

# ASEE

New Officer Orientation

# Section & Zone



# Division & Council



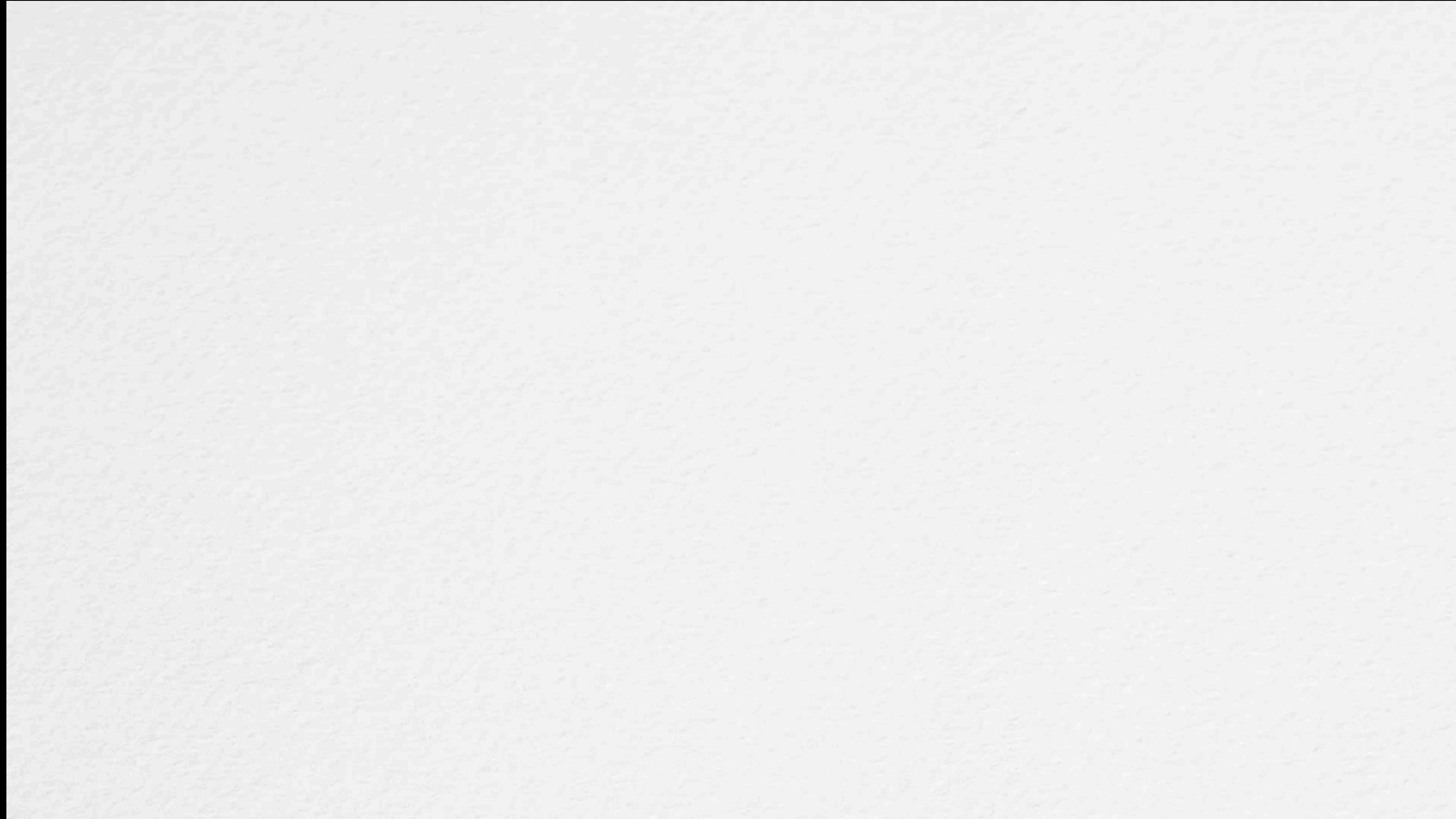
# Annual Report



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# This is ASEE



# To Do

- Read Section or Division operating manual
- Submit new officer form by July 1
- Read bylaws
- Update bylaws
  - > 10 years since last revision
  - Ensure all board positions are referenced
  - Include diversity statement
- Contact predecessor
- Send welcome emails to new members
- Send emails encouraging lapsed members to reactivate
- Think of volunteer opportunities

# Who Represents You?

- Section by 1 of 4 Zone Chairs
- Division by 1 of 5 Professional Interest Council (PIC) Chairs



# ASEE HQ SERVICES

- Membership Rosters
- Other Supplies - Promotional Materials
- Web Hosting
- Member IDs for voting
- Conference in a box
- Proceedings and newsletter archiving
- Meeting promotions
- Listserv

# Listservs and Membership Rosters

The image shows a screenshot of the ASEE (American Society for Engineering Education) member dashboard. The page features a navigation bar with links for Home, Contact Us, Membership, and Log out. Below the navigation bar, there is a secondary menu with links for About, Publications, Conferences, Fellowships, For Members, and Marketing. The main content area is titled "Welcome," and contains several sections. On the left, there is a vertical list of menu items: "Your ASEE Membership", "Upcoming Conferences", "Classifieds", and "Leadership Positions". The "Leadership Positions" item is circled in red. On the right, 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 of the page, there is a "Questions?" button and a small notification box.

ASEE AMERICAN SOCIETY FOR ENGINEERING EDUCATION

Home | Contact Us | Membership | Log out

About Publications Conferences Fellowships For Members Marketing

Welcome,

- Your ASEE Membership
- Upcoming Conferences
- Classifieds
- Leadership Positions

Your ASEE Profile  
[Update your profile](#)  
[Reset your password](#)

Your ASEE Membership Status  
**MEMBER**

Open Invoices  
You have no open invoices.  
[View all of your invoices](#)

Your ASEE Participation  
63 paper reviews completed

Questions?

# Listserve

- Chairs, Program Chairs, others as designated by Chair
- Must be sent from email address associated with profile
- Upload >200kb to online storage site and include link
- The announcement either goes out or it doesn't
  - If one person receives the announcement, the send was successful
  - Check junk folders, personal spam filters, have email admins check universal filters
- ASEE is unable to provide assistance once an announcement has been sent.

# NEVER...



**USE A MEMBERSHIP ROSTER  
TO SEND GROUP E-MAILS**



# Charge to all officers

- A working – not honorary – position
- Advance planning, continuity of effort
- Maintaining effective communication
- Represent membership
- Adhere to deadlines
- Promoting society
- Keep HQ informed

# Ideas

- For Sections: ensure session rooms are close to exhibits
- Host social events at annual conference or Section meeting
  - Send thank you notes to sponsors immediately after the function
- For Sections: email printable parking pass to registrants
- For Sections: have members register using their ASEE ID

# Officer Duties: Chair

- Responsible for function of group
- Establish long-range planning goals
- Organize and preside at all business meetings
- Plan and chair all executive committee meetings
- Oversee annual meeting
- Welcome letter to all new members
- Ensure officers fulfill their 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 duties designated by bylaws



# Officer Duties: Program Chair

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

# Officer Duties: Secretary/Treasurer

- Keep rosters of all members
- Keep all minutes
  - Finance-related to ASEE HQ
- 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

# Officer Duties: Awards Chair

- Work with awards committee to select award recipients
- Advise chair and HQ
- Transmit award information to HQ for publicity and publication
- Notify awardee and nominator
- Notify nominators of unsuccessful nominations
- Plan presentation ceremony
- Initiate invoicing of awards sponsors

# Officer Duties: Editor

- Collect, correlate, edit material for periodic newsletter
- Advise chair and HQ the requirements for the transmission of the letter

# Officer Duties: Historian

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

# ASEE Annual Conference

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

# External Organizations

- Requests to sponsor, support, or endorse external events requires written approval of ASEE's board of directors

# Notes

- Sections cannot charge dues
- ASEE is unable to administer unit elections
- If one person receives your listserv announcement, the send was successful
- Requests for distribution of announcements to other groups must be sent to group chair
- Invest in a banner/table top display



# BASS and Operating Accounts

- Financial policy is located here: <https://www.asee.org/about-us/policy/financial-policy/part-1#Field> Unit Finances
- BASS account rolls forward year over year
- Operating account is a use it or lose it fund and allocated at the beginning of the fiscal year
  - For Divisions : Calculated by using \$1/member from the previous year
  - For Sections : \$550/ fiscal year
  - For Councils : \$1,500/ fiscal year

# BASS Accounts

- Income sources:
  - Membership Dues – (this includes “Sections Dues” at \$1/member)
  - Contributions
  - Sponsorships
  - PIC special allocation funds
  - Annual Conference net income
- Expense:
  - Awards/Honorariums
  - Events at the ASEE annual conference or own conference
  - Printing & Publications
  - Travel
  - General administrative costs (includes the ASEE administrative fee)

# Administration

- ASEE Contact: Joe Dillon, CFO (j.dillon@asee.org)
- For BASS Operating policies and forms, please go to:<https://www.asee.org/member-resources/resources/financial-policies-forms>
  - BASS disbursement form: submit receipts/documentation/W9 with signed disbursement form to Joe Dillon
  - BASS unit deposit form (send checks/along with deposit form) to our lockbox address on the form.
  - BASS invoice request form (send invoice requests to Joe

# Administrative Fee

- Why is an administrative fee being assessed to the BASS accounts?
  - The BASS accounts are an element of ASEE's operational accounts. They have previously been shielded from the operating expenses imposed on other parts of ASEE through a full subsidy, which, unfortunately, the Society can no longer afford to provide. The ASEE Board of Directors has made a balanced budget a top priority. This requires shared sacrifice and commitment from headquarters, board members, and you, our members, to cut costs and increase revenue. Applying an administrative fee to BASS accounts at least partially covers the true cost to ASEE of managing those funds.
- What is the amount of the fee?
  - The fee will be 30% of the value of incoming funds from external sources

# Administrative Fee

- What happens to the fees collected?
  - The fees will be allocated to help defray the overhead expenses on BASS account expenditures.
- Does this apply to internal transfers of funds from one BASS account to another or from an endowed award account to a BASS account?
  - The administrative fee will not be applied to internal transfers from one BASS account to another, or from an ASEE endowed account to a BASS account.

# BASS Activity

- Will the administrative fee apply to ticketed events where deposits are collected from attendees, then passed through to cover meal costs?
- Funds collected for ticketed events at the Annual Conference are first collected and paid for through ASEE Conferences. The only amount that gets forwarded to BASS accounts represents the overage between funds collected and costs incurred. That overage would be subject to the administrative fee at the point it is deposited. The same process is true for Division/Section/Council specific conferences managed by the ASEE conferences department.

# BASS Activity

- The administrative fee will not be applied to operating funds that are allocated internally from the ASEE membership department to each of the Divisions/PICs/Sections and other units at the beginning of the fiscal year.
- ASEE internal staff will make a point to use up operating funds first before dipping into BASS account funds for expenses; as Operating accounts are a use it or lose it fund.
- Quarterly reports will be sent out to Chairs and Treasurers

Thank you for representing ASEE!