

PROPOSAL to PNW Membership

for consideration as a strategy/recommendation

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Situation:

Accurate, consolidated regional financial reporting remains difficult. Chairs, treasurers, and the bookkeeper struggle to coordinate and stay current. At the same time, we face another leadership transition, fewer available volunteers, possible major expenses, and potential changes to region-owned property.

Background:

Close coordination among the PNW Region and the Portland and Seattle Centers is essential to protect nonprofit status and meet the Region's oversight responsibilities under Subud governance. Because they share one tax-exempt ID, the Region must ensure sound financial management across all entities.

This requires clear, transparent records for facilities, rental and enterprise income, donations, tax exposure, restricted funds, and ongoing profit and loss. Consolidated accounting, CPA guidance, and bookkeeping support have improved oversight, but the system remains hard to sustain.

Assessment:

With fewer volunteers, an aging membership, and limited specialized skills, Subud PNW lacks the capacity to sustain critical operations. Too few people are available to take on or learn roles such as bookkeeping and website management. Selective outside support can provide continuity, stability, and needed expertise, and our experience shows it can work well within Subud.

Recommendations:

- 1) Continue CPA oversight of consolidated regional accounting and the three treasurers, with active involvement from the PNW, PDX, and SGS chairs. Shelly Rogers understands our organization and offers affordable expertise to help manage the complexity ahead.
- 2) Add external contract bookkeeping support to supplement, and if needed replace, the current in-house arrangement. Our CPA recommends this approach and can suggest qualified independent bookkeepers.