

**Attachment2: Balance sheet as of end-of-June report**

Balance Sheet, ASQ Silicon Valley Section  
 Period ending 6/30/2016

		checking	savings	PayPal	
WF account balances	6/30/2016	136,422.39	13,613.59	13,976.54	
<b>outstanding checks</b>					
#	payee	amount			
		total			
<b>reconcile checkbook</b>	net WF balance	136,422.39	13,613.59	13,976.54	
					137648.36
audited balance, 31Dec2015		137,146.77	501.59	4,022.64	
expenses to 30Jun2016		(10,391.84)		(16,111.40)	(transfers)
income to 30Jun2016		9,667.46	13,112.00	26,065.30	
balance as of 30Jun2016		136,422.39	13,613.59	13,976.54	
<b>against income/expense from 1/1</b>					

starting position	141,671.00	3 accounts
change in accounts	22,341.52	
ending position	164,012.52	3 accounts
change in WFB accounts since 1/1/16	12,387.62	

**against QB**

QB 6/30/16	136,422.39	13,613.59
------------	------------	-----------

accounts payable as of 6/30	status	amount
Sarhadi/Dedhia/Pandey-WCQI	paid	5,600.00
BSA-ISO 9001:2105	paid	1,000.00
Kurani: B107,B108	paid	1,100.00
Schenkelberg: CQE	pending	2,365.00
Harms	pending	34.00
	<b>total:</b>	<b>10,099.00</b>

Attachment3: Income vs. Expense, end-June report

8:43 PM  
07/14/16  
Cash Basis

American Society for Quality, Income vs. Expense, January through June 2016

	<u>Jan - Jun 16</u>	<u>SG budget</u> (full year)	DM budget
<b>Ordinary Income/Expense</b>			
<b>Income (includes checking &amp; savings)</b>			
Administrative Revenue			
001.4000 - Membership Dues	6,442.25	18,000.00	18,000.00
001.4871 - Interest	0.81		
<b>Total Administrative Revenue</b>	<u>6,443.06</u>		
Conference Revenue			
003.4300 Registration	2,741.03		
<b>Total Conference Revenue</b>	<u>2,741.03</u>	4,500.00	4,400.00
Education Course Revenue			
004.4300 Registration ASQ Cert	6,041.41		
004.4302 Registration Biomedic	7,553.96		
<b>Total Education Course Revenue</b>	<u>13,595.37</u>	22,000.00	22,000.00
<b>Total Income</b>	<u>22,779.46</u>	45,000.00	44,400.00
<b>Expense</b>			
Administrative Expense			
510 Printing and Production			
001.5101 Printing	29.59		
<b>Total 510 Printing and Production</b>	<u>29.59</u>		
530 Committee			
001.5360 Committee Expense	1,233.75		
<b>Total 530 Committee</b>	<u>1,233.75</u>	2,500.00	1,400.00
550 Contract and Professional			
001.5567 Web Server Fees	1,255.00	2,400.00	2,540.00
<b>Total 550 Contract and Professional</b>	<u>1,255.00</u>	2,500.00	
560 Equipment			
001.5660 Purchases	336.56		
<b>Total 560 Equipment</b>	<u>336.56</u>		
580 Meetings and Meals		travel: 3,550.00	5,500.00
001.5803 Dinners	2,400.48		
<b>Total 580 Meetings and Meals</b>	<u>2,400.48</u>	7,500.00	5,070.00
<b>Total Administrative Expense</b>	<u>5,255.38</u>	16,400.00	14,510.00
Conference Expense			
580 Meeting and Meals			
003.5803 Dinner	4,589.66		8,800.00
<b>Total 580 Meeting and Meals</b>	<u>4,589.66</u>		
<b>Total Conference Expense</b>	<u>4,589.66</u>	350.00	8,800.00
Course Expense			
510 Printing and Production			
004.5101 Printing	46.80	600.00	
<b>Total 510 Printing and Production</b>	<u>46.80</u>	900.00	1,200.00
550 Contract and Professional		travel: 700.00	700.00
004.5551 Spkr/Instructor Fees			
Instruct Fees-Biomed Course	500.00	course c: 5,000.00	4,000.00
<b>Total 004.5551 Spkr/Instructor Fees</b>	<u>500.00</u>	12,000.00	14,000.00
<b>Total 550 Contract and Professional</b>	<u>500.00</u>		
<b>Total Course Expense</b>	<u>546.80</u>	19,200.00	19,900.00
<b>Total Expense</b>	<u>10,391.84</u>	35,950.00	43,210.00
<b>Net Ordinary Income</b>	<u>12,387.62</u>	9,050.00	1,190.00

## Meeting Summary June 24, 2016

**Participants:** Indra Desai, Marieann Shovlin

**Absent Members:** Christopher Arboleda, Susie Geiss, Austin Lin, Soly Paterson (emailed report), David Pickett, Roxana Rhode, Vidhi Joshi (emailed report), John Latimer, Don Mintz (excused)

### June Meeting Agenda:

1) Social networks status - hits, errors, changes? – \*Roxana & Vidhi, please update with your inputs:

Facebook - <https://www.facebook.com/ASQsiliconvalley>/<https://www.facebook.com/ASQsiliconvalley/>

Twitter - @asq\_sv

Meetup – Attendance?

2) Marketing presentation – Vidhi emailed for Leadership Committee approval; attached to this report email.

### 3) Education Program

#### Class summary & status:

Date	Class	No. Registrants
April 4	C102 CQE online	5
April 8	B102 Biomed Intro	5
April 21	B131 ISO 9001:2015	10
April 22	B132 ISO 9001 Risk	11
April 29	B108 Complaint Handling	7
May 6	B107 CAPA & Deviations	6
June 10	Internal Audits	9
June 3	B120 Software Risk V & V	6
July 12	B110 Risk Management	6
July 16	B113 510's	0
July 22	B112 Design Control	1
July 14	B117 SPC	3
Aug 1	C103 CRE online	1
Aug 1	C106 CMQ/OE Online	1
Aug 6	C105 CBA	1
Aug 11	B127 Probability & Statistics	1
Aug 13	B114 CE Marking	0
Oct 22	C107 CSQE	0
Oct 29	C104 CQA	0
Oct 7	B106 ISO 13485:2016	2
Oct 20	B131 ISO 9001:2015	0
Oct 21	B132 ISO 9001 Risk	0

Instructor for CBA & CQA left area; looking for a new instructor; contacted Biomedical Division for recommendations.

4) Corporate Leaders event – John L. – meeting is scheduled for August 17, 2016; two confirmed participants to date. Progress report?

## Attachment 4: ASQ Silicon Valley Education & Marketing Committee Meeting

### 5) Other marketing opportunities:

- Colleges, Universities - who are our contacts at
  - DeAnza & Foothill
  - San Jose State
  - UCSC
  - Santa Clara
  - Stanford
  - Other local schools

**\*Please fill in any you know!**

**\*Who will volunteer to make contacts?**

#### - Professional organizations:

SME – Marieann – attended June 9 Conference with ASQ SV handouts at a table.

\*ASQ Sections – should we contact?

\*IEEE

\*Others?

### 6) Website Update – Kurt has added capacity for 5 events on right hand column

**\* What other changes do we want incorporated – Monthly Chair letter, more photos, new members for each month, member comments from meetings & classes?**

### 7) Education Program Guide - any more changes? Will send Revision N in July

**8) ITU Partnership - Invitations went out for ASQ SV ITU Presents Panel for Sept. 15; Barry Craner will moderate; 6 participants have confirmed to date.**

9) Section/Marketing goals: How can we support the Section Goal?

**Section Goal: Increase Membership / Improve Retention to have a net increase of >1 member for 2016**

**10) Next meeting: Fridays prior to LC meeting at noon: July 29, 2016:**

**Current conference call Info: 712.775.7031; access code 946685**

## Attachment 5 Membership Report

From: Stephen Choy, Membership Chair

To: ASQ Section 0613 Chairman

1. SUBJ: Membership Chair Report for June 2016

1. **Membership Strength & Composition.**

- a. Based on the last membership data update, file dated JUN-2016
  - o Overall section membership decreased by 111 members between 2015 and 2016
    1. Month to month change is down by 10

Membership Type	Jun-15	May-16	Jun-16	Year to Year	Month to Month Change
FULL	547	477	468	-79	-9
SENIOR	382	355	354	-28	-1
STUDENT	67	55	50	-17	-5
ASSOCIATE	54	63	68	14	5
FELLOW	15	15	15	0	0
SITE	7	0	0	-7	0
ORGMEMBER	4	7	7	3	0
ORGANIZATION	1	4	4	3	0
<b>Total</b>	<b>1,077</b>	<b>976</b>	<b>966</b>	<b>-111</b>	<b>-10</b>

2. **New Members Welcomes**

- Welcome emails were sent on June 17<sup>th</sup> to **25** new members (Section 0613) who joined in the month of MAY (per NEW.CSV dated JUN-2016)
- 25 of the 25 (100%) are newly joined members to ASQ
- Email included information about up-coming dinner forum

3. **ASQ Section 0613 Membership Retention Plan**

- a. Meetings held to establish phone interview criteria
  - o Focusing on unpaid members (153 total)
  - o In the order of membership types:
    1. Senior ASQ Certified
    2. Senior
    3. Full ASQ Certified
    4. Full
    5. Associate ASQ Certified
    6. Associate
    7. Student ASQ Certified
    8. Student
- b. Phone script has been developed



