinuing the job board; funds could be used for other membership benefits elsewhere that may be more important to folks. Look to the program review on this topic.

Section II: Membership Categories

A. Enhance Student Engagement

1. Develop a process to keep an up-to-date, real time, comprehensive list of student units and faculty/staff advisors.
2. Explore an alternate/additional way to join or renew without logging in or registering for an account first. This would help students attending meetings to be able to sign up quickly via a QR code. They could receive an email later with a request to create their profile.
3. Empower Chapter leadership to reach out to new student members using a template email and additional methods. This is low effort, low to medium impact, but one piece of the toolkit - if we personalized more, would increase effort.
4. Increase networking opportunities beyond just the annual meeting. One way of doing this may be to establish a mentorship program for students beyond annual meetings. A society wide mentorship program could be more centrally organized.
5. Continue to fundraise for and support awards and travel opportunities for students.
6. Plan Chapter level activities for students to receive professional resume/cover letter reviews. These could include: events at all Chapter meetings, a volunteer team with open office hours for mock interviews and resume review. Chapters who have done this work could share framework and any templates already developed.
7. Broaden the "adopt a student" program. This could be simplified and included as a part of membership renewal (Would you like to adopt a student and fund their membership for the year?). This could or could not include a membership component. AFS could get a list of students from the subunits that would like to be sponsored. This would help with early recruitment that would hopefully be retained over time, and also give students a sense of belonging (someone "adopted" me!). This would hopefully create a feedback loop where they would adopt a student later on in their career.
8. Help Chapters develop a sustainable relationship with the student subunits in their area. Facilitate conversations among Chapters and Divisions to compare their efforts, successes, and failures and develop ideas to try. Consider starting with a webinar between state Chapters and student subunits

that are already doing a good job of this (share other items on this list). Compile a best practices document based on experiences across the Divisions and Chapters.

9. Explore ways to reach the students that are at smaller schools/programs that don't have a student sub-unit. For example Iowa has started a non-affiliated student sub-unit with members from multiple schools beyond Iowa State. Consider pairing student subunit officers with state Chapter leadership.
10. Provide examples and encourage Chapter leadership to recruit students to get involved in Chapter governance.
11. Make it possible for students to join their sub unit and Chapter via the parent society website which will also allow them to be AFS members. Perhaps make it easier to join the Society (not just a student subunit for \$10) by working with the student subunits to have a way to submit the required membership info electronically and allow them to collect the \$30 and submit at a later time as one lump for all students that joined that year.
12. Explore development of a society-level student internship program where undergraduate and graduate students can be placed in locations across the country with AFS designated mentors from all career stages (early, mid, late, retired, and DEIJA/EOS representation) to learn new experiences. This could be considered an expansion of the Hutton program.
13. Add a note to the membership web pathway about using a personal gmail instead of a .edu institutional address for when you graduate.
14. Develop a one-page flyer/Facebook/Instagram post with instructions for AFS students members about how to stay involved with AFS after graduating and moving to a new state or country.

B. Support Early Career Members

1. Evaluate the current timeline and consider extending it for early career membership.
2. Develop a Task Force of Early Career Members that provide specific measures to assist early career members and review AFS programs and products from an early career perspective.
3. Provide registration discounts or in-kind support for early career members volunteering at annual meetings.
4. Increase networking opportunities beyond just the annual meeting.
5. Fundraise for and support awards and travel opportunities for early career professionals such as the Western Division Early Career Travel award. Develop awards categories that recognize short term achievements. Encourage Sections specifically to develop an early career travel award as a way to build Section level membership.
6. Continue the climate ambassador program and develop similar programs.

C. Retain Regular Members

Membership Benefits & Process

1. Revamp the membership renewal process including renewal timelines. Explore allowing 2 and 5 year membership renewal categories in addition to annual. Make auto-renewals of membership an option to all members. Make it easier to join Chapters and Sections (High Effort-High Impact)
2. Improve communication on the value of membership through publications and events (High Effort - Medium Impact)
3. Regular members value access to applied science and management information in journals-encourage members to publish and bring forward something from their agency to the table.
4. Recognize years of membership in Fisheries publication, or small gifts (pin, sticker, hat, etc) (High Impact – Low Effort)

5. Explore a referral incentive program (Low Impact – Low Effort)

Continuing Education (High Impact and Medium Effort)

6. Strengthen public outreach, mentoring, and continuing education.
7. Increase networking opportunities outside of in person meetings.
8. Determine desired Continuing Education courses.
9. Based on the above, continue and/or expand continuing education and workshop offerings at annual meetings, and Division and Chapter meetings; develop a webinar series for continuing education.

Certification (High Impact and High Effort)

10. Review the certification program (revamp or eliminate?)
11. Show value to employers to make certification mandatory and/or an asset and to incentivize members to become certified.
12. Improve the process for becoming certified.

D. Convince Chapter-Only Participants to become AFS Members

1. Require all Chapters to use the Society website for signing up for membership.
2. Offer agency bulk memberships at some discount.
3. Change how we label conference fee categories to camouflage including annual membership dues to make it easier for people to become members and be reimbursed by their employer.
4. Communicate the value of membership through personal stories - perhaps through short videos.
5. Strengthen networking and mentoring, and continuing education beyond AFS in-person meetings.
6. Support Divisions and Chapters to survey their affiliate members to determine what their interests and needs are.
7. Provide talking points and materials for Chapters and Divisions to convey the benefits of membership.
8. Ensure that AFS officers and staff participate in Chapter and Division meetings along with selected other professional meetings to provide Society updates and to staff AFS booths that provide direct opportunities for member and non-member engagement.
9. Consider lower initial rates for non-AFS members with gradual increases.
10. Offer discounted membership rates bundled with parent society annual meeting registration.

E. Increase Retired Member Participation

1. Build a community for retired members where they feel welcome and can easily interact with other retirees both professionally and socially along with other AFS members.
2. Establish formal mentorship programs for retired professionals to connect with early career professionals.
3. Offer reduced prices for continuing education.
4. Organize opportunities for retirees to teach continuing education classes or webinars, maybe offering reduced fees in return depending on the amount of time required.
5. Organize networking opportunities for retired members.
6. Provide travel assistance for retired members.
7. Engage with retirees through meet-ups and webinars.
8. Explore a travel program – AFS sponsored trips to different areas of the country or international locations to learn about and participate in local fisheries.

9. Explore Ecologists without Borders as a mechanism to assist fisheries workers in geographic areas that are requesting assistance to improve their resources and knowledge.
10. Encourage Chapters, Sub-Units, and Divisions to find ways for retirees to serve as mentors/resources along with providing resources to facilitate this opportunity.
11. Many retirees have extensive fisheries and aquatic science libraries, photos and other artifacts that they struggle to find space for. Provide a mechanism to allow retirees to give or sell these often important pieces of science to other members, maybe through a members only Facebook marketplace location.

Section III: Employment sectors and Geographic regions

A. International Members

1. Continue to host some AFS meetings in locations outside of the United States. Recognize that these will likely not be money makers for the Society and the key to good attendance may be to partner with other professional societies, similar to JASM model. The ICES/PICES Early Career Science Symposium held in Labrador is an example.
2. Convene a workgroup to examine revamping the abstract submittal process for international attendees since the timeline for obtaining visas and other travel approval is very long and different among countries.
3. Develop a workgroup of international members to provide appropriate mechanisms for AFS to engage in policy development and how to facilitate policy updates for non-U.S. countries with specific subgroups for Canada and Mexico.
4. Carve out a spot in Fisheries for non-US fisheries stories/member profiles, perhaps on a quarterly basis.
5. Increase the focus on broad international fisheries issues within AFS journals – for example special publications on regions/international issues.
6. AFS needs to develop an international membership strategy as many geographic areas have an existing country- based Fisheries society.
7. Engage with the Canadian Aquatic Resources Section directly to determine how to improve membership satisfaction, how better to serve Canadian members, and how to increase membership in Canada.
8. AFS lacks the local nonprofit and government connections, as evidenced by the Latin Congress challenges. Assess how to build stronger connections starting with just a few countries and then slowly add more over time.
9. Work with the International Fisheries Section to try out ways to reduce barriers for meeting attendance.
10. Organize webinars or programs that focus on marine or other fisheries outside the US borders. The Yangtze River collaboration is a great example.
11. Explore developing a fifth "Division" that incorporates international locations so they get automatically placed in that Division and receive information that Division members receive automatically, have an officer structure and an opportunity to participate in AFS governance (outside of the International Section).
12. Explore income-based membership costs or membership fees based on countries' economy.
13. Work with IFS to develop relevant and viable geographical units within IFS. Similar to Student Subsections within the Education Section.

14. Build better virtual meeting opportunities because travel to in person meetings is difficult and expensive. But virtual events and programs must be developed carefully and intentionally to really foster interaction, not just passive listening to a speaker.

B. Tribal Natural Resources Managers

1. Explore developing an effort to specifically reach out to Tribal Natural Resources Departments in each AFS Division and begin dialog on how AFS may be able to assist with issues they are working on.
2. Designate a liaison and a process by which the Society will engage with Tribal Natural Resources/Fisheries so as not to overwhelm them with requests.
3. Reactivate/reinvigorate the Native Peoples Fisheries Section.
4. Fundraise to offer travel funding opportunities for Tribal Department staff to attend regional and annual AFS meetings.
5. Develop internship opportunities for tribal technicians/interns.
6. Engage with the Native American Fish and Wildlife Society on joint membership opportunities and other opportunities for working together.

C. State Agency Staff

1. Have AFS officers and Executive Director attend all Association of Fish and Wildlife Agencies and regional association meetings to include staffing a booth to make state agency leadership aware of AFS and the benefits that staff generate from AFS.
2. Develop messaging that makes clear that AFWA members will benefit from also being AFS members and that AFS is not just focused on supporting academics.
3. Have AFS members and leadership engage in state in-service training sessions.
4. Create an auto renewal option for increments of time such as 2 or 5 years or beyond years.
5. Offer more online training sessions to increase participation from state agency staff who do not have access to funding to travel to annual meetings.
6. Provide talking points and written materials to state agency department heads to help explain the professional development opportunities offered through membership and participation in AFS.
7. Talking points can include the opportunity to serve in leadership roles at the Section and Chapter level which can help develop skills that are useful for leadership roles within the agency.
8. Explore developing weekly or monthly emails at the Chapter level that include links to relevant articles.
9. Explore bundling meeting registration with annual membership.
10. Work with Sections to develop membership recruitment activities for state agency staff who work on those specific topics relevant to the Sections.
11. Help Sections to be in contact with their members more frequently through emails and webinars and trainings and other virtual and in person activities.
12. Some employee unions will offer funds for continuing education and membership in professional societies. Encourage state agency staff to communicate with their union representative to determine if that is offered. Encourage staff in leadership positions to communicate any opportunities to their staff.
13. Increase communication with state fisheries agency leadership to determine how AFS certification is currently useful or not useful, and if it can be changed to be a useful tool for state agency hiring.

D. Federal Agency Staff

1. AFS officers and the Executive Director meet with federal agency fisheries leadership to make federal agency leadership aware of AFS and the benefits that staff generate from AFS.
2. Have AFS members and leadership engage in federal in-service training sessions.

E. Non-Profit Organization Staff

1. Convene a group of current members who work for non-profit entities and listen to their experiences with AFS and recommendations they have.
2. Ask Divisions and Chapters to compile a list of relevant organizations in their area and reach out to them. Ask those non-profit staff members to present at meetings, contribute to newsletters, be keynote speakers, and become members of the American Fisheries Society community.

F. Academic Staff (Professors, Administrators)

1. Convene a group of current members who work for universities and 4 and 2 year colleges and listen to their experiences with AFS and any recommendations they have.

Section IV: Organizational Units

A. Student -Unit Level

1. Encourage Chapters to maintain and enhance their working relationships with their student sub units.
2. Determine best practices among the Chapters for creating and maintaining relationships with student sub units, and compile and disseminate this information across the network.
3. Create webinars specifically focused on student sub units and create opportunities for student sub units to interact with each other across the country via virtual means. For example, North Central Division is looking into starting a student conclave this summer and Southern Division has done this. Create opportunities to bring students from multiple universities together virtually or in-person.
4. Maintain and update annually the list of student sub units and faculty sponsors that was developed by the Student & Early Career Subsection in 2022.
5. Develop a communication strategy for AFS staff to send quarterly messages to the student sub units – in addition to any communication that they receive through their Chapter.

B. Chapter Level

1. Work with each Division to implement a membership toolkit for Chapters with materials (posters, postcards, powerpoint slides, swag) that promotes and makes it easy for Chapter meeting attendees to sign up for and renew membership.
2. Develop a best practices guide for Chapters on how to recruit each of the membership types to join (students, early career, regular, retiree).
3. Identify a Membership Lead or Membership Committee within each Chapter to facilitate recruitment.
4. Develop a 'student subunit engagement guide' for Chapters.

C. Division Level

1. Develop talking points for Division leaders to deliver at in-person meetings to include messages from the AFS President and Executive Director.

D. Section Level

1. Promote Sections and Section activities in AFS level newsletters and social media.
2. Ask Section leadership to send and communicate membership renewal notices.

WDAFS DEI Survey

In the spring of 2024, the Western Division American Fisheries Society (WDAFS) Diversity & Inclusion (D&I) committee initiated a survey of WDAFS chapters regarding their Diversity, Equity, and Inclusion (DEI) initiatives. The primary goal of the survey was to receive input on how WDAFS could best support chapter-level DEI initiatives. Tim Copeland, Amber Steed, and Rob Van Kirk developed the survey and sent it to the 10 WDAFS chapter presidents via email in early June. The full content of the email, survey questions, chapter DEI contacts, and responses are given at the bottom of this document.

Summary of responses

Five of the ten chapters responded to the survey. Of those, four have a DEI committee. Based on information on chapter websites, seven of the nine long-standing chapters have a DEI committee. We do not know whether the newest WDAFS chapter—Pacific Islands—has a DEI committee.

Formation of DEI committees

Establishment of DEI committees and initiatives at the chapter level is driven organically when a critical mass of chapter members has identified a need. In some cases, these individuals engaged with the WDAFS D&I committee prior to initiation of chapter-level initiatives, but **chapter committee formation has been the result of grass-roots discussions and commitment of a small number of leaders within chapters**. Although this process differed across chapters, DEI needs champions in each chapter.

DEI activities at annual meetings

All responding chapters, whether or not they have a formal DEI committee, have implemented activities and accommodations at their annual meetings. Frequently mentioned among these are childcare, gender-neutral restrooms, identity-group socials, and workshops/training opportunities.

Assessment of DEI needs

For the most part, DEI needs and response to DEI initiatives and activities have been assessed either informally or as part of other surveys. Although generally positive toward chapter DEI initiatives and activities, some chapter members rank DEI needs lower in priority than other chapter objectives. **Formal assessment is needed to evaluate effectiveness of existing DEI initiatives.**

Challenges

Challenges vary by chapter but most report **low participation or engagement, due in part to uncertainty in why DEI initiatives are important** and how to have productive discussions.

Suggestions for WDAFS support

1. Act as a forum to share ideas/experiences/resources.
2. Expand DEI-related scholarships.
3. Adapt approaches to different chapter needs and experience.
4. Make DEI an integral part of WDAFS meetings.

Full survey content

Dear Chapter President,

As part of an effort to provide support and service to chapter Diversity, Equity and Inclusion (DEI) initiatives, the Western Division American Fisheries Society (WDAFS) Diversity & Inclusion Committee is compiling some basic information on chapter-level DEI initiatives. The Committee will synthesize the results and organize a chapter roundtable discussion to follow up. We are particularly interested in learning about specific support the Division can provide to help chapters achieve their DEI goals. As president, if you feel you are the best person within your chapter to answer these questions, please feel free to do so. However, if there is someone else in your chapter who is better able to do so (e.g., the chair of a DEI Committee, if you have one), please forward this email to them. In any case, please submit your responses via “reply all” to this email by June 24.

Thank you ahead of time for your input.

Sincerely,

Tim Copeland, WDAFS Vice President

Amber Steed, Montana Chapter AFS DEI Committee Chair

Rob Van Kirk, Idaho Chapter AFS DEI Committee Co-chair

1. Please provide name(s), positions(s) and email address(es) for the person(s) in your chapter who is/are most involved with DEI initiatives at the chapter level.
2. Does your chapter have a standing DEI or similar committee? If yes, please answer the following:
 - a. When was the committee formed?
 - b. What events led to its formation, for example: informal discussions among chapter members, a formal proposal, activities of another standing committee, motivation from division or parent society committees, etc.
3. If your chapter does not have a standing DEI committee, have there been discussions within the chapter—either formal or informal—about forming one? Please briefly summarize those discussions.
4. Regardless of whether your chapter has a DEI committee, please answer the following.
 - a. Has your chapter incorporated specific activities and/or accommodations at your annual meeting to encourage and promote attendance and participation among historically underrepresented groups? For example, mother’s rooms, alcohol-free social events, or specific continuing education opportunities.
 - b. Have your chapter meetings included themes, workshops, or special sessions devoted to promoting DEI within the fisheries profession?
 - c. Have you surveyed your membership or otherwise received input from chapter members on DEI initiatives they would like to see at the chapter level?
 - d. What challenges have you had in incorporating DEI initiatives in your chapter?
5. What support, services or resources could WDAFS provide to help your chapter develop and implement DEI initiatives? What experiences would you like to share with other chapters?

Contact information

AZ/NM

Zach Beard, current chapter president zbeard@azgfd.gov

Idaho

Kat Gillies-Rector, DEI Committee co-chair kat.gillies-rector@idfg.idaho.gov

Rob Van Kirk, DEI Committee co-chair rob@henryfork.org

Montana

Full list of committee members, with committee chair listed first.

Amber Steed, chair MTAFS DEI committee, asteed@mt.gov

Lisa Eby, active member of MTAFS DEI committee, lisa.eby@mso.umt.edu

Clint Smith, MTAFS outgoing secretary/treasurer and member of MTAFS DEI committee, clsmith@mt.gov

Leo Rosenthal, MTAFS soon to be past-president and member of MTAFS DEI committee, lrosenthal@mt.gov

Leanne Roulson, member of MTAFS DEI committee, leanne.h.rouslon@gmail.com

Oregon

Full list of committee members, with committee chair listed first.

Guillermo Giannico (Chair). Professor Fisheries, OSU. giannico@oregonstate.edu

Adrienne Averett. Fish Biologist. ODFW. adrienne.w.averett@odfw.oregon.gov

Ryan Branstetter. Fish Biologist. Columbia River Intertribal Fish Commission. brar@critfc.org

Benjamin Clemens. Fish Biologist. ODFW. ben.clemens@oregonstate.edu

Nilanjana Das. Ph.D. Candidate. OSU. dasni@oregonstate.edu

Alex Harrison. Fish Biologist. ODFW. alexis.s.harrison@odfw.oregon.gov

Andy Lara. Fish Biologist. Cramer Fish Sciences. andy.lara@fishsciences.net

Denny Lassuy. Fish Biologist (Retired). dennylassuy@gmail.com

Christine Moffitt. Professor (Retired). University of Idaho. cmoffitt@uidaho.edu

Shivonne Nesbit. Fish Biologist. NOAA. shivonne.nesbit@noaa.gov

Michele H Weaver. Fish Biologist. ODFW (and President ORAFS). michele.h.weaver@odfw.oregon.gov

J. Antonio Salgado. ODFW. antonio.salgado@odfw.oregon.gov (committee member but not actively involved).

WA/BC

Sabrina Haney sabrina.haney@wsu.edu

Full responses, by chapter

AZ/NM

2.) No, the Arizona-New Mexico Chapter does not currently have a DEI committee.

3.) There have been minimal discussions about starting a DEI committee within the chapter, though this survey did spark some informal discussion amongst the Executive Committee at the most recent monthly meeting. A survey to chapter membership a couple years ago about what chapter members want their Executive Committee to focus their efforts on, resulted in chapter membership rating establishment of a DEI committee low in comparison to other chapter activities.

4.) A. Some Chapter members put together a mentorship program for tribal students to sponsor them and get them to our annual meeting. This program was started prior to our 2023 meeting and has supported tribal students to attend our annual meeting over two years. The Chapter also held an informal LGBTQIA+ meet up at the meeting this year.

B. The Chapter has previously hosted Women in Wildlife Panels. The most recent plenary session for our annual meeting focused on Tribal Wildlife Management and featured several speakers from local tribal governments and wildlife management agencies. The previous year's plenary session focused on the use of art in scientific dissemination and public engagement.

C. We have not surveyed them specifically in regards to DEI initiatives, but a previous survey to our membership about activities they would like to see the Executive Committee focus on and DEI initiatives were a possible answer, but scored low compared to other items.

D. There has been little support or initiative expressed within our chapter for taking on DEI initiatives. In addition, we don't have a clear idea of how best to tackle DEI initiatives in a way that will be productive for the chapter.

5.) Guidance on what DEI initiatives the WDAFS has already implemented and how to implement similar initiatives in a productive way. Also, guidance on how to establish a successful DEI committee would be helpful. We don't have any specific experiences to share with the other chapters.

Idaho

2. Yes. The committee was originally formed as an annual meeting planning committee in 2021, as the chapter was planning its 2022 annual meeting. Several chapter members contacted the President Elect, who was in charge of planning the meeting, with requests for DEI-related workshops and meeting theme. Members of that ad-hoc committee then participated in the planning committee for the joint Idaho/WDAFS meeting in 2023 to ensure that the joint meeting included a DEI workshop and accommodation. The two current co-chairs then submitted a formal proposal for creation of a standing DEI committee to the chapter EXCOM in the fall of 2023, and EXCOM approved formation of the committee in December 2023.

4a. Has your chapter incorporated specific activities and/or accommodations at your annual meeting to encourage and promote attendance and participation among historically underrepresented groups? Examples could include mother's rooms, alcohol-free social events, or specific continuing education opportunities.

- Pronouns on nametags
- Gender neutral restrooms
- Lactation room
- Moved poster session to morning to avoid alcohol and increase comfort for attendees that don't drink

- DEI-related workshop each year since inception
- Multiple avenues to report harassment/code of conduct violations
- “Alphabet social” to create networking opportunity for BIPOC, LGBTQIA+ folks prior to start of meeting

4b. Have your chapter meetings included themes, workshops, or special sessions devoted to promoting DEI within the fisheries profession?

- Meeting theme in 2022: "Removing barriers: Opening pathways to the fisheries profession"
- Workshops
 - 2022: Cultural Competency and Relevancy Workshop
 - 2022: Inclusion in the Workplace: Practical Strategies for Consideration Workshop
 - 2023: Identifying and Preventing Harassment in the Field: A Training by FieldFutures

4c. Have you surveyed your membership or otherwise received input from chapter members on DEI initiatives they would like to see at the chapter level?

We have not surveyed the membership specifically about DEI initiatives but have surveyed members after recent annual meetings. Those surveys included questions about DEI-related meeting content. Input from members has generally been supportive of continuing to provide accommodations such as a lactation room and to including workshops and sessions related to tribal perspectives and building equitable and inclusive teams in the workplace.

4d. What challenges have you had in incorporating DEI initiatives in your chapter?

- Reception of most changes has been good. Most “resistance” is from folks who think we don’t “need” DEI initiatives, but who don’t protest the accommodations or activities.
- Some changes like pronouns or lactation room were well received but hard for folks to adapt to. IE, knocking before entering lactation room, remembering to use correct pronouns, remembering to include them on nametags, etc.
- Participation in the committee is low, but it’s also new

5. What support, services or resources could WDAFS provide to help your chapter develop and implement DEI initiatives? What experiences would you like to share with other chapters?

- Having a list of folks who provide DEI related trainings, workshops, etc. would be really helpful. Recruiting trainers and planning workshops is the biggest lift for our DEI committee. Also, the workshops we end up with are usually really high quality and could be shared with other chapters to improve training across the division and take advantage of existing expertise.
- A retreat or similar for DEI committee chairs in the division to share knowledge, receive some basic training such as implicit bias, mental health and DEI work, field safety, or similar would be really cool and helpful
- MULTIPLE grants or scholarship funds for historically underrepresented groups. Chapters don’t necessarily have the resources to support all the deserving individuals so more money is always better.

Montana

2. Does your chapter have a standing DEI or similar committee? **Yes**. If yes, please answer the following:

- a. When was the committee formed? **12/2023**
- b. What events led to its formation, for example: informal discussions among chapter members, a formal proposal, activities of another standing committee, motivation from division or parent society committees, etc. **Pulled from our latest newsletter**

article on the subject: The MTAFS DEI Committee was born from the interest of engaged Chapter members looking to make our professional environment as inclusive, diverse, and equitable as possible. This began with some of our members becoming involved with the WDAFS D&I Committee during 2022, learning from and forming connections with that proactive and organized group. We knew we wanted to bring that level of energy and awareness to the Montana Chapter by growing it from within.

So, a small group of Chapter members had our first meeting during spring 2023 to discuss our perceived DEI-related needs, whether a committee was the appropriate way to address them, and how to proceed. Later that year, we agreed to move forward with committee formation. As stated in our Chapter Bylaws (Section 7), “Committees and the Chairs of Committees may be appointed by the EXCOM or the President as necessary to conduct Chapter business.” With a unanimous vote, our committee became official.

3. If your chapter does not have a standing DEI committee, have there been discussions within the chapter—either formal or informal—about forming one? Please briefly summarize those discussions.
4. Regardless of whether your chapter has a DEI committee, please answer the following.
 - a. Has your chapter incorporated specific activities and/or accommodations at your annual meeting to encourage and promote attendance and participation among historically underrepresented groups? Examples could include mother’s rooms, alcohol-free social events, or specific continuing education opportunities. *Yes. Since our committee was newly formed at our most recent annual meeting, we used that as an opportunity to direct members’ attention to the topic in a couple of ways. First, we focused our chapter’s continuing education training on DEI topics. Second, we put out a survey to membership just prior to and during the meeting to characterize our chapter member demographics, perspectives, ideas, and priorities when it comes to DEI. We presented the results during the meeting and in a follow-up report to membership. Since then, ideas from the survey will potentially be integrated into our next annual meeting, including but not limited to: offering more interesting non-alcoholic social options, and/or eliminating free alcohol at social functions; offering or exploring childcare options for attendees; encouraging underrepresented students and aquatic professionals to attend through free or discounted attendance fees; continuing to focus workshops, plenary, and/or symposia on DEI-related topics and underrepresented groups.*
 - b. Have your chapter meetings included themes, workshops, or special sessions devoted to promoting DEI within the fisheries profession? *Yes. In our most recent meeting, the plenary showcased aquaculture professionals, who have been underrepresented in recent years. As mentioned earlier we also hosted a DEI-themed continuing education workshop, and a hatchery-focused symposium. Our most recent annual meeting theme was, “more of everyone, all of the time” – intended to be as open and welcoming as possible.*
 - c. Have you surveyed your membership or otherwise received input from chapter members on DEI initiatives they would like to see at the chapter level? *Yes, we conducted a chapter survey on this during winter 2024.*
 - d. What challenges have you had in incorporating DEI initiatives in your chapter? *One of the biggest impediments to embracing DEI in the MTAFS is overcoming assumptions about what DEI means. There are many interpretations of the topic, and some are negative and/or politicized. It can be hard to know what’s “ok” to say or do in a DEI context, while many of us are still learning how to safely communicate about the topic with genuine interest, empathy, and curiosity. While we have received some negative feedback on pursuing DEI in*

our chapter through our survey, but the vast majority has been positive and supportive of our efforts.

5. What support, services or resources could WDAFS provide to help your chapter develop and implement DEI initiatives? What experiences would you like to share with other chapters? I think it's important to help our membership feel that the DEI space is intended to welcome everyone who wants to engage. That should include those who haven't historically seen themselves equally represented in fisheries while also encouraging patience and "safe spaces" to respectfully learn about one another's perspectives and experiences. In the spirit of that, I'd encourage WDAFS to demonstrate those sentiments when interacting with chapters. Acknowledging that we're all at different places on this DEI landscape, meeting people where they are, and fostering communication across chapters who are at different ends of this spectrum. It could also be helpful to share how to incorporate more DEI into chapter meetings without labeling it as such to gain initial traction in places we haven't seen interest yet.

Oregon

2. Yes. There is a DEI Committee everyone in list above is part of that committee.
 - a. The DEI committee was formed in 2016/2017.
 - b. Gabe Sheoships had been leading Diversity, Equity and Inclusion external committee efforts for the Oregon Chapter since the planning and conversation started in 2015, and then when the committee was officially adopted in 2016. Past OR-AFS presidents, Ben Clemens and Shivonne Nesbit, among others, played a large role in these efforts. OR-AFS president Rebecca Flitcroft and past president Kris Homel, have also been supportive in their leadership over this time period. The committee has been the result of many conversations among chapter members, the strong commitment many have for the issue of underrepresentation of many communities in the fisheries profession and the generosity and drive of some key players.
3. N/A
4.
 - a. Yes. The examples are: continuing education opportunities during chapter meetings, provide at least one all-gender restroom at meeting venues, provide or facilitate access to day care services near meeting venue location, hire a DEI consulting firm to deliver a DEI training program designed on an assessment of the chapter's membership.
 - b. Yes. Symposia sessions on DEI in the workforce are included in the program of the annual chapter meeting.

WA/BC

2. Does your chapter have a standing DEI or similar committee? If yes, please answer the following:
 - a. When was the committee formed? In process of forming
 - b. What events led to its formation, for example: informal discussions among chapter members, a formal proposal, activities of another standing committee, motivation from division or parent society committees, etc. Motivation from lack of childcare and unbalanced membership male/ females, USA/ Canadian, Tribal/ other races
3. If your chapter does not have a standing DEI committee, have there been discussions within the

chapter—either formal or informal—about forming one? Please briefly summarize those discussions. *There have been informal discussions getting many working committees running. We sought out two interested members in moving the DEI committee forward.*

4. Regardless of whether your chapter has a DEI committee, please answer the following.

a. Has your chapter incorporated specific activities and/or accommodations at your annual meeting to encourage and promote attendance and participation among historically underrepresented groups? Examples could include mother's rooms, alcohol-free social events, or specific continuing education opportunities. *We have included mother's rooms and some dietary options. I would like to expand including childcare opportunities, EVERY provided meal including a dietary restricted choice. Mandatory microphones, and options for interpreter. Scholarships for both women and women of color.*

b. Have your chapter meetings included themes, workshops, or special sessions devoted to promoting DEI within the fisheries profession? *No, we haven't, but I have a great idea for one of my favorite DEI speakers to come visit!*

c. Have you surveyed your membership or otherwise received input from chapter members on DEI initiatives they would like to see at the chapter level? *No*

d. What challenges have you had in incorporating DEI initiatives in your chapter? *Getting members to take surveys. I tried to seek ideas about childcare and received very low input.*

5. What support, services or resources could WDAFS provide to help your chapter develop and implement DEI initiatives? What experiences would you like to share with other chapters?

1) *Ideas on how to fund childcare/ or provide scholarships to those in need. I really like the idea of providing a 'personal babysitter scholarship' limit it to \$500, they can use it for a tag-a-long sitter, or a sitter of their choice at the location of conference. This saves money on in house childcare that may/may not be used. And can serve as advertisement until it becomes more well known that we support working mothers!*

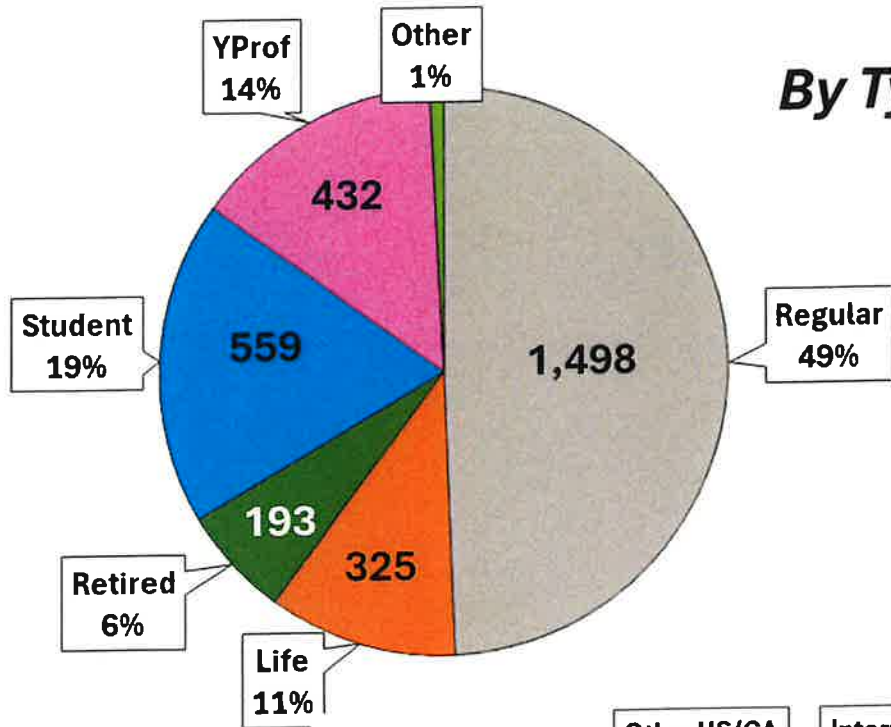
2) *Having DEI workshop and a voice of DEI in the plenary sessions. I have been completely moved by great speakers and want to become an ally when they are broadcasted to the large audience.*

Western Division AFS Membership

January = 1055 Last year ~ 2550
 Currently = 3031

811 renewed for 2025

By Type



By Geography

