

2020 Annual Report

You may click on any title to go directly to that report

[AmSAT Mission Statement and Purposes](#)

[The purposes of AmSAT are:](#)

[2019-2020 Board of Directors](#)

[AmSAT Staff](#)

[Advisory Council Members](#)

[2019 Award Winners and In Memoriam](#)

[Board and Key Volunteer Reports](#)

[Chair, Cheryl Pleskow](#)

[Chair Elect, Lisa Levinson](#)

[Secretary, Holly Rocke](#)

[Treasurer, Rick Carbaugh](#)

[Archivist, Jared Negley](#)

[Alexander Technique Affiliated Societies \(ATAS\), Claire Creese](#)

[Office Report, Fran Rickenbach, Maggie Barlow](#)

[Information Manager \(IM\), Angeline LeLeux](#)

[AmSAT Journal \(Journal\), Joe Alberti](#)

[Organizational News, Emma Sapa](#)

[Committee Reports](#)

[Annual Conference and General Meeting Policy Committee \(ACGM\), Jo Gray](#)

[Attendees' Convocation \(AC\), Ron Dennis](#)

[Committee for the Alexander Technique and the Performing Arts \(CATPA\), Beth Robinson](#)

[Continuing Education Committee \(CEC\), Anne Johnson, Anne Shivas](#)

[Credentials Review Committee \(CRC\), Rebecca Tuffey](#)

[Definitions Committee \(DC\), Jill Geiger, Walton L. White](#)

[Government Relations Committee \(GRC\), Rick Carbaugh](#)

[Membership \(MC\), Amanda MacDonald](#)

[Nominating \(NC\), Mara Sokolsky](#)

[Professional Conduct Committee \(PCC\), Pamela Bartlett](#)

[Research \(RC\), Heidi Leathwood](#)

[Rules and Bylaws \(RBC\), Rose Bronec, Claire Creese](#)

[Training Approval Committee \(TAC\), Rena Anya Deveza, Lori Schiff](#)

[Training Directors Committee \(TDC\), Karen DeWig](#)

[Financial Reports](#)

[Assets and Liabilities](#)

[Full Revenue and Expense Report](#)

[2019 Budget Pie Chart](#)

AmSAT Mission Statement and Purposes

To establish the Alexander Technique as a basic and recognized resource for health, productivity, and well-being.

The purposes of AmSAT are:

1. To spread knowledge of the Alexander Technique;
2. To promote acquisition of skill in the Alexander Technique;
3. To encourage research related to the Alexander Technique;
4. To approve the establishment and continuance of Teacher Training Courses;
5. To maintain professional relations with other organizations of teachers of the Alexander Technique;
6. To set standards for AmSAT's Certification of teachers;
7. To benefit the public by promoting high professional teaching standards;
8. To preserve the legal right to teach the Alexander Technique without inappropriate and/or unnecessary requirements and restrictions;
9. To support AmSAT members in their teaching practices, research, and applications of the Alexander Technique.

2019-2020 Board of Directors

Cheryl Pleskow, Chair
Lisa Levinson, Chair Elect
Rick Carbaugh, Treasurer
Holly Rocke, Secretary
Lisa DeAngelis, Member-at Large
Matthew Dubroff, Member-at-Large
Jay Foote, Member-at-Large
Wes Howard, Member-at-Large
Xochi John, Member-at-Large
Claire Rechnitzer, Member-at-Large
Sara Silva, Member-at-Large

Mara Sokolsky, Member-at-Large

AmSAT Staff

Maggie Barlow, Management Associate
Fran Rickenbach, Senior Advisor

Advisory Council Members

Financial: Clare Maxwell, Ann Rodiger. Rick Carbaugh (Board Liaison)

Leadership: Rose Bronec, Jill Geiger. Lisa Levinson (Board Liaison)

Legal: Seeking new member

2019 Award Winners

Distinguished Service Award

None Given

Certificate of Merit

Brian McCullough (TAC Chair), Frances Robertson (Membership Chair), Renee Schneider (2019 ACGM Planning Chair).

Certificate of Appreciation

All AmSAT Committee Chairs and Co-Chairs; all members of the Board of Directors. 2019 ACGM Programming Committee: Lisa First, Kecia Chen, Rebecca Price, Jennifer Sielicki, Alice Olsher, Ian Jorgensen, Constance Clare-Newman

40 Year Teaching Anniversary

John Dollar, Joanne Somerville, Helene Weisbach, Mary Seelye, Larry Ball, Pamela Blanc, Edward Bouchard, Ron Dennis, June Ekman, Helen Hobbs, Susan Loeb, Babette Markus, Idelle Packer, Amy Pell, Nancy Wechter, Regina Wray Cochrane, Diana Bradley

30 Year Teaching Anniversary

Wade Alexander, Christine Inserra, N. Brooke Lieb, Katherine Mitchell, Robert Rosenberg, J.P. Watkins

20 Year Teaching Anniversary

Glenna Batson, Erik Bendix, Kecia Chin, Lois Cone, Kathryn Conrad, Nancy Dawley, Sharon

DeCelle, Nada Diachenko, Denise Dumeyer-Kangas, Alexander Farkas, Emily Faulkner, Janice Haugan, Anja Koch, Karen Oosterbaan, Cynthia Pipkin-Doyle, James Ruttkay, Fumi Sasa, Ethel Scrivener, Penny Shaw, Michael Summer, Kris Sutton, Ralph Zito

Trainee Scholarship Winners

Yael Beretta (ATU), Brandt Kempin (DIMI), Georgette Garbes-Putzel (BA), Hyewon Lee (ATI-LA), Kathleen Summerland (ATI-LA), Brian Washington (RIAT).

In Memoriam

Ken Andersen
Patricia McGinnis
Connie Serchuk

Board and Key Volunteer Reports

Chair

Cheryl Pleskow

As I write, we are in the midst of great upheaval in our personal and professional lives due to the global COVID pandemic. Within our families and businesses, we are learning to prioritize our energies and resources, and the same is true of the dynamics within AmSAT. It is challenging enough, as a volunteer leader, to keep up with all the “regular” stuff — the internal processes that make AmSAT run from year to year. How do we keep it all going, and respond to the cascade of decisions that are required in this extraordinary moment?

Moving into the Chair role last June, I was lucky to inherit a set of clear strategic priorities, initiated by Lisa Levinson and agreed upon by the Board. These broad areas continue to provide a guideline over the long term, even as we respond to the urgencies of the moment. They include: Governance & Management, Standards & Competencies, Community, and Growth of AT and AmSAT.

Last June, the Board prioritized our efforts around two objectives: (1) assessing our relationship with MEI and our management review process; and (2) refocusing our marketing and publicity efforts. We created small working groups within the Board to generate action in these areas. We continue a productive dialogue with MEI in revising our scope of work, establishing an evaluative process, with linkage to contract negotiations. Publicity and marketing continue to be areas in which we need to develop a comprehensive approach to our messaging, the social media we choose to use, and the sustainability and coordination inherent in these choices. Thus far, we have invested in two successful Feathr campaigns, and approved the charter for the Slogan Committee.

With the guidance of the Rules & Bylaws Committee, the Board also approved charters for two new committees: The Judy Leibowitz Scholarship Fund for Training Alexander Teachers who are People of Color; and the Diversity Committee.

In March, only days after the ACGM 2020 website rolled out, as it became necessary to respond to the COVID crises, the Board made the difficult decision to cancel our ACGM in Boulder this year. After taking

time to reassess, we are grateful that Anna Sobotka and her team are willing to remount the rich program of workshops and classes they originally planned, and that we can look forward to meeting together in person in 2021.

The Board voted to hold the business portion of our meeting online, which will take place during the weekend of June 27 -28th, 2020. We are working out the logistics for meeting and voting electronically. In consultation with Ron Dennis and the Attendees Convocation (AC) Committee, we will forgo the AC this year, and look forward to a robust discussion in 2021.

Some of our most important committees have been affected by current circumstances, and I am grateful to the leadership in our Training Approval, Training Directors, and Rules and Bylaws Committees in working together to enable our training courses to adjust appropriately in the coming months. My thanks too to the many Committee Chairs and members who, despite upheaval, continue to move forward with each committee's mission, without missing a beat. Our communication vehicles - the e-UPDATE, the Huddles, the Journal, the Organizational News — these are just a few ways that we stay connected to each other, and they continue seamlessly, only because there are AmSAT members who continue to commit to these projects and ensure that we are indeed informed.

Finally, there are the helpers who come forward in moments of crises, and we owe a debt of gratitude for the extraordinary efforts of Amanda MacDonald, Chair of the Membership Committee, for investing her time and creativity in developing our weekly Thursday “chats” — a program which has generated real connection and positive energy amongst our membership; to all the presenters at our chats, who so generously offer their experiences in online teaching and initiate discussion on important emerging topics; to Fran Rickenbach and Maggie Barlow, who worked mightily on the ACGM 2020 website, and who offered the idea of the chats, carrying through the ACGM “Time to Connect” theme, who thought ahead and immediately secured tentative meeting space in Boulder for 2021, and who continue to conduct regular AmSAT business remotely, without interruption; to members of the Executive Committee for agreeing to meet weekly at the first sign of the pandemic; and to our Board, who committed to meeting every other week, through to the end of June, in order to field the many decisions coming our way — my thanks for your leadership and support.

Chair Elect

Lisa Levinson

Spending a year as Chair-Elect after serving as Chair has allowed me to sit back a bit and observe the inner workings of AmSAT from a fresh perspective. The issues and concerns we've always faced have taken on new angles and new urgency as we entered the pandemic with its resulting quarantine orders. In this next Board cycle, we will need to fine-tune our strategic plan to help guide us through a post-COVID world. I look forward to working with the Board and with committees and members as we explore ways for AmSAT to be responsive to, and stay relevant in, a changing world.

Secretary

Holly Rocke

I have enjoyed my role as Secretary. If you have an interest in serving as a future Secretary please let me know. I would love to train my replacement for 2021.

This past year, I have maintained the official documents. Working with the office, we have created a separate tab on the Board page so you may easily find Executive Committee minutes. We will continue to work to improve communication between the board and the membership and I invite your suggestions.

Treasurer

Rick Carbaugh

The 2019 Statement of Financial Position and Activities has been prepared by Goldshot, Lamb & Hobbs, CPA of Dayton, Ohio. Their official report is included in this annual report.

The Comparative Statement of Financial Position between the years ending December 31, 2017 and December 31, 2018 is included in this report.

For 2019, AmSAT ended with a deficit of \$12,650.00. These figures reflect all CPA adjustments for an accrual report.

The 2020 budget was adopted at the February 23, 2020 Board meeting.

2019 ACGM New York City: We again thank Renee Schneider, the ACGM Planning Committee, our Association Management Company MEI and the many additional members for their contributions of time and effort to the 2019 Annual Conference. We also thank member Ted Dimon and his assistant Rebecca Price for helping AmSAT secure the Columbia College location. The ACGM is AmSAT's largest volunteer project throughout the year and it is always highly anticipated by members. This conference themed "Diversity, Equity and Belonging" was a particularly ambitious event.

The 2019 ACGM programming was highly praised and the Planning Committee navigated many obstacles in pursuit of their goals. Financially, the ACGM was a break even event due to a muted registration. As AmSAT's valued event for fundraising, to break even was disappointing particularly since the previous 2018 Chicago ACGM ended in a small deficit. In New York, we lacked the anticipated number of full paying participants, particularly for the location and the easy accessibility of members in the immediate area and region. Due to this lower registration and ensuing communication issues, we were unable to adjust the number of workshops and small groups offered, resulting in a higher honoraria and facility expense. Finally, New York is not for the financially faint of heart. The Columbia facility expenses and labor outstripped our original budget. While outstanding programming is a top priority, a balance between programming and finance is needed. Between the financial performance in Chicago and New York combined with the cancelation of the 2020 Boulder ACGM and it's expected financial contribution, AmSAT is lacking the financial security the ACGM provides for a third year running. Maybe our fourth year will be the charm as we 'return' to Boulder for 2021.

Supporting research continues to be an area of importance in AmSAT's overall strategic plan. In past years funding was based on proceeds from the ACGM Auction and donations to the Teacher's Memorial Fund. Beginning in 2020, to assure consistency of funding, the research grant has been made a \$2,000 budget line item. In addition, funding will continue to be supplemented by donations earmarked for research. Members interested in making a gift contribution to the Research Fund are encouraged to contact the AmSAT office. Your continuous support is truly appreciated! We encourage your ideas for additional funding sources to grow our research support.

The Board has noted a decline in membership over the last two years. We have been investigating the cause for this decline and the impact it may have on AmSAT. Some issues resulted from inattentiveness to the renewal process by the office starting in 2018. These issues were flagged by the New York ACGM Planning Committee and steps were taken to address procedural aspects of the renewal process including greater reporting requirements by the office to the Treasurer.

We have continuing questions about the mechanics of our renewal process, now several years since switching from an annual dues drive to rolling anniversary renewal dates. As the current process includes several initial emails and an as-needed, snail mail followup, we wonder, how these renewals slip by unnoticed? Do we need a more personalized reminder system? And how can we make renewals more convenient? Plans were in the works to begin member-to-member calls to ask these questions just as the pandemic emerged. While we will temporarily delay our inquiry, AmSAT appreciates your continued membership, which is vital to maintain our organization. You are welcome to contact the office or myself or any Board member for the variety of dues payment options available as we move through these unprecedented times.

As reported by the office, AmSAT is in a transition with older members and organizational mainstays teaching less and retiring while fewer of our newer graduates and members make the transition from the three- year new teacher welcome to full teaching membership. As a volunteer run organization, we need to embrace a new generation of members to take the lead, provide support and help redefine the relevance of AmSAT and the Alexander Technique in the future.

AmSAT currently maintains adequate financial reserves for the current crisis with approximately one year of operating capital. Who could anticipate a once-in-a-lifetime event like the current pandemic and the impact it is having on the Alexander Technique as a profession? We know that this has been a financial setback for many members requiring a nimble response to day-to-day changes in circumstance. While the ‘way back’ remains uncertain, it is our hope to support one another in crafting a new normal for AmSAT and the profession we love.

Here is an overview of each AmSAT fund and account:

1. Stability Fund

The goal of the Stability Fund is to maintain 6 – 12 months of average operating expenses. The minimum balance must be \$5,000. Funds are in a restricted CD, renewable each November. There is a balance of \$20,271 as of December 31, 2019.

2. Expansion Fund*

This fund is used to fund Board-approved projects that serve AmSAT’s members and the general public. The minimum balance in this fund is \$1,000. There is a balance of \$2,754.56 as of December 31, 2018.

3. Teacher’s Memorial Fund*

This fund is to honor members and their commitment to the Alexander Technique through support of education, research and cultural development programs that further the mission and objectives of AmSAT. Scholarships for trainees to attend the ACGM and the Research Grant both come from this fund. This fund is an interest-bearing savings account totaling \$4,741 as of December 31, 2019.

4. Teach One Lesson Fund

This fund has a balance of \$2,756 as of December 31, 2019.

5. High Yield Savings Account and Money Market Account

These accounts were established to maximize our capital. These accounts have a total of \$110,687 as of December 31, 2019.

6. Depository Account and Operating Account

These funds are used for the day-to-day operations of AmSAT. These accounts are kept low by transferring unneeded funds to interest bearing money market accounts. These accounts totaled \$10,033 as of December 31, 2019.

* As of August 15, 2018, the Teacher's Memorial Fund and the Expansion Fund have been combined into AmSAT's Money Market account in order to receive the benefit of slightly higher interest rates available.

Below is a pie-chart of AmSAT's 2019 budget.

Archivist

Jared Negley

Board Liaison: *Matthew Dubroff*

Jared has no report this year. The Board thanks him for his continued service.

Alexander Technique Affiliated Societies (ATAS)

Claire Creese

Board Liaison: Cheryl Pleskow

At the request of the 2019 ATAS meeting, a *Draft Observation* about discussions on training held at the 2018 and 2019 meetings was formulated in September 2019 and distributed to society representatives. The draft will be reviewed at the upcoming 2020 ATAS meeting. The document was drafted by Claire Creese (AmSAT rep), Sue Fleming (STAT rep) and Sirpa Tapaninen (FinSTAT rep.)

The 2020 Annual Meeting, originally scheduled to take place in Barcelona, had to be cancelled of course. But enough representative wished to hold a meeting by videoconference. So, the Secretariat set about reformatting a three-day face to face meeting into two days of video meetings (5 hours each day), comprising 8x 1-hour sessions in total. Reps are attending across a 12-hour time differences.

As newly elected to the ATAS Secretariat, the reformatting has been an interesting, if daunting, process. On the positive side, it has opened up the meeting, making it more accessible to societies outside Europe.

This is all to the good because there are significant items on the May agenda that include: communication within ATAS, the process of affiliation, ceasing affiliation (a process is lacking in the ATAS Agreement), and course structure.

Office Report

Maggie Barlow (Management Associate), Fran Rickenbach (Senior Advisor)

Board Liaison: *Rick Carbaugh*

I am honored to be working with and learning from the wonderful members of AmSAT, and I continue to be amazed at your expertise and commitment to the Alexander Technique. As always, our goal is to provide the best value to the membership – particularly during the COVID-19 pandemic. The Office is your resource and your support, and we hope you will continue to rely on us in the coming year.

My daily responsibilities include answering inquiries from the public and the membership, managing the membership database, maintaining content on the AmSAT website, fulfilling orders from the Bookstore and managing its inventory as well as the online functions, coordinating the preparation and implementation of the ACGM with the planning committee, assisting the Board and committees with their objectives and projects, preparing the agenda and minutes for the Board meetings. This year we have continued working with the Board on strategic planning, which has become an integral part of every Board meeting agenda. I have worked closely with Angeline LeLeux, IM Manager, to prepare and send regular and special e-Updates to the membership. I also work closely with Amanda Blair MacDonald, Chair of the Membership Committee, to verify new members and help to grow our membership.

2020 Highlights:

- Our new website is now fully integrated with our membership database and also brings greater functionality for members and should help in increasing public awareness of the Alexander Technique and AmSAT. One of the prime benefits for members with the new site is having only 1 login now for their membership records and teacher profiles. Since the launch, we have been working on updating and editing content and assisting members with their profile updates and login issues.
- Our transition to an anniversary membership schedule continued with the 2020 dues year, and is running as smoothly as can be expected. 2020 renewal invoices are sent electronically approximately 45 days prior to your renewal date, and reminders are sent only to those members who haven't renewed online. We are working with members who are still on a learning curve with the transition to paperless renewals and forget to renew because they haven't seen our emails; this has caused a slight drop in renewals, but we are improving! This new process is not only more efficient, but it should save AmSAT the cost of mailing out annual renewals.
- Our Professional Liability Insurance program with increased coverage at a significant cost reduction as well as easy enrollment through the Office has become a very popular member benefit. We now have 225 members who are enrolled in the program.

Most recently, I worked with the 2020 ACGM Planning Committee in preparation for our conference in Boulder, CO. The Board and the Planning Committee did an incredible job creating a special conference at the UC Boulder Campus, an ACGM that builds the sense of being part of a strong, varied, and talented community, supports teachers to bring their work into the world, confidently spreading the knowledge of

the effectiveness of the Alexander Technique – focusing on “taking time to connect”. Unfortunately, the onsite ACGM had to be cancelled due to COVID-19, but we look forward to gathering again in 2021.

Bookstore:

We processed 87 orders online for total gross sales of \$3,248.53 from May 1, 2019 – April 30, 2020.

Membership:

We welcomed 29 First Year voting members this year, and had 443 voting renewals as well as 12 returning members. We also processed 36 members in the various non-voting categories.

After the ACGM had to be cancelled due to COVID-19, we initiated a weekly Zoom chat based on the “taking time to connect” program theme to bring our members together for presentations and dialogue on ongoing issues facing our members. More than 25% of the membership attends these sessions regularly, and they are also recorded and posted on the special “Taking Time to Connect” page on our website. Special thanks to Cheryl Pleskow and Amanda Blair MacDonald for their continuing efforts in bringing this special support to our membership! We will continue these chats for the foreseeable future to support AmSAT members.

In the coming year, I will be working with the Board to streamline our processes and make sure that they build on our strategic goals, continue making AmSAT more environmentally friendly by utilizing electronic systems wherever possible, and maintaining the AmSAT website to increase its functionality as both a benefit to our members and as a marketing vehicle for AmSAT and the Alexander Technique. We will also continue moving the Bookstore to an online platform, and identify other ways to enhance the value of membership in AmSAT.

Finally, I want to thank the Board for their grace and dedication as we worked together strategically to strengthen AmSAT and its value to our members. Every day I am amazed by the passion that you have for the Alexander Technique, and your commitment to this wonderful organization. I truly appreciate the opportunity to serve you all and look forward to many years of working together as we grow and sustain AmSAT!

Maggie Barlow, Management Associate

Information Manager (IM)

Chair: *Angeline LeLoux*

Board Liaison: *Cheryl Pleskow*

Summary

- The role of the Information Manager (IM) is to receive, edit and coordinate the communication of information within AmSAT, and between AmSAT and the public. The IM works in close collaboration with the Chair and the AmSAT Office staff.
- The IM is responsible for e-UPdates, monitors the Announcements page on the website, and works together with the AmSAT office on responses to inquiries from members and the public.

- The IM assists committees in determining appropriate placement and release of information to members and the public.

Report

The IM serves as the gateway for information passing within AmSAT and between AmSAT and the public. Information is received from the Board, Committee and Task Force Chairs, the AmSAT office, the Promotions Media Director (PMD), the membership, and the public. Working in close collaboration with the Chair and the AmSAT office, the IM coordinates and directs information to the appropriate outlet with the goal of timely, consistent, coherent communication to the membership and to the public.

Responsibilities include:

e-UPdates

The IM is the publisher/editor/production coordinator of e-UPdate, AmSAT's e-newsletter sent to the membership on alternate weeks with occasional e-UPdate Extras sent on weeks in between as needed.

Announcements Page on website

With the revision of the website, it was decided that the Announcements page would be updated by the AmSAT office staff instead of by the IM. The IM will continue to monitor the Announcements page to keep information current and coherent and will alert the office if changes or updates need to be made.

Resource for association management company

The IM serves as a resource to AmSAT's association management company (MEI) for information on the AT and AmSAT. Inquiries sent to AmSAT through the website are received by both the AmSAT office and the IM. Some are appropriate for response by the IM and others are forwarded to the appropriate person within AmSAT for response. There is ongoing consultation with the AmSAT office on various issues including responses to inquiries from members and the public, setting up e-UPdates and website questions.

Additional projects this year include:

- Collaboration with the AmSAT office and the ACGM program committee on communication of registration deadlines and volunteer opportunities for the 2020 ACGM in Boulder, CO. Further collaboration on editing statements and information from the AmSAT Chair and the AmSAT office/MEI on our organization's response to the COVID-19 pandemic: cancellation of the ACGM, announcement of weekly ZOOM meetings, and guidelines for teaching in our current situation.

AmSAT Journal (Journal)

Journal team: *Joe Alberti*, Editor, *Genoa Davidson*, associate editor and production manager, *Jonathan Leathwood*, layout and cover design, *Sandy Gordon*, photo editor, *Travis Chastain*, photo editing and research, *Christopher Neville*, cover design, *Rosie Pearson*, copy editor. Interns: *Anna Stelle*, *Alleese Eldredge*, *Lily Evans*.

Board Liaison: *Matthew Dubroff*

- Issues #15 and #16 were published.
- We have formed a partnership with Jamie McDowell and Paul March, editors of STATNews and *The Alexander Journal*, to share both resources and papers. We have met three times via Zoom and the meetings have been very productive. We intend to keep meeting bi-monthly.
- We have drafted a Mission Statement and Aims and Scopes statement and have been recruiting teachers for peer review.

- Due to the current health concerns and the canceling of the 2020 Conference, we have made the decision to offer Issue #17 online only. This will drastically reduce costs and reduce risks to both members and staff. Based on member feedback, we are considering switching to an online format in the future, with printed copies available by request, both online and hard copies in color. We are also exploring the possibility of a Kindle/iPad option.
- Plans for the upcoming year include: publishing Issues #17 and #18 (possibly online), obtaining our ISSN number, publishing peer reviewed papers, joining COPE (Committee for Publication Ethics), increasing our website presence on the AmSAT website and continuing our partnership with Jamie and Paul to make more papers available to members and increase overall communication with the Alexander community world-wide.

Organizational News

Coordinator: *Emily Sapa*

Board Liaison: *Holly Rocke*

Mission

To share information with AmSAT members regarding the activities and policies investigated by the Board and Committees.

Year in Review

In 2019 the Organizational News was published in December on AmSAT's website, focusing on Board and Committee activities after the New York ACGM. Nearly 20 reports by Board members, Committee Chairs, and Committee members were included in this issue. It was a treasure trove of information about AmSAT's activities in the summer and fall. In the future I plan to continue encouraging and facilitating the submission of reports from each Committee in an effort to increase transparency and communication across the organization. Watch for e-UPdates in November 2020 announcing the next information-packed issue!

Committee Reports

Annual Conference and General Meeting Policy Committee (ACGM)

Chair: *Jo Gray*

Members: *Lisa De Angelis, Renee Schneider*

Board Liaison: *Rick Carbaugh, Lisa Levinson*

My committee welcomed two new members in March 2020, both are past Chairs of ACGM Planning Committees. We have had one conference call, where we discussed the updating of the ACGM Policy and Procedures document on 3/31/20. We recommend updating this document every three years rather than annually. We discussed the challenges of writing the ACGM Planning Committee Chair's report for ACGM 2019 before the final financial report has been presented. We recommend that financial reporting is accurate and timely so that all parties involved have a clear sense of budgetary implications.

We also need to update the ACGM Policy Committee webpage and concluded that the website needs to accurately reflect the language of committee and documents.

There were significant improvements to the 2020 ACGM Registration materials, with tabs and filters, improving the whole process. From now on, the registration site will stay open until the day of the event.

Attendees' Convocation (AC)

Chair: *Ron Dennis*

Members: *Pamela Blanc, Mary Derbyshire*

Board Liaison: *Claire Rechnitzer*

Starting in October 2019, the Attendees' Convocation Committee (Ron Dennis, Chair, Pamela Blanc, Mary Derbyshire) began preparations for the 2020 meeting through communications with the AGM Planning Committee regarding scheduling of the AC at the 2020 AGM. By December it had been established that this meeting would be held on Saturday morning, after a brief general business meeting to establish the required quorum.

In late January, a message from the AC Committee to the Membership was sent out reporting this arrangement as well as soliciting contributions to the 2020 AC Agenda. Two items were submitted soon thereafter, one now appearing on the AC Agenda page of Members Forum, the other withdrawn as being a suggestion for a discussion rather than an actionable idea.

In late April, after cancellation of the ACGM by the Board, the AC Committee agreed that the 2020 Attendees' Convocation should be postponed until next AGM, because its deliberations and actions, inherently nuanced as well as substantive, were perceived as not compatible with a virtual format. The 2020 AC Agenda page will remain open in Members Forum.

Committee for the Alexander Technique and the Performing Arts (CATPA)

Chair: *Beth Robinson*

Members: *Sami Pincus, Tim Pyper, Erin O'Leary, Eleanor Taylor, Kelley Schoger, Tom Truss*

Board Liaison: *Jay Foote*

Mission:

Our mission is threefold: 1) to promote the inclusion of Alexander Technique instruction in performing arts settings, such as performing arts departments in academic institutions, orchestras, choruses, theatre companies, dance companies and performing arts festivals, 2) to provide resources and support for AmSAT teachers who currently work with performing artists, 3) to provide resources and support for AmSAT teachers who would like to expand their practice into the performing arts.

Past Year Activities:

- Committee member Tom Truss facilitated an online huddle call discussion group, on June 23rd, 2019, titled: *Connecting the Dots: Finding Commonality Between Principles of the Alexander Technique and the Performing Arts*.
- Committee members Erin O’Leary, Beth Robinson, Eleanor Taylor and Kelley Schoger co-facilitated two 2019 AmSAT ACGM Workshops titled: *Play On: Games for Teaching Alexander Technique to Performing Artists*.
- Committee members Erin O’Leary, Kelley Schoger and Eleanor Taylor womanned a committee table at the AmSAT ACGM community fair.
- Committee member Erin O’Leary authored an article for the *AmSAT Journal*, Summer 2019 issue describing her experience as a mentee in the CATPA Mentoring Program titled: *Supporting New Teachers*.
- Committee chair Beth Robinson organized Zoom meetings for AmSAT teachers teaching in educational institutions to brainstorm ways to transition to mandatory online teaching during the pandemic.
- Committee members Erin O’Leary and Eleanor Taylor will be facilitating a Huddle Call discussion group with the Continuing Education Committee for May 19th, 2020 on the topic: *Adapting our Work in These Changing Times* to explore how we can shift from in-person to on-line instruction during the pandemic, as well as how to maintain our manual skills while we practice physical distancing and separation.

Plans for the Coming Year:

- CATPA will continue to provide support and resources to members and collaborate with other AmSAT committees in response to current and changing conditions.

Appreciation:

- Welcome to new committee member, Tim Pyper!
- Much gratitude to outgoing CATPA Chair, Sami Pincus, for her dedication and gracious leadership of this committee!

Continuing Education Committee (CEC)

Co-Chairs: *Anne Johnson, Anne Shivas*

Members: *Alexandra Kassouf*

Board Liaison: *Sarah Silva*

Anne Johnson and Anne Shivas have been co-chairs of the Continuing Education Committee since 2018.

In September 2019 we resumed the Continuing Education Zoom Huddle calls. Our yearly series focused on Business and Practice Building, hosting 7 Huddle talks and 5 Open Discussion Forums.

We are grateful to the following presenters for sharing their insights and adding to our rich archive of talks on the CEC webpage: Clare Maxwell, Monika Gross, Imogen Ragone, Lori Schiff, Lauren Hill, Mihaela Hauser Wagner and Ariel Carson, Lindsay Newitter, Erin O'Leary and Eleanor Taylor.

As a membership benefit, the CEC has begun the development of a mentoring project for early-year teachers following the identification of this need at the 2018 ACGM. We have registered the interests of a core group of teachers willing to be mentors. In October 2019, as part of the process to develop this, we began Open Discussion Forums for teachers of all levels of experience and separate discussions for early-year teachers (1 – 3 years) together with third-year trainees. We also identified the need to create a private Facebook group for this community, which is in process.

The discussion groups are designed to build community with other AmSAT teachers by sharing and discussing teaching interests, challenges and concerns that arise in our practices. Our final Open Discussion Forum was hosted in May of 2020 by CATPA for all members.

Following the discussions with the early year teachers and trainees, we consulted and collaborated with the Membership Committee hearing ideas to better help meet the needs of new teachers transitioning and connecting with AmSAT.

The CEC also updated the Continuing Education Requirements for the Member Handbook to reflect member resolutions passed during the 2019 AGM Business Meeting.

Credentials Review Committee (CRC)

Chair: *Rebecca Tuffey*

Committee Members: *Eileen Troberman, Michaela Hauser-Wagner*

Board Liaison: *Mara Sokolsky*

In the year since our last report (Spring 2019), the CRC oversaw the credential review process and eventual membership acceptance of Gabrielle Czaja. Welcome, Gabrielle! There is one applicant presently going through the credential review process. We have received inquiries from two others. We will be sharing our rules and procedures with Alexander Technique Canada, in response to their request for partnership.

We welcome applicants and inquiries. AmSAT is strengthened by a membership of active, committed, and diverse participants.

Definitions Committee (DC)

Chairs: *Jill Geiger, Walton L. White*, Co-Chairs

Board Liaison: *Sarah Silva*

Summary

The DC consults with committees and individual members to define and explain the Alexander Technique accurately, appropriately and coherently to a particular group, for a particular purpose and/or in a particular context. The services of the DC are available to Board, Committees and members alike.

Report

In the interest of clarity and consistency in how we define our work to the public, the Definitions Committee (DC) was formed in 2003. Working primarily in an advisory capacity, the DC works with

committees and individual members to define and explain the Alexander Technique accurately, appropriately and coherently to a particular group, for a particular purpose and/or in a particular context. Since its inception the DC has been collecting and writing definitions of the Alexander Technique for a variety of contexts.

The DC works especially closely and in a collegial manner with individuals and committees whose work is related to the promotion of the AT and to the self-regulation of our profession. Along with the GRC, the DC reviews content changes to the website.

This past year the DC consulted with:

- Slogan Committee regarding wording of slogan and tagline phrases to be proposed to the membership
- TDC Subcommittee regarding revision of the Practical Work Policy and the Teacher Certification Requirements
- CATPA regarding revising AT description in our website's Performing Arts section and
- Board Chair regarding wording of the Feathr ad.

Interested in the challenge of creating definitions of the AT for various contexts? The DC is looking to add a member or two to collaborate on wording in response to requests. Work is occasional, interesting and not time-consuming. If this might interest you, please contact Jill Geiger with any questions: jill@ATinstruction.com.

Government Relations Committee (GRC)

Acting Chair: *Rick Carbaugh*

The Government Relations Committee informs members of legislative initiatives that could affect their right to practice as teachers of the Alexander Technique, and works to ensure that Alexander Technique is defined and represented appropriately.

AmSAT has been a longstanding member of the Federation of Therapeutic Massage, Bodywork and Somatic Practice Organizations (FTMBS). The GRC Chair meets with other Federation members on a monthly basis to review nationwide legislative issues. Federation members also meet in person once yearly for more in depth discuss of legislative issues as to share information on organizational development. The FTMBS website is <http://www.federationmbs.org/>. AmSAT members may find the materials available on the website worth review.

The 2020 face-to-face Federation meeting scheduled for March in Memphis, TN was postponed due to travel concerns in light of the pandemic. Federation members decided to incorporate topics from the in-person meeting into the regular schedule of upcoming monthly meetings.

Legislative Activity mid 2019 - mid 2020

Legislative activity has increased and intensified during the past year driven by States being lobbied to address issues of human trafficking. These influences are coming internally from Police organizations and a multitude of organizations focused on the effects of human trafficking.

Unfortunately, there remains little understanding in state legislatures of ways to effectively craft legislation to address human trafficking. Legislators have taken an approach to 'throw whatever they can against the wall'

and see what sticks. Legislatures are looking to pass laws, regardless of their effectiveness or ability to be enforced, but to show that they've done something. When professional licensing laws, laws that include education and training parameters, are assailed as too burdensome, then legislators switch to promoting registration or establishment legislation. When massage regulations are found ineffective, and the majority of complaints regarding human trafficking are with massage, then legislators subsume movement professions and others as part of the problem, when there is clear evidence to the contrary.

Human trafficking is an activity of organized crime. It is pervasive throughout our society, not restricted to massage or sex work. Legislation to address human trafficking has been studied and documented. It requires three main areas to be addressed: 1) Stronger penalties for those buying and profiting from these services, 2) Greater coordination between policing powers and other governmental organizations in identification and monitoring, and 3) Recognition that trafficked individuals are victims, not perpetrators. These individuals need support to escape their oppressors.

Unfortunately, legislation of this nature requires money. Money is in short supply for many states when looking at the long term commitment necessary to address human trafficking problems. Until states decide to apply their will and finance to the issue, short term 'fixes' such as turning attention to the regulation of legitimate professions will continue to prevail. As legislative bodies, from state to state, tend to copy one another in their efforts, we expect to face a continuing spread of similar legislation.

An unlikely 'benefit' of the coronavirus pandemic has been a lull in legislative efforts as States have been forced to address the outbreak. As legislatures resume action in the upcoming months, we will see how priorities shift and the changed financial prospects of states influence legislative action.

States with legislative issues being monitored/addressed include:

Massachusetts / There has been ongoing legislation (SB.168) for the past three years. An original bill died with the end of the 2018 legislative session. It was revived in 2019 with a flurry of activity and again little cooperation between those in opposition, the bill sponsors and the Attorney General's office. AmSAT members were active in their opposition to the bill, attending a legislative open house initiative, public hearings and letter writing campaigns. After being submitted to the Joint Committee on Consumer Protection and Professional Licensure and with several public meetings, the bill was referred for study. This means that the bill will again likely not survive the current legislative session.

Rhode Island / S.576-Substitute A removed the Federation sponsored exemptions clause from the existing Massage Therapist Licensing Bill. In cooperation with the American Massage Therapy Association (AMTA), the Federation strives to include an exemption clause in massage therapy bills as they are enacted in each state. This 'exemption clause' may be viewed at the Federation website in the Legislative Packet. While many Federation members have a policy to seek specific exemption from massage legislation, AmSAT has by policy decided to remain unnamed with the understanding that the Alexander Technique is neither massage nor bodywork. The removal of the exemption clause caught Federation members by surprise as we were unaware of the bill and the changes involved until it had already been passed.

Minnesota / Language changes are in consideration for the massage therapy bill and are moving through a number of current evolutions. Minnesota has an approved Health Freedom bill on its books currently.

Ohio / The AMTA is monitoring changes in massage legislation that will address changes in massage legislation to require the inclusion of ‘relaxation massage’ which does not require licensure and is currently distinct from the licensure of massage therapy.

Illinois / American Organization for Bodywork Therapies of Asia (AOBTA), a Federation member, had their exemption removed from the Illinois Massage Therapy legislation. The result is that AOBTA members are no longer able to practice in Illinois without a massage therapy license. This resulted from a complaint by anti-human trafficking organization.

California / San Francisco legislation has disrupted massage therapy practices within the city during the past year. Efforts to resolve the issues have been in discussion. We are awaiting a current update.

Vermont / In a state where massage legislation has been deemed unneeded on several prior occasions, an incident of personal assault involving an individual masseur, pushed by a victim advocacy group, has raised the prospect of future legislation. The last update received indicated the legislature was considering a less intrusive registration bill versus a licensing bill.

Kansas / In response to local regulation that would restrict the practice of Rolfing and other forms of bodywork, a practitioner concerned with the legal right to practice has been crafting a bill creating an umbrella of all ‘bodywork’ practitioners in the state and removing current exemptions for other movement professionals. Federation members do not see the legislation as favorable and are in continued conversation to address the legislation as it advances.

In addition to legislation at the state level, there are a growing number of local and municipal regulations that affect massage therapy and alternatively other movement practices. We recommend that Alexander Technique teachers stay informed of current and upcoming regulations and the ways they may affect your teaching practice. The GRC relies upon our members as the front line of being informed of upcoming legislative initiatives. We encourage you to share timely information you receive with us and with your local teaching associates.

Help Wanted! Government Relations Committee Chair

The AmSAT Board is seeking a Chair and committee members for the Government Relations Committee. Responsibilities of the AmSAT GRC Chair include attending monthly JGRC meetings, usually 90 minutes, with other JGRC representatives to discuss the latest in legislative issues, generally on a state-by-state basis, that could affect a member’s right to practice.

The GRC Chair is also invited to attend a yearly, in-person Federation meeting hosted at different locations throughout the United States. This two day meeting allows more in-depth discussion of legislative topics as well as the opportunity for member organizations to share a look at the internal mechanisms of how their organizations function. If you are interested in legislative issues, organizing members and would like to find out more about helping with this essential committee, please contact Rick Carbaugh, rick.carbaugh@amsatonline.org or any AmSAT Board member.

Strength in Numbers

As other Federation MBS members continue to remind us, being an active member and listed on the website of a national organization may provide one of the strongest legitimizing identifiers for any profession. As AmSAT members, we are the prime beneficiaries of the continuing work being done to maintain our organization and the professional legitimacy of the Alexander Technique in the eyes of the

governing establishment and the public. It is your continuing support, both financially and in volunteer time that makes this all possible. Thank you!

Membership (MC)

Chair: *Amanda MacDonald*

Members: *Nancy Romita*

Board Liaison: *Xochi John*

The role of the membership committee is to assist the Board and Office in all membership inquiries and processes, to facilitate growth of new membership, and to serve and strengthen our existing membership by supporting trainee members and inspiring the professional development of all currently active members. As committee chair, I hold regular meetings with the office and the AmSAT Chair to discuss actions to fulfill this role.

As part of our work with the office, we have updated membership materials to include new language encouraging members to “Be Informed, Be Involved, and Be Invested” in the work of our organization.

Currently, the membership committee’s main project is organizing the weekly all-membership Zoom meetings scheduled as a result of the COVID-19 pandemic and stay-at-home orders issued in many states. These meetings use the planned ACGM theme, “Taking Time to Connect,” and serve as a forum to gather and share information among our members. We encourage members to continue the conversation on the Community Forum page of the AmSAT website.

Planned for the near future is an audit of AmSAT’s renewal process. We wish to learn how our members experience the renewal process, if there is anything we can do to make renewal easier, and any other ways we can support and engage our members.

Board member Lisa DeAngelis and I submitted a motion to change the name of one of our membership categories from “Associate” to “Supporting.” This will be followed by a membership committee initiative to grow this category. Our hope is to engage supportive members of the public and add resources to our financial bottom line.

The membership committee is in conversation with the Continuing Education Committee about areas where our work overlaps. We also plan to reach out to active regional groups of teachers to discuss membership engagement and to build the membership committee.

Nominating (NC)

Chair: *Mara Sokolsky*

Member: *Melissa Brown*

Board Liaison: *Mara Sokolsky*

The Nominating Committee is pleased to report that we have a full slate of officers for the 2020-2021 term. These include:

Chair: Lisa Levinson

Past Chair: Cheryl Pleskow

Chair Elect: Matt Dubroff

Secretary: Holly Rocke

Treasurer: Rick Carbaugh

Members at Large: Mara Sokolsky, Wes Howard, Lisa DeAngelis, Claire Rechnitzer, Renee Schneider

Professional Conduct Committee (PCC)

Chair: *Pamela Bartlett*

Members: *Eve Bernfeld, Glenn Kenreich, Brooke Lieb, Bobby Rosenberg*

Advisor: *Ruth Rootberg*

Liaison: *Cheryl Pleskow*

The Professional Conduct Committee welcomes Brooke Lieb as a new member of the committee, beginning in April 2020. Brooke brings many years of experience as a teacher, training course director, and active member of AmSAT.

After Serving on the PCC since September of 2013 and taking on the chair position in November of that same year, Ruth Rootberg stepped down on September 15, 2019. Pamela Bartlett has stepped into the chair role after having served on the committee since January of 2013. Ruth Rootberg remains in an advisory role to Pam Bartlett. As Ruth was stepping down and Pam was taking over, we were asked to consult with the Training Directors' Committee on clarifying the Practical Work Policy and Teacher Certification Requirements, which we did.

The PCC continues to address concerns of members as we receive them, and to process pre-complaints and complaints as they arise.

Research (RC)

Chair: *Heidi Leathwood*

Members: *Sarah Barker, Meg Jolley (retired, 1/2020), Karl Snider (retired, 2/2020)*

Board Liaison: *Jay Foote*

The RC formed a panel of three reviewers, and awarded a \$2000 grant for a proposal by **Nicola Hanefeld, MSTAT**, who with her collaborators **Dr Lesley Glover** and **Prof. Julie Jomeen** of the Faculty of Health Sciences, University of Hull (England) will complete the study "*How do women use the Alexander Technique in the early postpartum period?*"

Many thanks to outgoing members for their many years of service on this committee: Meg Jolley (9 years) and Karl Snider (2 years). This year Meg worked hard to secure our review panelists. Karl worked closely with one of his students who works in development, about possibilities for future development.

Through Jay Foote's work with the Board, the research grant has been increased to \$2500 and funded for 2021, 2022, and 2023.

Many thanks to Sarah Barker for continuing to provide support to incoming chair Heidi Leathwood, for writing the website update for poster presentations, and volunteering to coordinate the poster presentations for the ACGM.

The committee has discussed expanding their role to do additional fund raising, and also move in the direction of providing guidance and resources for members interested in pursuing research. Heidi

Leathwood has talked with AT experienced researchers to serve as consultants to help the committee move in this direction.

Jay Foote has begun discussion with the board about the development of an awareness campaign/fundraiser to be unveiled at future AMSAT ACGM. The discussion has centered around developing a funding source from students or enthusiasts who are financially independent.

We still need to establish a clear system for checking in with the progress of research projects and find out what the results were. With two members retiring, the committee is seeking new members and welcomes communications from those interested in supporting research to advance our profession.

Rules and Bylaws (RBC)

Co-Chairs: *Rose Bronec and Claire Creese*

Committee Member: *Kathryn Miranda*

Board Liaison: *Holly Rocke*

AmSAT's Bylaws provide for a Rules and Bylaws Committee (RBC) under *Article XIV, Section 2*, which instructs the committee to perform a parliamentary review of motions for the annual meeting. It is considered a standing committee, however the RBC had not been active since 2013. In October, the Board discharged the Bylaw Review Committee (BRC), a special committee, which had fulfilled its original charge, and adopted a charge to reconstitute the RBC, appointing Co-Chairs and a committee member. Claire, Rose and Kathy had served on the BRC and now embrace this opportunity to continue through the RBC. We report on both committees here.

The RBC needs more committee members. Please consider this important and gratifying work which focuses on how we come together as “a body of persons meeting to discuss and determine upon common action”. (RONR, p. xxix)

Before their discharge, BRC members assisted the Secretary in publishing the *2019 Bylaws* and Bylaw-related documents, and the *2019 AGM Minutes*. The *Format & Style Guide for the AmSAT Bylaws* was updated. We assisted the Board in the charge for the newly formed Slogan Committee, appointed at the 2019 AGM to handle a referred motion. We held an introductory educational meeting for the incoming Board on the Bylaws, hierarchy of rules (which rules apply when) and basics of Robert's Rules. In October 2019, the Board approved two BRC-generated templates—*Template for Drafting a Motion for AmSAT's Annual General Meeting* and *Template for a New Special or Ad Hoc Committee*. The BRC webpage has been updated and will be archived.

The reconstituted RBC has been consistently at work since our first formal meeting (January 5, 2020). We have fulfilled multiple requests from the Executive Committee for input and advice, including the New York State statutes on Not-for-Profit Corporations and new guidance regarding annual meetings given the state mandates for social distancing and travel restrictions during the COVID-19 pandemic.

Prior to the pandemic, the RBC with assistance from Lola Fehr, Parliamentarian, undertook the month-long review of motions for the annual meeting. There were eight submissions—four Bylaw amendments and four member resolutions. During the review one motion was withdrawn and another was divided into two motions. Many motions required clarification—improved format, wording, and comprehension, facilitating the tasks of the Chair, Secretary, and membership once the motions reach the floor of the annual meeting.

The RBC has worked with other committees by: following through on updating documents affected by 2019 AGM motions; providing committees with the new templates named above; editing the ACGM planning guide; bringing consistency to (new) special committee charges (JLSF, Diversity); responding to a questionnaire review of committee's needs for and evaluation of administrative support from the office; and meeting with the Training Approval and the Training Directors' Committees to consolidate action in relation to the effect of the pandemic on training courses.

We would be remiss to end this report without acknowledging Ken Andersen and express our deep sadness with his passing in January. Ken first began serving as AmSAT Parliamentarian at the 2013 AGM. He held a deep regard for community building. Due to his advice over the years, our committee, members of other committees, and individual Board members have been able to keep us focused on the greater good and welfare of our AmSAT community.

Training Approval Committee (TAC)

Co-Chairs: *Rena Anya Devéza and Lori Schiff*

Members: *Jameson James, Heidi Leathwood, Geordie MacMinn, Chris Mincer, Jonathan Salcedo*

Board Liaison: *Cheryl Pleskow*

Jameson James, Geordie MacMinn and Rena Anya Devéza joined the TAC in September 2019. Rena started as co-chair in January of 2020.

Here is the list of training course re-approvals for this year, starting in June, 2019. Jameson, Geordie and Rena were on the TAC only for the last re-approval, ATMA:

- Ted Dimon, The Dimon Institute
- Nancy Romita, ATMidAtlantic
- Christiane Friedman, ATTIC
- Heidi Leathwood, ATD
- Karen DeWig, AT-ABQ
- Sidney Harris, ATI-LA
- Sumi Komo, ATMA

The TAC worked with the TDC and the RBC to create the Motion for Temporary Allowances for AmSAT Training Courses Due to COVID-19 Pandemic, April 2020. This motion was approved by the Board on April 19, 2020.

Training Directors Committee (TDC)

Chair: *Karen DeWig*

Members: *John Baron, Pamela Blanc, Rose Bronec, Rick Carbaugh, Ted Dimon, Michael Frederick, Chris Friedman, Marian Goldberg, Sydney Laurel Harris, Jane R. Heirich, Molly Johnson, Ruth Kilroy, Lyn Charlsen Klein, Heidi Brende Leathwood, Babette Markus, Frances Marsden, Brian McCullough, Kathryn M. Miranda, Daria Okugawa, Alice Olsber, Giora Pinkas, Rebecca Robbins, Ann Rodiger, Jean-Louis Rodrigue, Nancy Romita, Vivien and Neil Schapera, Luc Vanier, Thomas Vasiliades, Matthew Ventura, Nanette Walsh, Rabima Wright*

Board Liaison: *Wes Howard*

The Training Directors Committee (TDC) is composed of all of AmSAT's directors of training. The TDC facilitates communication and a sense of community among directors. It also serves to give training course

directors an individual and collective voice, especially about matters regarding the training of teachers. Our mission: *Contributing to the health and growth of teacher training within the AmSAT community by offering recommendations from the Training Directors' perspective.*

Highlights of our work this past year:

- We meet in person once a year at the ACGM. At last year's meeting in New York 20 training directors attended, representing 14 training courses.
- Using the recommendations from the *Policy on Exceptions for Trainees* (approved by the membership at the 2018 AGM) we created the document *Support for AmSAT Training Course Record Keeping*. It was approved by the Board in October 2019 and can be found on the TDC committee page in the TD Handbook.
- The subcommittee charged with updating and clarifying the *Practical Work Policy* finalized their draft in January 2020. The Board voted to approve the revisions at their February 2020 meeting. The *Practical Work Policy* can be found in the TD Handbook on the TDC committee page and on the Training Approval Committee (TAC) page.
- In February the Board approved the TDC recommended changes of terms (related to changes in the *Practical Work Policy*) on the FAQ page of the website.
- A subcommittee working towards updating and clarifying the *Teacher Certification Requirements* received feedback from the community forum and completed proposed revisions in January. The TDC approved a motion which will bring the proposed revisions to the membership for a vote at the 2020 AGM.
- After 5 years of review and feedback from current training directors, the TAC, and the community forum, a subcommittee has drafted a motion for the 2020 AGM regarding specific Bylaw requirements for teachers applying to open a training course. The subcommittee is offering Bylaw language that would strengthen the assisting requirements and clarify the relationship between the continuing education requirements for members and those required for opening a training course.
- In March Karen worked with the Rules and Bylaws Committee and the Training Approval Committee to draft a motion outlining temporary measures for training courses during the pandemic.
- We continue to hold bi-monthly video calls as a means toward community and involvement. Starting in April we are meeting once a month to offer mutual support during the pandemic.
- Karen fields questions and offers support to TDC members over the course of each year.

Plans for the upcoming year:

- A subcommittee will present a motion to revise the *Teacher Certification Requirements* at the 2020 AGM.
- Also at the 2020 AGM, a subcommittee will present a motion to clarify and update the Bylaw requirements for teachers applying to open a training course.

Financial Reports

AMERICAN SOCIETY FOR THE ALEXANDER TECHNIQUE, INC.
STATEMENTS OF FINANCIAL POSITION
DECEMBER 31, 2019 AND 2018

Draft - Preliminary
For Discussion Purposes Only
Subject to Change
Not for Release to Third Parties

	<u>2019</u>	<u>2018</u>
ASSETS		
Current Assets		
Chase Depository Account	\$ 8,676	\$ 10,734
Chase Operating Account	277	2,153
Chase Savings Account	20,695	18,275
Capital One Savings Account	89,992	88,432
Capital One Certificate of Deposit	20,272	20,191
Total Cash and Cash Equivalents	139,912	139,785
Inventory	6,364	5,370
Prepaid Expenses	10,099	13,801
TOTAL ASSETS	\$ 156,375	\$ 158,956
 LIABILITIES AND NET ASSETS 		
Current Liabilities		
Accounts Payable	\$ 1,670	\$ 2,075
Net Assets		
<u>Without Donor Restrictions:</u>		
For Current Operations	123,014	130,222
Board-Designated for Specific Purposes:		
Teach One Lesson Fund	2,756	2,756
Board Travel Fund	15,293	14,793
Research Fund	(1,467)	480
Training Director Council Fund	4,444	2,171
Expansion Fund	200	-
Net Assets Without Donor Restrictions	144,240	150,422
 <u>With Donor Restrictions:</u>		
Prudent Reserve	1,651	1,651
Teachers Memorial Fund	4,741	4,808
Judith Leibowitz Scholarship Fund	8,015	-
Feathr Campaign	(3,942)	-
Net Assets With Donor Restrictions	10,465	6,459
Total Net Assets	154,705	156,881
TOTAL LIABILITIES AND NET ASSETS	\$ 156,375	\$ 158,956

See accountant's compilation report.

AMERICAN SOCIETY FOR THE ALEXANDER TECHNIQUE, INC.
STATEMENTS OF ACTIVITIES
YEARS ENDED DECEMBER 31, 2019 AND 2018

Draft - Preliminary
For Discussion Purposes Only
Subject to Change
Not for Release to Third Parties

	2019			2018		
	Without Donor Restrictions	With Donor Restrictions	Totals	Without Donor Restrictions	With Donor Restrictions	Totals
Revenues and Support						
Contributions	\$ 1,511	\$ 9,248	\$ 10,759	\$ 940	\$ 2,500	\$ 3,440
Conference and General Meeting	127,432	-	127,432	19,882	-	19,882
Books and Literature Sales, net	3,883	-	3,883	858	-	858
Interest Income	1,663	-	1,663	920	11	931
Membership Dues	128,574	-	128,574	143,280	-	143,280
Advertising	-	-	-	840	-	840
Training and Certification	2,750	-	2,750	1,700	-	1,700
Net Assets Released from Restrictions	5,242	(5,242)	-	300	(300)	-
Total Revenues and Support	<u>271,055</u>	<u>4,006</u>	<u>275,061</u>	<u>168,720</u>	<u>2,211</u>	<u>170,931</u>
Expenses						
Program Activities:						
Educational Events	133,394	-	133,394	30,092	-	30,092
Scholarships/Memorials/Research	2,760	-	2,760	2,300	-	2,300
Website Development & Support	5,398	-	5,398	12,394	-	12,394
Publications	10,311	-	10,311	7,074	-	7,074
Supporting Services:						
Management and General	125,374	-	125,374	116,039	-	116,039
Total Expenses	<u>277,237</u>	<u>-</u>	<u>277,237</u>	<u>167,899</u>	<u>-</u>	<u>167,899</u>
Increase (Decrease) in Net Assets	(6,182)	4,006	(2,176)	821	2,211	3,032
Net Assets, Beginning of Year	<u>150,422</u>	<u>6,459</u>	<u>156,881</u>	<u>149,601</u>	<u>4,248</u>	<u>153,849</u>
Net Assets, End of Year	<u>\$ 144,240</u>	<u>\$ 10,465</u>	<u>\$ 154,705</u>	<u>\$ 150,422</u>	<u>\$ 6,459</u>	<u>\$ 156,881</u>

See accountant's compilation report.

AMERICAN SOCIETY FOR THE ALEXANDER TECHNIQUE, INC.
STATEMENTS OF FUNCTIONAL EXPENSES
YEARS ENDED DECEMBER 31, 2019 AND 2018

Draft - Preliminary
For Discussion Purposes Only
Subject to Change
Not for Release to Third Parties

2019

	Program Activities			Supporting Services		Total Expenses
	Educational			Management and General		
	Events	Website	Publications	Fundraising		
Accounting	\$ -	\$ -	\$ -	\$ 3,500	\$ -	\$ 3,500
Conference and Meeting Fees	93,712	-	-	-	-	93,712
Credit Card Service Fees	-	-	-	7,289	-	7,289
Editor's Fee	-	-	2,010	-	-	2,010
Insurance	250	-	-	1,411	-	1,661
Management Fees	-	-	-	105,612	-	105,612
Marketing	-	-	-	4,942	-	4,942
Office Supplies and Expenses	115	-	-	555	-	670
Printing/Copying	1,140	-	4,922	266	-	6,328
Scholarships/Memorials/Research	2,760	-	-	-	-	2,760
Shipping and Mailing	685	-	2,498	759	-	3,942
Software Charges	-	-	81	-	-	81
Taxes	-	-	-	50	-	50
Telephone	-	-	-	990	-	990
Travel	10,113	-	800	-	-	10,913
Website Development/Support	-	5,398	-	-	-	5,398
Workshops, Speakers, Honorariums	27,379	-	-	-	-	27,379
	\$ 136,154	\$ 5,398	\$ 10,311	\$ 125,374	\$ -	\$ 277,237

2018

	Program Activities			Supporting Services		Total Expenses
	Educational			Management and General		
	Events	Website	Publications	Fundraising		
Accounting	\$ -	\$ -	\$ -	\$ 3,450	\$ -	\$ 3,450
Conference and Meeting Fees	15,788	-	-	-	-	15,788
Credit Card Service Fees	-	-	-	3,878	-	3,878
Editor's Fee	-	-	1,948	-	-	1,948
Insurance	-	-	-	1,436	-	1,436
Marketing	-	-	-	-	-	-
Management Fees	700	-	-	103,210	-	103,910
Office Supplies and Expenses	6	-	-	1,756	-	1,762
Printing/Copying	-	-	2,723	262	-	2,985
Scholarships/Memorials/Research	2,300	-	-	-	-	2,300
Shipping and Mailing	20	-	965	495	-	1,480
Software Charges	-	-	638	-	-	638
Taxes	-	-	-	50	-	50
Telephone	-	-	-	1,502	-	1,502
Travel	7,245	-	800	-	-	8,045
Website Development/Support	-	12,394	-	-	-	12,394
Workshops, Speakers, Honorariums	6,333	-	-	-	-	6,333
	\$ 32,392	\$ 12,394	\$ 7,074	\$ 116,039	\$ -	\$ 167,899

See accountant's compilation report.

2019 Budget Pie Charts

