



**Executive Director's  
Fall Report to the  
Board of Directors**

October 4, 2025

Prepared by A.S. Engel

# Executive Summary

Coinciding with my one-month anniversary as the NSS's first Executive Director, I submit the NSS's first Executive Director's Report for the upcoming Fall meeting of the Board of Governors in Ely, Nevada.

The goal for my report is to provide an overview of big-picture activities within the Society, point to current and ongoing accomplishments within the divisions, note unmet goals and challenges, particularly as they pertain to the annual budget and strategic goals, and describe my high-level ongoing and future plans to help the divisions address their gaps and problems. Areas where the Board can contribute are highlighted throughout the report and summarized at the end.

In the past, Division Heads submitted separate reports to the Board. I will not change this procedurally because it is important for Heads to compile their progress, problems, and plans ("3Ps") and present this work to the Board. The division reports are provided to the Board as submitted to me. Some of the divisions may choose to amend their reports with more details prior to the Board meeting.

Lastly, I want to take the opportunity to thank the Board, Division Heads, department and committee chairs and members, grotto leaders, Preserve volunteers, and others for their commitment to the Society. The NSS depends on volunteers. What started in 1941 by a few cavers has now become the largest organization in the world dedicated to caves, caving, and cavers. Our collective enthusiasm for and dedication to the shared mission will ensure that the NSS will continue to thrive for generations.

Respectfully,

Annette S. Engel  
*Executive Director*

September 4, 2025



## MISSION

The National Speleological Society is a nonprofit organization dedicated to the protection of caves and their natural contents through science, conservation, ownership, stewardship, public education, and promoting responsible cave exploration and fellowship among those interested in caves.

# Strategic Plan Highlights



## SOCIETY PRIORITIES

- Increase membership
- Improve member retention
- Promote a welcoming environment for all cave enthusiasts



## STRATEGIC PRIORITIES

- Promote responsible and safe caving through education and training
- Educate the public and landowners about effective cave and karst protection practices
- Increase visibility and transparent communication
- Engage partners to advocate for responsible cave access, protection, acquisition, and management



## SOCIETY OPPORTUNITIES

- Cultivate legacy giving and grow donor opportunities
- Expand funding for research and exploration
- Optimize volunteerism

## Fellowship

The National Speleological Society has become the world's largest organization dedicated to cave exploration, conservation, and science since a small group of like-minded individuals founded the society in 1941. With over 8,500 members, 250+ grottos connect diverse caver-communities throughout the United States and internationally. The NSS hired its first Executive Director in 2025, after years of member-informed discussion and planning and following restructuring the Society's activities into seven Divisions – Membership, Communications, Conservation & Science, Education & Training, Facilities, Operations, and Accounting & Finance. The new leadership structure optimizes the Society's abilities to meet its strategic goals and ensure that the NSS will continue to thrive for generations.

## Communication & Education

As a global leader dedicated to cave exploration, conservation, and science, the NSS plays a critical role in the development and distribution of information about caves and karst through its publications, training programs, and educational resources. Recognizing that responsible caving starts with education, the NSS develops and improves training programs focused on caving and vertical techniques, as well as cave safety and rescue practices. Educating the public and private landowners about protecting caves and karst will be critical for the future of cave and karst conservation, restoration, and management efforts.

## Access & Conservation

The NSS is leading advocacy efforts to access caves for exploration, science, and conservation-minded recreation through its curated partnerships with land managers and conservation organizations. After decades of developing and applying acquisition and management practices, the NSS owns 19 Nature Preserves and manages four others. Increased funding for and promotion of NSS's conservation work will improve resource access, acquisition, and advocacy into the future.

## Scientific Study & Exploration

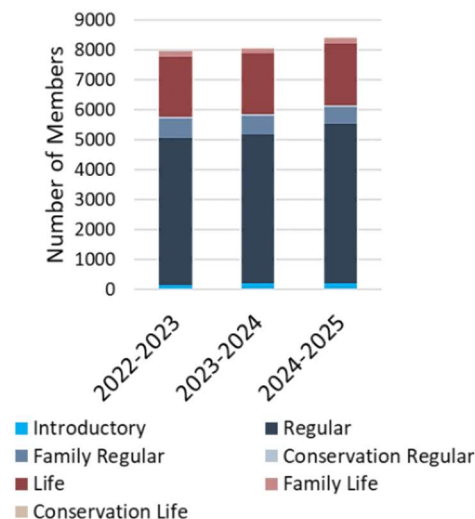
Without exploration, our understanding about caves and karst would be limited. Pursuing knowledge and promoting the responsible study and exploration of caves, their contents, and past uses are foundational tenets within our Society's mission. Through funding opportunities, the NSS advances knowledge, and its publications and resources educate its members, landowners, and the public about caves and karst.

# Society Snapshot

## Membership

Membership growth is evident. As of August 2025, membership increased by 5% from the previous year, and is up by 19% from five years ago. Overall member retention rate remains steady at ~70%. Life membership increased by 1.4% in 2025. Sustained membership growth and retention could push membership over 9,000 by next year.

### MEMBERSHIP GROWTH



## Operations – Human Resources

Hiring the new Executive Director (Annette Engel) in August 2025 increased the number of full-time NSS employees to three, adding to the Facilities Manager (Jarvis Scruggs) and the Bookstore and Membership Manager (Esther Crawford). The NSS has one part-time employee, the Secretary-Treasurer (Kristine Ebrey), and a part-time contracted bookkeeper (Michelle Kesler).

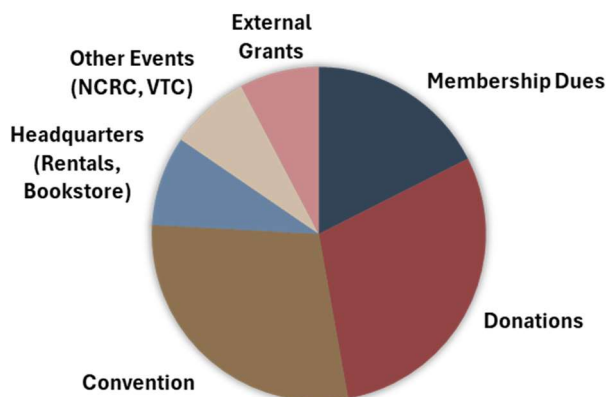
Before the next fiscal year, the NSS has the opportunity to increase the number of paid staff by hiring a Convention Bookkeeper and Event Planner. Review of how these positions can best serve the Society, and of modifications to their roles, are ongoing. Other opportunities to hire temporary/contract staff positions are also described in the report.

## Finances

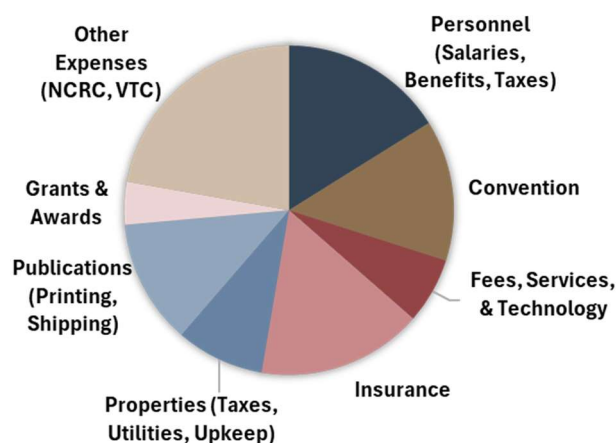
The NSS’s major income streams include Donations, Membership Dues, and the annual Convention. From April 1 until July 31, Society revenue totaled \$442,637.62 and was balanced against \$416,308.87 in expenses. Major expenses include Insurance, event costs (Convention, NCRC, and VTC), and Personnel. Accounting for expenses through July 2025 (four months of the fiscal year), the NSS has spent 37.4% of the FY25-26 budget.

Twenty investment funds with the National Speleological Foundation (NSF) total over \$4,480,000. Combined with other bank accounts and fixed assets (real estate, cave preserve lands), the NSS’s financial portfolio has reached \$14,354,631. Investment income places the Society in an excellent position of having a positive financial future. As of July 31, the NSS is operating with a net income of \$184,928.

### SOCIETY INCOME



### SOCIETY EXPENSES



# Communications Division Highlights

## Overview

The Communications Division oversees Media & Marketing, Publications, and Partnerships. For FY25-26, the Division's strategic goals are split into Marketing & Media, Publications, and Partnerships department.

## Marketing & Media

As of August 2025, several goals targeting fellowship and communication have been met, including development of onboarding materials for new division members, development of new and expiring member email notices, and publication of a monthly e-newsletter. Several tasks to meet goals are ongoing or have not started, such as those associated with the NSS website and marketing plans. Unmet goals are due to vacancies, such as department chairs for Social Media and Marketing, and from limited or insufficient volunteer time.

## Publications

The *NSS News* and public-facing *Journal of Cave and Karst Studies* require large teams of volunteers to produce consistent, high-quality work. The publications require proofreading, which has been outsourced to a contractor with the intent to speed up the process and improve quality. Manuscript review deadlines have also been set to encourage timeliness.

## Partnerships

Partnerships are important for the NSS because they help to educate the public and advocate for cave access. Several positions have been filled this year, including a liaison for the National Cave Association and Cave Preservation Network (CPN), which increased activity from show caves. The Executive Director recently found a liaison for the American Association for the Advancement of Science (AAAS), which has been vacant for years, is working with the Division Head to fill other vacant liaison positions with scientific societies, and is reviewing current and expired MOUs with partners.

## Adjustment to Division Composition

The Government Liaison Committee (GLC) was placed within this Division, as its main work is to develop agency partnerships. However, the chair position has been vacant. After committee actions during the summer, the Executive Director and Chair of the Board, in consultation with the Division Head, decided the **GLC should be under the Executive Director**. This should legitimize actions done by committee members on behalf of the NSS and facilitate MOU or MPA development with governmental groups and agencies.

## Challenges and Plans

Identifying volunteers to **fill vacant positions** has been challenging. Much of the Division's work is technical and time-consuming. This Division is currently the only one to **pay multiple contractors to accelerate progress**, including a proofreader that receives \$1000/month and a new contractor to assist with the NSS website restructuring, which is critical to improve user experience. Honoraria are also provided for the *NSS News* and *Journal of Cave and Karst Studies* editors for issues they produce. The current budget can handle these expenses, but future requests will need to follow a prioritization plan that aligns with strategic goals.

## KEY PERSONNEL

**Division Head: Jolene Creighton**

*NSS News* editors:

Adam Weaver (Production)

Joel Despain (Managing)

*Journal of Cave & Karst Studies*:

Malcolm Field (Editor-in-Chief)

Scott Engel (Production)

*American Caving Accidents*:

Adia Sovie (chair)

Special Publications

Email & Newsletter Department:

Jay Mrazek (head)

Website Department

Government Liaison Committee:

**Chair, vacant**

Partnerships & Misc. Liaisons

# Education & Training Division Highlights

## Overview

The Education Division has two departments, Training and Education. Most of the Division's current activities focus on programs delivered by the National Cave Rescue Commission (NCRC) and the Vertical Training Commission (VTC). The Division's goals focus on hosting and expanding the programs and reestablishing different committees to fulfill needs.

## Education

This Department Head position remains vacant, as is the SpeleoGuest Coordinator position. Department activities have been limited to the Webinar program and providing financial support for various educational activities. Two awards totaling \$1,565 have been given thus far.

## Training

The Safety & Techniques Committee was reestablished, which completed one of the division's strategic goals; two co-chairs were appointed. There is high demand for the NCRC Small Party Assisted Rescue (SPAR) courses, compared to larger and more frequent Orientation to Cave Rescue (OCR) courses, but there are fewer SPAR instructors (only 8-9 are qualified).

Since April 1, the NCRC has held courses for:

- 135 instructors and 280 students (19 receiving scholarships)
- 9 separate NCRC courses, including at the National Seminar in July
- 9 additional NCRC courses are planned for the rest of the year

The VTC held:

- 9 Level 1 courses, attended by 103 students
- 2 Level 1 Trainer courses for 16 trainer candidates

## Challenges and Plans

Since the Division was established, identifying volunteers to **fill vacant positions** has been challenging. The Division would like to expand their programming, such as teaming up with CaveSim for outreach events and coordinating with other divisions (e.g., Conservation & Science), but the department needs more volunteers.

The Executive Director is working with the Division Head to **develop position descriptions** for the Education Department Head and other positions that will be advertised on the NSS website; the hope is to fill the positions by the start of FY26-27. The Executive Director also recently met with the National Cave and Karst Research Institute's (NCKRI) Executive Director to discuss potential ways that both organizations could coordinate education and outreach activities and resources, even if the NSS's department position continues to remain vacant. The goal would be to **develop an MOU between the NSS and NCKRI** that would benefit the Education and Training Division, help a future Department Head, and accomplish NSS's strategic goals related to education Society-wide. Once drafted, the MOU will be sent to the Board for approval.

The demand for NCRC and VTC training programs is quite high, as are their expenses, specifically for insurance and gear replacement. The division's FY25-26 budget is only 7.1% of the overall operational budget for the NSS, and the Executive Director will work with the Division Head to plan for **future cost increases**.

## KEY PERSONNEL

**Division Head: Tim White**

Training Department:  
Tim White (head)

NCRC National Coordinator:  
Gretchen Baker

VTC National Coordinator:  
Ron Miller

Safety & Techniques Committee

Education Department:  
**Head, vacant**

Education Grants & Scholarships

Brochures & Display Team

Webinar Team  
Jenna Crabtree (chair)

SpeleoGuest Coordinator,  
**vacant**

# Conservation & Science Division Highlights

## Overview

The Conservation & Science Division is large and consists of many active committees and subcommittees. The work of this division touches all aspects of the NSS's Strategic Plan. The division is separated into three departments: Conservation, Cave Management, and Cave Science.

## Conservation

As of August 2025, this department was still working on meeting some strategic goals, including video production for various conservation and restoration topics. One of the department's ongoing tasks is to develop and release a Volunteer Value form online to track volunteerism associated with conservancy and preserve activities. This is important.

## Cave Management

As of June 2025 (Convention), all of the NSS Nature Preserves have been participating in the online permit system, and over 1,200 permits had been issued to date. Each Nature Preserve has a management plan, and the permit system continues to be adjusted to fit each preserve's needs. One of the department's ongoing goals is to develop and improve special use guidance. Work to research and evaluate prospective acquisitions continues in several states. Risks to Preserves are assessed frequently and legally-advised communications are sent when needed. Two key goals were completed:

- Implementation of a process to receive and pay property taxes and secure exemptions if necessary
- Production of an *NSS News* issue dedicated to the NSS Preserves. Although published in May 2025, positive feedback continues.

## Cave Science

Scientific research and U.S. and International exploration grants were awarded through the Research Advisory Committee and by committees for each award. Financial support from the Cave Conservancy Foundation increased the amount of funds for International grants from \$4,350 to \$9,850. Several committees within the department have one or only a few volunteers, which has slowed or delayed meeting some goals to date, such as updating website content related to scientific disciplines and completing the revisions to the White Nose Syndrome policy document.

## Challenges and Plans

**This division's portfolio is expansive**, and the department heads are extremely dedicated to their work for the NSS. The Executive Director will continue to work with this division to **advertise for volunteers** to fill positions, particularly the Head of the Cave Science Department. The Executive Director will also work with the division on the **Volunteer Value Program**, and on findings ways to **improve grant funding amounts**.

## KEY PERSONNEL

### Division Head: Emily P. Davis

Conservation Department:  
Val Hildreth-Werker (head)

Conservation Outreach

Conservation Grants

Volunteer Value Committee

Vandalism Deterrence  
Commission

Regional Conservation Groups

Cave Management Department:  
Emily P. Davis (head)

Cave Conservancies Comm-  
ittee: Kim Fedrick (chair)

Landowner Relations Network  
Committee:

Julie Schenck-Brown (chair)

Nature Preserves &  
Acquisitions Committee:  
Julie Schenck-Brown (chair)

Nature Preserves &  
Acquisitions Committee:  
Julie Schenck-Brown (chair)

NSS-Land Trust N. AL Liaison

Cave Science Department:  
Emily P. Davis (**interim head**)

Preserves Science

Geospatial Committee

Biological Response

NCKMS Committee

Research Advisory &  
Exploration Grants

# Facilities Division Highlights

## Overview

This division has three main departments: Facilities (i.e., Buildings and Grounds); Museum & Archives, and the Bookstore. Much of the work is done at the Headquarters (Pulaski Pike), and this division has the largest portion of the annual budget, at 19.4% of the total.

## Buildings & Grounds

Since April 2025, donated artwork has been placed in the Headquarters foyer and some rooms in the “Back 5” have been cleaned for the Archival team. Volunteers regularly participate during work weekends. Following June 2025 Board action, the Division Head hired Neuhoff Taylor Architects to prepare conceptual drawings for a potential vertical training facility and classroom space. Donations for the “Vertical Tower” are >\$70,000.

Different spaces at the Headquarters can be rented, which serves as income to the NSS. As of July 2025, rental income has been \$17,475. At this rate, venue rental income could surpass \$50,000 for the year, but this would be less than the \$95,000 projected in the FY25-26 budget.

## Museum & Archives

This Department handles archival materials donated to or collected by the NSS, including for the Library, the Museum, the Photo Archives, the Cave Files, and the Audio-Visual Library. Space is limited and the team has started cleaning up under-utilized spaces for work and storage. Several large donations were made in recent years, which takes time to sort and catalog. The Library is searchable online through the LibraryWorld Online Patron Access (OPAC) system, which should be linked to the NSS website, <https://opac.libraryworld.com/>. The team has digitized museum items for the NSS website, to make content available for the membership.

## Bookstore

The NSS Bookstore sells apparel (T-shirts, sweatshirts), misc. items (umbrellas, stickers), and books. As of July 2025, sales totaled \$25,052, with Convention sales representing ~26%. At this rate, sales could exceed \$55,000 this year, which will surpass the \$50,000 projected in the FY25-26 budget. The Bookstore attended more caver events this year, which is important for membership and directly aligns to strategic goals focused on fellowship. However, of the four events attended (SERA Cave Carnival, Speleofest, Karst-o-Rama, Old Timers Reunion), only OTR came close to yielding a profit. This was due to the Executive Director serving at the booth to minimize staff billing overtime. Other ways to improve profit would be to reduce travel costs, solicit volunteer (including Board) help to meet and interact with members, carry new merchandise, and improve the online purchasing framework. Lastly, the Executive Director assessed the Bookstore’s holding costs to be over \$400,000, due mostly to overstocked items. More marketing is needed to move this stock.

## Challenges and Plans

This division has several challenges, including **improving rental income and Bookstore sales**, but one of the biggest challenges is tied to Headquarters upkeep and **Capital Expenditure (Capex) planning**. Infrastructure needs (e.g., roof, HVAC systems, parking lot, etc.) have led to costly emergencies in the past. Capex planning removes surprises and prepares the Society for financial stability. The Chair of the Board has developed a Capex plan, and the Executive Director and Division Head will continue updating the scope of anticipated expenses. A Capex endowment fund should be approved by the Board and contributed to annually. With a Capex Plan in place, improvements can be made to the Headquarters that could increase revenue.

### KEY PERSONNEL

#### Division Head: Maureen Handler

Museum & Archives  
Department: Ed Strausser (chair)

Librarian: Bob Roth

AV Library: Dave Socky

Building & Grounds Department:  
Maureen Handler (chair)

### STAFF

Jarvis Scruggs (Facility Manager)

Esther Crawford (Bookstore &  
Membership Manager)

# Membership Division Highlights

## Overview

This division has two main departments: Convention and Membership. Much of this division's activities are to meet strategic goals associated with Fellowship, such as increasing NSS's visibility, creating a welcoming environment, increasing membership, and coordinating volunteers.

## Conventions

Conventions are one of the most important activities of the Society. A tremendous amount of work goes into finding willing and able hosts in compelling locations that will attract members each year. Also, considerable attention is given to budgets and event planning year after year. The goal is for Conventions to turn a small but important profit that can be used to pay for professionals to assist with bookkeeping and event planning. The 2025 Convention turned a profit. The Executive Director has yet to be included in the budget reviews for the 2026 and 2027 Convention. Future Conventions are planned; the hope is for the Society to return to the West to improve fellowship at the national-level.

## Membership

Finding new and retaining old members is important work. One of the division's ongoing goals is to produce a video about the NSS for grottos, to encourage new members and improve NSS's visibility. Except for Life Members, everyone else renews their memberships annually. The auto-renewal rate is 72%. The online membership platform (YM), although clunky and not user-friendly, should email reminders to members. The prompted renewal rate is ~80% because emails can get lost, but ~4.5% of members do not have an email address on file. Nevertheless, membership has been steadily increasing over the past few years. If the current growth rate of ~5% continues, then the NSS should reach 9,000 active members next year.

## Challenges and Plans

To reduce the financial and planning burdens experienced by Convention hosts, the Board approved hiring a **Convention Bookkeeper and an Event Planner** using registration costs (Board Act 56-981). Both positions were intended to be temporary and be in place for the 2024 Convention. However, the part-time Secretary-Treasurer filled the bookkeeper role for the 2024 and 2025 Conventions, and no event planner was hired.

This is a **pivotal opportunity** for the NSS to continue employing professional staff for recurring, national-level work that benefits the Society. Having learned more about the NSS's needs for these two positions, the Executive Director would like the Board to consider modifying the job duties to become full-time, paid staff positions under the Executive Director (and not the Convention Department):

- The part-time Secretary-Treasurer becomes full-time by subsuming the Convention Bookkeeper role (see the Accounting & Finances Section for more explanation).
- A paid, full-time **Event and Outreach Planner** could coordinate Conventions annually but also coordinate other events and outreach activities throughout the year to improve NSS's national to local visibility and fellowship; events could include national and regional conferences/expositions for nonprofits, regional and local caver events, Preserve open-houses, and other educational activities.

## KEY PERSONNEL

### Division Head: Carol Tideman

Convention Department:  
Carol Tideman, Rich Geisler

Salons: Blake Jordan,  
Dave Socky

JSS Coordinator

Membership Department:  
Amber Jackson (chair)

Awards Team:  
Bill Steele (chair)

Congress of Grottos:  
Talia Sepiol (chair)

Internal Organizations:  
Paul Winter, Nick Anderson

Youth Group Liaison

International Secretary

# Operations Division Highlights

## Overview

The Division Head position is vacant, as are the IT and HR Department chairs. Different committees lack members. These gaps require immediate attention. The Executive Director is acting as interim Division Head to maintain basic division function but cannot also do IT work.

## Human Resources

The NSS has previously been lax in this area, likely because there were few employees. With the potential to increase the number of paid employees in the (near) future, but also the need to recruit and retain more volunteers, HR attention is needed. Thus far, the Executive Director has upgraded timesheets to align with federal reporting standards and started compiling job descriptions for employees and volunteer groups.

In consultation with current employees, the Executive Director has been updating the Employee Handbook (dated 12/2022) to comply with Alabama and federal laws, as well as to modify policies and practices tied to time-off and medical benefits that could lead to turnover. One critical improvement is migrating medical benefits from a fixed indemnity health insurance plan to a business market plan through Blue Cross/Blue Shield of Alabama. The new plan has lower employee deductibles and is used by most providers. For the NSS, the cost per employee will increase slightly, but the overall expense is well within the \$20,000 budgeted for FY25-26.

Volunteer recruitment, coordination, and recognition are essential activities that need improvement. The Membership Division produced an online form to solicit volunteer interest, and a steady stream of submissions occurs weekly, but overall efforts are loosely coordinated among the divisions. The Executive Director will work to identify NSS members who are experienced in volunteer recruiting and management to form a Volunteer Management Team within the HR Department of this division.

Other important issues to consider addressing in the future include implementing a conflict-of-interest policy, a fair and transparent promotion and compensation policy, and a recruiting and hiring best practice policy. Collectively, these practices should balance the NSS’s Code of Conduct and Anti-Harassment policies.

## Operations

Ongoing Operations activities include legal work and fundraising. Legal work done for and on behalf of the NSS is done by a relatively small group of dedicated members who practice law. Their roles vary, from reviewing legal documents to providing guidance about Code of Conduct issues for grottos and at the national-level and issues related to the Preserves (e.g., cease and desist actions). Recent Board-led fundraising activities include donor recognition (Stephenson Group) and a planned giving campaign, which will include a website and form, as well as email and newsletter. Also, “business development” is within this division, but it is unclear whether any related work is being done.

## Challenges and Plans

**Filling the Division Head position** is critical, as is finding qualified volunteers (or contract-paid staff) for IT work (website, databasing, etc.) and Volunteer Coordination. **Positions should be advertised soon.** In the meanwhile, division work is actively being completed with Executive Director input.

### KEY PERSONNEL

- Division Head:** Vacant  
(Executive Director, interim)
- IT Department: Chair, vacant
  - Website Operations
  - Cloud Infrastructure
  - Membership Database
  - IT Support Services
- HR Department: Chair, vacant
  - Volunteer Management Team
- Operations Department: vacant
  - Legal
  - Fundraising
  - Business Development

# Accounting & Finance Division Highlights

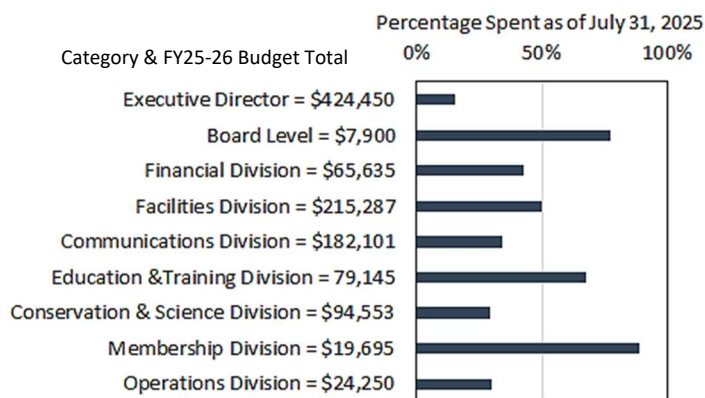
## Overview

This division handles NSS’s accounts and insurance. The Secretary-Treasurer is currently a part-time paid position, with their primary responsibilities being to manage the Society’s finances, including investments. The chair of the Insurance Committee provided a separate report for the Secretary-Treasurer’s report. The NSS’s Bookkeeper is a paid contractor who currently works two days at Headquarters and when necessary throughout the week, generally handling bills, invoices, sales taxes, royalties, and donations, reviewing accounts and charges, and sending “thank you” notes to donors. This contracted position is essential.

## Accounting

The NSS’s books are in good shape. It has been challenging to align division income and expenses in the current budget structure (having moved from officers to divisions). Some expenses for the divisions (e.g., merchant processing, postage, etc.) are shared but need separated.

As of July 31, the NSS is operating with a net income of \$184,928. Assessing FY25-26 expenses (totaling \$416,308.87) by division or major category (e.g., Executive Director, Board), the *estimated* spend-rate is roughly 37%, with all of the divisions/categories being underspent:



The Executive Director’s budget category (payroll, office expenses, and staff travel) is the most underspent (at only ~16% spent to date), due in part to not needing 4 months of Executive Director’s salary or benefits; the Executive Director also does not need medical benefits, which is a cost-savings. The Conservation & Science Division has spent 29% of their budget, with expected grant and Nature Preserve expenses coming in the near future. The Secretary-Treasurer and Executive Director will meet with Division Heads to review their spend-rates and expenses in the near future, in preparation for the FY26-27 budget and strategic planning.

Past reporting from the NSF was problematic, but progress has been made recently. Unmingling accounts resulted in excess funds that were put into a holding fund. Ongoing meetings with NSF are also underway to begin another account (Perpetuity Fund), bringing the total to 21 investment accounts. There have also been discussions about the request to diversify the portfolio with another brokerage, which would result in more accounts—potentially double—and be a serious undertaking.

## KEY PERSONNEL

**Division Head / Secretary-Treasurer: Kristine Ebrey**

NSS Bookkeeper:  
Michelle Kesler

Fine Arts Salon Treasurer:  
Kim Fleischmann

2025 Convention Treasurer:  
Mitch Berger

2026 Convention Treasurer:  
Sharon Schierling

NCRC Treasurer: Rachel Walker

VTC Treasurer: Jenny Tison

Insurance Committee:  
Michael Cicherski (chair)

## Insurance

Insurance is challenging for the NSS but the Society broker, Marsh McLennan Agency LLC, has been reliable and helpful at finding the best coverage and rates. The coverage umbrella includes the general liability for NSS properties and the NSS Preserves, a Directors and Officers liability policy, VTC general liability policy, hired and non-owned automobile policy, and an occupancy policy, among others. Aside from salaries, **insurance is one of the biggest expenses for the NSS**, and more coverage is needed for some of the Society's activities and programming. Policies and coverage will be reviewed starting in December 2025, including for the upcoming 2026 Convention. **The expectation is that insurance costs will increase.**

## Challenges and Plans

The Secretary-Treasurer is responsible for the Society's record keeping, management and administration of NSS's accounts, reconciling NSF investments and preparing for new investment diversification opportunities, reconciling accounts for the NCRC, VTC, and Fine Art Salon, closing out annual budgets, preparing Form 990 for the IRS, and reviewing the Society's insurance coverage. Additionally, in the absence of a Convention Bookkeeper, the Secretary-Treasurer has reconciled the 2023 and 2024 Convention budgets, will soon begin closing the 2025 Convention account, and has been helping to set up the 2026 Convention account, review the 2027 Convention preliminary budget, and train future Convention treasurers. This work has been uncompensated, although there is Convention revenue that could be used. Recently, the Executive Director has been working closely with the Secretary-Treasurer to identify areas where more financial oversight is needed, such as understanding division actuals and budgets, reviewing facilities use and rental rates, assessing business license renewal responsibilities, collecting and reporting sales taxes in different states, evaluating NSS-published book contracts and Bookstore contracts with the VTC and NCRC, estimating and refining travel costs for the Bookstore to attend events (including Convention), reviewing employee benefits, and assessing bank account use, need, and closure, etc.

The Secretary-Treasurer's part-time position was to be capped at 17 hours/week and was encouraged to reduce effort to 10 hours/week after the Executive Director was hired. Based on the Secretary-Treasurer's report, the workload is high and there is a backlog of work needed to meet division goals and activities. Moreover, the Executive Director's oversight and activities do not lower the Secretary-Treasurer's workload.

The Executive Director would like the Board to consider that the **Secretary-Treasurer should be in a full-time, salaried position** for the NSS. This could be accomplished by:

- Converting the position from part-time to full-time by continuing the current workload and subsuming the Convention Bookkeeper position, which would use registration-supported Convention funds to augment the salary; this shift would also negate the need to hire a separate Convention bookkeeper.
- Retaining the part-time NSS Bookkeeper, currently paid by contract, because this position is important for financial oversight, reporting, and routine day-to-day transactional activities; this position reduces the workload for the Secretary-Treasurer and allows for more high-level focus on the Society's strategic financial planning, budgeting, fundraising, and investing.

After assessing the underspent Executive Director's budget category to date, the Executive Director projected the costs for salary and benefits of a full-time, salaried Secretary-Treasurer for the remainder of the FY25-26 (starting October 1). The additional salary in the Executive Director's budget category would still be under budget for this year.

# Conclusions - Closing the Loop

**The Society is in good hands.** Leaders and volunteers have taken extraordinary measures to ensure that the NSS will thrive for generations. The transition to a paid Executive Director was visionary.

The Executive Director's role is primarily to manage the NSS's daily operations and staff, implement the Board's Strategic Plan, oversee programmatic and financial activities, and cultivate relationships with members, Society leaders, donors, and the public. This work allows the Board to govern, provide policy oversight, and strategically plan for the NSS's future without being deeply involved in operations. Next steps for the Executive Director, as outlined in this report, involve continuing to work with Division Heads and Committees to improve volunteer recruitment and establishing a Volunteer Coordination team associated with HR activities. To improve HR policies, she will also continue to revise the Employee Handbook and refine policies that emphasize that the NSS is a robust, supportive, and equitable employer. She will also explore opportunities to strengthen and expand NSS's partnerships, such as with NCKRI, and will work with the Government Liaison Committee to develop and renew MOU/MPA activities that have stalled in the past. She will also strategize ways to improve rental income and finance tracking, as well as to expand Bookstore sales while also decreasing the holding costs for overstocked items. Lastly, she will work with the Secretary-Treasurer and Division Heads to plan for the FY26-27 budget and assess opportunities to expand and improve division programming that increases NSS's visibility, communications, and fellowship opportunities.

**The NSS could reach 9,000 active members by next year.** Although a conservative estimate, the current growth and retention rate for Regular members is strong. There is also potential for the number of Life members to increase in the next year, considering the modest growth rate. Several divisions are dynamically focusing on improving the visibility of the NSS, enhancing fellowship, and creating a welcoming, safe community for cavers. Education and training programs ensure members are skilled to explore, survey, and study caves. These activities are supported through a range of Society grants.

**The NSS's books are in good shape.** There have been challenges aligning the budget to the division structure, but the transition is underway. Budgeted expenses within divisions appear to have spending rates that are less than expected at this point in the year, and some divisions are underspent. With its investment income, the Society is currently operating with a net income of \$184,928. There are also ongoing opportunities to initiate new investments from holding funds that will continue to financially sustain the Society.

**Board consideration is needed in some areas.**

- **Strategize ways to help recruit, train, and retain volunteers and fill vacant positions.** The Executive Director is in the process of developing position descriptions for key positions, such as the Government Liaison Committee chair, Cave Science Department chair, Education Department chair, and Operations Division Head. These positions can be advertised on the NSS's website. The Executive Director could also use the Board's knowledge of past or perhaps new volunteers to help identify and build leadership capacity within the NSS. The Board comes from across the U.S. and may know of people from their grottos or regions that could make excellent heads or chairs. The Executive Director will reach out directly (personally), and positions could have flexible options, such as having a trial period or being done on an interim basis.

- **Evaluate the strategic use of funds to pay contractors when suitable volunteers cannot be found.** As a nonprofit organization dependent on volunteer energy to accomplish shared goals, paying contractors for specific jobs within the organization can accelerate progress and goal completion but can also rapidly dwindle budgets. Some positions (Social Media, Proofreader, Website development, Cloud updating, etc.) require constant attention and compensation may be justified. However, some members may begin to think that any “skilled” or “technical” job done for the NSS should be paid, which can create a “have” and “have not” cultural separation among divisions and committees if some work is paid while other, equally technical volunteer work is not. The Communications and Accounting & Finance divisions each pay contractors, but other divisions could add this (e.g., Operations for IT work). The Board should consider the philosophical and practical aspects of this action for the Society. Depending on what the contracted work is, the control that the NSS has on how the work is being done, and how much independence the contractor has completing the work in return for being paid, the Board should define the point in which a paid contractor may (or should) become a part-time staff member, especially for recurring, ongoing, and long-term work.
- **Improve grant funding amounts.** The NSS offers many different types of exploration and research grants, but most of the money awarded is limited by the size of the investment fund for the award. As such, amounts are generally small and challenging for members who are facing higher expedition costs or science funding cuts. The Board should consider ways to increase fund sizes that would yield greater amounts distributed from the investments.
- **Start a Capital Expenditure (Capex) endowment fund.** Capex planning improves the NSS’s financial stability by planning for costly infrastructure emergencies before they happen.
- **Approve modifications to the Event Planner position.** This position should be full-time and salaried, and be expanded to accommodate both Event and Outreach Planning. This position would be under the Executive Director, like other staff positions. The position would perform two critical jobs for the NSS: coordinate Conventions annually and coordinate other events and outreach activities throughout the year. Having a dedicated staff person in this role will improve NSS’s national to local visibility and fellowship. This person should join the office staff at the Headquarters, and their salary would be commensurate with the wages of the current staff. Funding for this position could come from registration-supported Convention funds, from investment funds (e.g., Perpetuity Fund), and other income streams.
- **Approve converting the part-time Secretary-Treasurer position to a full-time, salaried position.** The current Secretary-Treasurer’s workload is high. They are not only managing the NSS’s finances but have also been performing the role of Convention Bookkeeper because this position has gone unfilled since 2024. Converting this position to a full-time position, and one in which the Convention bookkeeping is compensated, will remove the need to hire a separate bookkeeper for Conventions.

**Thank you for your Board service.**

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