



I. An Appreciation to Susan Ackerman's Presidency

I have had the privilege to work with four presidents during my tenure as Executive Director. Hands down, the most enjoyable part of my job over the past 12-13 years has been the opportunity to get to know our officers well, and to make life-long friendships. That enjoyment has come from building relationships with all of our officers and not just our presidents.

Of course, it's impossible to single out one officer as the best or the one with whom I've had the most rewarding relationship; yet, I can say with certainty that Susan and I have spent more time together on the phone and in person than I have with any other officer. Susan has devoted more time to her role as President than any other officer during my tenure. Some weeks Susan worked as many hours as me, and those were weeks when I was working well over 40 hours per week.

I should also stress that ASOR, the staff, and I benefitted greatly from all of those donated hours. Some colleagues at other learned societies would complain about how much time an officer might spend, and I would always reply that I was extremely fortunate to have a president who was a true leader and partner. Susan was the officer with the final say, and the one who provided the executive decision when that was needed. Yet, she is not a person to just do the leadership jobs and ask others to do the grunt work. When we were in crisis or behind, Susan was there to do everything. She proofread, compiled board reports, and did whatever else needed to be done. Most importantly, she has (and continues) ensured that the information that the Board receives is comprehensive and thorough so that the Board can make the best decisions regarding the future of ASOR.

Perhaps most importantly, Susan is not one to be concerned with who gets the credit. She works tirelessly for the good of ASOR, and she wants to see ASOR advance regardless of whether she or someone else gets the credit. One of the reasons that ASOR has thrived over the past decade or so is that our leaders, Board members, donors have not sought personal recognition or glory. Susan has led the way in this regard. In spite of her humility, I think that everyone knows that there is not one advancement that does not have her fingerprints over the past six years.

And there have been so many accomplishments. Perhaps most importantly has been the emphasis on strategic planning and good communication with the Board and our membership. I am humbled by Susan's commitment to preparing reports, and I envy her way of expressing herself. I'm convinced that strategic thinking and communication have been one of the most important keys to our success, and we are all indebted to Susan for that.

Fundraising. Board members have often heard me say, "No margin, no mission." That saying might be a little trite, but I'm convinced that adequate funding not only allows ASOR to pay our bills, but it enables us to excel in carrying out our mission. If we are struggling for funding, it's very difficult for us to serve our members adequately and to play the leadership role that is needed in our fields.

ASOR has distinguished itself among other learned societies in both participation and dollars raised. We made tremendous progress towards success in the Building a Foundation for ASOR Campaign before Susan's presidency, and we brought that campaign home during her first six month. As she alluded to in her report, she played a crucial role in recruiting both modest and large gifts. We have consistently seen our donor participation rate grow, and we have seen the numbers of major donors grow. Susan has not only asked others to give generously, she has led the way with financial contributions of her own—in addition to donating at least 20 hours per week (that's my estimate) for six years.

Endowments. Again, Susan has been a team player in helping ASOR build on past successes and to fund endowments to ensure success in perpetuity. Over the past six years, we have seen the number of members in the Legacy Circle double. We have also seen the number of named endowments grow to nine. I think that it's likely that the tenth endowment (the Mason Fund) will be fully vested at \$50,000 by early 2020. One of the emphases of the Strategic Plan was to raise funds for excavation projects and for our members—in addition to dig scholarships for students and early career scholars. We have done just that during the past six years. Not only did we award \$52,000 in dig scholarships last summer, but we awarded substantial funds to support our members research. We supported travel to collection fellowships; Harris, Seger, and Gold grants to excavations; and a Mesopotamian Fellowship.

I anticipate that ASOR will award more than \$85,000 in grants, fellowships, and dig scholarships during the summer of 2020. I think that the growth in endowments will mean that we may reach \$100,000 per year awarded within the next five years. Think about that number—it's truly extraordinary for a society of our size.

Crises. I don't think anyone could have anticipated all of the crises that would arise in the past six years. Fortunately, we have made lemonade out of lemons. Susan has outlined these in her report, so I don't want to repeat everything here. However, I do think that it's important for all of us to thank Susan for her leadership, hard work, and good spirits through each of these challenges.

I do want to add a few thoughts on the office relocation... For me, the move from Boston to Alexandria has been the most challenging and the most rewarding crisis that we have experienced during my thirteen years as Executive Director.

March 16th in 2017 is ingrained in my memory. When we received the email from the Dean at Boston University, we were convinced that the year in our “separation notice” must have been a mistake. It had to be 2018 and not (the end of May) 2017. While I could go on for a page about the stress and trials of that sort notice, I want to focus on the leadership that Susan exhibited on helping us as an organization and a family decide on who and what we should be the second quarter of the 21st century and beyond.

There were at least three ways that Susan rose above any reasonable expectation for a president: 1) We didn’t panic; 2) We worked hard to keep things moving; and 3) We undertook a planning process that helped us make the choice that best advanced our strategic goals as outlined in our strategic plan.

I’m not sure that most Trustees realize how much time Susan invested in what I labeled as #2 (we worked hard). In addition to needing to find provisional office and to keep our staff so that we could continue to serve our members, we had to operate with minimal disruption for our members. There was a need to visit prospective universities and to negotiate with deans and provosts. There was a need to make quick trips to Boston to carry out these tasks, and Susan “volunteered” to help me with this work. I had an intense travel schedule, and I was in Maine much of the other time. Susan made the trip to Boston on more than a few occasions with a tape measure and camera in hand, to help us gather information.

In the end, we signed leases and some as contingencies. We found temporary space at Virginia Theological Seminary in Alexandria (and again, Susan maid trips to VA on her dime!). All-in-all, the relocation was probably one of the best things that ASOR has done, but it was more disruptive than even I had anticipated. One of the biggest reasons that we made it through and continued to serve our members is that Susan was there to share the workload and to make sure that somehow it all kept moving forward.

I think that the most important part of the move was that ASOR focused on our mission as we sought a new home (#3 above). Inspired by a speech by Jim Strange just two years ago, ASOR decided that it was time to buy our own home in the U.S. after almost 120 years. I do not think that we can over-estimate the importance of having undertaken a thorough strategic planning process *before* we considered buying an office and changing locations.

As many of you know, I tend to focus on the operations and bottom line tasks when things are challenging. I’m thankful that Susan constantly insisted (in a kind way) that we focus on mission and process. The result was that we took the bold decision to move to Alexandria so that we could support our public-facing programs better, and so that we could interact more with federal agencies and other non-profits.

I realize that I have gone on for almost three pages. The reason is that words alone are not sufficient to express my personal gratitude to our friend and leader, Susan Ackerman. We have been blessed many great (and esteemed) presidents. Susan has taken her place among the best of them, and now we look forward to welcoming the leadership of Sharon Herbert and to reaching even greater heights...

II. Summarizing some programmatic areas and finances

Finances: While finances are clearly not the most important thing for ASOR, it is hard to carry out our work and mission if we are not operating in the black. As stated above, I often think of the saying, “No Margin, no mission.” I’m thrilled to report that ASOR ended FY 2019 in what I consider to be our best financial position in our 119-year history.

The audit has again been delayed because of issues relating to our staff transition and because some extenuating (and understandable) circumstances at Romeo and Wiggins. I am deeply grateful that our lead auditor, Angela Goodwin, has literally burned the candles on both ends this past week to complete our audit just before our Board Meeting. As of the writing of this report, we have posted a preliminary balance sheet and Profit and Loss Statement, but the final audit will not be posted before Friday. That said, the numbers do not look like they will change.

Bottom lines:

- Increase in total net assets = \$845,000
- Increase in net assets without donor restrictions = \$738,000
 - Previously called “unrestricted net assets”
- Decrease in net assets w/o donor restrictions available for operations = -\$346,000
 - Previously called “unrestricted net assets available for operations”
 - This amount includes a line of credit of \$325,000 for the James Strange Center (see below, where it is described how this was repaid by September 1, 2019)
- Decrease in assets w/o donor restrictions avail. for operations excluding loan = -\$21,000

Trustees may recall that we attempt to operate in the black by having what has been called our “unrestricted net assets available for operations” remain in the black or grow each year. We have labelled this account as our “rainy day fund.” Accounting standards now require that we rename this amount as “Net assets without donor restrictions available for operations.” I still think we can consider this amount as our “rainy day fund.” It is our surplus net revenue available for operations.

Trustees will also recall that ASOR budgeted the use of \$100,000 from “net assets without donor restrictions available for operations” (rainy day fund) to be used in the FY2019 budget for one-time costs associated with our move from Boston. These costs include incentive and separation pay for employees, relocation expenses, and other one-time expenses. After the line of credit is subtracted from the decrease, we only experienced a \$21,000 decrease in what I have called our “rainy day fund.” I am very pleased with this result because we budgeted for a \$100,000 drop in this amount.

I think that the more accurate number for the drop is likely \$35,000, because there was a \$14,000 decrease in the Opportunity Fund that was transferred to what I am calling our rainy-day fund. This transfer from the Opportunity Fund was caused by reclassifying unsold books and accounts receivable for books to the other unrestricted category.

The bottom line is that our operating budget for Fiscal Year 2019 is advantageous by at least \$65,000. I anticipate that some of the one-time expenses associated with the move may hit our books in FY 2020, but I am confident that we will end FY 2020 within the \$100,000 allocation that we have set aside for the transition to Alexandria, VA.

The other very positive news is that we paid off our line of credit by September 1, 2019. We still need to complete our fundraising for the Building Fund (see below under fundraising), but we no longer have a loan or line of credit—to the bank or to ASOR. Therefore, not only have our net assets increased by almost \$850,000 this year, they will likely increase by at least \$500,000 in FY 2020.

We have many operational and missional challenges following our move, but the state of ASOR is strong—thanks to the support of our generous trustees and donors.

Annual Meeting: As of Monday, November 18, 2019, we had 922 registrants for the Annual Meeting. We thus will see a substantial increase in attendance over Denver. I hope that we will reach 950 attendees, but that is probably something of a reach at this point.

I also wanted to add that this staff has done an amazing job with the Annual Meeting once again. It was very helpful to have Inda on staff through September 15th, and Britta has continued to provide continuity. Arlene does amazing work in leading us all. Marta, Felice, and (most recently) Meagan have also been working hard and well. I'm most pleased that the Annual Meeting continues to be more and more of a team effort rather than something segmented from other programs. A big thank you to all of our staff!

The future of the Annual Meeting: When introducing our Annual Meeting to hotels, I often say, "Our Annual Meeting is not the biggest thing that we do each year, but it is our most visible."

While the Annual Meeting accounts for about 25% of our total budget, quite a few of our members equate ASOR's success with the success of our Annual Meeting. For many, ASOR's Annual Meeting and our journals define the organization—or at least the tangible benefits that they associate with their membership dues.

We are thus facing a critical decision and crossroads because of SBL's decision to sign contracts through 2031 has meant that is not practical or reasonable to meet in the same city in San Antonio and Denver (2021–2023).

I want to stress and state unequivocally that a slight change in dates (e.g., Tuesday to Friday) will not solve our problem. Arlene and I have explored every possibility that we could, and the results from hotels is that shifting towards the weekend (e.g., Thursday to Sunday, or Friday to Monday) might result in more options and better room rates. Indeed, The Westin Waterfront in Boston put in writing that we could save \$10 per night if we started on Thursday. Shifting earlier in the week did not help in Boston, San Diego, Denver, or San Antonio—and I suspect in other cities. I covered this all this in greater detail in my Spring Board Report, but I think that it was worth briefly repeating here.

Susan has outlined the investigations that we have undertaken in Denver and San Antonio in her report, so I will not repeat that in my report.

Positive side of 2021 to 2023: I am confident that we can find excellent hotels for these years that fit the needs of most of our members. We have focused on cities where attendees that wish to move on to the SBL hotel can do with non-stop flights. We have heard from some of our international attendees that a conference in New York, Philadelphia, Washington, or Chicago, may be advantageous and allow them to break up their flights. Because flights from these cities are economical, and because they have non-stop arriving flights from the Middle East and Europe, the costs for these attendees may not be substantially more. In some cases, the costs may actually be less.

Most important, and as illustrated in the feedback from the Program Committee and the CCC, these cities would allow us to supplement our academic papers with access to cultural sites and museums.

We have come a long way since our first independent meeting in Napa Valley—one which many of you join me in remembering fondly. I look forward to receiving more feedback from the Board on the direction that we should proceed, and I am confident that we will plan a meeting is extremely successful.

Publications and Journals: I do not want to repeat the detailed information found in the COP report, but I think that it's helpful to make few comments about some of the larger issues facing the Board.

First, and in my mind most importantly, the transition to UCP has proven to be extremely successful. UCP is able to support our editors in ways that the ASOR staff could not in the past—they have a team of more than 12 to do what ASOR did with one and a half FTE staff. The journals are available online in a seamless fashion, and the enhanced text is really amazing. If you haven't already done so, please log into the UCP online portal and look at how much more useful the articles are with the new features. You can download figures with a watermark already applied, and you can automatically download premade PowerPoint slides from the illustrations, drawing, and photos. UCP also has the capability to include features like videos and other supplemental content that will make our journals even more useful.

Second, UCP has taken over the production of our journals, and they have handled all of the fulfillment issues for our members (after we send them requests). They also handle all institutional billing, and they pay us a guaranteed royalty. All of this has allowed ASOR to cut staff time allocated to these purposes, and it is increasing allowing us to cut the accounting time needed to track journals. In addition, we no longer have to allocate office space for journals and for shipping.

Third, the partnership has helped our bottom line and given ASOR better benefits for our members. A year into the partnership, I could not be more pleased. It is my assessment that this has been a complete success, and it will continue to be positive for ASOR.

Finally, we continue to publish books, but we don't sell many books. Once things have calmed down a little more from our move and other transition, I would like to talk with the Publications Committee about how we might provide more support for books. We have funds from the Opportunity that we could utilize, and books were an important part of our strategic plan that we have not moved forward as much as we would like.

Membership and Friends of ASOR: I think all Trustees likely have experienced first-hand the care and thoroughness that Felice Herman has brought to her work as Membership and Friends of ASOR Manager. She (and all of the staff) benefitted from a long overlap period with Inda Omerefendic, and Felice has now put her own touch in membership relations and outreach. I have never seen reminders go out with such regularity, and she is constantly gathering data and feedback about how billings and reminders have worked. We experienced a slight drop in membership after the Boston Meeting in 2017, but we are starting to reach those highest numbers again. I anticipate that we will continue to see steady growth.

Of particular note has been the growth in sustaining memberships. Felice has corresponded with members to discuss how this type of membership supports our work and give the members added benefits. We now send all sustaining members a free ASOR book (based on availability), and we are looking at other ways to incentivize people upgrading to a sustaining membership—and to recognize them for their support. If you are not a sustaining member, I hope that you will consider upgrading your membership during the Annual Meeting or before the end of December.

Felice has also been working with the Friends of ASOR steering committee to revitalize our Friends Program. The *Ancient Near East Today* continues to be the primary benefit of the Friends program, but we are looking to add other benefits such as a photo archives, maps, back content, and access to special lectures and seminars.

Related, Felice has worked with Steve Dana to prepare a budget for the FOA program so that FOA can be self-sustaining. Programs that will generate revenue and public memberships include seminars and workshops, trips to the Middle East, and possibly a public track for the Annual Meeting. The Membership and Outreach Committee will be reviewing these programs, and we hope to institute some of them in 2020. As of the date of our Board Meeting, the number of active Friends has grown to a little over 15,000.

Cultural Heritage Initiatives: FY2020 will see a much-reduced level of activity and funding in ASOR CHI, but we continue to do good and important work. I also see this as an area of growth in calendar year 2020 and FY2021.

First, a summary of the places where we have consolidated... After much deliberation last year, ASOR decided not to apply for funds to conduct restoration work at religious minority sites in northern Iraq. We thought that we might have been particularly competitive for these NOFO's (Notice of Funding Opportunities) because our team had written the background papers. At the same time, the final NOFO excluded restoration projects at religious majority sites (i.e., Islamic sites), and we decided to pass on what might be seen as a political decision that could have negative implications for our members in years to come.

With the conclusion by the current US administration that ISIS had been defeated, the need for our monitoring, reporting, and fact-finding work was deemed as non-essential. Thus, that funding ended. Several of our core team members, including ASOR CHI Academic Director Michael Danti, were successful applicants (with the University of Pennsylvania) for stabilization projects in Iraq. We continue to benefit from Michael's consultation and advice, and he remains on our ASOR CHI advisory team. At the same time, he now is working full-time on a project affiliated with Penn. We had to furlough our other staff as grants expired.

Second, we applied for several other grants, and we have had conversations with non-federal donors and foundations about other work—especially in the areas of education and stewardship activities.

The first and largest of these programs was a substantial sub-contract from the World Monument Fund for work in Libya. The time-frame was very short because these funds had to be expended by the end of the end of calendar year 2018. Building on a training session in May 2018 and led by William Reynolds Susan Ackerman and I participated as well), we worked with the Historic Cities Authority in Benghazi to conduct rapid conservation and field assessments that would supplement the work by our geo-spatial team.

That work concluded in January 2019, but ASOR registered as a non-profit in Libya as part of that project. This registration and the connections that we made enabled us to apply successfully for two grants with the State Department that began this fall. ASOR was awarded an AFCP (Ambassador's Fund for Cultural Preservation) grant to work with the Libyan Boy Scouts and Girl Guides to conduct educational and stewardship programs in Libya. Will Reynolds, Heba Abd el Salam, and I traveled to Tunis last month to kick-start this program.

In addition, ASOR received a separate grant of about \$64,000 from the Embassy to Libya that is housed in Tunis to conduct activities that will advance the MOU between Libya and the United States relating to the trade of illicit antiquities.

This second grant, combined with remaining funds from the Whiting Foundation for digitization work of an archive in Ghadames, Libya, enable ASOR to hire Dr. Heba Abd el Salam as a half-time employee—as Manager of Cultural Outreach Programs. Dr. el Salam is an Egyptian American who has won several international awards for her stewardship and community program in Egypt. It has been invaluable to have a native Arabic speaker on staff as we work on the activities in Libya.

In addition, the Public Affairs Officer for Libya visited our office last week, and we have been encouraged to apply for further funding in the spring. We are also working with Prof. Susan Kane of Oberlin College on supporting colleagues in Libya for a 2020 AFCP grant.

Not all of our grant applications have been successful. We partnered with the John McCain Center at Arizona State to utilize our archives of cultural heritage damage in Syria and Iraq to develop legal cases against non-state actors. This grant was submitted in late June, and we just received a negative response last week.

After receiving a positive response from a two-page concept proposal for education and stewardship activities with Syrian and Lebanese youth in Lebanon, we resubmitted three lengthy revisions for a large (about \$300,000) grant. Hanan Charaf and other colleagues in Lebanon played a key role in these proposals, and we are grateful for their support. Unfortunately, we have not received word on this proposal (either positive or negative). The proposal was submitted to Near Eastern Affairs and the division of the State Department working in Syria (START). As we have not received any response or feedback, we can only surmise a negative answer and/or that everything is on hold with regards to Syrians and Lebanon.

We still have one outstanding grant that we submitted to the NEH in partnership with the Center for Digital Antiquity of Arizona State. We should hear about this application in December 2019.

At this point, we are focused on work in Libya, and I will be talking with the Cultural Heritage Committee about new proposal ideas. We would like to use the James Strange Center to carry out intangible heritage programs in Alexandria, and we have received positive initial feedback from BB&T, and it looks like local community foundations might be interested.

III. Fundraising—Immediate needs

I realize that my report has grown very long, so I will be brief at this stage... We have two pressing priorities.

First, we need to raise \$50,000 in new gifts or pledges for the James Strange Center in order to “earn” the last \$100,000 of an extraordinary challenge gift. We have four “asks” outstanding that may account for \$30,000 to \$40,000, but nothing is firm. I hope to receive some good news on this front during the Annual Meeting. I encourage all trustees to consider a new pledge (or consider giving a little more). We have until December 31, 2019, to meet this challenge. This is an amazing opportunity to have your gift doubled, and to endow the operations of our new home.

Second, we need raise \$125,000 in our Annual Fund. As we discuss in April, the Annual Fund is especially important this Fiscal Year. While we celebrate paying off our line of credit for the Strange Center, we do not yet have a building endowment that has accumulated funds to pay for the operations of the building. We thus need the Annual Fund this year as much as any in the past. Many of us (and I include my wife Amy and myself here) have focused our giving on the Building Fund. At the same time, we need to think about the Annual Fund—especially during FY2020 and FY2021, while our Building Endowment is growing.

IV. Next Steps and Immediate Priorities

I think that it is appropriate to remember our Board Chair Emeritus, P.E. MacAllister in this conclusion. I was pleased and honored to have visited with him at length in late April, and we spoke on the phone four times this fall. He was enthusiastic about ASOR’s future and about us reaching new heights. During our conversations, he reminded me of the importance of being a

player in the field and to making a difference in the world. He was very proud and pleased that we were no longer fighting for survival. I was inspired that at 101 years of age, he was encouraging us (all of ASOR) to think about the future.

While he had a wonderful ride (to borrow words from his son, Chris), we still miss him. He loved us, and we loved him. I feel his presence with us in San Diego, and his memory will always be a blessing in ASOR and in many of our lives.

With P.E.'s enthusiasm for ASOR to think and plan for the future at the front of my mind, I am thrilled to welcome the leadership of Sharon Hebert. I look forward to seeing where we will go now that we have permanent home in the James F. Strange Center in Alexandria, VA.

Three of our immediate priorities will contain the following: 1) to decide where we will hold our Annual Meetings in 2021, 2022, and 2023; 2) to apply for grants and other funding that will enable us continue the activities associated with ASOR Cultural Heritage Initiatives; and 3) to undertake a new strategic plan that will guide our work through 2025—the second quarter of the 21st Century.

Of course, we must never lose sight of our mission, our publications, and activities that support our members. This is, and must remain, our focus.

Thank you for all that you do for ASOR, and I look forward to working with you to advance our society in 2020—our 120th year!