

# Segment Volunteer Leader Workshop

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## Welcome

Sunday, August 11, 2019 9:00 am – 11:30 am

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Who attends?

How can we accomplish this?

When can you expect follow up?

Why do we have this?

Where can you use this information?

What can you expect to take away?



# Introductions and agenda overview

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*When you were a kid,  
what did you want to  
be when you  
grew up?*



2019

# Tools to help with your leadership role

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## Segment Leader Website

Email Timeline

Treasurer's Guidebook

Activity Proposal Form

A Year At A Glance





# SEGMENT LEADER WEBSITE

**Welcome to the Segment Leader Website. On this page you will find information that will be helpful during your leadership including timelines, announcements, action items, policies, forms, and more!**

## SPECIAL ANNOUNCEMENTS:

### Headquarters Offices Closed During Annual Meeting:

The AAA Office will be closing on Tuesday, August 6 at noon (Eastern) to allow Professional Staff to travel to the Annual Meeting. The office will remain closed through Monday, August 19th. Regular business hours will resume on Tuesday, August 20th.

### Segment Email Scheduling:

- Regularly scheduled Segment emails will be sent through Friday, August 9th. (Content is due by Friday, August 2nd for any emails to be scheduled the week of August 5-9).
- During the weeks of August 12-16 and August 19-23, Segment emails will **NOT** be sent.

## ACTION ITEMS

The following items need to be addressed for your Segments:

### **Due Date: September 16**

Segment President's Welcome Letter and photos due for websites

### **Due Date: September 25**

Approval of Email Draft of Call for Nominations for Section Elections

Your Executive Committees will be permitted to use this website



# Three Months At-a-Glance

## September 2019

- Call for Election Nominations - President approval of Draft email
- President's letter and photo due
- Member dues reminder email to members
- Winter Newsletters - Call for items
- AM - Award Call for Nominations - President approval of Draft email
- 2019 Midyear Meeting
  - KPIs and Plenary Slides sent to Leadership (ABO)
- 2020 Midyear Meeting
  - Calls for Submissions Open (FAS, GNP, PI)
  - Registration Opens (AIS, Auditing, FARS, IAS, MAS, SET)

## October 2019

- Member dues reminder email
- Call for Election Nominations emailed to members
- AM - Award Call for Nominations emailed to members
- 2019 Midyear Meeting:
  - KPIs and Plenary slides sent to Leadership (MW, DIV)
- 2020 Midyear Meeting:
  - Programs should be final (AIS, Auditing, FARS, IAS, MAS, and SET)
  - Registration Opens and Programs Should be Final (APLG, ATA)

## November 2019

- Segment Leader Webinar
- Call for Election Nominations emailed
- Q1 Financials Sent
- AM - Award Call for Nominations emailed
- 2019 Midyear Meeting
  - KPIs and Plenary slides sent to Leadership (TLC)
- 2020 Midyear Meeting:
  - Registration Opens and Programs Should be Final (FA, GNP, and PI)



**Get the Answers to these Questions at the Segment Leader Workshop: Sunday, August 11th from 9:00-11:30 am - Hilton Union Square, Lobby Level, Plaza B**

**Segment Leaders and AAA Professional Staff working together toward the best member experience!**

- Tools to help with your leadership!
- What have we learned from the Website Survey?
- Learn insights from the Membership Advisory Committee Chair and Director-Focusing on Membership!
- How to provide validation/insights into your Section's current and future activities
- What's next?

We look forward to this workshop.

Stay up to date on what is due for each month

We will post information about the webinar after the workshop.

## Documents & Forms

[Meeting Timelines](#)

[Section Midyear Meeting Timeline](#)

[Region Meeting Timeline](#)

[Year At-a-Glance](#)

[2019-2020 Yearly Timeline](#)

[Governance & Forms](#)

[Bylaws Template For Segments](#)

[Email Guidelines](#)

[New Activity Proposal Process & Forms](#)

[Proposal Form Round 1](#)

[Proposal Form Round 1B](#)

[Proposal Form Round 2](#)

[Propose a New Journal](#)

[Propose a New Meeting](#)

[Treasurer's Guidebook \(2019\)](#)

[Volunteer Survey Example](#)

[Webinar Request Form](#)

[Accounting: The Language of Business  
\(The Blue Picture\)](#)

## AAA Governance

▪ [Bylaws](#)

▪ [Policies & Procedures](#)

## AAA Boards' Decisions Towards a Sustainable Economic Future

[Click here](#) to view a video created by AAA President Marc Rubin to explain the market trends and the Board and Council decisions.

## Building Upon Foundations

In 2017-2018, the Association called upon its members to explore two critical issues for our organization and the academy.

The **Research Relevance Task Force** wrote a report exploring how the academy might increase the impact of accounting scholarship, and the impediments to accomplishing those changes. [Click here](#) to view this report.

The **Continuing Engagement Task Force** was asked to identify opportunities to meaningfully engage senior faculty as they transition from their full-time academic positions to new roles on campus and beyond. [Click here](#) to view this report.

## Past Meeting Materials

▪ [Spring 2019 Section Leader Webinar](#)

▪ [Fall 2018 Section Leader Webinar](#)

## Contact Us:

**Shauna Bigelow, Segment Member  
Services Coordinator**

[shauna.bigelow@aaahq.org](mailto:shauna.bigelow@aaahq.org)

941-556-4135

## 2019-2020 Segment Executive Committee Contact Information

Click [HERE](#) to access the 2019-2020 Executive Committee information.

## Conference Line

To request a conference line, please email the following information to [Shauna Bigelow](#):

The date and time (including time zone) of the call, as well as the country of any callers outside of the US.

## Annual Meeting

▪ [2018 Annual Meeting](#)

▪ [2017 Annual Meeting](#)

Download documents,  
Conference Line  
scheduling  
information, Segment  
EC Committee Contact  
Information



# Website Survey Review

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# Level of importance

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*The highest ranked:*

*Meetings*

*Join (Membership)*

*Officer Directory*

*News*

*Mission and Vision*

*Journals*

*The lowest ranked:*

*History*

*Miscellaneous Publications*

*Practice Resources*

*Scholarships*

*Operations Manual*





# Navigation Tabs

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*About*

*Meetings*

*Join Now*

*News*

*Publications*

- *Could everything else fit under these tabs?*

*Awards*

*Research*

*Teaching*

*Other*

- *How many tabs are enough or too many?*



# The Role of the Webmaster/Content Editor

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- *The Webmaster/Content Editor will ensure the functionality and efficiency of the website.*
- *They will gather changes and create new content as appropriate.*
- *Content changes would be sent to the Segment Member Services Coordinator, Shauna, who would be responsible for making sure that the updates were completed.*



# How well would this role work with your Section?

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## *Results of this question:*

- *Strongly agree: 35.56 %*
- *Agree: 40.00%*
- *Neither agree or disagree: 20.00%*
- *Disagree: 4.44%*
- *Strongly Disagree: 0.00%*



# What have we learned ??

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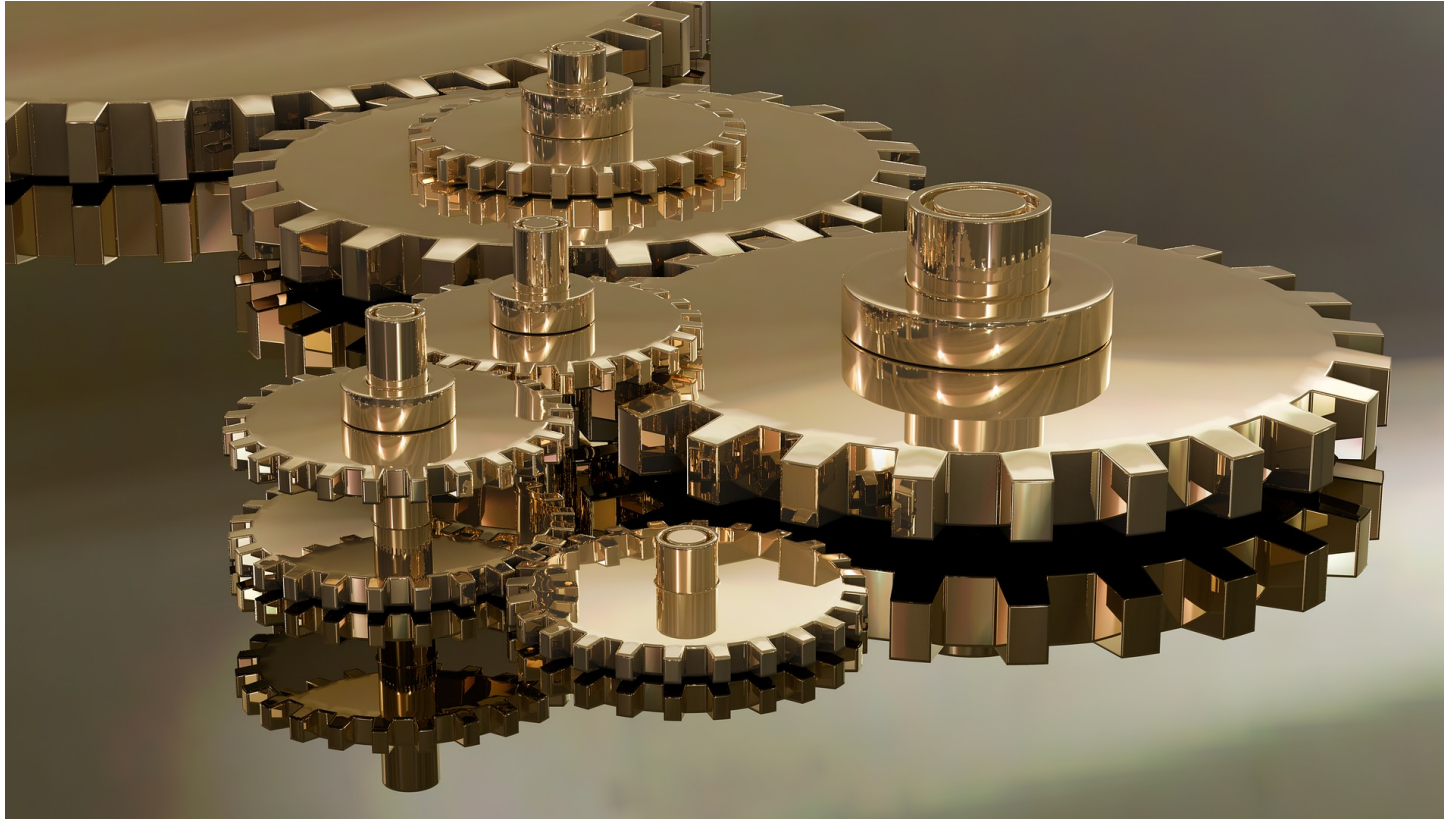


# Working Together – Next Steps

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Working toward the best member experience

Developing  
a  
Timeline



Webmaster Role  
Content Editor

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Time for a well deserved  
break

# Membership Survey update

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Attract  
Retain  
Loyalty  
Reconnect



# Involvement in AAA

	Number	% of 997
Attend annual meeting	555	56%
Attend section/region/specialty meetings	503	50%
Volunteer at section, regional, or AAA level	419	42%
Submit research paper to annual meeting	363	36%
Submit research paper to section/regional meeting	361	36%
Leadership role at section, regional, or AAA level	143	14%
Submit teaching/curriculum material to annual meeting	107	11%
Submit teaching/curriculum material to section/regional meeting	92	9%
None of the above	98	10%

# Why do you belong to AAA? (allocate 100 points)

	All Members	5 Years or Less	Tenure/Tenure Track	Not Tenure/TT
To network and build professional relationships	24.3	23.1	24.1	24.7
To obtain access to journals	20.7	19.4	20.6	20.9
Opportunities to present my research; attend research presentations	20.6	20.9	21.6	18.2
To attend AAA annual meeting	18.6	20.9	17.3	21.1
To attend section meetings	16.7	17.2	17.5	14.5
To stay current on profession	13.8	11.1	13.4	14.5
To obtain access to teaching resources	13.3	14.2	13.2	13.6
My dues are reimbursed	11.9	7.4	13.1	9.5
To belong to a section	11.1	6.0	12.0	9.1
Opportunities to present my teaching techniques/cases; attend teaching presentations	10.1	7.9	10.0	10.2
To access AAA/section leadership/volunteer opportunities	9.4	7.0	9.6	8.8
To access job opportunities (Career Center /Rookie Camp)	8.4	9.8	7.0	10.3
To attend region meetings	7.4	5.3	8.1	6.1
To earn CPE hours	7.3	4.1	7.5	6.8
My prof./supervisor/mentor suggested I join	6.0	6.7	5.8	6.3
Other	9.9	4.1	10.1	9.6
# of Respondents	997	291	596	401

# How likely would you be to recommend AAA?

	To a PhD Student?	To a Tenure Track Colleague?	To a lecturer colleague?
Extremely likely	512 (59%)	521 (60%)	216 (25%)
Very Likely	219 (25%)	212 (24%)	177 (20%)
Somewhat likely	102 (12%)	97 (11%)	232 (27%)
Not very likely	22 (3%)	24 (3%)	134 (15%)
Not at all likely	11 (1%)	9 (1%)	89 (10%)
Don't know	9 (1%)	11 (1%)	26 (3%)
Total	875	874	874



# Who pays for your dues?

		% of Total
100% paid by employer	523	60%
Employer pays a portion of my dues.	88	10%
None paid by employer	262	30%
Total	873	

# Membership Renewal

	How likely are you to renew your membership?		If personally had to pay 100%?	
Extremely likely	534	61%	78	13%
Very Likely	200	23%	114	19%
Somewhat likely	91	10%	165	27%
Not very likely	22	3%	142	23%
Not at all likely	16	2%	102	17%
Don't know	12	1%	12	2%
Total	875		613	

# Value of Membership

	Overall	Section Membership	Volunteer Opportunities	Journals	Annual Meeting	Section Meetings
Excellent	143 (16%)	217 (27%)	116 (14%)	263 (31%)	168 (20%)	226 (26%)
Very Good	219 (25%)	217 (27%)	168 (20%)	253 (29%)	195 (23%)	224 (26%)
Good	242 (28%)	187 (23%)	209 (24%)	202 (23%)	183 (21%)	164 (19%)
Fair	147 (17%)	85 (10%)	109 (13%)	76 (9%)	130 (15%)	65 (8%)
Poor	116 (13%)	28 (3%)	46 (5%)	23 (3%)	96 (11%)	23 (3%)
Don't know/ Don't use*	11 (1%)	67 (8%)	194 (23%)	43 (5%)	87 (10%)	144 (17%)
Not aware		17 (2%)	17 (2%)	2 (0%)	0 (0%)	9 (1%)
Total	878	818	859	862	859	855

\*Overall value question: Don't Know

Specific benefit questions: Don't use but aware of



# Value of Membership

	Overall	Regional Meetings	Specialty Meetings	Career Center	Website	Webinars	Discounted Access
Excellent	143 (16%)	73 (9%)	86 (10%)	85 (10%)	91 (11%)	40 (5%)	103 (12%)
Very Good	219 (25%)	126 (15%)	110 (13%)	144 (17%)	195 (23%)	90 (11%)	106 (12%)
Good	242 (28%)	152 (18%)	105 (12%)	140 (16%)	261 (31%)	109 (13%)	100 (12%)
Fair	147 (17%)	92 (11%)	68 (8%)	70 (8%)	137 (16%)	81 (10%)	59 (7%)
Poor	116 (13%)	65 (8%)	35 (4%)	26 (3%)	56 (7%)	44 (5%)	47 (6%)
Don't know/ Don't use	11 (1%)	334 (39%)	416 (49%)	350 (41%)	105 (12%)	350 (41%)	255 (30%)
Not aware		13 (2%)	33 (4%)	37 (4%)	5 (1%)	134 (16%)	182 (21%)
	878	855	853	852	850	848	852

# Open-Response Comments

- Word file with comments to question “Please provide additional suggestions or comments regarding your AAA membership that you would like the Membership Committee to know” posted on Segment Leader website for you to review

# Next Step – Dig into the data

- Membership committee focus on 5 year or less members and non-tenure/tenure track members
  - How to market AAA to non-members
- Provide section member data to section leaders
- Review Annual Meeting responses, compare to Annual Meeting evaluations
- Review open-response comments
- Prepare detailed analysis report for Board and Council for November meeting



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# How Does Your Section Provide Value to Members

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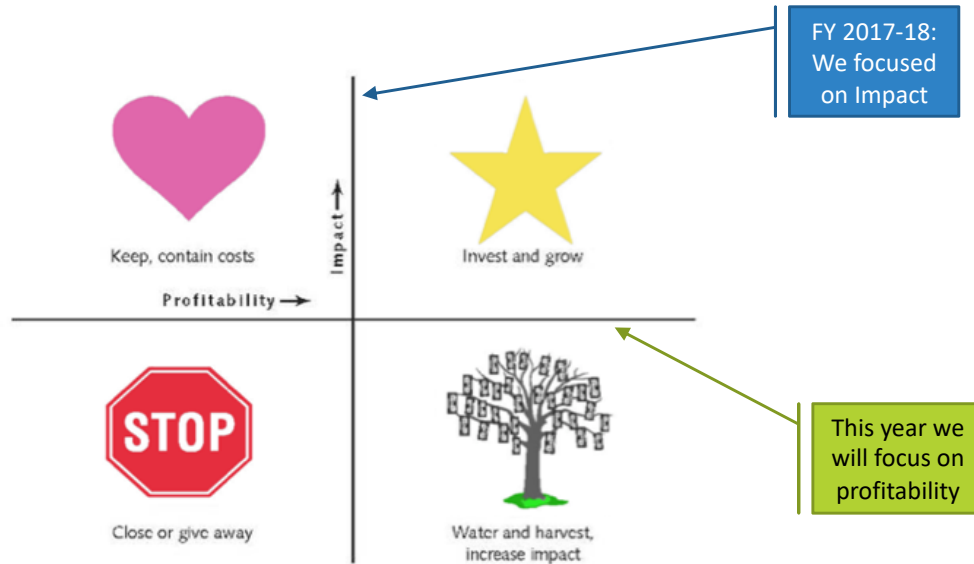
# Goals for this activity

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- *Our goal today is to:*
  - *Provide insights into current section activities*
  - *Long term, possibly identify additional activities that could enhance section membership*
- *Use the Sustainability Mindset framework*
  - *To score items to assess impact*
  - *Identify where items should be placed on the Sustainability Mindset Framework banner*
- *A report of today's insights will be provided on the Segment Leader website and reported on during the Fall Segment Leader Webinar*

# AAA Value Proposition: The Organizational Impact Perspective

## Sustainability Mindset



### Intended Impact

To what extent, as currently planned (and executed), does this program: Globally engage and inspire the accounting community, broadly defined, to advance accounting as a learned profession through the purposeful integration of research, teaching and practice.

### Excellence in Execution

Is this program something that AAA can currently deliver in an exceptional manner? In other words, is this a program you think AAA can currently execute at a high level – keeping in mind the current staff, knowledge and workload.

### Broaden Community

To what extent do you see this program effectively connecting, leveraging, nurturing and growing our relationships with internal or external constituents, both current and potential?

### Unmet Need

To what extent is there significant need for which the AAA has comparative advantage?

# AAA Impact Criteria Valuation Guidelines

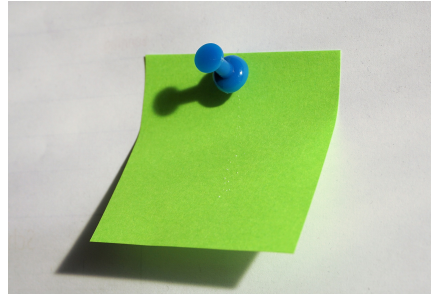
## AAA Impact Criteria Valuation Guidelines

Impact Criteria	Definitions of Scores
<b>Intended Impact</b> To what extent, as currently planned (and executed), does this program: Globally engage and inspire the accounting community, broadly defined, to advance accounting as a learned profession through the purposeful integration of research, teaching and practice.  <i>Provide score 1 (low) – 4 (high) and comments</i>	1. No focus on global issues, constituents outside of the AAA, or on integrating activities.
	2. Moderately broad impact, only focusing on ~one area of impact: - Global people or issues - Integration of Research/Practice or Teaching/Practice
	3. Broad impact - affecting a substantial, but no significant portion of AAA.
	4. Focuses on both of the following, Global People or Issues and Integration of Teaching, Research and Practice.
<b>Excellence in Execution</b> Is this program something that AAA can currently deliver in an exceptional manner? In other words, is this a program you think AAA can currently execute at a high level – keeping in mind the current staff, knowledge and workload.  <i>Provide score 1 (low) – 4 (high) and comments</i>	1. This project is outside of the AAA's current capabilities and would require development of significant new skills and staff resources.
	2. This activity is related to the AAA's core competencies, but would require development of additional skills/staff to execute successfully.
	3. The AAA has some expertise and know-how to provide this service, but would need to increase its bandwidth to execute either with new staff or outsourced, short-term support.
	4. AAA has expertise and know-how to immediately execute
<b>Broaden Community</b> To what extent do you see this program effectively connecting, leveraging, nurturing and growing our relationships with internal or external constituents, both current and potential?	1. Focused only on supporting our existing member base of tenure track faculty, does not broaden the connection, leverage or growth of the AAA.
	2. Builds upon our current core offerings to extend their reach to new constituents as recipients, but overall has a moderate effect of bringing in new constituents.

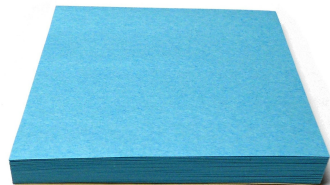
# Reflecting on the activities of your segment

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- *What does your Section/Region currently offer (things, events, experiences) that attracts and retains new members - very broadly defined? **Lime***



- *Are there any **new** events or activities that you would like to see your Section/Region do to attract and retain new members - very broadly defined? **Blue***





# Use the impact criteria to score your items

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- *Review your post it notes and use the Impact Criteria to score your items based on their impact to the AAA (add your score number to the post it note)*
- *For each item, identify where it belongs on the Sustainability Mindset framework*
  - *Heart, Star, Stop Sign, Tree?*
- *Whoever's birthday is closest to today, will be the table spokesperson! Choose one current and one new activity to report on.*

# What will Board & Council focus on in the coming year

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- *Business Model*
- *Non Tenure Track Proposal*
- *Region/Impact Meetings*
- *Research Relevance Task Force Report*
- *Continuing Engagement Task Force Report*

# What's Next for Segment Leaders

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- *Are there topics you would like to have your Council rep bring to the Fall Council Meeting?*
- *What's next?*
  - *Slides from this webinar will be posted on website*
  - *Fall Segment Leader Webinar*
    - *October 15, 2019 - 3:00 - 4:00 pm ET*
    - *Draft Agenda items*
      - *Continuing conversation on the websites*
      - *Insights from today's conversation on Segment Activities*



# Thank You!

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**American  
Accounting  
Association**

Your information resource  
Segment Leader Website  
**[aaahq.org/SegmentLeaders](https://aaahq.org/SegmentLeaders)**

**Shauna Bigelow**

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