

# 2020 Section Volunteer Leader Workshop

October 14, 2020



# **WELCOME to the 2020 Section Volunteer Leader Workshop**

**Please sign in for today's workshop using chat  
– name and section that you are representing!**

- **Halloween's top 10 candies are: Skittles, Reese's Cups, M&M's, Snickers, Starburst, Candy Corn, Hot Tamales, Tootsie Pops, Sour Patch Kids, Hershey.**
- **Using chat what's your favorite Halloween candy?**



# Agenda Review

Topic	Presenter	What you will learn
Welcome and Agenda Review	Audrey Gramling, Director Focusing on Segments	
Perspectives from Chief Executive Officer	Yvonne Hinson, Chief Executive Officer	Hear why the position interested Yvonne and what her first month has been like
News from the Board of Directors	Elaine Mauldin, President	Hear what the Board will be working on in the upcoming year
Reboot, Restart and Meet again	Erlinda Jones, Senior Director of Meetings	Learn about virtual meeting platforms
Resources for a successful year Segment Leader Website Treasurer's Guidebook	Shauna Bigelow, Segment Relations Manager Michele Morgan, Controller	Learn what's available to you as a leader of your section
Break	All	
Diversity, Equity and Inclusion discussion	Marc Rubin, Chair, DEI Task Force	Hear what the DEI Task Force will be working on in the upcoming year
What the "tab" is going on?	Mark VanZorn, Director of Information Technology	Learn the latest on the website project
Wrap-up	Audrey Gramling, Director Focusing on Segments	Action items







# **Perspectives from our CEO**

## **Yvonne Hinson**



# News from the Board of Directors

**Elaine Mauldin**





# **Reboot, Restart and Meet Again**

## **Erlinda Jones**





**Senior Director,  
Meetings &  
Programs  
Erlinda L.  
Jones**

# ***Meet our fabulous Member Event Services Team***

**Assistant  
Director,  
Meetings and  
Programs  
Stephanie Glazer**



**Director,  
Meetings &  
Programs  
Debbie  
Gardner**

**Meetings &  
Education  
Manager  
Jean  
Thompson**



**Director, Special  
Projects  
Beverly  
Collins**

**Desktop  
Publishing  
Specialist  
Kelly Lee**



**Concierge  
Meeting  
Coordinator  
Karen Toney**



**Meetings &  
Education  
Manager  
Kelli Rickrode**



## *How satisfied are you with the virtual conference:*

	EXTREMELY DISSATISFIED	SOMEWHAT DISSATISFIED	NEITHER SATISFIED OR DISSATISFIED	SOMEWHAT SATISFIED	EXTREMELY SATISFIED	TOTAL	WEIGHTED AVERAGE
(no label)	0.00% 0	1.47% 1	1.47% 1	39.71% 27	57.35% 39	68	4.53

- *Excellent considering we couldn't be there in person.*
- *I think everything went pretty well and people seemed happy with the sessions.*
- *The sessions I attended had good papers, good discussants, the technology worked well, and I enjoyed getting to see (virtually) so many friends and colleagues from all over.*



# **Resources for a Successful Year**

**Shauna Bigelow  
Michele Morgan**



# Your gateway to a successful year: **Segment Leader Website**

<https://aaahq.org/segmentleaders>

## Three Months At-a-Glance

### October 2020

- Member dues reminder email sent to members
- Call for Election Nominations emailed to members
- Award Call for nominations emailed to members
- Call for Annual Meeting Reviewers emailed to members

### November 2020

- Segment Leader Webinar
- Call for Election Nominations emailed to members
- Q1 Financials sent
- Award Call for Nominations emailed to members
- Call for Annual Meeting Reviewers emailed to members

### December 2020

- HQ closed between Christmas and New Year's
- Prepare Volunteer Surveys for Committee Positions
- Call for Election Nominations close
- Call for Annual Meeting Reviewers emailed to members

Either

Or

At-A-Glance Yearly Timeline for September to August

Month	Task	Month	Task	Month	Task	Month	Task		
Sept	<b>Admin</b> Call for Election Nominations President approval of Draft email President's letter and photo due Member dues reminder email to Members Winter Newsletter-Call for Items  <b>Annual Meeting</b> Award Call for Nominations - President approval of Draft email  <b>Midyear Meetings</b> Reports and Plenary slides sent to Leadership (ABO) Registration Opens (AIS, AUD, FARS, IAS, MAS, SET) Call for Submissions (FAS, GNP, PI)	Oct	<b>Admin</b> Member dues reminder email sent to Members Call for Election Nominations emailed to Members  <b>Annual Meeting</b> Award Call for Nominations emailed to Members Call for Reviewers emailed to Members  <b>Midyear Meetings</b> Reports and Plenary slides sent to Leadership (DIV, MW) Program should be final (AIS, AUD, FARS, IAS, MAS, SET) Registration Opens & Program should be final (APLG, ATA)	Nov	<b>Admin</b> Segment Leader Webinar Call for Election Nominations emailed to members Q1 Financials sent  <b>Annual Meeting</b> Award Call for Nominations emailed to Members Call for Reviewers emailed to Members  <b>Midyear Meetings</b> Reports and Plenary slides sent to Leadership (TLC) Registration Opens & Program should be final (FAS, GNP, PI)	Dec	<b>Admin</b> HQ closed between Christmas and New Year's Prepare Volunteer Surveys for Committee Positions Call for Election Nominations close  <b>Annual Meeting</b> Call for Reviewers emailed to Members  <b>Midyear Meetings</b> Reports and Plenary slides sent to Leadership (MAS)		
Jan	<b>Admin</b> Q2 Financials sent Prepare Volunteer Surveys for Committee Positions Winter Newsletter – post and send in Section emails  <b>Annual Meeting</b> Award Call for Nominations emailed to Members Call for Moderators/Discussants emailed to Members  <b>Midyear Meetings</b> Midyear Meeting Planning Calls (ABO, DIV, MAS Conf) Reports and Plenary slides sent to Leadership (AUD, FARS, AIS/SET/IAS, APLG)	Feb	<b>Admin</b> Round 1 Election candidate names, bios and pictures due Round 1 Candidates posted to websites Round 1 List of candidates emailed Call for Volunteers for Leadership and Committee positions emailed to Members Email Volunteer Surveys for Committee Positions to Members Spring Newsletter – Call for Items  <b>Annual Meeting</b> Call for Volunteers emailed to Members Award Call for Nominations emailed to Members Call for Moderators/Discussants emailed to Members  <b>Midyear Meetings</b> Registration Opens (AUD Boot) Midyear Meeting Planning Calls (TLC) KPI's and Plenary slides sent to Leadership (ATA, FAS, GNP)	Mar	<b>Admin</b> Round 1 Elections open & posted to websites Round 1 Election open emails to members Round 2 Election candidate names, bios and pictures due Round 2 Candidates posted to websites Round 2 Candidate announcement emailed Call for Volunteers for Committee positions emailed to Members  <b>Annual Meeting</b> Section Dues & AM Meal Pricing Due to Shauna Call for Volunteers emailed to Members Call for Moderators/Discussants emailed to Members  <b>Midyear Meetings</b> Reports and Plenary slides sent to Leadership (PI)	Apr	<b>Admin</b> Round 1 Elections Close Round 1 Election results emailed Round 2 Elections open & posted to web Round 2 Election open emails to members Segment Leader Spring Webinar Q3 Financials sent President-Elects begin filling Leadership/Committee positions for next year. Spring Newsletter – post and send in Section emails  <b>Annual Meeting</b> Award winner's information due to AAA Call for Moderators/Discussants emailed to Members  <b>Midyear Meetings</b> Call for Submissions (ABO, DIV, MAS Conf) Midyear Meeting Planning Calls (AIS, AUD, FARS, IAS, MAS, SET)		
May	<b>Admin</b> Elections Close Round 2 Election results emailed Round 2 Officer/Committee Directory spreadsheet sent to President-Elects to populate for next year  <b>Annual Meeting</b> Speaker information due to Shauna AM Awards information due to Helene Emails to Section members - AM events  <b>Midyear Meetings</b> Call for Submissions (TLC) Midyear Meeting Planning Calls (APLG, ATA)	June	<b>Admin</b>  <b>Annual Meeting</b> Section event logistics due to Shauna Emails to Section members - AM events  <b>Midyear Meetings</b> Registration Opens & Program should be final (ABO, DIV, MAS Conf.) Midyear Meeting Planning Calls (FAS, GNP, PI)	July	<b>Admin</b> Q4 Financials sent Officer/Committee Directory spreadsheet due to Shauna  <b>Annual Meeting</b> Emails to Section members - AM events  <b>Midyear Meetings</b> Registration Opens & Program should be final (TLC) Call for Submissions Opens (AIS, AUD, FARS, IAS, MAS, SET)	2020 Aug	<b>Admin</b>  <b>Annual Meeting</b> Segment Leader Workshop  <b>Midyear Meetings</b> Call for Submissions Opens – (APLG, ATA)		



# Policies, Forms, Timelines.....past meeting material

## Documents & Forms

### Meeting Timelines

- [Section Midyear Meeting Timeline](#)
- [Region Meeting Timeline](#)

### Year At-a-Glance

- [Segment Leader 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](#)
- [Reimbursement Form](#)
- [Treasurer's Guidebook](#)
- [Volunteer Survey Example](#)
- [Webinar Request Form](#)
- [Accounting: The Language of Business \(The Blue Picture\)](#)

## Past Meeting Materials

- [October 2019 Section Leader Webinar](#)

## AAA Governance

- [Board and Council Activities](#)
- [Bylaws](#)
- [Policies & Procedures](#)
- [Shared Values](#)
- [Statement of Responsibilities](#)
- [Vision and Mission Statements](#)

[Bookmark this website  
https://aaahq/segmentleaders](https://aaahq/segmentleaders)

## Contact Us:

### Shauna Bigelow, Segment Relations Manager

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941-556-4135



Look  
what's  
here!





# Treasurer's Guide – September 2020

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## TREASURER'S GUIDE

A Financial Guide for AAA Section Leaders



The information in this guide will enhance the financial operation of your section:

- Financial responsibilities of Treasurers and other Section officers
- Assignment of financial responsibilities to Sections and AAA
- Key Dates
- Financial reports
- Available support





*See you back in seven minutes*





# **Diversity, Equity and Inclusion**


**Marc Rubin**



- *Breakout Session information:*
  - *Your first task is to determine who in your group has a birthday closest to today's date – that person will be your reporter.*
  - *Your group will have 15 minutes to discuss and come up with ideas for the following question.*
- *What approaches could your section take to educating its members about DEI?*
- *For example:*
  - *How can sections facilitate networking for under-represented minority faculty?*
  - *If your section has a journal, what can your journal do?*







# What the “Tab” is going on?

## Mark VanZorn



# **Wrap-up – Audrey**

## **Action Items – send to Shauna!**

**Send your breakout reports to Shauna.**

**Would you prefer the Spring workshop to be held in April or May?**

**Questions/comments after the webinar should be sent to who?**