



COUNCIL FOR  
**Economic  
Education**

*Teaching Opportunity®*

## Council Affiliation Form

### **1. Basic Information**

This is a request for:

New CEE affiliation

Continued CEE affiliation (year of first affiliation if known: \_\_\_\_\_)

Council Name:

Council Mailing Address:

Council President/Executive Director:

Contact Information:

E-mail:

Phone:

Fax:

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I have reviewed the Council and Center listings and data on the CEE online database for our state and all of the information is accurate.

**Important note: You must update the CEE online database as part of this affiliation request.**

Have you updated your online productivity report?      Yes                      No

**Important note: You must have completed CEE's online quarterly productivity reports as part of this affiliation request.**

Is your Council university-based?                      Yes                      No

If so, at which university/college and in which academic department is the Council based?

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Council Staff positions  
(include yourself):

	tenured	administrative	full	part	Univ. supported
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you have an active, functioning Board of Directors? Yes  No

Do you have bylaws in place to which your Council adheres? Yes  No

If you said no to either of the two previous questions, could your Council use some help in these areas? Yes  No

**2. Financial Information**

a. If you have previously provided prior year audits (preferred) or other financial statements on the CEE online database, please provide the information below for your most recently concluded fiscal year. (If that was more than six months ago, please also provide year-to-date financial information as of a recently completed month.)

If you have not previously provided copies of audits or other financial statements on the CEE database, please provide the following information for each of the past two fiscal years, as well as year-to-date financials as of the end of a current month.

- i. Total cash (or equivalents) revenue
- ii. Total in-kind support
- iii. Total expenses
- iv. Change in net assets
- v. Total net assets

b. Please provide a copy of your budget for the current fiscal year. If for some reason you cannot provide a copy of your budget, please provide the budgeted amounts for each of the five categories listed immediately above.

c. By approximate percentage, for the most recently completed fiscal year, please indicate the sources of your revenues.

\_\_\_ Government (not including any grants via CEE)

- \_\_\_ Grants from CEE (including EEE grants)
- \_\_\_ Community Foundations
- \_\_\_ Individuals (including donor advised funds and private foundations)
- \_\_\_ Businesses (including corporate foundations)
- \_\_\_ Research grants
- \_\_\_ Other sources of revenue by category (please list):

**3. General Center Information**

a. Please list the centers in your state

Center	Currently Affiliated With CEE?		Separately Incorporated or 501(c)(3)?	
	Yes	No	Yes	No
_____	Yes	No	Yes	No
_____	Yes	No	Yes	No
_____	Yes	No	Yes	No

b. Describe the fundamental way that economic education programming is conducted in your state. (Please check one.)

- Programming is conducted both by the Council as well as independently by one or more of the Centers.
- Programming is conducted by the Council; the Centers do not independently conduct economic education programming.
- In general, programming is conducted by the Centers, and not by the Council
- This state functions in a different way. (Please describe.)

c. Please list any Center(s) for which economic education activities are limited primarily to research.

d. Are there Centers in your state which have only a very limited, or zero level of economic education activity? If so, please explain the reason(s).

e. Are there any Centers in your state for which you recommend that affiliation with CEE not be granted?

Yes      No

If yes, please identify the Center(s) and explain your reasoning.

**4. Specific Center Information**

a. For each center for economic education in your state included in this request, please provide the following:

- i. The academic department in which the center is housed
- ii. The discipline of the highest graduate degree held by the center director (e.g. economics, education, etc.)
- iii. The nature and extent, if any, of the university support provided to the center (e.g., office space, administrative support, funding, etc., but not including professor release time, which is requested below.)
- iv. The percentage of full-time work the director devotes to center duties.
- v. List and describe the financial support and any other types of support that your Council provides to this Center.
- vi. Does the Center have its own functioning board of directors or advisory committee?
- vii. Concerning any of the Centers in your state, describe any specific circumstances or situations which would be important for the affiliation review team to know.

Describe the staffing arrangements for each Center by listing each position and the requested information.

Staff positions:	tenured	administrative	full	part	Univ. supported
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## **5. Program Information**

Check the programs that the Council/Centers have done during the past four years.

Economics Challenge  
Personal Finance Challenge  
Treasury Capability Challenge  
Stock Market Game/Simulation  
International Economic Summit  
Economic/Financial Literacy Summit  
Masters in Economic Education Program  
Teacher Awards  
Student Awards  
Poster/Calendar Contest  
Business Plan Competitions  
Econ Camp  
Other (please list)

Use this opportunity to describe any economic education program activities conducted by your Council and/or Centers that may not be listed on the CEE Council/Center online data base or in CEE productivity reports. This could include any education programs directed to audiences that are not the typical audiences for CEE network programming (e.g., students, parents, clergy, etc.) and could include specialty programs of any type.

## **6. General Comments**

Areas of Council Strengths

Significant Constraints to Accomplishing Your Mission

Ideas/Plans for Better Accomplishing Your Mission

**Overall Health of Council:** What is your objective evaluation of the health of your Council? Please check one of the boxes.

- Excellent. Our finances and programs are strong and growing.
- Good. Our finances and programs are healthy and stable.
- Fair. Our finances and programs are okay, but we are facing challenges that could jeopardize them in the near future.

- Struggling. We are hanging in there, but face some significant challenges in our finances and programming
- Poor. We are facing serious challenges in our finances and programming.

### **7. Final Comments:**

How can CEE or the NAEE network best help you and your centers fulfill your missions (i.e., things CEE or NAEE should continue doing, start doing, and stop doing)?

If you are affiliated, to whom (besides yourself) should your letter be sent? Please supply name, title, and address of these individuals.

Additional Comments: