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# INTERNATIONAL ERGONOMICS ASSOCIATION

1.1 Rio

September 1995

## PRESIDENT'S REPORT

To IEA Annual Meeting of Council

Rio de Janeiro, Brazil, 14-15 October, 1995

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At the beginning of my term as President I stated several goals for my term 1994-1997. These goals have been discussed by the Executive Committee and later published in Ergonomics International, and the Bulletin of the Human Factors and Ergonomics Society. I would like to take the opportunity to discuss these goals briefly with Council, and the list of 10 goals are therefore reproduced below.

### Short term goals for IEA.

*1. IEA is the only global organisation in ergonomics and must take a global responsibility.*

The IEA should create opportunities to work with other global entities - especially United Nations organizations - to increase understanding and acceptance of our discipline. As a result of past collaborations with the International Labor Organization (ILO) and World Health Organization (WHO), IEA is now recognized as a Non-Governmental Organization (NGO) by ILO, WHO and the UN Economic and Social Council (ECOSOC). In the future IEA will continue to collaborate with UN.

Awareness of ergonomics needs to be increased in the UN. Many UN organizations still do not employ ergonomists, are unacquainted with ergonomics methodology, and do not know how ergonomics methodology can help to implement new projects in industrially developing countries. We are looking for opportunities to train UN employees through courses in ergonomics and to convince UN organizations to adopt ergonomics methodology in their work.

2. *IEA must continue to support ergonomics in countries where it has been neglected.*

In industrially developing countries it is sometimes difficult to provide high-quality education. Lack of funds and artificially high exchange rates often make text books and journals prohibitively expensive. Imagine having to pay the equivalent of \$ 1,000 for a standard textbook such as *Human Factors in Engineering and Design* by M.S. Sanders and E.J. McCormick". Such are the conditions in South-East Asia, China and India. In the future we want to expand our successful book donation program to educational institutions. ∇

We will also continue our involvement in education and training through seminars and special courses. The IEA can also stimulate ergonomics both in industrially developing countries and in East European countries by holding conferences at strategic locations. This has been done previously in Djakarta, Warsaw, and St. Petersburg. Conferences are now planned for 1995 in Brazil, and in 1996 in New Delhi and Bali.

Our motivation for continuing this type of support is two-fold: to expand ergonomics knowledge and to recruit additional societies as members of IEA. The continents of Africa and South America are each represented by only one ergonomics society belonging to the IEA : the Brazilian and the South African Ergonomics Societies. Both are very active and they can act as "bridge heads" to stimulate interest in neighbour countries.

3. *IEA must remain at the forefront of technological and scientific development.*

The Science and Technology Committee, chaired by Holger Luczak, Germany, carries the main responsibility. The committee organizes 16 Technical Groups, which arrange conferences, symposia and meetings of expert groups. Typically the IEA arranges about 2-3 conferences each year. The Technical Groups also help in the planning of the triennial IEA congress. (4-5!)

New technical groups can be proposed by federated societies or by interested individuals. Inactive technical groups are dissolved.

4. *IEA must disseminate information about ergonomics on a global scale.*

There are two main vehicles for this purpose. The first is the newsletter *Ergonomics International*, (edited by Stephan Konz, USA.), which is distributed quarterly as a section of the journal *Ergonomics* as well as via the Internet. It is also mailed to about 250 individuals around the world.

The other is through the Publication and Promotions Committee ( chaired by Waldemar Karwowski, USA), which is in charge of the distribution of books and journals to developing ← ∇

countries. Karwowski plans to explore the possibility of establishing the "IEA Press", with the main objective of making conference proceedings and books available at low cost.

5. IEA must facilitate global communication among professionals.

and those who are not on Internet??

Stephan Konz started this effort by making the newsletter available on the Internet. Plans for the future include expanding E-mail services, developing electronic bulletin boards for informal discussions, and compiling databases for information, publications, and a global register of E-mail addresses. These services should be available free of charge.

6. IEA must continue its leadership role in developing guidelines for educational accreditation and professional certification.

Draft guidelines have been developed through the Education and Training Committee, (chaired by Margaret Bullock, Australia). The final guidelines, which are intended as recommendations for adoption by federated societies, should be available within the next few years. The guidelines will, however, continue to evolve as changes occur in the field of ergonomics.

7. IEA must increase its budget and seek new sources of funding.

IEA relies on volunteer work, and for that reason it is possible to accomplish much at little cost. Current funding is provided by member societies, by donations, and by income from conferences. For the future, however, we must seek additional sources of revenue, such as contributions from individuals and international corporations, grants for research and development, conference fees, profits from publications, donations, and trust funds. With increased resources IEA will be able to initiate new projects. Examples of such were the recent moving seminars in South-East Asia, which were organized by the Education and Training Committee, and partially funded by IEA. This venture was typical of IEA activities, as it relied on volunteers including Margaret Bullock, Australia, Kamiel Vanwonderghem, Belgium, and Kazutaka Kogi, Japan. Additional funding is necessary to enter new collaborative ventures with UN organizations, which often require partial funding from external sources.

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sustainable

8. IEA Council members must be given opportunities to help with IEA business, for example by doing special projects.

Some Council members are already active on committees, but there are now opportunities for special projects of limited time duration. For example, Council members could make contact with a local aid organization to propose IEA collaboration for projects in industrially developing countries. One interesting new venture is the group of semi-retired ergonomics professionals organized by Stuart O. Parsons, USA Council member and Michael Kaplan.

zie initialief HFES-Fund

This group will offer free consulting to industrially developing countries. The only compensation they require is payment of travel expenses.

*9. IEA must actively recruit new members.*

IEA is composed of several categories of membership: federated members, associated members and corporate sustaining members. We have at present only one sustaining corporate member - the Hungarian Council of Industrial Design and Ergonomics. Such membership validates the importance of IEA to industry and creates opportunities for international collaboration. IEA will continue vigorously to recruit additional members, and in particular corporate sustaining members.

*10. IEA must promote an international debate on the goals and means of ergonomics.*

The purpose of ergonomics remains different in many parts of the world. This is reflected in differences in ergonomics practice as well as in education and research. I propose to organize an international workshop to discuss the various approaches to ergonomics and uses of ergonomics knowledge and methods. IEA must lead this debate, as it will further a global understanding of the application of ergonomics.

### **Travel Activities:**

During the past 12 months I have made trips on behalf of IEA to Lithuania, Latvia, Belgium, The Netherlands, Germany, Finland, Hong Kong, Taiwan, Switzerland, Japan, and USA. I have also made several trips within Sweden: to Stockholm to enquire about funding for IEA activities, and to Göteborg to help in making arrangements for the IEA Congress in Tampere.

The trips to Lithuania and Latvia were undertaken in February with the purpose to enquire about the status of ergonomics in these countries. I met with Professor Kurila at Kaunas University of Technology in Lithuania and following that with Dean Zvejnieks at Riga Technical University. As a result of these activities and with the help of a grant from the Swedish Department of Education, IEA organized Sept. 4-8 a course on Ergonomics at the Technical University of Riga. This was arranged in collaboration with the IEA Committee for Education and Training, and the course was taught by Professor Andris Freivalds from Pennsylvania State University, USA. We will apply for additional funding to arrange a course in Lithuania in 1996. Hopefully that these activities will inspire an organized interest in ergonomics, so that ergonomics societies may form in the close future.

Similar activities have also been undertaken in Estonia by Markku Mattila, and we have preliminary plans to submit a joint (IEA-Finland) proposal next year to Finnish authorities.

The trips to Hong Kong and Taiwan were undertaken in April. In Hong Kong I had the opportunity to give a seminar at the Hong Kong University of Science and Technology. In this context I encouraged the formation of a local Ergonomics Society.

I spent one week on Taiwan and gave presentations at two universities and one conference. I also advised the Taiwan Ergonomics Society what they should consider in submitting an application to join IEA, see below.

Trips to USA (twice), Belgium, Germany, and The Netherlands (twice) were undertaken to meet with past President Hal Hendrick and members of IEA Executive.

Finally I travelled to the World Bank in Washington, D.C. and ILO and WHO in Geneva. The outcome of these visits are discussed below.

ANNUAL REPORT SECRETARY GENERAL  
(1994 - 1995)

1. Secretariat

1.1 Introduction

Compared with the previous annual report, the staffing of the Secretary General office in Amsterdam (courtesy of the Nederlandse Vereniging voor Ergonomie / Dutch Ergonomics Society) remained unchanged in the reporting period 1994-1995. Mrs Linda Krokké-Read realised a tremendous amount of work of high quality!

1.2 In-/Output

In the period '94 - '95 about 250 faxes and letters were received and also sent off. This is about the same amount compared with the previous period. Incoming mail is now expanded by e-mail messages which raises the communication, at least between the Executive members, considerably.

1.3 Storage of Proceedings

The "warehouse" function of the secretariat office was expanded by the proceedings of the WWDU'94 Conference; the proceedings of the HCI '95 Symbiosis of Human and Artifact; the ODAM IV proceedings; the proceedings "The Paths to Productive Aging" (1994); proceedings IEA '94. The system of dissemination of the 10 copies to appropriate addresses is still not working sufficiently.

2. Secretary General

2.1 IEA Meetings

In this period a slight change in the meeting-rhythm took place. We had the usual annual Council meeting, combined with one Executive meeting immediately before and one after the Council meeting; a mid year meeting (January '95 in Vaals/Aachen) and 2 meetings (November '94 and May '95) of the 3 elected officers, in order to discuss urgent matters. All meetings appeared to be very effective.

## 2.2 Business Meetings / Visits / Representations

The Secretary General was invited - on the occasion of his visit to Japan / February '95 - to attend the Executive Board meeting of the Japan Ergonomics Research Society, chaired by prof. Oshima. A short statement was given in which the great Hanshin earthquake (January 17th) was commemorated. Afterwards the discussion was open and friendly.

In May 1995 business meetings took place with ILO officers (Occ. Health & Safety Branch; dr. Pinnagoda) where mainly was spoken about existing and future common ILO/IEA Publications. The experience of the Ergonomics Checkpoints Book was discussed. Also the Roving Seminar issue was discussed.

With WHO (dr. Mikheev; Office of Occ.Health) common future projects, mainly in the field of low back pain/muskeloskeletal disorders/training, were discussed. Mututal support could be very fruitful.

In this period one CREE (Center of Registration of European Ergonomists) Board Meeting could be attended (October '94). Some 100 ergonomists out of 9 European countries are registered. There are good contacts with BCPE.

## 2.3 Applications

Requests for IEA Federated Membership were received and treated from:

- All-Ukrainian Ergonomics Association
- Ergonomics Society of Taiwan
- Irish Ergonomics Society (change Aff. into Fed. status)

Information about IEA/IEA membership were received from many countries eg. Singapore, Cuba, Latvia, Turkey and Argentina). The IEA brochure appears for such questions very useful!



# **International Ergonomics Association Report of the Treasurer**

*(revised September 28, 1995)*

Including:  
Financial Statements, 1994  
Schedule of Dues Received  
Mid-Year Report  
Equity History

Y. Ian Noy, Ph.D.  
IEA Treasurer



**International Ergonomics Association  
Balance Sheet  
For Year Ended December 31, 1994**

	0.72 CHF	USD	Total In US \$	1993 Total \$
<b>ASSETS</b>				
Current Assets				
Cash Accounts (Hongkong Bank of Canada)	17,533	14,905	27,529	54,249
Term Deposits 100,000 (CDN)			71,429	38,314
	<u>17,533</u>	<u>14,905</u>	<u>98,957</u>	<u>92,563</u>
Seed Funds Receivable		20,043	20,043	19,043
	<u><u>17,533</u></u>	<u><u>34,948</u></u>	<u><u>119,000</u></u>	<u><u>111,605</u></u>
<b>EQUITY</b>				
ESA Fund for Conf. in Ergon. in South East Asia	11,572		8,332	8,139
SELF Fund		7,642	7,642	17,572
HFES Fund for Ergon. in Dev. Countries		2,136	2,136	767
Loans Reserve		35,000	35,000	35,000
HFAC/ACE Fund		17,000	17,000	
Cash Reserve 100,000 CDN <i>(money available for IFA)</i>	5,961	-26,830	48,890	50,127
	<u>17,533</u>	<u>34,948</u>	<u>119,000</u>	<u>111,605</u>
	<u><u>17,533</u></u>	<u><u>34,948</u></u>	<u><u>119,000</u></u>	<u><u>111,605</u></u>

**International Ergonomics Association**  
**Statement of Operations**  
**For Year Ended December 31, 1994**

	@	0.71	0.72		Total	1993
		CDN	CHF	USD	In US\$	In US\$
<b>REVENUE</b>						
Membership Dues			10,404	21,689	29,180	28,469
Capitation Fees (IEA'94,ODAM,MH)		23,938	1,220	1,470	19,950	
Interest		1,089	519	497	1,648	812
SELF Fund						17,572
Contributions towards HFS Fund				1,349	1,349	414
From IEA'94 to establish HFAC/ACE Fund				17,000		
Misc.			613		441	
		<u>25,027</u>	<u>12,756</u>	<u>42,004</u>	<u>52,568</u>	<u>47,266</u>
<b>EXPENDITURES</b>						
<b>Executive &amp; Administrative Expenses</b>						
Office-related expenses			8,312	475	6,460	1,938
Travel			5,670	3,236	7,318	6,100
Clerical			3,090		2,225	1,078
<b>Committees</b>						
Policy & Planning				2,124	2,124	2,263
Science & Technology			936	2,471	3,145	2,880
Education & Training				3,853	3,853	4,850
Roving Seminar						3,400
Directory of Educational Programs				3,500		
Publications			4,364	156	3,298	
Brochures				589	589	
Newsletter				1,331	1,331	1,100
Promotions & Public relations				156	156	
<b>Loss (St. Petersburg conference)</b>						330
Meeting costs			2,873	1,051	3,120	3,222
Bank charges			58	79	121	313
Grants (IDC del to IEA'94 & SEAES conf)				19,000		
Transfer to CDN TD		-28,912	7,874	15,000	0	
		<u>-28,912</u>	<u>33,177</u>	<u>53,021</u>	<u>33,739</u>	<u>27,474</u>
<b>OPERATING SURPLUS (DEFICIT)</b>		<u>53,939</u>	<u>-20,421</u>	<u>-11,017</u>	<u>18,829</u>	<u>19,792</u>
Assets at beginning of year		46,061	37,954	45,964		
Assets as at end of reporting period		100,000	17,533	34,948		

**International Ergonomics Association**  
**Statement of Changes in Reserves and Funds**  
**As at December 31, 1994**

	<i>net</i> Credits <i>in</i>	<i>net</i> Debits <i>out</i>	Balance
<b>Cash Reserve (USD)</b>			
Balance at start of year			50,127
Operating surplus	18,829		
Gain/Loss due to change in USD exchange		1,435	
Transfer to HFAC/ACE Fund		17,000	
Transfer to HFES Fund (interest)		1369	
Transfer to ESA Fund (interest)		192	
Transfer to SELF Fund (interest)		70	
<b>Balance at end of period</b>			<u><u>48,890</u></u>
<b>Loans Reserve and Receivable (USD)</b>			
Balance at start of year (available)			15,957
IEA'94 <i>seed</i>	15,000		
Brazil		4,000	
IEA'97		12,000	
Balance at end of period (available)			<u>14,957</u>
Receivable IEA'97	12,000		
Receivable Brazil	4,000		
Receivable SIE - Palermo	4,043		
Receivable			<u>20,043</u>
<b>Value</b>			<u><u>35,000</u></u>
<b>ESA Fund for Conf. in Ergon. in South East Asia (CHF)</b>			
Balance at start of year			11,305
Interest	267		
Balance at end of period			11,572
Receivable			
<b>Value</b>			<u><u>11,572</u></u>

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**HFES Fund for Ergon. in Dev. Countries (USD)**

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Balance at start of year		767
Interest	20	
HFS Contribution	1,349	
Balance at end of period		<u>2,136</u>
Receivable		
<b>Value</b>		<u><u>2,136</u></u>

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**SELF Fund (USD)**

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Balance at start of year		17,572
Interest	70	
Grant to SEAES conference		2,000
IEA'94 grants to delegates		8,000
Balance at end of period		<u>7,642</u>
Receivable		
<b>Value</b>		<u><u>7,642</u></u>

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**HFAC/ACE Fund (USD)**

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Balance at start of year		
HFAC/ACE Contribution	17,000	
Balance at end of period		<u>17,000</u>
Receivable		
<b>Value</b>		<u><u>17,000</u></u>

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## Notes to 1994 year-end report

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1. The IEA is an association of ergonomics and human factors societies around the world, registered as a non-profit organization under Swiss Civil Code. The IEA promotes the knowledge and practice of ergonomics by initiating and supporting a variety of international activities and cooperation.

### **Basis of Accounting**

1. The IEA fiscal year-end is December 31.
2. The IEA's policy is to prepare its financial statements on the cash basis of accounting. Under this basis, revenues are recognized when received and expenses are recognized when paid.
3. The financial system comprises two parts; (i) annual operation, and (ii) special reserves.
  - i) The annual operations budget includes revenues from membership dues, capitation fees, interest and other receipts; and expenditures for administrative and other recurring activities.
  - ii) Special reserves include a loans reserve and special funds. These reserves are identified under the Equity heading of the Balance Sheet.

A loans reserve has been established to ensure an adequate supply of seed funds for conferences. The level of the reserve was set at US\$ 35,000. Presently, this sum is included in the IEA general accounts but is tracked and reported separately. Seed funds given in accordance with the IEA Policy on Support of Conferences are handled through this fund. Therefore, they are not reflected in the Statement of Operations. However, amounts receivable are shown as an asset on the Balance Sheet.
4. Advances to officers are treated as expended items in the Statement of Operations when paid. However, they are tracked separately

## **Summary of Financial Performance**

1. The net surplus of operations for the year was \$18,829, owing largely to capitation income from conferences.
2. IEA '94 produced capitation fees totaling about \$19,950. Capitation income was also received from the ODAM conference and Warsaw Conference on Materials Handling.
3. The Human Factors Association of Canada/Association canadienne d'ergonomie (HFAC/ACE) created a Fund in the amount of \$17,000 to help delegates from industrially developing countries to attend future IEA Congresses.
4. The SELF Fund was used to pay \$8,000 towards travel grants for delegates from industrially developing countries to attend IEA '94. A further \$2,000 was paid as a grant to help SEAES conference. It should also be acknowledged that \$3,000 was paid to help delegates attend the 1993 World Conference on Materials Handling
5. There was a marked increase in office-related expenses which in all likelihood will continue to grow.

### **Proposal: Policy on Funds Administered by the IEA**

At the present time, the IEA manages four special funds. Three of these funds have been established from surplus income by societies that have hosted IEA Congresses. It is expected that more funds will be created in the future. Also, while fund activity has been limited to date, this is expected to increase. There are few rules guiding the management of these funds. A policy was drafted which sets out the terms of reference for the creation and management of funds. It is especially important to ensure that funds are managed in accordance with the wishes of the societies that have created the funds. Comments are invited on the proposed policy, attached.

	1995				1994				Arrears (years)		
	# Mem	Payable CHF	1.33 US \$	Paid CHF	0.75 US \$	# Mem	Payable CHF	1.52 US \$		Paid CHF	0.66 US \$
<b>FEDERATED SOCIETIES</b>											
AEE	78	487.00	365.25		365.25	185	915.00	603.90	166.00		
Asociación Española de Ergonomía											
BES	141	739.00	554.25		543.75	141	739.00	487.74		225.00	
Belgian Ergonomics Society											
ABERGO	133	707.00	530.25	in Rio	523.18	128	687.00	453.42		453.42	
Brazilian Ergonomics Association											
CHES	450	1,975.00	1,481.25		108.00	450	1,975.00	1,303.50		90.00	
Chinese Ergonomics Society											
CRES	160	815.00	611.25			160	815.00	537.90	60.00	100.00	95
Croatian Ergonomics Society											
CZES	933	3,041.00	2,280.75			933	3,041.00	2,007.06	3,041.00		95
Czech Ergonomics Society											
ES	219	1,051.00	788.25			219	1,051.00	693.66		532.55	95
Ergonomics Society											
ESK	551	2,277.00	1,707.75		1,707.25	520	2,215.00	1,461.90		1,461.90	95
Ergonomics Society of Korea											
ESA	50	375.00	281.25			50	375.00	247.50		500.00	91,92,93,94
Ergonomics Society of Australia											
ESFRY	522	2,219.00	1,664.25	2,219.00		559	2,293.00	1,513.38	2,293.00		94,95
Ergonomics Society of F.R. Yugoslavia											
ESSA	34	311.00	233.25		230.14					230.14	
Ergonomics Society of South Africa											
GfA	4243	9,861.00	7,245.75		7,245.00	4360	9,895.00	6,530.70		6,530.70	
Gesellschaft für Arbeitswissenschaft											
HES	476	2,079.00	1,559.25		1,559.25	479	2,091.00	1,380.06		1,547.34	
Hellenic Ergonomics Society											
HFES	70	455.00	341.25			70	455.00	300.30			94,95
Human Factors and Ergonomics Society											
HFAC/ACE	53	387.00	290.25		10.00	53	387.00	255.42		15.11	
Human Factors Association of Canada/ACE											
MES	32	303.00	227.25			32	303.00	199.98		200.00	95
Hungarian Ergonomics Society											
ISE	1906	4,987.00	3,740.25		3,740.00	1862	4,899.00	3,233.34		3,253.50	
Indian Society of Ergonomics											
IES	565	2,305.00	1,728.75		1,661.50	565	2,305.00	1,521.30		1,522.00	95
Israeli Ergonomics Society											
JERS	87	523.00	392.25			87	523.00	346.18		345.00	95
Japan Ergonomics Research Society											
NVVE	1497	4,169.00	3,126.75		339.00	1497	4,169.00	2,751.54		2,774.16	94,95
Nederlandse Vereniging voor Ergonomie											
NZES	41	339.00	284.25			44	351.00	231.66		232.00	
New Zealand Ergonomics Society											
NES	100	575.00	431.25		339.00	100	575.00	379.50		575.00	95
Nordic Ergonomics Society											
OAE	41	339.00	254.25		339.00	35	315.00	207.90		79.00	
Osterreichische Arbeitsgemeinschaft für Ergonomie											
PES	625	2,425.00	1,818.75		339.00	625	2,425.00	1,600.50			93,94,95
Polish Ergonomics Society											
APERGO	120	655.00	491.25		1,000.00	120	655.00	432.30		484.70	94,95
Portuguese Association of Ergonomics											
REA	693	2,561.00	1,920.75		1,682.50	693	2,561.00	1,690.26		1,690.00	95
Russian Ergonomics Association											
SEA	70	455.00	341.25			70	455.00	300.30			94,95
Slovak Ergonomics Association											
SIE	14,197	47,743.00	36,807.25	2,219.00	21,380.82	14,327	47,930.00	32,721.40	6,647.00	24,027.52	
Società Italiana di Ergonomia											
SEAF	39	256.00	192.00		192.00	31	224.00	161.28		160.00	
Société d'Ergonomie de Langue Française											
SEAFS	248	1,092.00	819.00		135.00	248	1,092.00	786.24	1,087.00		95
South East Asia Ergonomics Society											
IFES	20	180.00	135.00			11	144.00	103.68		26.00	
Irish Ergonomics Society											
<b>AFFILIATED AND SUSTAINING MEMBERS</b>											
Bur. Hungarian Council of Ind. Des. & Ergon.			1,000.00		1,000.00			1,000.00		1,000.00	
IFETI											
European Society for Dental Ergonomics											
ESDE	31	224.00	161.28		192.00	31	224.00	161.28		160.00	
Human Ergology Society											
HES(U)	248	1,092.00	819.00		135.00	248	1,092.00	786.24	1,087.00		95
Human Ergology Society											
IFES	20	180.00	135.00		135.00	11	144.00	103.68		26.00	
Irish Ergonomics Society											

\* - Based on 20% of Society's total fee income

Fees Formula

Federated Societies: Fees in CHF = 175 + (#members up to 500)\*4 + (#members above 500)\*2

Affiliated Members: Fees in CHF = 100 + (#members up to 500)\*4 + (#members above 500)\*2

**International Ergonomics Association  
Mid-Year Balance Sheet  
As at September 25, 1995**

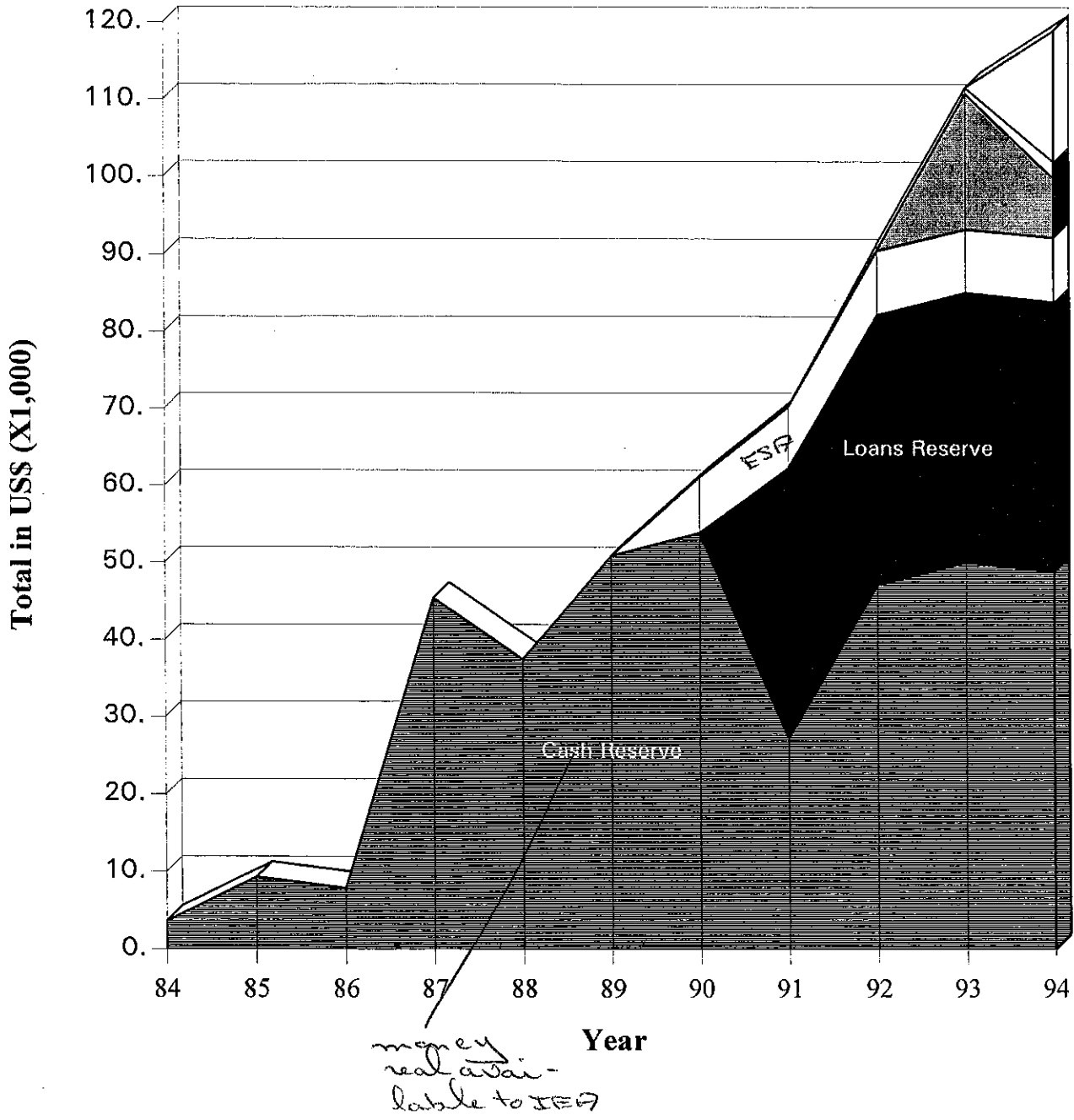
	@ 0.71 CDN	@ 0.72 CHF	USD	Total In US \$
<b>ASSETS</b>				
Current Assets				
Cash Accounts (Hongkong Bank of Canada)		6,705	29,814	34,642
Term Deposits (CDN\$)	104,157			74,398
		6,705	29,814	109,039
Seed Funds Receivable			24,043	24,043
	<u>104,157</u>	<u>6,705</u>	<u>53,857</u>	<u>133,082</u>
<b>EQUITY</b>				
HFAC/ACE Fund			17,000	17,000
ESA Fund for Conf. in Ergon. in South East Asia		11,572		8,332
SELF Fund			7,642	7,642
HFS Fund for Ergon. in Dev. Countries			3,639	3,639
Loans Reserve			35,000	35,000
Cash Reserve	104,157	-4,867	-9,424	61,470
	<u>104,157</u>	<u>6,705</u>	<u>53,857</u>	<u>133,082</u>



**International Ergonomics Association  
Mid-Year Financial Report  
As at September 25, 1995**

	0.72 CHF	USD	Total \$ In US\$	Budget In US\$
<b>REVENUE</b>				
Membership Dues		23,498	23,498	30,000
Capitation Fees				
Interest	104	220	295	800
Interest on CDN Certificate	4,157		2,969	
Contributions towards HFES Fund		1,503	1,503	
Royalties (Taylor & Francis)	225		162	
	<u>329</u>	<u>25,221</u>	<u>28,427</u>	<u>30,800</u>
<b>EXPENDITURES</b>				
Executive & Administrative Expenses				
Office-related expenses	4,023	138	3,035	5,360
Travel	3,662		2,637	9,140
Clerical				4,300
Committees				
Policy & Planning	325	1,344	1,578	3,350
Science & Technology				5,500
Education & Training		3,172	3,172	7,700
Roving seminar				3,500
Publications	365	1,535	1,798	4,000
Newsletter				1,500
Brochures				
Awards				
Meeting costs	2,755		1,984	3,500
Bank charges	27	123	142	200
	<u>11,157</u>	<u>6,312</u>	<u>14,345</u>	<u>48,050</u>
<b>OPERATING SURPLUS (DEFICIT)</b>	<u><u>-10,828</u></u>	<u><u>18,909</u></u>	<u><u>14,082</u></u>	<u><u>-17,250</u></u>
Assets at beginning of year	17,533	34,948		
Assets as at end of reporting period	6,705	53,857		

# IEA Equity History



Cash Reserve
  Loans Reserve
  ESA Fund
  SELF Fund
  HFES Fund

## **Policy on Funds Administered by the IEA**

The IEA administers funds established through contributions by Federated societies or other organizations (donor organization) wishing to contribute towards the development of ergonomics at an international level. Most funds are created for specific uses which are often specified by the donor organization. The IEA administers funds in accordance with the policy described herein and the corresponding terms of reference of the funds.

To establish a Fund a donor organization completes a form signed by authorized agents of the donor organization. The form provides the name of the fund and indicates the amount contributed initially upon establishment of the fund and the manner in which additional contributions, if any, will be made.

In addition, the donor organization is asked to specify the intended use of the fund and specify criteria it wishes to apply in the administration of the fund. Criteria may be general if the donor organization does not wish to constrain the use of the fund, or it may be quite specific, providing, for example, who is eligible to receive sums (recipient qualifications, geographical constraints), for what kinds of activities, how much can be provided, how the money is to be accounted for, whether any of it must be returned to the fund and under what terms, as well as the application/approval process. Based on these criteria, the IEA will create a Terms of Reference for the Fund which will be used to guide the administration of the fund by the IEA.

Once the Terms of Reference are agreeable both to the IEA and the donor organization, the IEA is deemed to have acquired authority to manage the fund in accordance with the said Terms of Reference and exercises independent judgment and freedom in the management of the fund. The IEA publishes details of the funds it manages in its brochures, newsletters and other instruments.

The IEA establishes a bookkeeping account in which fund contributions are held. Interest earned is credited to the account. Fund activity is monitored and reported in the IEA financial statements.

Once a fund is created, the assets thereof belong to the IEA. Funds remain active so long as there is money in the fund. Once all the money is depleted, the donor organization is notified that the fund will expire within 6 months unless additional amounts are received to replenish the fund.

## Application to Create IEA Fund

Name of donor organization:
Name of Fund:
Amount contributed:
Method of fund replenishment, if any (e.g., annual contributions):
Main objective(s) of Fund:
Criteria: <ul style="list-style-type: none"><li>• Eligibility of applicants (recipient qualifications, geographical constraints)</li><li>• Specify activities to be included</li><li>• Maximum amount, if any, that can be provided at any one time</li><li>• Method of accounting for money by recipient</li><li>• Does any of it have to returned be returned (e.g., seed money) and specify terms</li><li>• Application/approval process criteria</li><li>• Other criteria:</li></ul>