

XXI. LERA Annual Reports

Executive Board Meeting

June 10, 2009

Cafritz Conference Center, Washington, DC

Call to order—The meeting was called to order at 3:00 p.m. by President Joel Cutcher-Gershenfeld and he welcomed everyone to the meeting. Present at the meeting were officers and board members: Joel Cutcher-Gershenfeld, (President); Eileen Appelbaum (President Elect); Anthony Oliver, Jr. (Past President); Peter Feuille (Secretary-Treasurer); and Adrienne Eaton (Editor in Chief). Other Board Members present were Rose Batt, Robert Chiaravalli, Ralph Craviso, Ellen Dannin, Iain Gold, Julie Martinez Ortega Bonnie Summers, Christian Weller, and Charles Whalen. Board members unable to attend included Beth Almeida, Jacqueline Drucker, Richard Fincher, and John Godard and NCAC Chair William Canak. Invited guests and committee chairs present were: John Burton (Development) and Marlene Heyser (Grants) and David Lipsky and Robert McKersie. LERA staff present included Paula Wells and Emily Smith.

Approval of Minutes of January 2009 Board Meeting—Joel Cutcher-Gershenfeld requested the Board consider approval of the minutes of the last meeting on January 2, 2009. Bob Chiaravalli made a motion to approve the minutes, it was seconded by Christian Weller, and unanimously approved.

Committee and Officer Reports

Finance and Membership Report—Secretary-Treasurer Peter Feuille relayed the revised membership and financial reports to the board. He noted that in January the Board had approved an increase in member dues for the next year by \$20 to \$185 for regular individual membership; this rate is effective October 1, 2009. He reported the membership decline was lower than last year's even though the dues increased. He further noted that while membership attrition is slowing down, the organization continues to shrink and suggested we cannot continue to increase membership dues.

The Board was presented and examined the fiscal Year 2008 annual audit by independent auditor Stan P. Feller. After discussion, Paula Wells suggested the Board rescind the increased library subscription price of \$250 for libraries requesting an electronic subscription only. Those who request the new electronic subscription only will pay \$200 through 2010 and 2011. The increased rate for libraries who want print and electronic subscription copies will remain at \$250. Joel Cutcher-Gershenfeld motioned, it was seconded by Eileen Appelbaum, and unanimously approved by the board.

Development and Contributions Committee Report—John Burton presented the development report. He explained how the two committees (Development and Contributions Committee and the Grants and Sponsorship Committee) are coordinating their responsibilities. Development will be responsible for organizational fundraising, chapter, and individual fundraising. He presented a Development Committees Comparison Report showing contributions received from 2000-2009 in each of the Committees' different areas. Of special note was the Grants Committee's work to raise sponsorship monies of \$35,000 already this year; this includes a \$25,000 sponsorship from BNA and \$10,000 already received from Blue Cross and BlueShield Assn for a sustaining sponsorship. Bonnie Summers of BlueCross BlueShield Association was graciously thanked.

The Development and Contributions Committee reported it is defining an approach to chapter fundraising by creating a letter to send with a goal of getting to 100% chapter participation, starting with 10% a year.

John Burton also mentioned the committee continues to make progress on exploring the establishment of a quasi-endowment fund as a development effort for the association. The committee believes that individuals may contribute more to the Association if they feel like the contribution will live in perpetuity, and the committee is exploring moving forward with the University of Illinois Foundation option. Burton said he hoped to have a proposal by January 2010 to present to the board for a vote.

He further reported that Tom Kochan recently drafted a letter for a possible fundraising effort for LERA on behalf of John Dunlop. A fund in his name might be created to support the National Policy Forum or possibly Perspectives on Work. Burton reported that Tom Kochan was contemplating taking the lead to help line up former Secretaries of Labor and LERA Presidents to serve as honorary co-chairs (Shultz, Marshall.)

Also from the Development Committee, Ralph Craviso reported on the ongoing board member development effort. To date, ten board members have made a personal financial contribution to the LERA, with 4 of them giving the target amount of a \$500 gift. We were aiming for \$10,000 from this effort, and so far we have reached \$4,000. He suggested the Board discuss whether this an appropriate request to make? While the current Statement of Board Responsibilities does indicate an expectation of service, to grow and sustain the organization, Craviso asked if requiring further financial gifts were still appropriate for the culture and character of this association. Joel Cutcher-Gershenfeld suggested that he believes there is a willingness to help, but that maybe we need to further specify what those expectations are in those board orientation materials. After discussion, Ralph Craviso suggested that is read:

“LERA board members are expected to 1) participate in LERA efforts, as requested, in its efforts to broaden membership and increase individual and organizational financial support, 2) identify new sources of financial support to the LERA administrative staff and support the staff as requested, 3) make personal contributions according to individual means.”

Ralph Craviso made a motion to amend the Statement of Board Responsibilities, Christian Weller seconded the motion, and it passed unanimously. This motion is to replace the previous motion made in January about board contributions. This goal of raising \$10,000 from the Board should continue to be tracked and reported on at the next meeting.

Strengthening Organizational Memberships

General discussion took place about organizational membership. Ellen Dannin mentioned that she has solicited about 20 different organizations to become organizational members, but that her prospecting, as well as other's, would benefit by having a brochure resource and some sample letters, perhaps with different appeals for different groups. It was noted that if we need more members we should build more relationships with other not-for-profit associations. Once we identify another group we want to connect with, we must identify a champion from our own membership who will initiate and mentor the relationship.

Organization we might consider alliances with include: ACR, Labor Law Section of the Bar, Dispute Resolution Section of the Bar, American Sociological Association, NOVA, Natl. Acad. of Arbitrators, FMCS, AAA, Industry Studies Association, SHRM, Afr. Amer. HR Profs., Labor Historians, Upjohn Inst., EBRI, World at Work, Nat'l Academy. of Social Insurance, Natl. Acad. of HR, Sociologists, Dispute Resolution Section of the ADA. These organizations should contribute to a master list of candidates and we should identify champions to contact them, with one person to coordinate the entire effort. It will require us to structure a value proposition relevant to the mission of each target audience (organizational memberships).

Other Business

Annual Meeting 2010—Joel Cutcher-Gershenfeld reported on special sessions planned for the 2010 Annual Meeting in Atlanta, GA, to include “Internal Change Agents Panel”, “Green Jobs Panel”, “Labor Relations in a Rock Band (Aerosmith) Panel”, and “The Second Industrial Divide' and 'The Transformation of American Industrial Relations': Looking Back and Looking Forward a Quarter Century Later”.

National Skills Certification Program—President Cutcher-Gershenfeld presented a new draft document for the skills certification initiative and provided an overview of the program to the board. This will be a substantial strategic initiative to be undertaken by the LERA. The overarching goal will be to increase labor-management skills in the field utilizing a provider distribution system that will encompass LERA meetings, local chapter meetings, existing IR/HR programs at universities, government agencies and NGO's, and other practitioners delivering various component and materials for the certification training. He explained that individuals will then sign up for LERA membership and enrol in the certification program, take their training courses from various providers, take exams administered by the LERA, and work towards their professional certification. Providers will become organizational members of the LERA and submit their training materials and curriculum for approval.

Ralph Craviso pointed out that the value of what LERA brings to a certification program of this magnitude is that LERA is a composite of various stakeholders in the employment relationship and that this combination of talent is unique and the product that we can deliver can only be delivered by the LERA. There is no other single entity that can deliver this certification to individuals. He further suggested that we should make sure the initiative would embellish the LERA, not only as a source of new revenue, but it will also make membership in the association more visible and attractive.

There were some questions about how this might impact some of the current university programs that would be counted on to deliver some of the content. Joel explained this program is to be designed to be inclusive, and bring together all the components of LERA membership, and to benefit all parties. LERA organizational members who wouldn't have the resources to build a pipeline they way they might wish will have the access they need, and a growing pool of the professionals with the appropriate training to take the place of those retiring. LERA chapters will be able to take part in the delivery of curriculum, thereby boosting their revenue and membership. Existing educational programs and universities can use this certification to augment their own curriculums and offer a better product to their consumers.

The model would include 1) a panel of blue-ribbon experts who identify the curriculum and certification standards, 2) providers (various) who obtain authorization from us to provide training to individuals either in person, or via web/video, etc., 3) a series of certification exams for the individuals to take after obtaining the proper training from the providers.

Cutcher-Gershenfeld reported that currently, we do not have funding for the initiative, but there is some dialog with the MacArthur Foundation for a sizeable grant that would allow us to increase staff and go forward with the program. Alternatively, if EFCA passes, government grant funds may become available. Joel also cautioned that until we obtain initial funding, we can only move forward at a slow though deliberate pace. There appeared to be interest and enthusiasm by the board for the idea, but also concerns about how it will work for the individual parties involved. He suggested we continue to put together the committees and begin discussions to further develop the ideas, pursuing an initial source of funding and the support of a full time staff person to help us jump-start the initiative as we can.

Electronic Publications—Paula Wells of the LERA office reported we are making progress towards converting some of our publications to electronic format, and the newsletter will be the first to be converted. The Annual Proceedings will also move to electronic format this year.

Meeting Adjournment—President Joel Cutcher-Gershenfeld adjourned meeting at 5:58 p.m.

Executive Board Meeting

December 9, 2009—2:30 p.m. EST

Via Conference Call

Call to order—the meeting was called to order at 2:30 p.m. ET by Joel Cutcher-Gershenfeld, president. Present at the meeting were officers Past President Tony Oliver, and President-Elect Eileen Appelbaum. Also attending were Gordon Pavy, 2010 president elect. Members present included: Beth Almeida, Rose Batt, Ellen Dannin, Richard Fincher, John Godard, Julie Martinez Ortega and Charles Whalen. Board members not able to attend were Robert Chiaravalli, Ralph Craviso, Jacqueline Drucker, Adrienne Eaton, Jack Fiorito, Iain Gold, Lisa Lynch, Bonnie Summers, and Christian Weller. Committee Chairs in attendance were John F. Burton, Jr, Development and Contributions Committee chair; David Lewin, Finance and Membership Committee chair; and Hoyt Wheeler, Nominating Committee chair. LERA office staff in attendance were Paula Wells and Emily Smith.

Approval of the Minutes—a motion from Tony Oliver was heard to approve the minutes of the board meeting held in Washington, DC in June 2009. The motion was seconded by Rose Batt and passed unanimously.

Committee and Officer Reports

Nominating Committee Report—Hoyt Wheeler reported that David Lewin was nominated by the LERA Nominating Committee to be the President-Elect. The Executive Board reviewed the list of candidate nominees and alternates that had been determined by committee consensus and indicated concern for the “representativeness” of the slate. More specifically, the issues of gender and domestic/international components of the slate were discussed. David Lewin’s nomination was approved as the next president elect, but the Board requested the committee rework the candidate slate to represent a demographic more representative of the organization and to be considered for approval at the next Board meeting.

Finance and Membership Report—David Lewin advised the board not to raise dues again in the coming year in light of the recent series of dues increases and suggested we need to be looking at other sources of increasing revenue. The operating loss for 2009 looks relatively modest, but the projected deficit in 2010 looks larger, and we need to look for ways to close the gap. Membership has declined by half in the last 10 years, and with this year’s membership dues increased to \$185 Lewin expected that number to decrease again.

Various members of the board suggested ideas to increase revenues including: increasing the usage of the Listserv to more favorably expose the association, highlighting a member benefit each month; increasing the free and engaging resources (content) we host online, with an opt-in function to capture demographic information; getting the new certification program funded and off the ground; and, since most non-profit associations depend upon revenue from their conferences as their main source of revenue, to look at the architecture of our meetings. Ideas of meeting architecture included:

- re-design the National Policy Forum as an annual event, and possibly re-aligning it as our primary meeting
- pulling out of the ASSA shared revenue arrangement and holding our own annual meeting (where we could keep the registration fees, sell booth space, have more control and choices about when and where to hold the meetings, etc.,
- linking with several other associations to hold a joint meeting

A discussion about a complete strategic overhaul of our meetings was suggested for the next Board meeting in January. Paula Wells will prepare a brief about historical meeting revenue/loss.

Perspectives on Work Report—Paula Wells reported that we will be publishing only one issue of *POW* in 2010 because Editor Susan Cass can only commit to one issue, and we need to keep expense under control.

Editorial Committee Report—Paula Wells reported that Adrienne Eaton is stepping down as Editor-in-Chief, due to new commitments at Rutgers University and that she has recommended appointing Françoise Carré and Christian Weller as Co-editors-in-Chief as her replacements. The motion to approve this was seconded and approved unanimously.

Education Committee Report—The Education Committee has recommended that they go on a period of hiatus, until a new mission is appointed by the Board. Most committee members have been engaged in the new certification program. The motion to move the Education Committee to inactive status was seconded and approved unanimously.

Industry Council Coordinating Committee Report—Joel Cutcher-Gershenfeld brought a motion forward from the Health Care Industry Council to set up 10% discount rate for joint membership to LERA and other organization, provided there is a reciprocal discount offered by the other associations. It was unanimously agreed to allow this on a trial basis (to this limited group) and to monitor the results for potential expansion. It was also discussed that eventually, specific protocol (and programs) would need to be developed to verify other association memberships and their reciprocal arrangements.

63rd Annual Meeting Report—Eileen Appelbaum has announced the program committee composition and program theme for the 63rd Annual Meeting in Denver, CO. Her theme, *Employment Relations for Economic Recovery and Sustained Growth* and the new 2011 Program Committee appointees were unanimously approved by the Board.

Other Business

Certification Committee Report—Joel Cutcher-Gershenfeld reported that five sub-committees had been formed and were at work and that he and Eileen Appelbaum and a few others were looking for funding to support 1-2 staff people and possibly a consultant for this project. It was discussed we needed to especially look at what other organizations were doing/had done to learn from their mistakes and successes, that we needed to do some benchmarking and identify the critical success factors. The sub-committee chairs will meet in Atlanta (Saturday from 2:30-4:00 p.m. at the Hyatt) and all Certification Committee members were invited to attend as well.

New Business

ASSA Meetings Report—Paula Wells reported that the ASSA sent a letter of intent to change the revenue-sharing agreement with LERA and the other 4 organizations in effect since 1964. Essentially, AEA seeks to expand its own meeting revenue by freezing the amount it pays to the other associations while increasing the registration fees over the next few years. They are doing this because they have decided to reduce their own dues structure and need to make up the revenue elsewhere. Paula Wells and Eileen Appelbaum will be meeting with the ASSA and the other organizations in January 2010 to hear more about the new, unilaterally determined arrangement.

Adjournment—The conference call meeting was adjourned at 4:00 p.m. by President Cutcher-Gershenfeld.

LERA Executive Board Meeting

Hyatt Regency Hotel, Atlanta, GA

January 2, 2010—6:00 p.m. to 10:00 p.m.

Call to order—the meeting was called to order at 7:12 p.m. by Joel Cutchler-Gershenfeld, President. Officers present at the meeting were Past President Tony Oliver, President-Elect Eileen Appelbaum, Secretary-treasurer Peter Feuille, and Editor-in-Chief Adrienne Eaton. Board members present included Beth Almeida, Rose Batt, Robert Chiaravalli, Ralph Craviso, Ellen Dannin, Julie Martinez Ortega, Bonnie Summers, Christian Weller (incoming Co-Editor-in-Chief and member), and Charles Whalen. Incoming board members present were Scot Beckenbaugh, Linda Ewing, Dennis Kuhl, and Jody Hoffer Gittel. Board members not able to attend were Jacquelin Drucker, Richard Fincher, John Godard, and Iain Gold. Committee Chairs in attendance were President's Committee Member David Lipsky, Nominating Committee Chair Hoyt Wheeler, NCAC Chair William Canak, incoming Co-Editor-in-Chief Françoise Carré, Sponsorship Committee Chair Marlene Heyser, and Finance and Membership Committee Chair David Lewin. LERA office staff in attendance were Paula Wells and Emily Smith.

Outgoing board members were presented with a certificate of appreciation for their service on the board to Julie Martinez Ortega, Adrienne Eaton, Ralph Craviso, and Jacquelin Drucker (not in attendance). A plaque was presented to Adrienne Eaton for her years of meritorious service leading us as the Editor and Joel Cutchler-Gershenfeld was presented with a clock as a thank you for his work as President.

Approval of the minutes—a motion from Beth Almeida was heard to approve the minutes of the previous board meeting held via conference call on Wednesday, December 9, 2009 at 2:30 p.m. ET. The motion was seconded and passed unanimously without changes.

Committee and Officer Reports

LERA Nominating Committee report—Hoyt Wheeler summarized the nominating committee report. The slate has been adjusted following comments from the Board during the last board meeting in December 2009. The motion was presented by Julie Martinez Ortega to accept the new slate of nominees, it was seconded, and unanimously approved.

Finance and Membership Committee report—Peter Feuille overviewed the budget and membership figures. The income increased this year by about \$50,000 and the expenses decreased this year by about \$45,000. Our net income has been a loss since 2006, and this isn't a sustainable position. We have \$175,000 in unrestricted cash and funds. If this situation continues unchanged, the future is uncertain. Our primary task going forward it to increase revenue as there are few expenses left that can be cut further.

LERA's Sustaining Sponsors, The Bureau of National Affairs, Inc. and BlueCross BlueShield National Labor Office, may be contributing again next year, but it's uncertain. It was commented by incoming President Appelbaum that we need to make sure that we are continuing to meet their value proposition.

David Lewin put forth a motion from the Committee that the board approve the 2010 LERA budget; it was seconded by Peter Feuille and unanimously approved by the board. In the membership discussion, it was noted that the membership decline has halted as least for 2009—membership numbers remain fairly consistent with the previous year.

Lewin also put forth a motion from the Finance and Membership committee that we do not raise dues in 2010 as we have raised them substantially and consistently in the near past. The motion was seconded and unanimously approved. It was pointed out that LERA dues are now higher than most other academic social science organizations.

Several Board members suggested that focusing on Chapter members becoming national members should be a priority goal for the organization; there may be around 4,000-5,000 chapter members, and only a few hundred of these are national members as well.

NCAC Committee report—Bill Canak reports that the NCAC awarded Alabama, Gateway, Long Island, and NW Seattle, and Washington, DC with various Outstanding Chapter Awards. We have seven or eight chapters who are in arrears in their chapter payments, and we are working on resolving this together. The LERA office is bringing new technical services to the chapters online including web hosting, e-store, the e-calendars, etc. Many of the local chapters still view the national organization as an academic entity. Hopefully, with initiatives currently underway, like certification, that perspective may change going forward. President Joel Cutcher-Gershenfeld visited nine local chapters this year and reported that they are open to building bridges.

It was discussed to form an ad hoc committee to further examine Building a membership drive to sign up 1000 new members from chapters. We should solicit their support or send them the message that we all are at risk. A group of people were asked to put a plan together and Ralph Craviso volunteered to put together an action plan. Bonnie Summers, Bill Canak, Ellen Dannin, Gordon Pavy, Marlene Heyser, Julie Martinez-Ortega and Eileen Appelbaum have volunteered to be part of the Chapter Membership Drive Committee. The committee will push the idea far enough to put it on the agenda of the chapter reps committee.

Development and Contributions Committee report—John Burton reported that we have substantially increased contributions each year since 2000. Ralph Craviso reported on the board member contributions drive; fourteen of the seventeen board members have contributed from \$20 to \$1500, with an average contribution of \$345 per board member. However, the chapter appeal for donations only netted two new organizational members which we see as goal for the future. The committee is talking to the University of Illinois about establishing a quasi-endowment fund. This is to become the backdrop to a new marketing effort. Also Tom Kochan will be taking the lead on a John Dunlop contribution promotion to target Dunlop's ex-students with endowment gifts.

Sponsorship and Grants Committee report—Marlene Heyser reported that we netted \$25,000 from both of our sustaining sponsors in 2009, The Bureau of National Affairs, Inc. and the BlueCross BlueShield Assn's National Labor Office and that we are looking at how we can continue to be valuable to these groups. There are also three other organizations on our prospect list, the AFL-CIO, the American Arbitration Association, and the UpJohn Institute. Dick Fincher has a contact with the AAA and David Lipsky may be able to help with this effort as well. Joel Cutcher-Gershenfeld agreed to talk to the Upjohn Institute. Gordon Pavy will work with the AFL-CIO.

Certification Committee report—Joel Cutcher-Gershenfeld reported that there are four subcommittees working towards this goal. These groups are each going to be taking a vision statement that we will be drafting tomorrow. We anticipate bi-weekly phone calls throughout 2010 in which a certification model will emerge. We wish to start in a targeted pilot way to make sure we understand the complexities of the task, beginning with health care, public sector, etc. The one thing that is going to be crucial is that the LERA national staff has to be expanded by at least 1 maybe 2 additional staff members—after it's up and running the hope is that it will be self-sustaining. Building a way that will take existing programs and local chapters as conduits of training. We also see it as something that will help bridge the gap between national and local reinforcing the relationship between both. Once we have the model, then we need to talk to foundations and government agencies to get the funding, because we cannot administer the program on a volunteer basis.

Editorial Committee report—The Committee is essentially a year behind in the schedule to put together a Research Volume for 2011. The proposal in hand is called *Employee Ownership and Shared Capitalism: New Debates for the 21st Century*, ed: Edward Carberry. The motion to approve the topic of the next Research Volume was seconded and unanimously approved by the board. We had some discussion over printing/producing a small booklet by Walter Gershenfeld, and we recommend that LERA produces this booklet and sells it at a discounted price of \$15—it is hoped that this will breakeven or potentially be profitable. A motion to enter into an agreement with Walter Gershenfeld and put this project into production at the LERA office and distribute the publication was seconded and unanimously passed.

Other Business

ASSA/AEA Meetings report—The American Economic Association has done two things – it has frozen meetings registration fees to AEA members at \$60, as well as the registration fee for all non-AEA members \$75. It has also informed LERA and four other allied (ASSA) agencies who have been profit-sharing partners since 1962 that will be freezing the LERA meetings share of profit at \$6,000 beginning after the Denver 2011 meeting. This led to an extended conversation about the general structure of our meetings, or meeting architecture. David Lewin was asked to lead a task force to look into options for future LERA annual meeting architecture and present some options at the next Board meeting.

Awards to be given at the General Membership meeting were recapped by Paula Wells. This comprises the largest set of award winners we've ever had and is a set of highly accomplished professionals. The 2009 award recipients were: *John T. Dunlop Outstanding Scholar Awards*—Ian Greer, Leeds University and Jon Guryan, University of Chicago; *LERA Fellows*—Henry S. Farber, Princeton University; Gladys Gershenfeld, Arbitrator; Sanford M. Jacoby, University of California—Los Angeles; David Lipsky, Cornell University; Anthony T. Oliver, Parker Milliken Clark O'Hara and Samuelian; Nancy Peace, Arbitrator/Mediator; *Lifetime Achievement Awards*—Bonnie P. Castrey, Arbitrator/Mediator; Russell Lansbury, University of Sydney; Martin Wagner, University of Illinois at Urbana-Champaign Emeritus (posthumously); *Outstanding Practitioner Award*—Thomas J. Schneider, Restructuring Associates, Inc.; *James G. Scoville Best International Paper Award*—Lowell Turner, Cornell University; *Susan C. Eaton Scholar-Practitioner Grant*—Daniel B. Cornfield, Vanderbilt University; *Susan C. Eaton Outstanding Scholar-Practitioner Award*—Lawrence Katz, Harvard University; *Thomas A. Kochan & Stephen R. Sleigh Best Dissertation Award*—Co-winners Marco Hauptmeier, Cardiff University and Mingwei Liu, Rutgers University; *Honorable Mentions*; J. Ryan Lamare, Cornell University and Adam Seth Litwin, John Hopkins University; and *LERA Outstanding Chapter Awards*—Alabama Chapter; Gateway Chapter; Northwest Seattle Chapter; Washington, DC Chapter.

New Business

FMCS will not be holding their annual meeting in 2010, so the Board discussed the possibility of a May 8 or early June board meeting date near the O'Hare airport in Chicago to facilitate same day travel. The staff will poll the Board in a few weeks to determine the best date and venue.

Adjournment—President Joel Cutcher-Gershenfeld adjourned the meeting at 10:20 p.m.

LERA General Membership Meeting and Awards Ceremony

Hyatt Regency Hotel, Atlanta, GA

January 4, 2010—5:45 p.m. to 6:45 p.m.

Call to Order. President Joel Cutcher-Gershenfeld called the meeting to order at 5:45 p.m. He announced the nomination of David Lewin as our next President Elect-Elect.

Committee and Officer Reports

Report from the Finance & Membership Committee. Peter Feuille reported that the finances of the organization is challenging and that several efforts are underway to address the deficits. He reported the Board has decided to keep the dues level the same in 2011 as it is in 2010.

Report from the Development Committee. John Burton reports that our membership continues to decline, making it clear that we need to depend on other sources of revenue other than dues. Individual contributions have increased this year, and this is critical to our success. Marlene Heyser, Tony Oliver and Joel Cutcher-Gershenfeld were instrumental in helping us receive sponsorships from both BNA and BlueCross BlueShield, totaling an amount of \$50,000.

Report from the Editorial Committee. After 7 years of service, Adrienne Eaton has stepped down as Editor-in-Chief, and the Board has appointed two Co-Editors in her place, Françoise Carré and Christian Weller. Form the University of Massachusetts-Boston.

Report from the Strategic Planning Committee. The Board has three new strategic initiatives to pursue, one of which is the Certification program. Tony Oliver, Gordon Pavy, and Joel Cutcher-Gershenfeld will be leading the committee with four sub-committees to move this project forward quickly. We will be launching a national initiative to certify professionals in our field, complementing existing training provided by government agencies, local chapters, and university programs.

The second initiative is outreach to local chapters has been a perennial issue and Eileen Appelbaum is heading the challenge to bring local chapter members into the national fold.

The third initiative concerns meeting architecture. The ASSA has made some unilateral decisions about revenue-sharing related to our annual meetings which has begun the conversation about meeting architecture. David Lewin has agreed to chair a targeted task force to look at various meeting structures to bring to the next board meeting.

Instead of depending on membership dues, we are examining new programs, and bringing in new members and strengthening chapter relationships to increase revenue in 2010.

LERA Awards Presentations. The 2009 Awards were given out as follows. *John T. Dunlop Outstanding Scholar Awards*—Ian Greer, Leeds University and Jon Guryan, University of Chicago. *LERA Fellows*—Henry S. Farber, Princeton University; Gladys Gershenfeld, Arbitrator; Sanford M. Jacoby, University of California—Los Angeles; David Lipsky, Cornell University; Anthony T. Oliver, Parker Milliken Clark O'Hara and Samuelian; Nancy Peace, Arbitrator/Mediator. *Lifetime Achievement Awards*—Bonnie P. Castrey, Arbitrator/Mediator; Russell Lansbury, University of Sydney; Martin Wagner, University of Illinois at Urbana-Champaign Emeritus (awarded posthumously and accepted by his children Martha Wagner Weinberg and John Wagner). *Outstanding Practitioner Award*—Thomas J. Schneider, Restructuring Associates, Inc. *James G. Scoville Best International Paper Award*—Lowell Turner, Cornell University. *Susan C. Eaton Scholar-Practitioner Grant*—Daniel B. Cornfield, Vanderbilt University. *Susan C. Eaton Outstanding Scholar-Practitioner Award*—Lawrence Katz, Harvard University. *Thomas A. Kochan & Stephen R. Sleigh Best Dissertation Awards Co-winners*—Marco Hauptmeier, Cardiff University and Mingwei Liu, Rutgers University. *Honorable Mentions*—J. Ryan Lamare, Cornell University and Adam Seth Litwin, John Hopkins University. *LERA Outstanding Chapter Awards*—Alabama Chapter, Gateway Chapter, Northwest Seattle Chapter, Washington, DC Chapter.

Meeting Adjournment. President Joel Cutcher-Gershenfeld adjourned the meeting at 6:46 p.m.

STAN FELLER, CPA

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INDEPENDENT AUDITOR'S REPORT

Board of Directors
Labor and Employment Relations Association
121 ILIR Building, 504 East Armory Avenue
Champaign, Illinois 61820

I have audited the accompanying statements of financial position of the Labor and Employment Relations Association (a nonprofit organization), State of Illinois, as of December 31, 2008 and 2007, and the related statements of activities and cash flows for the years then ended. These financial statements are the responsibility of the Organization's management. My responsibility is to express an opinion on these financial statements based on my audit.

I conducted my audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that I plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. I believe that my audit provides a reasonable basis for my opinion.

In my opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Labor and Employment Relations Association as of December 31, 2008 and 2007, and the changes in its net assets and its cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America.

Stan Feller, CPA
Champaign, Illinois
April 24, 2009



LABOR AND EMPLOYMENT RELATIONS ASSOCIATION**STATEMENT OF FINANCIAL POSITION****December 31, 2008 and 2007**

ASSETS	2008	2007
Current Assets		
Cash and Certificate of Deposit	\$ 300,405	\$ 309,756
Accounts Receivable - Net	76,652	124,976
Grants Receivable	0	0
Prepaid Expenses	26,583	27,315
Inventory	10,488	18,784
Accrued Interest Receivable	<u>441</u>	<u>455</u>
Total Current Assets	<u>414,569</u>	<u>481,286</u>
Property and Equipment	14,868	13,781
Less: Accumulated Depreciation	<u>(11,204)</u>	<u>(9,803)</u>
Net Property and Equipment	<u>3,664</u>	<u>3,978</u>
TOTAL ASSETS	<u>\$ 418,233</u>	<u>\$ 485,264</u>
LIABILITIES AND NET ASSETS		
Current Liabilities		
Accounts Payable	\$ 5,139	\$ 3,664
Accounts Payable to UCIRHRP	5,187	6,145
Accrued Liabilities	15,515	15,569
Dues Collected in Advance	107,741	108,351
Subscriptions Collected in Advance	22,109	16,358
Deferred Contributions	31,025	2,550
Eaton Memorial Scholarship Receipts	44,525	46,133
Kochan-Sleigh Award Receipts	47,460	37,973
Deferred Grant, Contribution Income	<u>7,500</u>	<u>11,115</u>
Total Current Liabilities	<u>286,201</u>	<u>247,858</u>
Net Assets		
Temporarily Restricted	0	0
Unrestricted		
Operating	132,032	237,406
Total Net Assets	<u>132,032</u>	<u>237,406</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 418,233</u>	<u>\$ 485,264</u>

The accompanying notes are an integral part of these financial statements

LABOR AND EMPLOYMENT RELATIONS ASSOCIATION

STATEMENT OF ACTIVITIES
Years Ended December 31, 2008 and 2007

	2008			2007		
	Unrestricted	Temporarily Restricted	Total	Unrestricted	Temporarily Restricted	Total
Revenue, Gains and Other Support						
Membership Dues	\$ 167,102	\$	\$ 167,102	\$ 137,852	\$	\$ 137,852
Subscriptions	38,124		38,124	29,471		29,471
Chapter Fees	7,500		7,500	6,425		6,425
Publications	23,787		23,787	2,337		2,337
Advertising	475		475	1,213		1,213
Mailing List Rental	3,211		3,211	3,175		3,175
Royalties	11,715		11,715	12,979		12,979
Meeting Income	33,082		33,082	99,196		99,196
Interest Income	7,724		7,724	14,975		14,975
Member Contributions	16,920		16,920	21,296		21,296
Administrative Fees	1,195		1,195	2,349		2,349
Contributions						
GE Contributions		0	0		0	0
FMCS Grant		0	0		32,722	32,722
Sloan Grant		3,615	3,615		45,373	45,373
Restrictions satisfied	3,615	-3,615	0	78,095	-78,095	0
Total Revenues, Gains and Other Support	314,450	0	314,450	409,363	0	409,363
Expenses and Losses						
Program Services						
General	230,157		230,157	206,013		206,013
Meetings	53,886		53,886	82,724		82,724
Publications	82,456		82,456	61,346		61,346
Grant Expenses						
Sloan Grant Expense - See Note 5	3,615		3,615	42,992		42,992
GE Contributions - See Note 4	0		0	0		0
FMCS Grant Expense -See Note 6	0		0	32,722		32,722
Supporting Services						
Management and General	33,411		33,411	30,812		30,812
Membership Development	16,299		16,299	10,431		10,431
Total Expenses and Losses	419,824		419,824	467,040		467,040
Change in Net Assets	-105,374		-105,374	-57,677		-57,677
Net Assets at Beginning of Year	237,406		237,406	295,083		295,083
Net Assets at End of Year	\$ 132,032	\$	\$ 132,032	\$ 237,406	\$	\$ 237,406

The accompanying notes are an integral part of these financial statements.

LABOR AND EMPLOYMENT RELATIONS ASSOCIATION

STATEMENT OF CASH FLOWS
For the Years Ended December 31, 2008 and 2007

CASH FLOWS FROM OPERATING ACTIVITIES

	2008	2007
Change in Net Assets	\$ (105,374)	\$ (57,677)
Adjustments to Reconcile Change In Net Assets to Net Cash		
Cash Flows from Operating Activities		
(Increase) or Decrease in Operating Assets:		
Cash Received/Disbursed for general undesignated offerings	48,324	(69,561)
Cash Received from restricted grant contributions	0	15,330
Cash Received/Disbursed for Prepaid Expenses	732	(23,215)
Cash Received/Disbursed for Inventory	8,296	(5,737)
Cash Received from Interest Income	14	3,759
Increase (Decrease) in Operating Liabilities		
Cash Received/Disbursed for general undesignated offerings	36,871	(15,546)
Cash Received/Disbursed from undesignated accrued liabilities	(54)	7,299
Cash Received for general supporting and fundraising expense	5,751	21,882
Cash Disbursed for general supporting and fundraising expense	(610)	(8,498)
Cash Disbursed for restricted grant contributions	<u>(3,615)</u>	<u>(45,373)</u>
Net Cash Provided by Operating Activities	(9,665)	(177,337)
Cash Flows from Investing Activities		
Depreciation	1,401	1,218
Loss on stolen fixed asset	0	761
Payments for Property and Equipment	<u>(1,087)</u>	<u>(2,382)</u>
Net Cash Provided by Investing Activities	314	(403)
Net Increase (Decrease) in cash and cash equivalents	(9,351)	(177,740)
Cash and short-term Investments:		
Beginning of Year	<u>309,756</u>	<u>487,496</u>
End of Year	<u>\$ 300,405</u>	<u>\$ 309,756</u>

The accompanying notes are an integral part of these statements.

LABOR AND EMPLOYMENT RELATIONS ASSOCIATION

STATEMENT OF FUNCTIONAL EXPENSES
For the Year Ended December 31, 2007

	MEETINGS				GRANTS/CONTRIBUTIONS					PUBLICATIONS				SUPPORTING SERVICES		
	General	Winter Conference	Regional Meetings	Nat'l Policy Forum	Winter Bd Meeting	Spring Bd Meeting	GE Contribution	FMCS Grant	Sloan Grant	Annual Proceedings	Perspectives	Research Volume	Directory & Newsletter	Management & General	Membership Development	Totals
Compensation	156,734						8,570	4,042								169,346
Payroll taxes & fringes	49,279						2,757	1,375								53,411
Depreciation														1,218		1,218
Insurance														3,051		3,051
Industry Research							21,066	2,911								23,967
Bank Charges		6,848		9,763				3,888						400	3,574	400
Promotion														13,180		13,180
Postage and freight								7,016						1,720		1,720
Accounting/auditing		970		482				2,465						4,855		4,855
Printing, production		2,024		409				11,200								16,047
Postage								1,000								1,000
Other public. costs		23,893		17,038				529								46,785
Meals		1,108		10,396												12,033
Travel		2,483		2,221			339	1,350								6,618
Other meeting expenses								6,806								
Sloan Grant Overhead																
Education																
Computer & label supplies								410								784
Office supplies																3,999
Student and member awards																1,685
Fundraising expense															1,543	1,543
Duplicating expense															3,872	3,872
Telephone and FAX																571
Chapter expenses															816	1,855
Dues																1,285
Other committee expenses																626
Miscellaneous office																3,425
	206,013	37,326	0	40,319	4,027	1,052	32,722	42,992	4,450	24,496	16,863	15,537	30,812	10,431	467,040	

The accompanying notes are an integral part of these financial statements.
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LABOR AND EMPLOYMENT RELATIONS ASSOCIATION

STATEMENT OF FUNCTIONAL EXPENSES
For the Year Ended December 31, 2008

	MEETINGS			GRANTS			PUBLICATIONS				SUPPORTING SERVICES				
	General	Winter Conference	Natl. Policy Forum	Winter Bd Meeting	Spring Bd Meeting	GE Contribs	Sloan Grant	Annual Proceedings	Perspectives	Research Volume	Cartoon Book	Directory & Newsletter	Management & General	Membership Development	Totals
Compensation	172,648														172,648
Payroll taxes & fringes	57,509														57,509
Depreciation													1,401		1,401
Insurance													3,016		3,016
Industry Research							627							38	665
Bank Charges													290		290
Promotion		8,338	33				1,000							11,783	21,154
Fulfillment															13,180
Postage and freight															2,112
Accounting/auditing		1,582	234						16,614	7,529	4,298				3,615
Printing, production		892	597					2,911	1,318	2,677	3,378				50,585
Postage								515	3,304	7,242	6,008				9,377
Other public costs								9,245							25,799
GE Contribution Expense															0
FIMCS Grant Expense															0
Sloan Grant Overhead															0
Meals, Receptions		21,339	7,458		2,032		1,000								33,740
Travel		1,652	4,266				821								6,739
Other meeting expenses		2,605	200		533										3,552
Education													757		757
Computer supplies/svc													1,891		1,908
Office supplies													2,682		2,682
Student and member awards														1,361	1,361
Fundraising expense														1,363	1,363
Telephone, Fax													1,719		1,719
Chapter expenses							150							1,135	1,285
Dues													1,025		1,025
Duplicating													217		217
Other committee expenses														619	619
Miscellaneous office													1,506		1,506
	<u>230,157</u>	<u>36,408</u>	<u>12,788</u>	<u>2,125</u>	<u>2,565</u>	<u>0</u>	<u>3,615</u>	<u>12,671</u>	<u>21,236</u>	<u>17,448</u>	<u>17,417</u>	<u>13,684</u>	<u>33,411</u>	<u>16,299</u>	<u>419,824</u>

The accompanying notes are an integral part of these financial statements.
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**LABOR AND EMPLOYMENT RELATIONS ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2008 AND 2007**

Note 1 – Nature of Activities and Significant Accounting Policies

Nature of Activities

The Labor and Employment Relations Association (LERA) was founded in 1947 to encourage research in all aspects of the field of labor, employment, and the workplace. It is a non-profit scholarly association of academic, labor, business and neutral communities committed to the full discussion and exchange of ideas between and among its broad constituencies through meetings, publications, and its various electronic listservs and websites. The LERA National Office is located in Champaign, Illinois and serves the association by planning conferences and meetings, and publishing the various research of its members.

Basis of Accounting

The financial statements of the Association are presented using the accrual basis of accounting.

Contributed Services

During the years ended December 31, 2008 and 2007, the value of contributed services meeting the requirements for recognition in the financial statements was not material and has not been recorded.

Net Assets

Net assets are classified into one of three classes based on the existence or absence of donor-imposed restrictions. Unrestricted net assets include all net assets which are neither temporarily nor permanently restricted. Temporarily restricted net assets include contributed net assets for which donor-imposed time and purpose restrictions have not been met and the ultimate purpose of the contribution is not permanently restricted. Permanently restricted net assets include contributed net assets which require, by donor restriction, that the corpus be invested in perpetuity and only the income be made available for program operations in accordance with donor restrictions.

Property, Plant and Equipment

Property, plant and equipment are carried at cost. Depreciation is provided using the straight-line method over an estimated five to seven year useful life. Beginning in 2005, LERA decided to follow the practice of the University of Illinois to expense any items purchased costing less than \$500.

**LABOR AND EMPLOYMENT RELATIONS ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2008 AND 2007**

Financial Statement Presentation

The Association has adopted Statement of Financial Accounting Standards (SFAS) No. 117, "Financial Statements of Not-for-Profit Associations." Under SFAS No. 117 the Association is required to report information regarding its financial position and activities according to two classes of net assets: unrestricted net assets and temporarily restricted net assets. As permitted by the statement, the Association does not use fund accounting.

Organization Name Change

Effective January 6, 2005, the organization's constitution and bylaws were changed to denote the name change to Labor and Employment Relations Association. The new name was ratified and approved at the executive board meeting on January 6, 2005, in compliance with a general membership vote by mail in June, 2004.

Contributions

The Association also adopted SFAS No. 116, "Accounting for Contributions Received and Contributions Made." Contributions received are recorded as unrestricted or temporarily restricted support depending on the existence or nature of any donor restrictions.

Temporarily restricted net assets are reclassified to unrestricted net assets upon satisfaction of the time or purpose restrictions.

Income Taxes

The Association is a not-for-profit Association that is exempt from income tax under Section 501 (c)(3) of the Internal Revenue Code, and is classified by the Internal Revenue Service as other than a private foundation.

Investments

The Association does not have any investments in marketable securities.

**LABOR AND EMPLOYMENT RELATIONS ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2008 AND 2007**

Cash and Cash Equivalents

For purposes of the statements of cash flows, the Association considers all highly liquid investments available for current use with an initial maturity of twelve months or less to be cash equivalents. None of the Association's cash investments held at five financial institutions exceeded the new \$250,000 FDIC insurance limit at December 31, 2008, but exceeded the 2007 \$100,000 FDIC insurance limit by a total of \$8,280 at December 31, 2007.

Inventory

The Association's inventory of directories, research volumes, proceedings and perspective magazines is carried at the lower of cost or market value.

Membership Dues and Advance Subscriptions Collected

Beginning in September 2006, membership dues and subscriptions are assessed and recognized into income on a rolling 12-month basis. Dues paid over one year in advance are not recognized into income until the twelve-month period they are due. Prior to September 2006, these dues and subscriptions were assessed on a calendar year basis and recognized on an annual accrual basis.

Functional Allocation of Expenses

The costs of providing the various programs and other activities have been summarized on a functional basis in the statement of activities. Accordingly, certain costs have been allocated among the programs and supporting services benefited.

Note 2 – Arrangements with the University of Illinois

The Association moved its offices to the University of Illinois at the end of 1999. Under an arrangement with the University, the employees of the Association are employed by the University. The employees' pension and benefits are part of the University's plans. The Association then reimburses the University quarterly for the cost of the employees.

Note 3 – UCIRHRP servicing arrangement to administer business

On January 3, 2003, the LERA entered into a servicing arrangement to administer the business of the University Council of Industrial Relations and Human Resources Programs (UCIRHRP). These servicing duties include dues notification and collection, annual meeting arrangement and report preparation,

**LABOR AND EMPLOYMENT RELATIONS ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2008 AND 2007**

Note 3 – UCIRHRP servicing arrangement to administer business - continued

and maintaining a data base and network communications for this separate organization. A separate financial statement is maintained for this company, but the fund's cash is maintained in LERA's general bank account. The amount of cash belonging to UCIRHRP in the general account is shown on LERA's balance sheet as Due to UCIRHRP. The initial deposit of UCIRHRP funds was wired to LERA on September 22, 2003, at which time the LERA began this servicing arrangement. UCIRHRP's cash balance in LERA's custody was \$5,187.36 at December 31, 2008, and \$6,145 at December 31, 2007. The LERA is allowed to collect 20% of dues collected each year as an administrative fee.

Note 4 – General Electric (GE) Contributions

On September 2, 2004, the LERA received a \$25,000 contribution, with \$5,000 allocated to its 2005 National Policy Forum (NPF), \$5,000 for the Aerospace Industry Council, and \$15,000 for unspecified uses. The LERA has deferred \$5,000 of the contribution to 2009 for Aerospace, recognized as income and allocated \$5,000 to 2005 NPF expenses, and allocated the unspecified portion to 2004 expenses.

On August 27, 2004, the LERA received a \$5,000 separate donation from GE to co-sponsor the 2004 LERA activities within the National Labor Management Conference and additional support for the Aerospace Industry Council. Aerospace Industry Council funds of \$2,500 have been deferred for future use, while NLMC co-sponsorship funds received were recognized in 2004.

Note 5 – Alfred P. Sloan Foundation Grant #2003-12-14

On December 13, 2004, the LERA received notification that it was the recipient of a grant for \$387,677 to establish a network of industry councils within the LERA. The grant was received in three installments, with \$147,400 received in January 2004, \$123,900 received in February 2005, and the final payment of \$116,377 received in 2006. The 2006 installment was offset with 2007 expenses totaling \$45,373, which includes overhead charges allowed at 15% and 2006 expenses totaling \$121,612, plus overhead charges of \$18,214. The 2005 installment was offset with 2005 expenses totaling \$91,872, plus overhead charges of \$13,780. The 2004 installment was offset with 2004 expenses totaling \$96,890, plus overhead charges of \$14,534. The remaining \$3,615 of unspent grant funds deferred to 2008 was expended by February 29, 2008 the end of the extended grant period. The grant was closed in 2008.

**LABOR AND EMPLOYMENT RELATIONS ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2008 and 2007**

Note 6 – Federal Mediation and Conciliation Services Grant #03-CA/I-004

On February 17, 2005, the LERA received notice of its \$125,000 grant application approval by FMCS and additional \$13,889 funds to be provided by MIT and LERA for LERA Airline Industry Council project leadership and management committee meetings. The initial project and budget period of this grant covered October 1, 2003 to September 1, 2006, but was extended in 2006 to cover 2007 expenses through March 31, 2007. \$48,000 in project reimbursement was received from FMCS in 2006. Expenses relating to the grant in 2006 totaled \$53,047. The last reimbursement of \$48,052 for this project was received from FMCS in 2007. Final expenses relating to the grant in 2007 totaled \$32,722. A total of \$125,000 in reimbursements was received by the LERA from FMCS over the course of the project. The grant was closed as of March 31, 2007.

Note 7 – Susan C. Eaton Scholar-Practitioner Memorial Fund

The LERA set up a memorial fund in honor of an author of a 1998 “Perspectives on Work” article and active young LERA member, who died on December 30, 2003. Memorial gifts received were \$1000 in 2007, \$2000 in 2006, \$13,629 in 2005, and \$36,331 in 2004. At its June 1, 2004 meeting, the LERA approved the establishment of an annual Susan C. Eaton Scholar-Practitioner award and grant, to be paid to one or more scholar researchers in even-numbered years or practitioners in odd-numbered years doing research in the labor and employment relations or related field. At its January 6, 2005 meeting, the Board directed that the LERA collect 10% of any gifts received each year as an administrative fee for managing the Fund and grant. One award totaling \$3,000 was paid in January 2008 and one award totaling \$3,000 was paid in January 2007. Including interest earned and paid to the account, \$44,525 has been deferred to future years for future annual award payments.

Note 8 – Kochan-Sleigh Best Dissertation Award Fund

On March 27, 2006, the LERA set up a temporarily restricted fund with contributions from a member and matching contributions from General Electric. The fund is restricted for a minimum of fifteen years, when only interest income may be used from the fund to pay for the \$1,000 annual best dissertation award.

After the fifteen-year period, the principle amount remaining may be released and become available to LERA for unrestricted purposes. The contributor made additional start up contributions of \$1,000 each in 2006 and 2007 to cover the award for the first two years before the fund is fully funded. A total of \$10,000 of member and matching contributions was received in 2008 and \$21,000 of member and matching contributions was received each year ended as of December 31, 2007 and 2006.

**LABOR AND EMPLOYMENT RELATIONS ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2008 AND 2007**

One best dissertation award totaling \$1,000 was granted in 2008, and two best dissertation awards totaling \$1,000 were granted in 2007. According to the terms of the award document and pursuant to a vote of the Executive Board in 2005, the LERA is to collect 10% of annual contributions as a one-time service fee to help cover the LERA costs to administer this award. Including interest earned and paid to the account as of December 31, 2008, \$47,460 has been deferred to future years for future annual awards.

Note 9 – Campaign Drive

To help ensure the financial stability of the organization, the LERA Board of Directors established a Development Committee on January 1, 2004 to begin its work raising money from the membership and supporting organizations. Beginning in 2006, LERA kicked off its campaign drive, where the executive board agreed to establish its formal campaign goal of \$1,500,000 to be raised over a three year period beginning January, 2007, the start of its campaign. The campaign goal is inclusive of all grants pledged and contributions given to the LERA since 2004. Total related expenses in 2008 and 2007 for this effort were \$1,363 and \$3,872, respectively.