



OLD WORLD - NEW WORLD
ONE WORLD

INTERNATIONAL ERGONOMICS ASSOCIATION

July 1994

PRESIDENT'S REPORT

for

IEA Annual Meeting of Council
Toronto, Canada, August 13-14, 1994

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At the beginning of my term as President, the Executive Committee and I set several major goals for the forthcoming three year period (8/91-8/94). These were as follows:

1. To greatly expand our involvement in supporting ergonomics in industrially developing countries.

As a portion of this effort, through the personal involvement of the President, to develop stronger ties with organized ergonomics societies in South America, Africa, Eastern Europe, and the Asian mainland.

2. To increase our federated society membership by at least two societies per year; and to add additional affiliated societies. Also, for the first time, to bring in sustaining members.

3. To continue to develop our active involvement in planning, organizing and promoting international ergonomics conferences; and for our Science and Technology Technical Groups also to become more involved in the planning of the technical program for the IEA Triennial Congress.

4. To strengthen our ties and involvement with the ILO, WHO, and the United Nations science and technology function.

5. To play a proactive role in harmonizing professional standards internationally (i.e., certification, educational guidelines and accreditation, codes of ethics/conduct).

6. Through the personal involvement of the President, to greatly increase awareness of the IEA and ergonomics internationally among member and potential member societies.

In my opinion, as summarized below, we have done remarkably well in meeting or exceeding these goals.

Part 1: IEA Accomplishments Over the Past Three Years

The past three years have been by far the most active in the history of the IEA. A brief summary of some of the major activities and accomplishments during this period are as follows.

Growth

During the past three years, the IEA has grown from 18 Federated and 1 Affiliated Member to 26 Federated, 2 Affiliated, and 1 Sustaining Member. At our 1994 Annual Council Meeting, we will consider at least three additional completed applications for Federated Member status. Should all three be approved, we will have grown from 19 to 32 member organizations, or by approximately 2/3rds since our Paris meeting three years ago.

In terms of society members, in 1991 there were 9,897 dues paying members among the IEA Federated and Affiliated Societies. Just two years later, in 1993, there were 13,423 members (source: IEA Treasurer's Reports). I anticipate that, as of the 12th Congress, we will be approaching 15,000 members among our member societies, or a 50% increase since 1991.

Policy and Planning

Major accomplishments in this area included the following.

1. The IEA Basic Documents were extensively updated and expanded, including researching and expanding the IEA History section.
2. A very comprehensive and extensive survey of the IEA Federated Societies was completed, and the data summarized. These data will be briefly summarized during the 12th IEA Congress. A more extensive report is in preparation for publication. This report will provide a far more complete picture of ergonomics internationally than has ever existed. It should be invaluable to the IEA and its member societies for future planning. It is intended to provide a sound basis for the development of an IEA strategic plan.
3. Guidelines were developed for use by Council in selecting host Societies for the IEA Triennial Congresses.
4. Guidelines and procedures for IEA sponsored conferences were developed.

5. A several studies relevant to future policy and planning were conducted at the direction of either Council or the Executive Committee (e.g., IEA Council representation criteria; biennial versus triennial Congresses).

6. A workshop was planned and will be conducted for new Council Members prior to the 1994 Council Meeting.

7. A new IEA Historian (Prof. Brian Shackel) was appointed, and a comprehensive history of the IEA and international ergonomics is in the initial stages of research and preparation.

Education and Training

The IEA became truly active in the E & T area during this three year period. Included are the following accomplishments.

1. An E.& T subcommittee actively coordinated international harmonization of professional certification standards and education and training guidelines (including accreditation). Included was the planing, organizing and conducting of an IEA conference on these topics in Palermo, Italy in October 1993 with the generous financial support of the Italian Ergonomics Society. This was followed by planing and organizing a two-day symposium on professional standards which is to be held in conjunction with the 12th Congress. This effort has greatly facilitated the process of working towards international harmonization of ergonomics standards and guidelines for professional certification and education programs.

2. A guideline document on professional ethics/practice was researched and drafted for use by ergonomics societies interested in developing their own code.

3. Together with the S & T Committee Technology Transfer TG and the ILO, an "Ergonomics Checkpoints" manual was developed for publication by the ILO in several languages. A group of internationally distinguished ergonomists voluntarily authored the book without financial remuneration. The book is designed to function as a handbook and provide very basic "how-to" ergonomics knowledge to supervisors and others in both industrialized and industrially developing countries. It includes 128 different "checkpoints"; each with concrete procedures and illustrations for applying ergonomics principles, guidelines, and data. Included are such areas as improving workstation design, materials storage and handling, welfare facilities, productive machine safety, lighting, premises, control of hazardous substances, and work organization. Many of the checkpoints were tested in South-East Asia as part of an IEA-ILO "roving" seminar (see below). I believe this book has immeasurable potential for enhancing the application of ergonomics in the industrially developing world. A printed announcement of the Checkpoints publication has been prepared by the ILO and will be distributed to all attendees at the 12th Congress.

4. Together with the ILO, a "roving" seminar pilot project was planned, organized and conducted at two South-East Asian locations in collaboration with the South-East Asian Ergonomics Society. The purpose of the seminars was to enhance the ergonomics capability of personnel in the host countries. Two internationally distinguished ergonomists with extensive South East Asian experience volunteered their time to conduct the seminars without financial remuneration. Travel expenses were borne jointly by the IEA and ILO. A major portion of the funds for the IEA part of the expense was provided from funds to support industrially developing countries established by both the Australian and United States societies. Follow-on projects of this type are now in the planning stages for other industrially developing regions of the World.

Science and Technology

1. The number of technical groups (TGs) was expanded from 12 to 16, and more of them have become truly active. One TG, Power Systems, has taken on a considerably expanded and proactive role.
2. Guidelines were expanded and refined for organizing and hosting IEA Congresses.
3. A "Manual for IEA Technical Groups" was developed which outlines the objectives and procedures for Technical Groups.
4. Guidelines and procedures for IEA sponsored international conferences were developed.
5. An extensive effort was carried out to establish a working relationship with the United Nations Science and Technology function. Included were meeting with U.N. officials, formal information briefings on the IEA and the field of Ergonomics for U.N. officials, and attendance at U.N. S & T meetings.
6. Three detailed IEA S & T project proposals were developed and have been submitted for possible U.N. funding (see S & T Committee report to Council, and attachments, for details).
7. Applications for NGO status (cat. 2) with the U.N. Economic and Social Council (ECOSOC) and UNESCO for Category "B" (later changed to "C" by UNESCO) relationship were completed and submitted in January '94 and November '93, respectively. We anticipate a response on both applications by the time of the Toronto Council Meeting.
8. In addition to the 12th IEA Congress, A total of 19 international conferences, or more than five per year, were sponsored by the IEA (including two to be held in 1995). The S & T committee and various IEA Council members played, or are playing, a direct formal role in the planing, organizing and presenting of five of these conferences: The IEA World

Conference on Materials Handling, Warsaw, June '93; Ergonomics in Russia, the Other Independent States, and Around the World, St. Petersburg, June '93; The IEA Conference on Education, Accreditation and Certification, Palermo, October '93; The Fourth International Symposium on Human Factors in Organizational Design and Management (ODAM'94), Stockholm, May '94; and the IEA Conference on the Ergonomics of Quality Manufacturing, Buffalo, NY, 1995. I have been extensively involved in the planning and organizing of three of these conferences and, to a lesser extent, in several others. I have directly participated in 11 of the 19, plus three other major conferences. One or more other members of Council also have been involved in most of these IEA sponsored conferences. Finally, in conjunction with the 12th IEA Congress, the IEA E & T committee has organized a two day symposium on harmonizing professional standards (education & accreditation, certification, and codes of ethics/conduct) and several IEA TG's have organized other special symposia.

Publications

1. In addition to our long-standing relationship with Taylor & Francis, and with its Journal, "Ergonomics" as the official journal of the IEA, relationships were established with other major publishers of ergonomics books and journals. For example, both Butterworth and Elsevier now give a substantial journal discount to any person belonging to an IEA federated society.
2. A new, more comprehensive and useful IEA Brochure was prepared and published.
3. The development of an address list for libraries in industrially developing countries was initiated. An initial listing is now available for persons wishing to donate ergonomics books and journals. Using this list, several persons already have made major donations.
4. An extensively updated 3rd Edition of the IEA "International Directory of Educational Programs in Ergonomics/Human Factors" has been completed; it should be available for distribution at the 12th IEA Congress in Toronto.
5. "Ergonomics International", the IEA newsletter, has been somewhat expanded and the hard copy address list updated. Of particular note, Ergonomics International now is available to IEA federated society members electronically via E-mail. This capability already has significantly expanded its readership.

Promotion and Public Relations

In addition to P & PR activities implicit in many of the activities and accomplishments, noted above, several other specific P & PR projects also have been under development. Of particular note is the design and production of an IEA portable table-top display for use at IEA and federated society sponsored

meetings and conferences. It is anticipated that this display will make persons more aware of the IEA and its activities. It also will serve as a display for distributing brochures, calls for papers, and other information on IEA sponsored conferences.

Part 2: Activities of the President

General Activities

The routine activities of the President involve working closely with the other members of the executive committee - particularly on matters of planning and policy, or when a "command decision" is required. The President also follows-up with these persons to insure that their functions are being accomplished according to plan; and to be of assistance when ever possible.

A second type of routine activity is that of responding to letters, faxes and phone calls concerning IEA or other international ergonomics activities, and to respond to a wide variety of questions about ergonomics. In this regard, the activities of the President somewhat parallel those of the Secretary General, who also receives similar inquiries.

Collectively, the above activities involve responding to about 50 letters, faxes and phone calls per month.

Public Relations

One of the major formal duties of the President is to personally promote the IEA and ergonomics internationally. The primary way of doing this is through active participation in IEA and other international ergonomics meetings and conferences. During the past three years I have given keynote or other invited plenary presentations at 11 of the 17 IEA sponsored international ergonomics conferences. In addition, I gave an invited plenary address at the 2nd Latin American Ergonomics Congress in Florianopolis, Brazil in October 1993, a banquet address at the Annual International Industrial Ergonomics and Safety Conference in Denver, Colorado in June 1992, and participated in an invited panel session on international ergonomics at the HFES annual meeting in Atlanta, GA in October 1992. I will be the invited keynote speaker at the 5th Conference of the ESA (Ergonomics, Southern Africa'94) at Rhodes University in Ghramstown, SA. in September. In October, I will give an invited plenary presentation at the IEA sponsored WWDU'94 conference in Milan, Italy. I also will be an invited guest speaker at both the IEA sponsored Third Pan-Pacific Conference on Occupational Ergonomics in Seul, Korea in November and the Ergonomics Summit Meeting in Japan in February 1995. Travel expenses for all of the above were, or will be funded primarily by the host organizations.

I also have directly and extensively participated in the planing and organizing of three IEA sponsored conferences and, to a

lessor extent, in several others. I have been an active participant in the 12th IEA Congress International Advisory Committee; and have been involved in some of the early planning for both the 13th and 14th IEA Congresses.

A new activity which I initiated was that of a regular "President's Column" in the IEA Newsletter, "Ergonomics International". At least two of these articles, which dealt with the structure and activities of the IEA, were picked up and published as a feature articles in several federated societies' newsletters.

Finally, I (along with our Secretary General, Pieter Rookmaaker) met with our primary contacts at both ILO and WHO in Geneva, and participated in the Executive Council meetings of several of our Federated Member societies.

Awards Committee

Another major activity of the IEA President is to organize and Chair the Awards Committee. With the expansion of the IEA awards from one to five categories, this has become a much more time-consuming activity - particularly during the third year of the President's term. All toll, it involves (a) generating about fifty pieces of correspondence and distributing each to from two to about 30 different addresses, (b) supervising the nominating, balloting and selection process, (c) preparing the awards and the accompanying citations, and (d) having the award plaques commercially made.

In addition, I (a) developed formal procedures for the conduct of the IEA Awards Committee, and (b) prepared the statement of the Awards Committee objectives, policies and procedures for the IEA Basic Documents.

I am pleased to note that for the five 1994 triennial awards, 23 persons were nominated. Nominations were received from over half of the IEA federated societies. Several persons were nominated by more than one society. The nominees for each award were all well qualified, which made the work of the Awards Committee difficult. In fact, the balloting for two of the awards was very close. As a result of this experience, the Awards Committee is recommending to Council that its rules be changed to allow for presentation of more than one award in a given category when the voting is very close. *This is an action item for our Toronto Council Meeting.*

The persons recommended by the Awards Committee were all formally approved by the Executive Committee. They are as follows: Distinguished Service Award, Harry L. Davis (USA); Founders Award, Karl U. Smith (USA); Technology Transfer Award, Houshang Shanavaz (Sweden); Outstanding Educators Award, Walter Rohmert (Germany); Ergonomics Development Award, Jacques Leplat (France).

The Awards Committee consisted of three IEA past Presidents, Ilkka Kuorinka, Harry Davis, and Sadao Sugiyama; the immediate past Treasurer and current Historian, Brian Shackel; and myself as Chair. Individual committee members did not vote on any award for which they, themselves were nominated. The committee members' willingness to serve is greatly appreciated by myself, and I have thanked them for the fine job that they did in making their selections.

At my recommendation, a new "President's Award" was created last year by Council for the purpose of enabling Council to recognize outstanding contributions to international ergonomics which do not fit our current awards criteria. No names have been put forward by Council or by the Executive Committee for this award for 1994 - probably because of the relatively short lead time since the award was established. I would encourage Council to think about possibly deserving individuals for this award for 1997.

Recently, I received a proposal from Dr. Tom Smith, son of K.U. Smith, to establish an IEA education scholarship in the name of the late Professor K.U. Smith, this year's IEA Founders Award recipient. Funds for this award are to be raised by the former students of Professor Smith. *This is an action item for our Toronto Council Meeting.*

Part 3, Special Acknowledgements

I would like to acknowledge to Council the generous financial assistance that was provided by the Societa Italiana di Ergonomia in support of the IEA Palermo conference on harmonizing ergonomics education and certification standards. This has proven to be a highly significant step in the path towards international harmonization of professional standards and guidelines; but it would not have been possible without the encouragement and financial support of the SIE.

At the risk of overlooking others who may be equally deserving of recognition, I want to acknowledge to Council the extraordinary volunteer effort of several persons on behalf of the IEA and its projects. Those persons are as follows.

IEA-ILO "Checkpoints"

I want to thank The editors and authors of the "Checkpoints" for their voluntary contributions. This project required a great deal of their valuable time and expertise for the kind of activity for which they would normally be compensated. These persons, in alphabetical order, are as follows.

Martin Helander - author
Andrew Imada - author
Hamid Kavianian - author

Karl Kreomer - author
Ilkka Kuorinka - IEA project supervisor and editor.
Tuulikki Kuorinka - editor
Kazutaka Kogi - ILO project supervisor, editor, and author.
Stephen Konz - author
Najm Meshkati - Expert Committee Chair and author.
Houshang Shahnavaaz - author
Wolfgang Laurig - author

IEA-ILO Roving Seminar

Two internationally distinguished ergonomists, both of whom are highly experienced in working in South East Asia, volunteered their time to assist with the planning and curriculum development; and then actually served as the international instructors for the IEA Roving Seminar, which was given in Indonesia and Thailand. They were Kamiel VanWanterghem for the IEA and Kazutaka Kogi for the ILO. Kitti Intaranont and Adnyana Manuaba served as the local organizers in Thailand and Indonesia, respectively, and also taught part of the seminars. The IEA and ILO jointly paid the travel and logistical expenses, but all instructor time was voluntary. I wish to personally acknowledge to you the unselfish contributions of these colleagues.

IEA Committee Chairs

The many accomplishments of the IEA during the past three years may be traced directly to the outstanding work of the IEA Standing Committee Chairs, and to a number of their subcommittee and technical group Chairpersons. Their individual contributions are evident in the accomplishments within their respective areas of responsibility, many of which I cited above. We owe them a great deal of thanks for their many hours of talented leadership and hard work.

IEA Officers

I, personally, and the IEA in general have been extremely fortunate to have had two such highly talented and devoted persons serving as our Secretary General and Treasurer. The day-to-day operations of the IEA have never been in better hands. I wish to thank both Pieter Rookmaaker and Ian Noy for their truly outstanding support.

IEA Council

Finally, I wish to personally thank the IEA Council for your collaboration and support, and for making the past three years so enriching for me personally. In spite of our increased size, I do not believe we have ever had a more collaborative and effective Council during my 14 years of direct participation. The science and practice of ergonomics internationally is the direct beneficiary of your commitment and effectiveness.

Annual Report Secretary General
(1993-1994)

1. Secretariat: Introduction

One of the main tasks of the Secretary General is the attention for the secretariat, staffed by Mrs. Linda Krokké since 1991. Though a lot of work is realized by Mrs. Krokké, the Secretary General always has the final responsibility and must also take the necessary initiatives. He also has to plan actions according to the time schedules, prescribed in the IEA Basic Documents.

1.1 Output/Input Mail

In the period '93-'94 about 250 letters/faxes were received; about the same amount were sent off; the majority to the Executive members and councillors, member societies, international organizations related with IEA, external organizations and individuals.

Some 3000 copies of the updated IEA brochure were shipped mostly to member secretariats and organizers of IEA endorsed meetings. Some books, donated by IEA, were also shipped.

1.2 Storage of Proceedings

According to the IEA Basic Rules 11 copies of IEA endorsed meeting proceedings must be forwarded to the Secretary General secretariat. In the period '93-'94 the proceedings of the WWDU '92/Berlin and HCI '93/Orlando were received. The system of balanced distribution is not yet optimal and is subject for discussion in the Executive.

1.3 Special Documents

A considerable time is always needed for the preparation and follow up of the regular activities.

In this period attention was asked for Executive meetings in Warsaw ('93), in Orange County (January '94) and in Toronto (August '94) (agenda, documents, actionlist). In the same period the follow up of the Warsaw Council (minutes, updated documents) and the preparation of the Toronto Council (draft agenda, documents) was required. The updated version of the IEA Basic Document (Current June '94), prepared by the chair Policy & Planning, was edited and multiplied. Editions of the IEA addresslist were prepared and forwarded to the councillors and member secretariats.

2. Secretary General Matters

2.1 IEA Membership

Since the '93-Council 4 applications for the IEA federated membership were received (Hellenic Ergonomic Society; Portuguese Association of Ergonomics; Slovak Ergonomic Society; Ergonomic Society of Southern Africa); 1 for IEA affiliated membership (Irish Ergonomic Society) and some others (All-Ukrainian Ergonomic Society; Turkish Ergonomic Society) are seriously considering an application for membership.

Matters about membership are often rather time consuming and sometimes related with political issues (e.g. Association Ergonomic Society of Yugoslavia).

2.2 NGO-Membership and others

An application for a category B-membership was submitted at UNESCO. Recently we were informed about a negative decision by the Director General (major activities of IEA do not correspond to those of UNESCO; the geographical extension of the IEA membership is insufficient). We are now discussing next steps.

The application for NGO Status, Category 2 with ECOSOC was granted.

2.3 Meeting with ILO/UNCTAD; Geneva Febr. 18th 1994

Together with prof. Luczak the Secretary General had talks both with ILO (dr. Pinnagoda e.a.) and UNCTAD (dr. Roffe e.a.) in Geneva as a continuation of a visit paid by the President and the Secretary General in 1991. Aim of the most recent meeting was to discuss the follow up of the Check Point Book and the Roving Seminars (ILO) and the possible cooperation in projects and other activities, funded by UNCTAD. Both persons (dr. Pinnagoda and dr. Roffe) were invited to visit the Toronto Council Meeting in order to give an address. Unfortunately both have apologized for absence.

2.4 CREE-Meetings attendance

The Secretary General is invited to attend the CREE (Center for Registration of European Ergonomists)-meetings as official observer. In this period 3 board meetings took place. Procedures, by-laws, day-to-day functioning were discussed. The real registration of the first Eur. Erg's is foreseen to take place before January 1995.

D.P. Rookmaaker
Secretary General
August 1994

1.3 To



International Ergonomics Association Report of the Treasurer

(revised July 27, 1994)

Including:
Financial Statements, 1993
Schedule of Dues Received
Mid-Year Report
Equity History

Y. Ian Noy, Ph.D.
IEA Treasurer



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INTERNATIONAL ERGONOMICS ASSOCIATION

July 27, 1994

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To: Members of the IEA Council

I am pleased to submit the Report of the Treasurer, attached hereto, comprising;

1. Financial Statements for the year ended December 31, 1993, including Balance Sheet, Statement of Revenues and Expenditures, Notes, and Statement of Changes in Reserves and Funds 1
2. Schedule of Dues Received and Outstanding 7
3. Mid-year report and operating budget as at June 30, 1994 8
4. Chart depicting the IEA equity history 9

I look forward to presenting this report to the Council at the August meeting in Toronto.

Respectfully submitted,

Y. Ian Noy, Ph.D., P.Eng
Treasurer

**International Ergonomics Association
Balance Sheet
For Year Ended December 31, 1993**

	0.72		1,993	1,992
	CHF	USD	Total S	Total S
ASSETS				
Current Assets				
Cash Accounts (Hongkong Bank of Canada)	37,954	26,922	54,249	31,741
Term Deposits 46,061 (CDN)			38,314	36,999
	<u>37,954</u>	<u>26,922</u>	<u>92,563</u>	<u>68,740</u>
Seed Funds Receivable		19,043	19,043	22,614
	<u>37,954</u>	<u>45,964</u>	<u>111,605</u>	<u>91,354</u>
EQUITY				
ESA Fund for Conf. in Ergon. in South East Asia	11,305		8,139	8,312
SELF Fund		17,572	17,572	
HFES Fund for Ergon. in Dev. Countries		767	767	829
Loans Reserve		35,000	35,000	35,000
Cash Reserve 46,061 CDN	26,650	-7,375	50,127	47,213
	<u>37,954</u>	<u>45,964</u>	<u>111,605</u>	<u>91,354</u>
	<u>37,954</u>	<u>45,964</u>	<u>111,605</u>	<u>91,354</u>

International Ergonomics Association
Statement of Operations
For Year Ended December 31, 1993

	0.72		1,993	1,992
	CHF	USD	Total \$	Total \$
REVENUE				
Membership Dues	11,036	20,523	28,469	35,334
Capitation Fees				20,716
Interest	794	240	812	3,886
ILO Checkpoints				8,000
SELF Fund		17,572	17,572	
Contributions towards HFS Fund		414	414	829
Misc.				50
	<u>11,830</u>	<u>38,748</u>	<u>47,266</u>	<u>68,815</u>
EXPENDITURES				
Executive & Administrative Expenses				
Office-related expenses	2,391	216	1,938	7,637
Travel	5,785	1,935	6,100	15,126
Clerical	1,497		1,078	1,731
Committees				
Policy & Planning		2,263	2,263	2,875
Science & Technology	2,356	1,184	2,880	1,042
Education & Training		4,850	4,850	5,076
Roving Seminar		3,400	3,400	
Publications				1,655
Brochures				
Newsletter		1,100	1,100	1,371
Promotions & Public relations				
Awards				
Loss (St. Petersburg conference)		330	330	
Meeting costs	4,523	-35	3,222	4,277
Bank charges	120	227	313	243
Miscellaneous				9,666
	<u>16,672</u>	<u>15,470</u>	<u>27,474</u>	<u>50,698</u>
OPERATING SURPLUS (DEFICIT)	<u><u>-4,842</u></u>	<u><u>23,278</u></u>	<u><u>19,792</u></u>	<u><u>18,116</u></u>
Assets at beginning of year	42,796	22,686		
Assets as at end of reporting period	37,954	45,964		

International Ergonomics Association
Statement of Changes in Reserves and Funds
As at December 31, 1993

	Credits	Debits	Balance
Cash Reserve (USD)			
Balance at start of year			47,213
Operating surplus	19,792		
ESA & HFES transfers for Roving Seminar	1,000		
Gain due to change in CHF/USD exchange	684		
Transfer to HFES Fund		438	
Transfer to ESA Fund		552	
Transfer to SELF Fund		17,572	
Balance at end of period			50,127
Loans Reserve and Receivable (USD)			
Balance at start of year (available)			12,386
Amount forgiven SEA - St. Petersburg	330		
1993 World Conf. Material Handling	6,000		
IES Conf - Palermo		4,043	
SEA Conference - St. Petersburg	3,644	2,360	
Balance at end of period (available)			15,957
Receivable IEA'94	15,000		
Receivable SIE - Palermo	4,043		
Receivable			19,043
Value			35,000
ESA Fund for Conf. in Ergon. in South East Asia (CHF)			
Balance at start of year			11,232
Interest	767		
Paid to IEA for Roving Seminar		694	
Balance at end of period			11,305
Receivable			11,305
Value			11,305

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

Balance at start of year			829
Paid to IEA for Roving Seminar		500	
Interest	24		
HFS Contribution	414		
Balance at end of period			<u>767</u>
Receivable			<u> </u>
Value			<u><u>767</u></u>

SELF Fund for Ergon. in Dev. Countries (USD)

Balance at start of year			
SELF Contribution	17,572		
Balance at end of period			<u>17,572</u>
Receivable			<u> </u>
Value			<u><u>17,572</u></u>



Notes to 1993 year-end report

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

2. The IEA fiscal year-end is December 31.
3. 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.
4. 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.

5. Advances to officers are treated as expended items in the Statement of Operations when paid. However, they are tracked separately

Summary of Financial Performance

6. Despite a projected deficit for 1993, there was an operating surplus, resulting in an increase in the IEA cash reserve.
7. The IEA financial position has sustained continuous growth over the past several years. Membership fees have generally covered the cost of operations, with real growth attributable primarily to capitation income. As a result, no membership fee increases are proposed at this time. The last rate increase occurred in 1986.
8. A substantial grant was received from the SELF to support the development of ergonomics in industrially developing regions. The amount contributed by SELF towards this fund was FF 100,000 (equivalent to US \$17,572).
9. The IEA organized, through the Education & Training Committee, roving seminars in South East Asia. This joint IEA-ILO test project was successful and future projects are being considered for Africa and/or South America. The cost to the IEA was US\$ 3,400, \$1,000 of which was provided from the ESA and HFES Funds.
10. The St. Petersburg conference ran a slight loss. The IEA forgave the seed money outstanding, in the amount of US\$ 329.89, as well as the capitation fee for foreign delegates.
11. In accordance with Council's decision during the Warsaw meeting, the IEA has advanced a loan to the Società Italiana di Ergonomia in the amount of \$4,043 to help with the organization of its 5th national congress in Palermo, during which a special IEA symposium on "Ergonomics for Quality Practice: Ergonomics Education, Accreditation and Certification" was held. This amount is to be returned to the IEA.

Proposal: Waving IEA Capitation fees policy:

Capitation fees from IEA-supported conferences represent an important source of revenue for the IEA. It is proposed, however, that "upon specific application by the organizers of an IEA-supported conference, the IEA Executive Committee may, at its discretion, wave the capitation fees for delegates from industrially developing countries (to be designated). This waver, once granted for a given conference, will only be valid provided that the registration fees for the designated delegates are reduced accordingly. Notwithstanding, capitation fees for all other delegates continue to be payable."

International Ergonomics Association
Mid-Year Balance Sheet
As at June 30, 1994

	CDN	@ 0.66 CHF	USD	1,994 Total S
ASSETS				
Current Assets				
Cash Accounts (Hongkong Bank of Canada)		31,373	36,697	57,403
Term Deposits (CDN\$)	46,703			37,362
	<u>46,703</u>	<u>31,373</u>	<u>36,697</u>	<u>94,765</u>
Seed Funds Receivable			19,043	19,043
	<u>93,406</u>	<u>31,373</u>	<u>55,740</u>	<u>113,808</u>
EQUITY				
ESA Fund for Conf. in Ergon. in South East Asia		11,305		7,461
SELF Fund			17,572	17,572
HFS Fund for Ergon. in Dev. Countries			2,116	2,116
Loans Reserve			35,000	35,000
Cash Reserve	46,703	20,068	1,052	51,659
	<u>46,703</u>	<u>31,373</u>	<u>55,740</u>	<u>113,808</u>

International Ergonomics Association
Mid-Year Financial Report
As at June 30, 1994

	0.66		1,993	US\$
	CHF	USD	Total \$	Budget
REVENUE				
Membership Dues	1,186	13,715	14,498	30,000
Capitation Fees		1,470	1,470	22,000
Interest	289	247	438	800
Interest on CDN Certificate	642		513	
Contributions towards HFES Fund		1,349	1,349	
Royalties (Taylor & Francis)	613		405	
	<u>2,088</u>	<u>16,781</u>	<u>18,673</u>	<u>52,800</u>
EXPENDITURES				
Executive & Administrative Expenses				
Office-related expenses	3,105	361	2,410	5,205
Travel	3,213	782	2,902	8,964
Clerical	1,224		808	2,435
Committees				
Policy & Planning		650	650	2,400
Science & Technology		1,226	1,226	3,775
Education & Training		1,494	1,494	5,100
Directory		1,000	1,000	
Publications	1,129	156	901	1,700
Newsletter		100		1,300
Brochures				1,500
Promotions & Public relations		156	156	2,000
Awards				
Meeting costs		1,051	1,051	4,500
Bank charges		30	30	500
ILO Checkpoints				
Miscellaneous				
	<u>8,669</u>	<u>7,005</u>	<u>12,627</u>	<u>39,379</u>
OPERATING SURPLUS (DEFICIT)	<u>-6,581</u>	<u>9,776</u>	<u>6,046</u>	<u>13,421</u>
Assets at beginning of year	37,954	45,964		
Assets as at end of reporting period	31,373	55,740		

IEA Equity History

