



I.A.T.E. Fiscal Guidelines

A. Administrative Guidelines

1. That income received be used for those appropriate expenditures provided for in the annual budget.

2. That all bank statements be mailed to the Treasurer.

3. That income may be invested in certificates of deposit with the approval of the Budget Committee.

4. That I.A.T.E. provide an annual appropriation of \$150.00 per district plus \$1.00 per each member over 50 members per district for district operating expenses.

5. That the Executive Secretary be authorized to expend money for the clerical labor and secretarial supplies necessary for the operation of the Executive Secretary's office whenever such supplies are not available without charge from the school where the Executive Secretary resides.

6. That members of the Executive Council and committees charged with Executive Council business be reimbursed for telephone, fax, and postage expenses incurred in carrying out said business.

7. That expenditures be authorized for honorary awards or for gifts for distinguished service as voted by the Executive Council.

8. That expenditures be authorized by the Executive Secretary or designee for flowers or other suitable remembrances for present or former members of the Executive Council who are ill or have died.

9. That from the net worth of the I.A.T.E. in the previous fiscal year, funds not in excess of ten percent of said amount may be set aside for research, scholarships, grants, and other valid or worthy appropriations.

10. That no unbudgeted expenditures in excess of \$250.00 may be voted on without prior written announcement and rationale provided in the agenda for any given meeting.

11. That I.A.T.E. budget annually the amount of \$1000.00 to be awarded for research in the teaching of English/Language Arts. No less than half of this amount (\$500.00) shall be awarded in the name of Paul Jacobs and will be designated as the "Paul Jacobs Award for Research in the Teaching of English/Language Arts". The balance may be assigned to other research projects and/or to other candidates. If appropriate, the entire amount of \$1000.00 may be designated as the Paul Jacobs Award in any given year.

12. That I.A.T.E. budget annually the amount of two \$1,000.00 minority scholarships available for all eligible public, post-secondary institutions in Illinois to two deserving prospective elementary and/or secondary English teachers.



13. That any checks over one year old be returned and cleared by sending them back to avoid auditing problems and reimbursements be made.

14. That an outside agency/person audit the financial records of the Association annually.

15. That the Treasurer maintain these guidelines and that all changes voted on by a majority of the Executive Council be included in each subsequent printing of the guidelines.

B. Executive Council Guidelines

1. That Executive Council members as defined in the Constitution be reimbursed for travel and lodging to the annual Spring meeting at the following rates and for the following conditions:

- a. up to \$15.00 for participation in meetings on Friday and/or Saturday and/or Sunday where overnight lodging is not chosen.
- b. up to \$60.00 for participation in meetings on either Friday and Saturday where overnight lodging is chosen.
- c. up to \$75.00 for participation in meetings on Friday and Saturday or Saturday and Sunday where overnight lodging is chosen.
- d. up to \$50.00 for each additional night of lodging as business necessitates.

2. That persons representing I.A.T.E in an official capacity at NCTE, ISBE, IAAE, Read Illinois, Rebecca Caudill Leadership Conference, or SLATE be reimbursed with registration fees for the days of official participation at the following rates and for the following conditions:

- a. up to \$15.00 per day for participation in meetings where overnight lodging is not required.
- b. up to \$60.00 for a meeting where overnight lodging is chosen.
- c. up to \$75.00 for a meeting of two consecutive days or parts thereof where overnight lodging is chosen.
- d. up to \$50.00 for each additional night of lodging.
- e. reimbursement for transportation at ten cents per mile for any one person charged to represent I.A.T.E. in an official capacity at said meetings (may be applied to airfare, etc.).
- f. full transportation costs for the President or designee of I.A.T.E. to the N.C.T.E. Fall and Spring Conventions.
- g. for the Fall and Spring Conferences, these persons representing I.A.T.E. will be the N.C.T.E. directors: the I.A.T.E.



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president at the time of the N.C.T.E. Conference, the immediate past president, the Executive Secretary, and the first, second, and third vice-presidents. Since some members of the I.A.T.E. leadership may be designated directors by virtue of other offices held in N.C.T.E., the I.A.T.E. directors will be named each August by the Executive Secretary in consultation with the President.

Representation to a particular meeting that has not been specified by the Constitution, Executive Council, or Fiscal Guidelines must have approval by the President in consultation with the Executive Secretary and Treasurer.

(The above rates and conditions of B-1 and B-2 should be reviewed annually by the Budget Committee).

3. That members of the Executive Council will be reimbursed for travel to the annual Fall Executive Committee meeting prior to the Convention at the rate of \$.20 per mile. This rate should be reviewed annually by the Budget Committee.

4. That there be no reimbursement or complimentary accommodations for members whose expenses are paid by their schools or other outside agencies (ISBE, for example)

5. That the I.A.T.E. Office Secretary be reimbursed for travel, lodging, and meals at the same rate allowed for members of the Executive Council in recompense for services performed for the organization.

6. That the Executive Secretary or President be authorized to contract for the facilities necessary for the meetings of the Executive Council and be authorized to provide at I.A.T.E. expense "coffee and rolls" at any morning session of the Executive Council.

7. That \$150.00 may be budgeted per year by the Second Vice-President for each of any three districts targeted as having the smallest membership and/or lacking a district leader so as to generate more members in those areas.

C. Annual Conference Guidelines

1. That there be a differential between pre- and on-site Conference registration fees.

2. That the Program Chair be authorized to determine the costs of the Friday banquet and the Friday and/or Saturday luncheon.

3. That the Program Chair and the Local Arrangements Committee Chair make appropriate allocations at their discretion for the following Conference expenses:

- a. Honoraria, lodging, travel expenses, and other expenses for the Conference speakers.
- b. Complimentary luncheon or Banquet tickets for those invited to be part of the program.



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- c. Cost of the Past Presidents' Breakfast
- d. Flowers , decorations, and/or luncheon favors
- e. Publicity and local printing
- f. Local mailing and telephone/fax expenses.
- g. Those individuals serving solely as Program Committee Members and in no other capacity at the Spring Executive Committee Meeting be reimbursed for travel and lodging at the same allowable rates noted under Fiscal Guidelines, B, Executive Council Guidelines, 1, and that said individuals be allowed an additional \$15.00 meal expense for that Committee meeting.

4. That the Convention Chair be allocated the sum of \$4,000.00 to cover the above said costs or other such Convention costs as needed with the exclusion of the Convention meal expenses and that the Chair should present an accounting of these expenses at the Spring meeting. Said allocation should be reviewed annually by the Budget Committee and the Third Vice-President. Any expenses exceeding the \$4,000.00 should have been done with the approval of the President, Executive Secretary, and the Treasurer.

5. That the Honorary Awards Chair be allocated the sum of \$1,000.00 to cover the Illinois Author of the Year expenses as needed and that the Chair should present an accounting of those expenses at the Spring meeting. Said allocation should be reviewed annually by the Budget Committee and the Third Vice-President.

Revised: October, 1995