



New Officer's Orientation

(to be used in conjunction with the [Group Operating Manual](#))

membership@asee.org

Materials

- [New Officer Form / Unit Report](#)
- Signature Forms (to be completed by chair and treasurer)

Organization

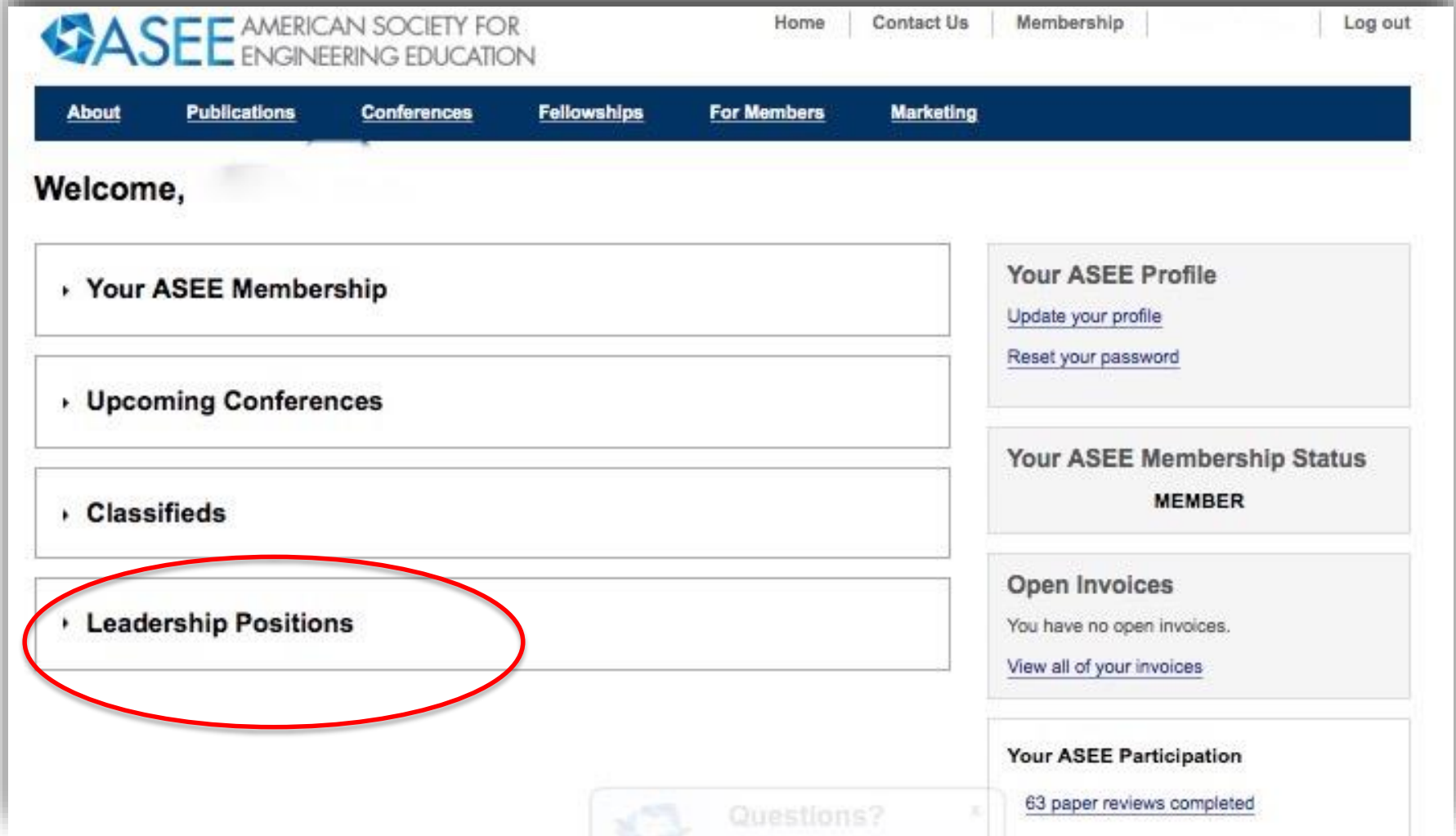
- 12 Sections = 4 Zones
 - Represented by the Zone Chair
- 53 Divisions = 5 PICs
 - Represented by the PIC Chair

What can HQ do for you?

- Mailing labels
- Membership rosters
- Promotional materials
- Web hosting
- Listservs
- Promote meetings via ASEE Connections
- Proceedings archive

May I Send to a Listserv or Access a Roster?

www.asee.org/public



The screenshot shows the ASEE member dashboard. At the top, there is a navigation bar with links for Home, Contact Us, Membership, and Log out. Below this is a dark blue menu bar with links for About, Publications, Conferences, Fellowships, For Members, and Marketing. The main content area is titled "Welcome," and features a list of menu items on the left: "Your ASEE Membership", "Upcoming Conferences", "Classifieds", and "Leadership Positions". The "Leadership Positions" item is circled in red. On the right side, there are several informational boxes: "Your ASEE Profile" with links to "Update your profile" and "Reset your password"; "Your ASEE Membership Status" showing "MEMBER"; "Open Invoices" with the message "You have no open invoices." and a link to "View all of your invoices"; and "Your ASEE Participation" showing "63 paper reviews completed". At the bottom, there is a "Questions?" button with a speech bubble icon.

Charge to Officers

- A working - not honorary - position
- Advance planning
- Effective communication
- Represent membership
- Adhering to deadlines
- Promoting society
- Keep HQ informed

Officer Duties

- Chair
 - Responsible for functioning of group
 - Establish long range planning goals
 - Organize and preside at all business meetings
 - Plan and chair all executive committee meetings
 - Oversea annual meeting
 - Welcome letter to all new group members
 - Ensure officers fulfill their specific duties

Officer Duties

- Chair-Elect
 - Prepare annual request for operating budget
 - Assume duties in chair's absence
 - Assist in overseeing program planning
 - Assume duties delegated by chair
 - Perform other functions designated by by-laws

Officer Duties

- Program Chair
 - Develop sessions according to delegates' interests
 - Coordinate sessions within timeframe set by HQ
 - Work with ASEE Conferences in developing written program

Officer Duties

- Secretary/Treasurer
 - Keep roster of all members
 - Keep all minutes
 - Submit approved signature form to controller
 - Collect all group income
 - Maintain auditable financial records
 - Submit financial report at each group meeting
 - Turn over all records to successor
 - Other duties as determined by chair

Officer Duties

- Awards Chair
 - Work with awards committee to select award recipients
 - Promptly communicate award selection to HQ
 - Transmit awardee information to HQ for publicity and publication
 - Notify awardee and nominator
 - Notify nominators of nominees not selected
 - Plan presentation ceremony
 - Initiate invoice of award sponsors

Officer Duties

- Newsletter Editor
 - Collect, correlate, edit material for periodic newsletter
 - Advise chair and HQ requirement for newsletter distribution / hosting

Officer Duties

- Historian
 - Keep, catalogue, transfer to successor information not normally kept by secretary
 - Responsible for filing appropriate historical documents with group's archival library
 - Other duties as designated by chair

ASEE Annual Conference

- Consider co-hosting sessions with other divisions
- Program development should begin 12 - 18 months beforehand
- Groups have reasonable freedom in developing sessions
- Number of sessions limited by space available
- “Quality rather than Quantity”

External Organizations

- Request to sponsor, support, endorse external events requires written approval of ASEE's Board of Directors

Financial Resources

- BASS Account
- Operating Account
- Local Account

Making Deposits

- Send checks to:
 - American Society for Engineering Education
 - Attn: Joe Dillon
 - 1818 N St. NW Suite 600
 - Washington, DC 20036

Making Payments (Rules to Remember)

- Must Support ASEE Mission & Vision
- No Personnel Expenses
- Operating Account cannot be used for travel to ASEE
Annual Conference

Making Payments (Requirements)

- Disbursement Request Form
- Supporting Documentation
- IRS form W-9 for Award Recipients

**AMERICAN SOCIETY FOR ENGINEERING EDUCATION
BASS/OPERATING ACCOUNT DISBURSEMENT REQUEST**

DATE: _____ FROM: _____

TO: ASEE
Attn: Alisa Graham
1818 N Street NW, Suite 600
Washington, DC 20036
a.graham@asee.org

I, _____, am the Secretary/Treasurer of the _____ Choose One

hereby authorize the ASEE Business Office to pay all sums noted below:

Treasurer's Signature: _____

Chair's Signature (if necessary): _____

| | |
|---|--|
| PAY TO: _____ _____ _____ _____ _____ | THE AMOUNT OF \$: _____ PURPOSE OF EXPENDITURE: _____ _____ _____ _____ |
|---|--|

ACCOUNT #: _____ BASS Account Expense -or- Operating Account Expense
(Please choose one) 74200 74210

*If OPERATING Funds are requested, please justify (See Operating Manual):

REMINDER: Send copies of all receipts, invoices, or announcements in order to substantiate claims and awards.
 If no supporting material is available, a copy of the Board minutes or a letter from the Chair is necessary.

ASEE Business Office Verification
 BASS Account \$ _____ as of _____ Operating Account \$ _____ as of _____

Special instructions or handling:
 Review/Submission:
 Approval:
 Entered:

Financial Policy: Frequently Asked Questions & Answers

- Do the balances of the BASS & Operating Accounts get carried over the next fiscal year?
 - YES, for BASS Accounts
 - NO, for Operating Accounts
- Can a BASS or Operating Account have a negative balance?
 - NO for both – accounts cannot be overdrawn

Financial Policy: Frequently Asked Questions & Answers

- Who can sign the disbursement requests?
 - Signers on the “Officers Signature Form”
 - Treasurer is primary signer
 - Chair is secondary signer
- What is the normal turn-around time for a disbursement request?
 - Approximately 10 - 15 business days

Financial Policy: Frequently Asked Questions & Answers

- Who is the main contact at the Headquarters regarding BASS and Operating Accounts?
 - Joe Dillon
 - j.dillon@asee.org
 - (202) 350-5000

Thank you for representing ASEE!