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- Please note speaker's notes displayed beneath the slide in "normal" mode. They may help to clarify the slide's message.



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Reg. 05 Section Member Leader Training Program Presentation 2012-13

An overview of key Member Leader positions:
Primary responsibilities and resources



August 2012 ew

This presentation is the second layer of Section Member Leader Training.

The first layer is an email to which the presentation is attached. The email summarizes position responsibilities, and provides hyper links to key on-line resources. The email is customized for each position. The email for the Chair position is sent to all incoming section Chairs. There are also emails for Secretary, Treasurer, Audit Chair, Membership Chair, and Nominating Chair. Other committee chair positions are covered briefly in this presentation.

The third layer of the training program is a live Q&A session held eg. as a phone conference.

Agenda

- **Minimum Requirements** (MRs... per SOA, QMP, P&Ps)
- **6 Required Positions** (Chair, Sec, Treas, Memb, Audit, Nom)
 - **Responsibilities** (per MRs and Position Descriptions)
 - **Position descriptions, resources** (links to web site)
 - and some other committee chairs on the...
- **Member Leader website**
- **Sharepoint site**



This training program is designed to help assure that you have the up-to-date information you need whether you are new to the position, or an old hand at it (as I know many of you are). This information is being provided in the form of an email and powerpoint presentation that you can review at your own pace -- without having to travel, on your own schedule. We will then schedule a telephone conference question / answer / discussion session so that those of you who need to / want to can collaborate with myself and our DRDs, as well as among yourselves.

Here's what we'll be covering.

MR - Minimum Requirements

- **3 Elected Officers** (Chr, Sec, Treas – reported / entered by **May 15**)
 - Officers, Chairs paid up and in good standing
 - Officers must be Full Members
- **3 Committee Chairs** (Mem, Aud, Nom – reported / entered by **May 15**)
 - Chairs must be affiliated with section if Site / Enterprise
- **Audited Financials** (reported by **mid Feb per Friday Fast Facts**)
- above = QMP Level 1, Section Basics
- **30 or more members** (in good standing)
- these requirements are **NOT optional**



These requirements are the minimum that a section can fulfill and remain in good standing.

Unlike some of what follows, these requirements are NOT optional.

Every section must elect / appoint and REPORT the 3 required officers, and the 3 required committee chairs

Every section must compile, audit, and submit a detailed financial report after the end of the fiscal year.

MR - Tracking

- Weekly Min Requirements Report

» see Friday Fast Facts down near bottom for link

Region	Sect No	Section Name	Officers List	Comm List	All Financial Forms Rec'd	Chair	Treas	Sec	Aud	Memb	Nom	Memb Count	Count Met
5	0500	Lehigh Valley			08/10/2009			U				414	Y
	0501	North Central Pennsylvania			08/10/2009							136	Y
	0502	Baltimore			07/31/2009							610	Y
	0503	Harrisburg		N	08/11/2009				N			424	Y
	0505	Philadelphia			08/18/2009							974	Y
	0506	Delaware			08/04/2009							281	Y
	0508	Southern Jersey		N	08/17/2009						N	146	Y
	0509	Washington Dc & Maryland M			8/31/2009							767	Y
	0510	Reading			08/11/2009							214	Y
	0511	Northern Virginia			08/11/2009							775	Y
	0512	Delmarva			09/10/2009			U	U			69	Y



Weekly report tracks

Officers

Comm Chairs

Financials

and Member Count

MR - Other good QMP practices

- Annual Business Plan and
- Annual Budget (both submitted on time for Level 2)
- above = QMP Level 2, Section Planning
- Results vs. Bus. Plan for last year & cover letter (both submitted on time for Level 3)
- QMP Level 3, Total Quality (if $\geq 75\%$ of target)
- And, per the SOA... stated as min reqmts... but not tracked...
 - 1 Leadership Mtg, 1 mailing / quarter
 - 4 Membership / Development Mtgs per year



Sections are “required” to develop a Business Plan and Budget... but reporting to ASQ is optional

Other non-tracked requirements are leadership meetings, member mailings, and member meetings

BUSINESS PLAN TEMPLATE FOR [ENTER MEMBER UNIT NAME/NUMBER]

Objective	Activity Title	Activity Description	Activity Date(s)	Measure	Goal	Status ^	% of Goal Achieved †	Contact*	Comments
Increase Impact <ul style="list-style-type: none"> Support global transformation initiative Support Social Responsibility movement 	<ul style="list-style-type: none"> IMPACT MEMBERSHIP GROWTH MEMBER LOYALTY MEANS (revenue / margin) PROCESS PERFORMANCE PEOPLE 								
Grow Membership <ul style="list-style-type: none"> Grow the number of organizations served Grow the number of members engaged in member unit activities Grow the number of renewing members 									
Increase Customer Loyalty <ul style="list-style-type: none"> Improve member retention Enhance the value of the Quality BoK through strategic use 				Process Performance <ul style="list-style-type: none"> Use technology to enable information sharing Improve performance using Baldrige criteria or other methodology 					
Grow Means <ul style="list-style-type: none"> Increase professional certifications Increase use of ASQ training 				People <ul style="list-style-type: none"> Increase Member Leader satisfaction Increase Member satisfaction Increase number of Member Leaders participating in leadership training 					

- Objective
- Activity
- Dates
- Measure
- Goal
- Status
- % Achieved
- Responsible
- Comments

The business plan template covers ASQ objectives of

IMPACT....
MEMBERSHIP GROWTH...

etc.

and requires corresponding Objectives... Activities... Goals... Dates...

etc.

MR - References

- **SOA** (Section Operating Agreement)
 - <http://www.asq.org/about-asq/how-we-do/pdf/SectionOperatingAgreement2009.pdf>
- **QMP manual** (Quality Management Program)
 - <http://www.asq.org/member-leader-community/key-tasks/quality-management-program/index.html>
 - formerly SMP, Section Management Planning
- **P&P** (Policies & Procedures, specifically S 01.00)
 - <http://www.asq.org/about-asq/how-we-do/pdf/s-01-00.pdf>

Due dates can change, see Friday Fast Facts for the latest!



These are the primary sources regarding Minimum Requirements

Oh, yes... and Friday Fast Facts esp. for latest on due dates. They can change eg. if they fall on Saturday or Sunday.

The Excellence Awards

- Another facet of QMP
- Eligible if Level 1 & 2 completed
 - Level 3, Total Quality not required
- Based on Satisfaction*, Loyalty*, Retention**
- Above average on
 - » any one... Bronze
 - » any two... Silver
 - » all three... Gold

* per CMS Customer Measurement Survey

** per Member Retention Report

<http://www.asq.org/about-asq/how-we-do/pdf/retention.pdf>

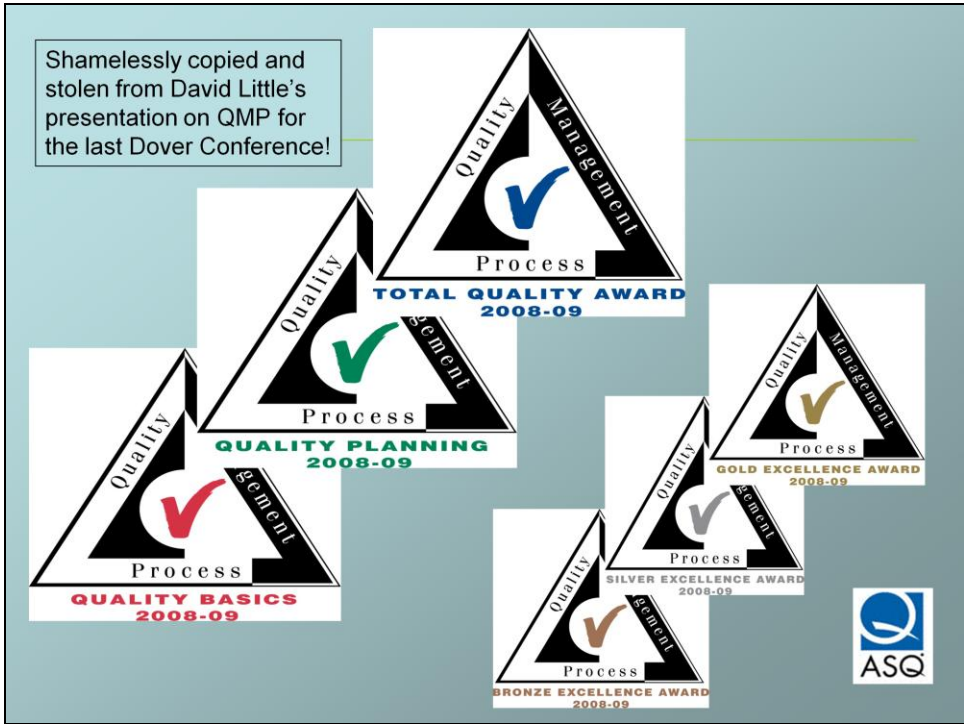


Still within the context of QMP...

The Excellence Awards are in **PARALLEL WITH** and not **IN ADDITION TO** Level3 / Total Quality

A section can receive **Bronze, Silver, or Gold** without having achieved Total Quality as long as they've made Levels 1 and 2

Shamelessly copied and stolen from David Little's presentation on QMP for the last Dover Conference!



The award logos

Officers & Chairs

- the Duties & Responsibilities of the
- Officers... elected
 - Chair
 - Secretary (must be full members)
 - Treasurer
- Committee Chairs... appointed
 - Membership
 - Audit (must be affiliated)
 - Nominating



Now let's look at the duties and responsibilities of each position

Officers, Chairs, All Leaders

- Meet minimum requirements to maintain section
- Develop Goals / Objectives, Metrics
- Develop Business Plan & Budget
- Uphold ASQ Bylaws, SOA, P&Ps, etc.

- <http://www.asq.org/member-leader-community/index.html>
- See Interact, Key Tasks, Positions, Resources, Initiatives, News/Dates



All member leaders are responsible for...

ASQ: The Global Voice of Quality - Mozilla Firefox

ASQ is a global community of people passionate about who use the tools, their ideas and expertise to make world work better. ASQ: The Global Voice of Quality

ASQ

KNOWLEDGE CENTER MEMBERSHIP CERTIFICATION TRAINING

Ford Talks Quality With ASQ
Ford VP Says, "Quality Is More Than a Car—It's an Experience"

Present at the 2012 World Conference
Share best practices, successes, and proven techniques to a global audience from various industries. Submit your presentation by August 9, 2011.

Connect With Quality Worldwide
Learn more about the international reach and resources provided by ASQ Global!

Service Quality Measurement
42% of customers with poor service experiences do not return. SQM helps you achieve service goals. Register today.

Headlines

Your Communities

FEATURED

ASQ And BSR Release Executive Report On Corporate Social Responsibility
ASQ and BSR released an executive brief titled CSR and Quality: A Powerful and Untapped Connection, which explores the intersection between quality and corporate social responsibility (CSR). The report highlights shared concepts in quality and CSR.

Workforce Deviance And The Business Case For Employee Engagement
A recent article in the current issue of Journal for Quality and Participation shows how employee engagement can be a powerful force for addressing and preventing behaviors that undermine customer, product, and process quality.

MEMBER LEADER
Resources for managing your community available at the Member Leader Community of Practice

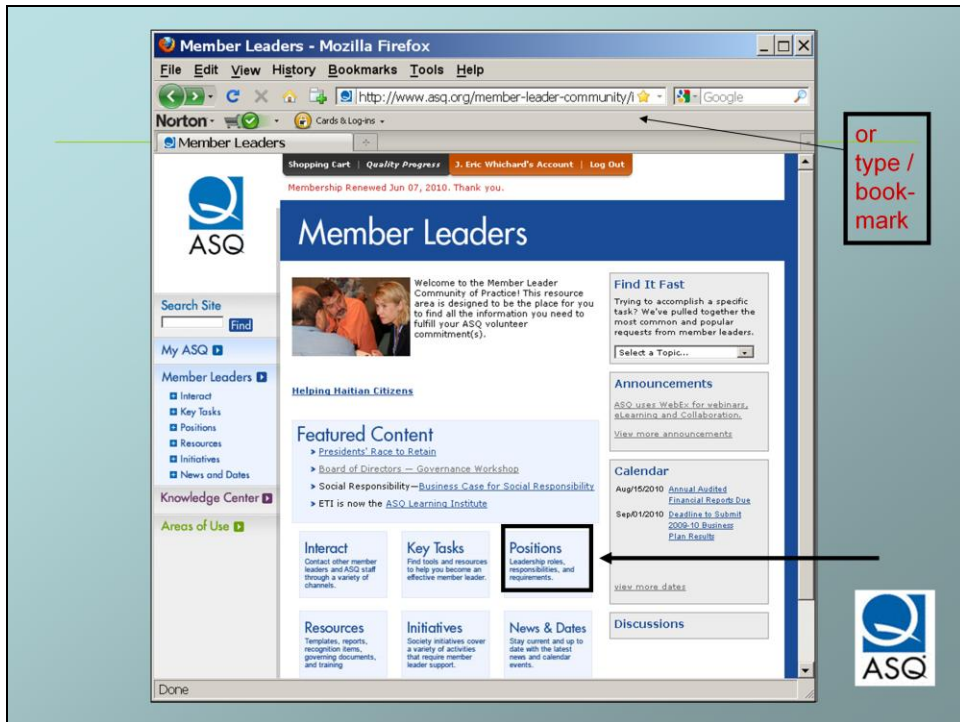
CONNECTIONS
Lehigh Valley Section
North-Central Pennsylvania Section

Learn to see your data

Quality Trends

Access the Member Leader website here

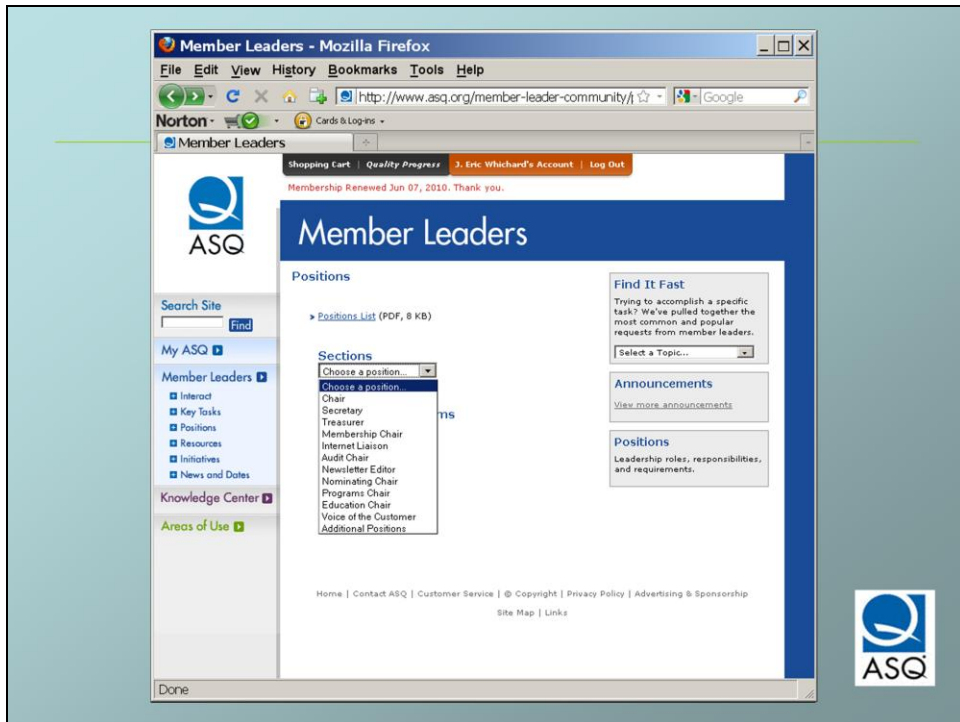
We're going to be looking at a wealth of member leader information and resources, which are located in the **MEMBER LEADER AREA** as accessed via the main ASQ.org web page



Here's the ML site.

We'll be concentrating on the POSITIONS area

and will take a quick look at the other areas after that, as well as SHAREPOINT



Click Positions
then Choose a position
in our case under SECTIONS

Officers - CHAIR



- Overall requirements, operations, results
- Report / enter elected officers* (assure eligibility, good standing)
- Appoint & report / enter committee chairs*
- Assure audited financials are reported* * on time
- Develop Business Plan & Budget (with other leaders, optionally report*)
- Assure results to plan are reviewed (optionally report*)
- Assure other requirements (members, meetings, mailings, etc)

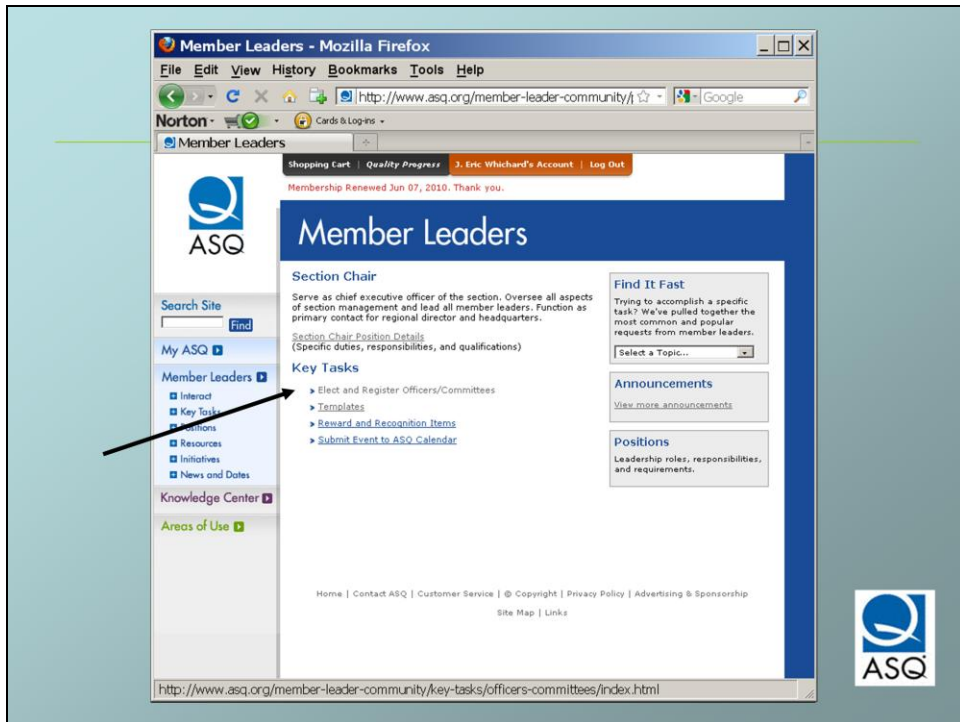
• <http://www.asq.org/member-leader-community/positions/section-chair/index.html>



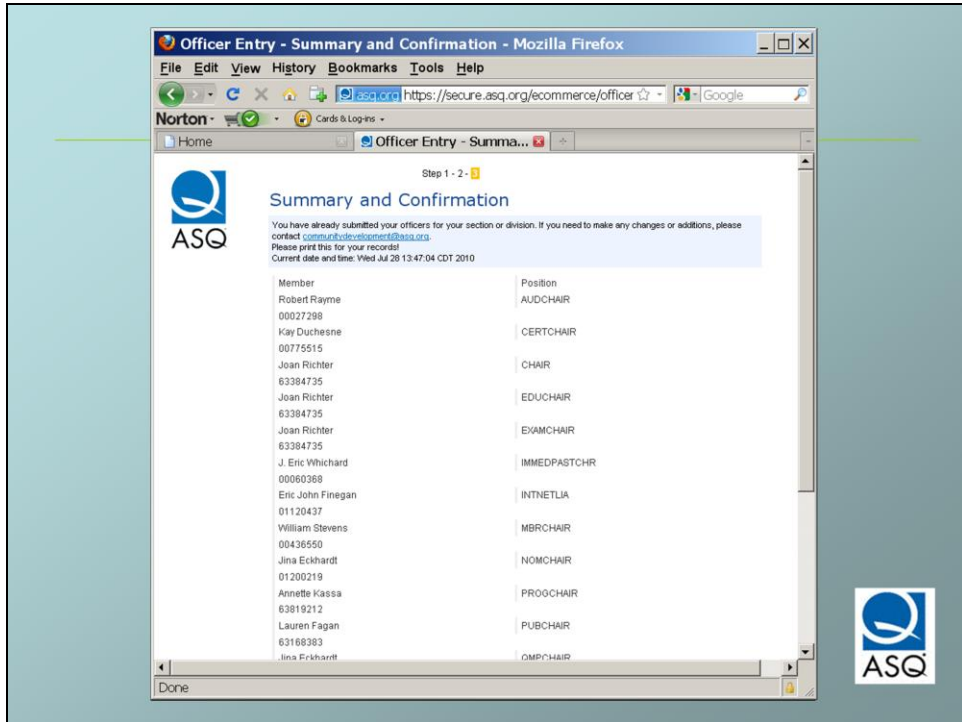
Basic CHAIR responsibilities are...

Note deadline re: some items!

for more detail, see the link at bottom of slide



Member Leader area provides access to the Officer / Chair entry online tool, templates, and other good stuff



After officers / chairs are entered and submitted, you'll see this confirmation screen which can be copied, printed, etc. for your records

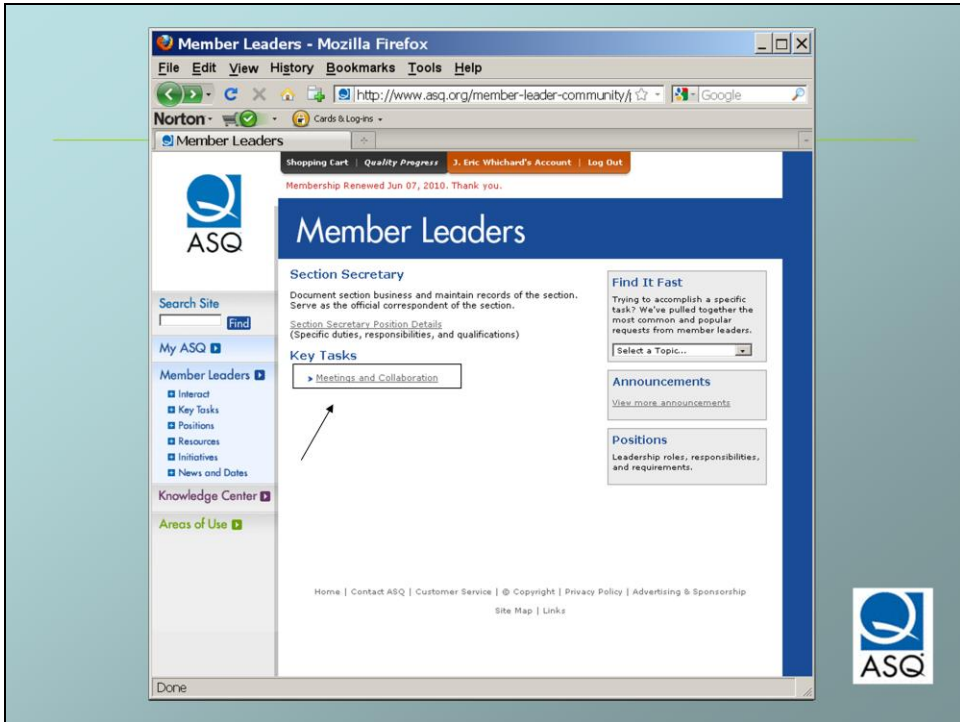
Officers - SECRETARY

- Primary correspondent for the section
- Prepare leadership meeting agenda
- Record leadership meeting minutes
- Assure minutes corrected / approved / archived
- Maintain section bylaws, P&Ps (if any)
- Sign MOU, contractor agreements, etc.
- Promote communication, collaboration

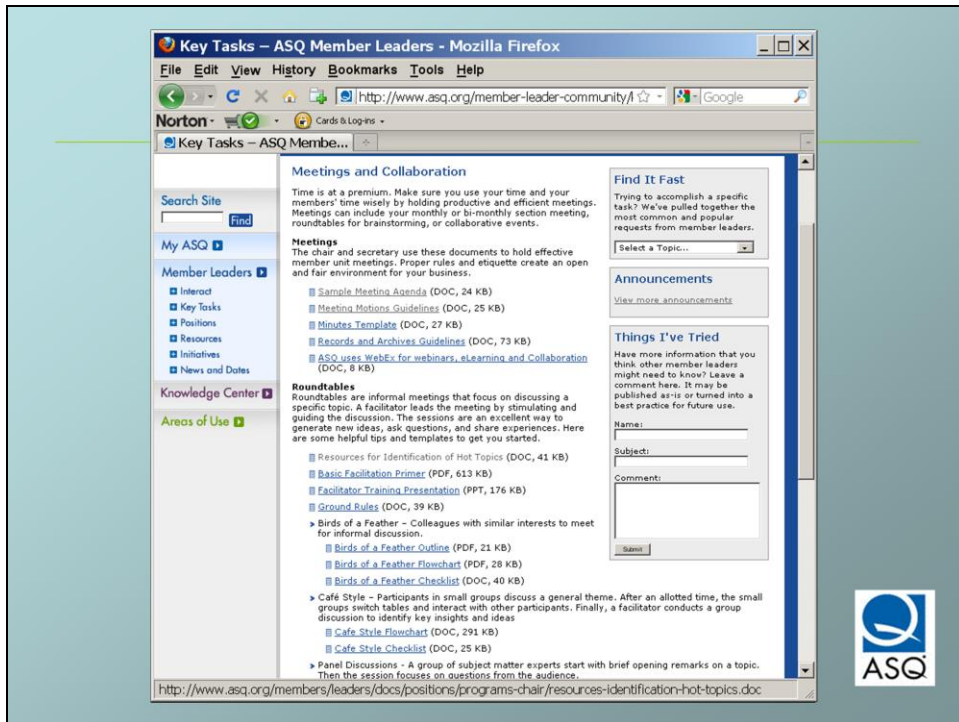
• <http://www.asq.org/member-leader-community/positions/section-secretary/index.html>



The SECRETARY'S responsibilities are...



There are a lot of resources for the Secretary under the Meetings link



Whoa!! A ton of stuff.

Never realized how much was involved in being Secretary!

Some good things for other positions as well (eg. facilitation)

Officers - TREASURER

- Development of Budget (with other leaders, optionally report*)
- Financial Accounting, Reporting
 - ongoing, up to date, accurate, transparent
- Funds receipt, custody, disbursement
 - documented, justified, approved, etc.
- Financials audited & reported annually*
- 1099 contractor report annually* * on time
- Cash position reported quarterly*

• <http://www.asq.org/member-leader-community/positions/section-treasurer/index.html>

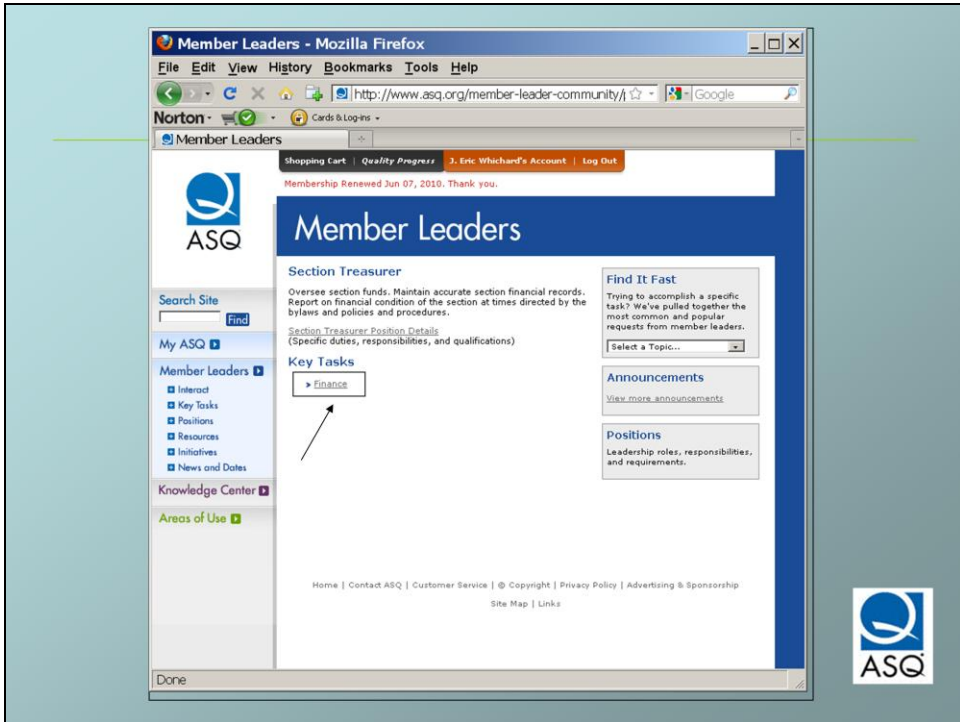


The TREASURER'S duties are...

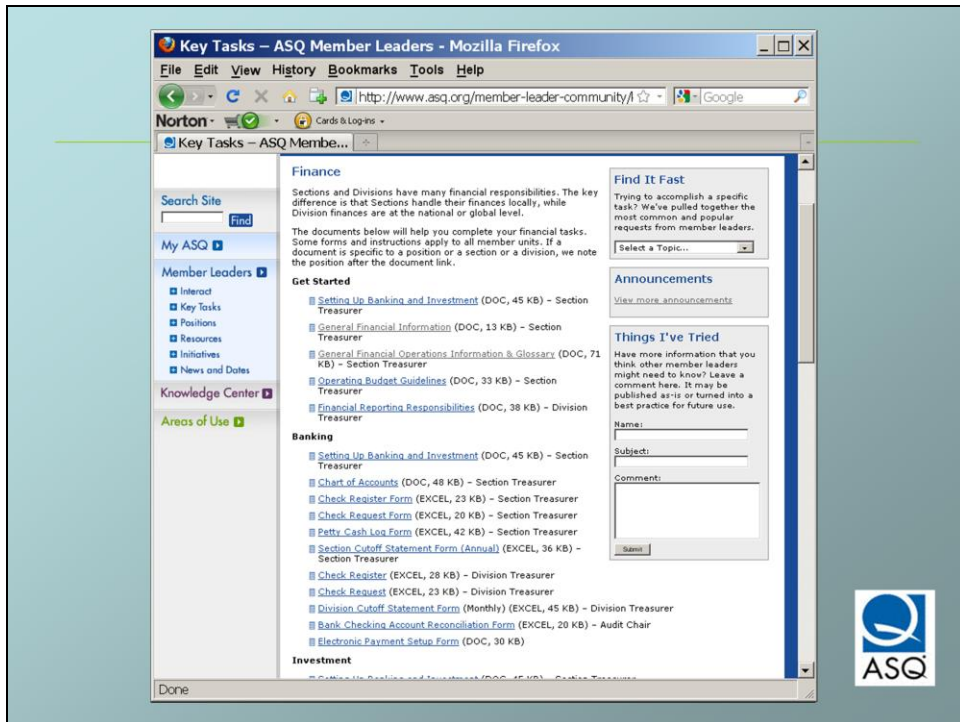
Note "on time" items

Timely and accurate financial reporting is critical to ASQ.

Monthly on-line reporting will help us detect the need for help throughout the year – instead of running headlong into it in August.



Again... looks simple...

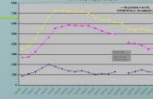


But look at all the resources provided.

These essentially replace the old Treasurer's Handbook

Chairs - MEMBERSHIP

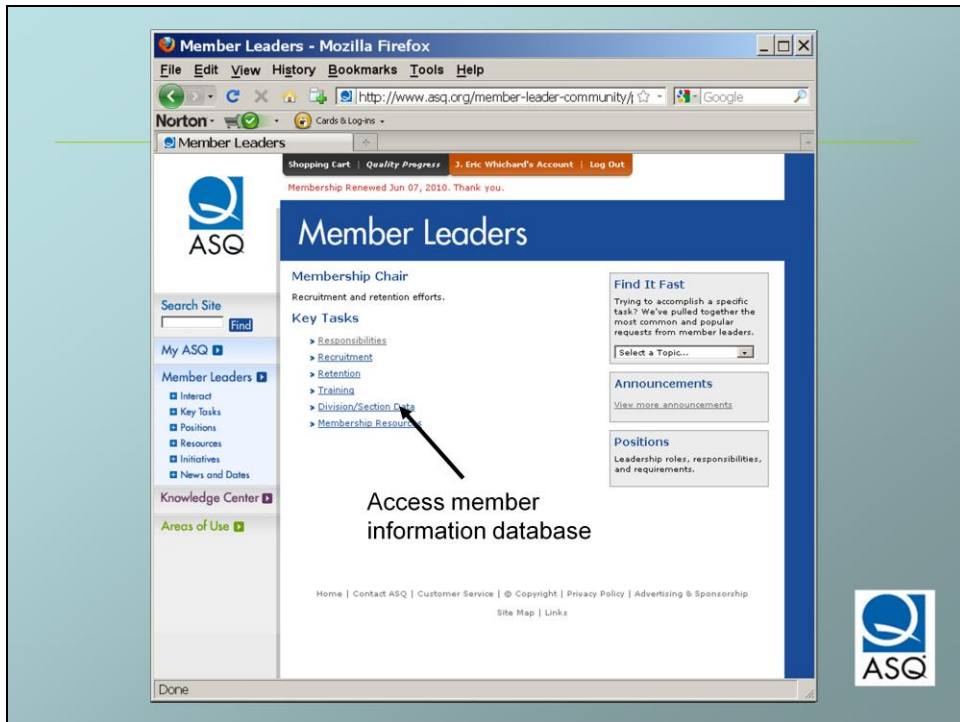
- Focus on member recruitment, retention
 - **Goals, efforts / initiatives, metrics, results**
 - **Promotion** (eg. via newsletter, applications available, area business contacts, etc)
 - Other recommended duties
 - **Chair committee, analyze data, pursue plans, hold meetings, get results re: recruitment, retention**
 - **Member support**
 - issues, suggestions, requests, etc.
 - prospective, new, renewing, unpaid members
 - advocate for value, satisfaction, loyalty
- <http://www.asq.org/member-leader-community/positions/membership-chair/index.html>
- <http://www.asq.org/member-leader-community/positions/membership-chair/details/index.html>



ASQ would like Membership chairs to focus much more on recruitment and retention...

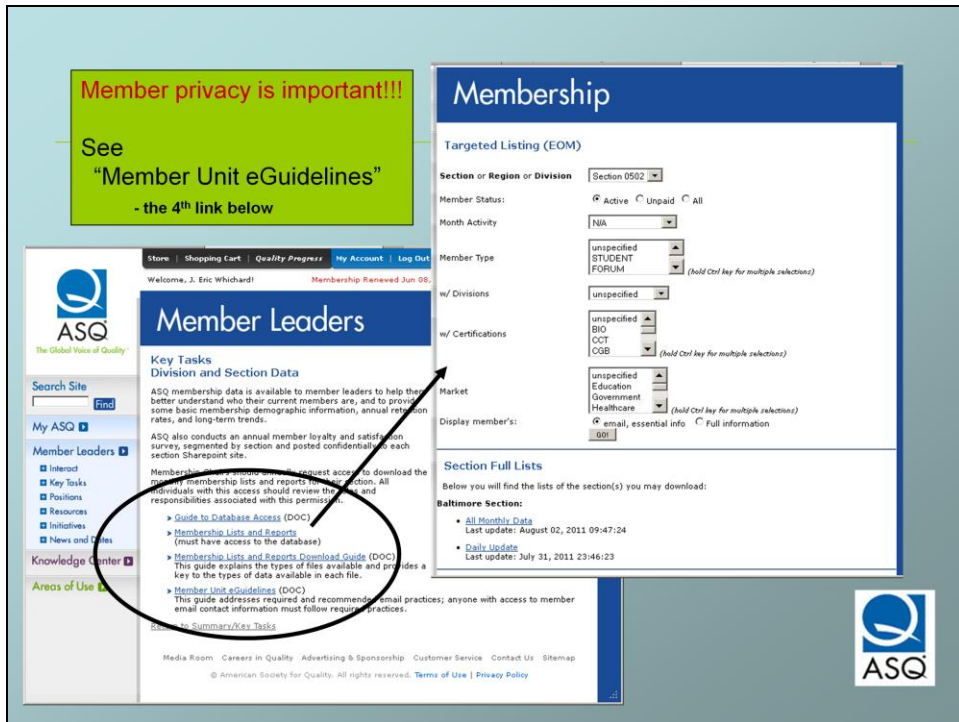
not simply the member list, member support, etc.

We'd like this chair to really DRIVE efforts in these two critical areas!



**Note RECRUITMENT, RETENTION items...
as well as more traditional Membership Chair tools.**

**Access and instructions re: the member database is under “Division /
Section Data”**



Membership Lists and Reports lets you generate a custom list based on various selection criteria.

Or you can just download a .zip file containing complete lists regarding

Activity, Allotment, New Members, Section Members, and Unpaid Members

which can tell you which members have just renewed, which ones haven't and are now Unpaid, who just joined, etc.

Complete member info is provided including Member#, Name, Address, phone numbers, email address, job title, membership level, certifications, etc.

Just remember... MEMBER PRIVACY must be maintained!! Be sure and read "Member Unit eGuidelines".

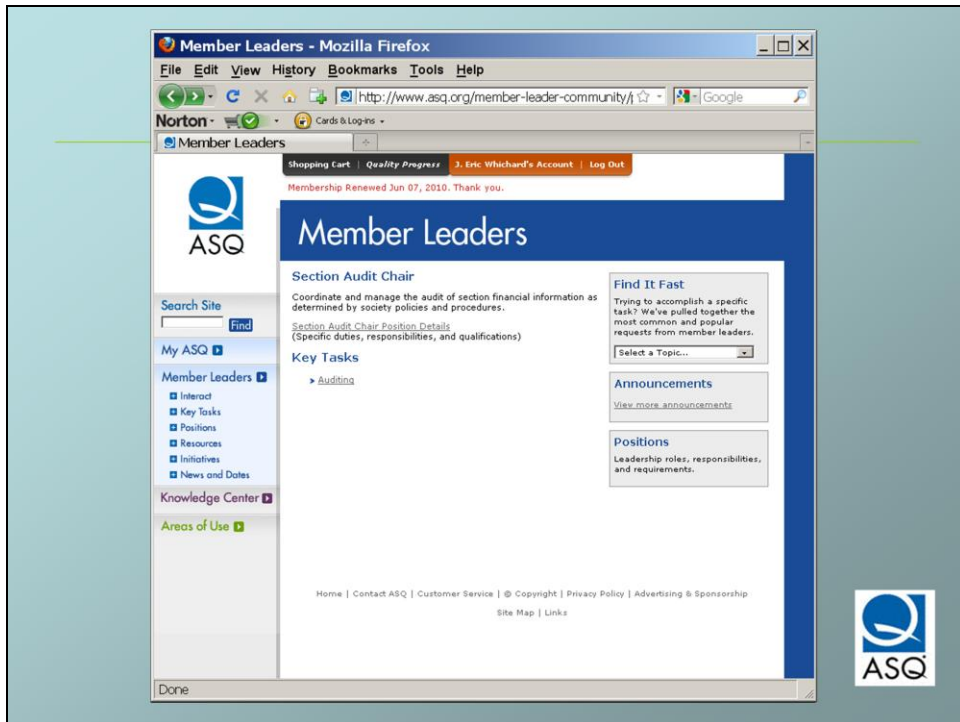
Chairs - AUDIT

- Annual audit of financials*
 - **Report findings, improvement recommendations**
 - **Execute audit certificate** (when audit results acceptable)
- Quarterly audit of books * on time
 - Internal... not tracked

• <http://www.asq.org/member-leader-community/key-tasks/auditing/index.html>



**The Audit Chair works closely with the Treasurer.
Note “on time” requirement.**



Everything needed is provided under Key Tasks

Chairs - NOMINATING

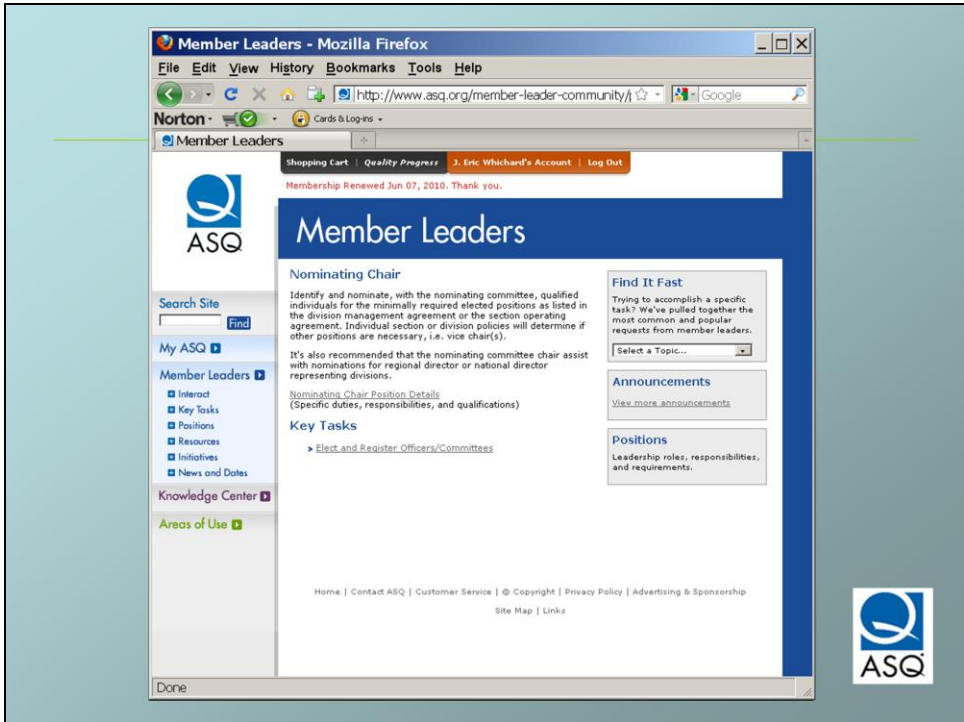
- Identify & nominate officer candidates
 - with Nominating Committee, other Leaders
 - vet qualifications, eligibility
 - call for nominations \geq 30 days before elect / declare
- Assist with higher level nominations
 - Regional Director, Deputy Regional Directors
 - Corporate Director
- <http://www.asq.org/member-leader-community/positions/nominating-chair/details/index.html>



Every organization with elected officials needs a Nominating Chair / Committee.

Nominee eligibility (discussed earlier, and in P&Ps, should be vetted AHEAD of nomination if possible)

Note 30 day deadline



Chairs - Other

- Internet
- Newsletter
- Program
- Education
- VOC
- Others...

Search Site
Find

My ASQ

Member Leaders

- Interact
- Key Tasks
- Positions
- Resources
- Initiatives
- News and Dates

Knowledge Center

Areas of Use

Positions

[Positions List \(PDF, 8 KB\)](#)

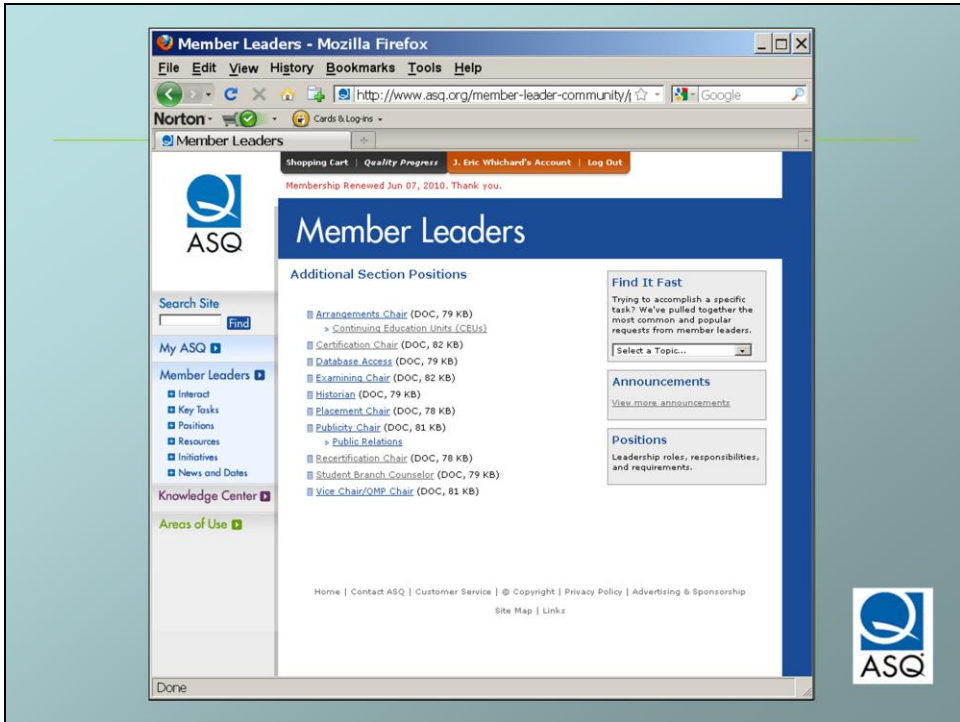
Sections

Choose a position...

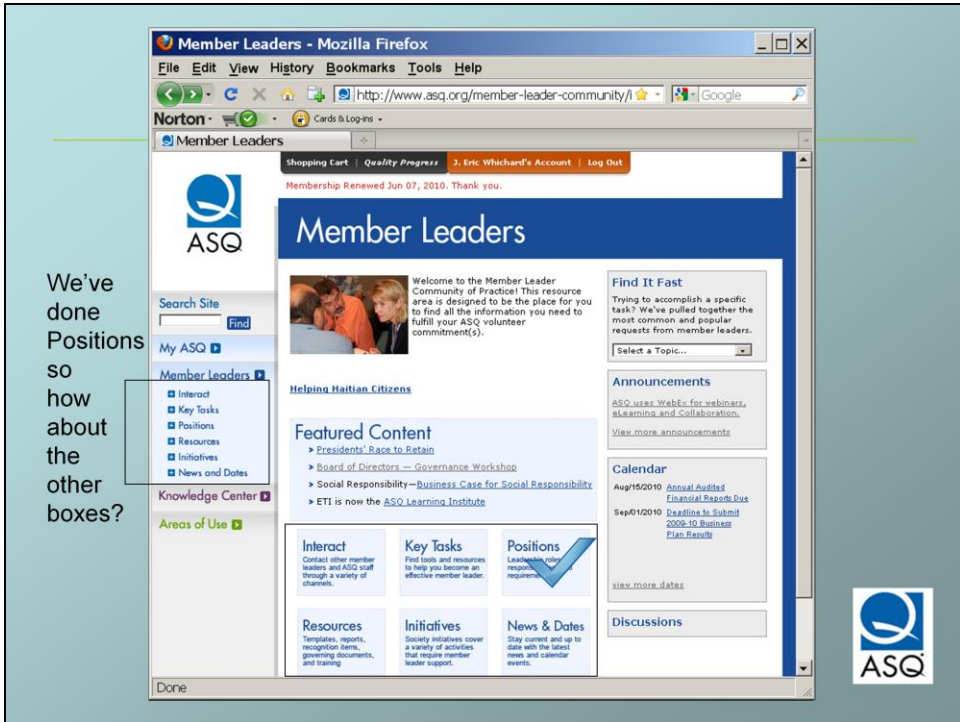
- Choose a position...
- Chair
- Secretary
- Treasurer
- Membership Chair
- Internet Liaison
- Audit Chair
- Newsletter Editor
- Nominating Chair
- Programs Chair
- Education Chair
- Voice of the Customer
- Additional Positions



The ML web site also provides position description and resources for other positions if applicable to the section

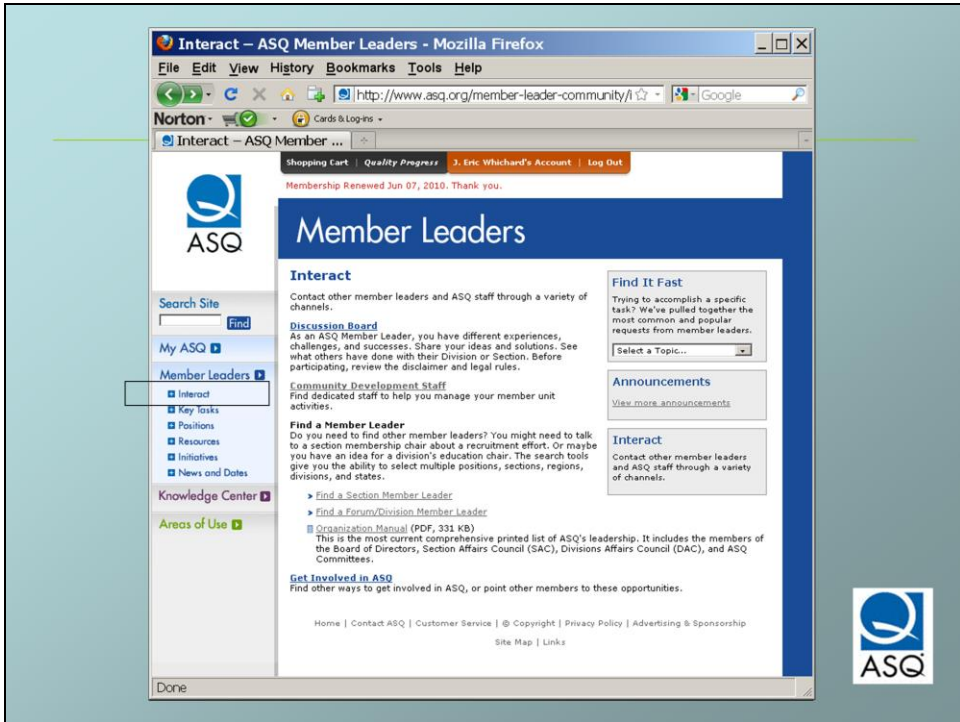


including these OTHER / ADDITIONAL positions



Ok... that wraps up the six required positions.

Let's take a quick look at some of the other areas of the ML site



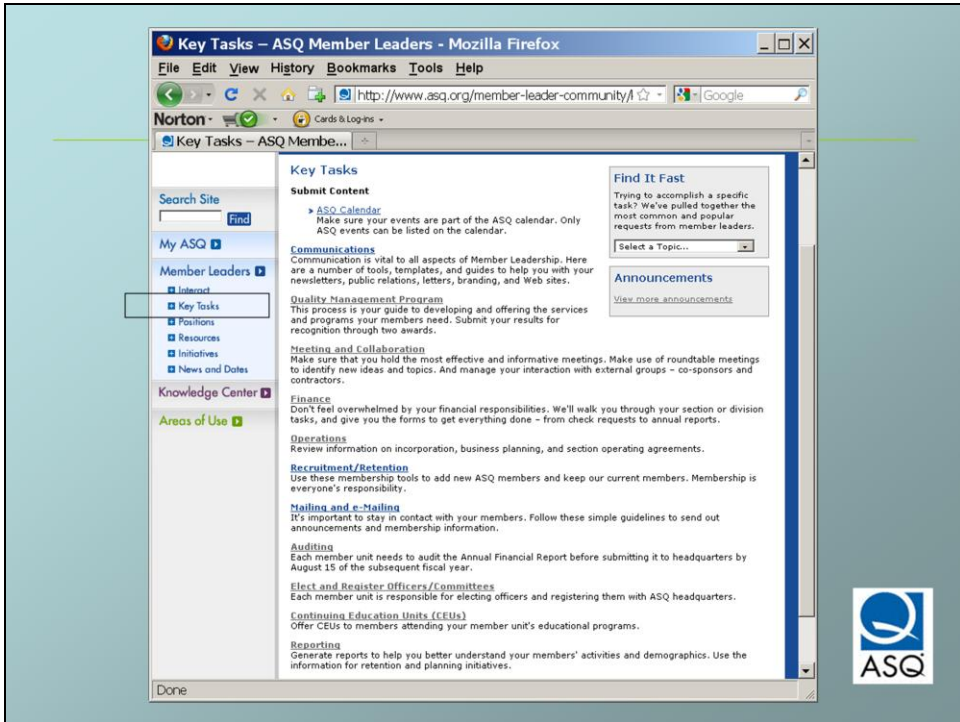
Interact.....

What are other MLs saying

Who's your ASQ support person?

Find an ML

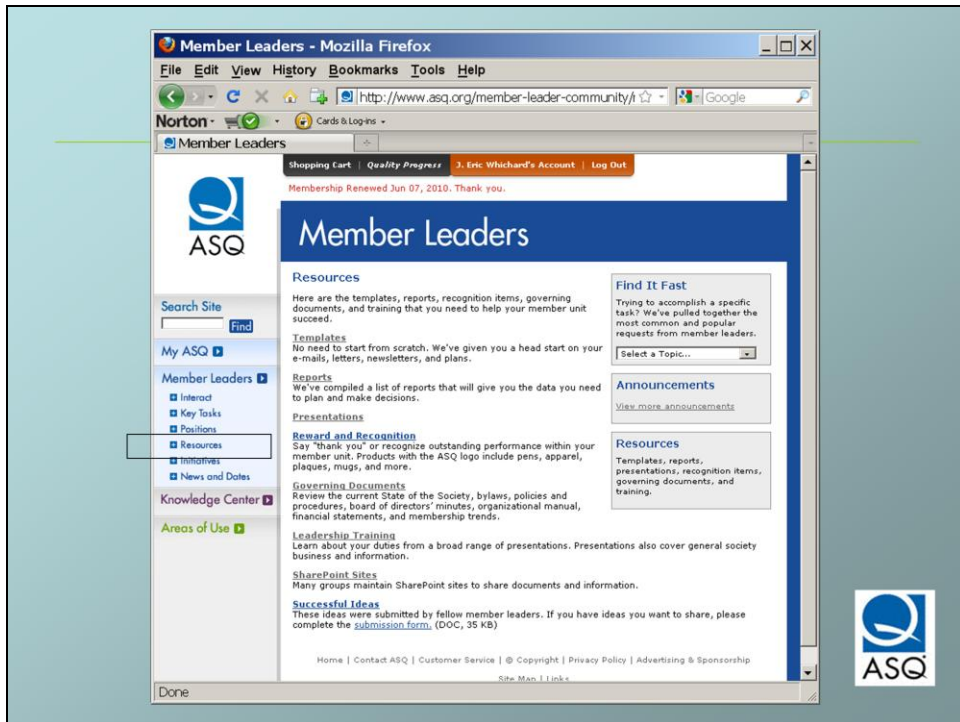
Access the current Org Manual



Key Tasks.....

Spend some time at home looking at this area.

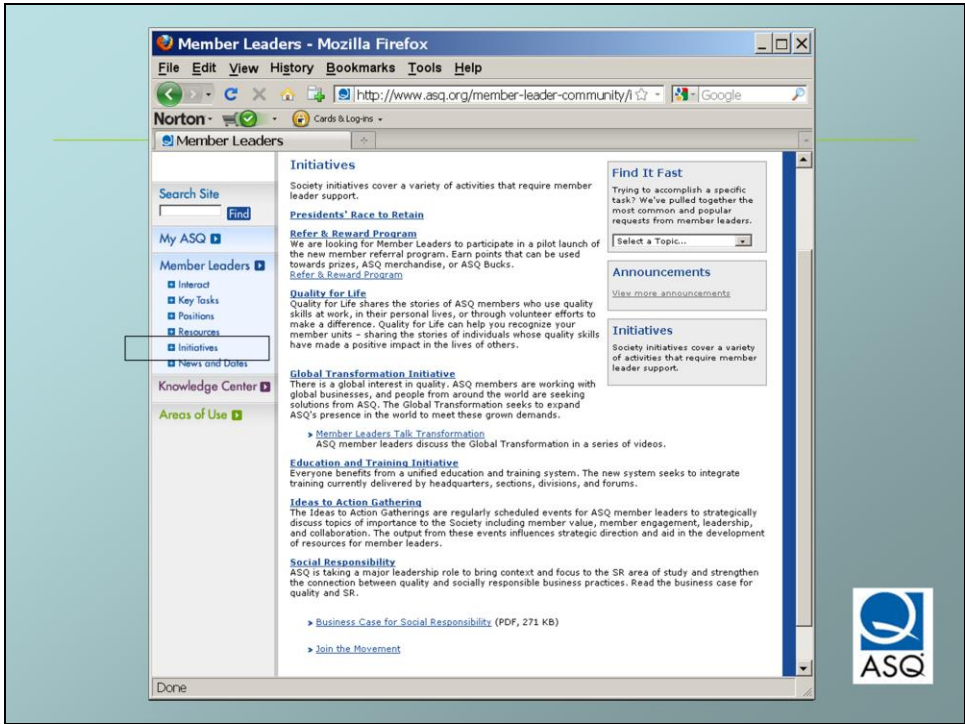
There is SOOOOOOOOOO much there!



Resources.....

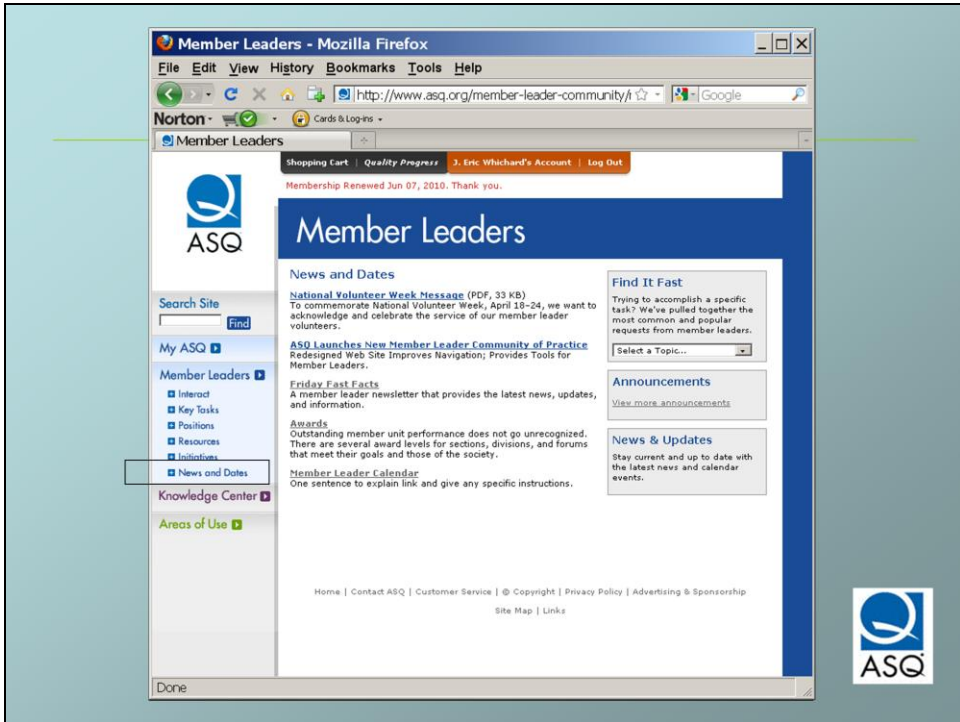
Another area you'll want to be familiar with.

**Note access to TEMPLATES, REPORTS, GOVERNING DOCUMENTS
and the SHAREPOINT site**



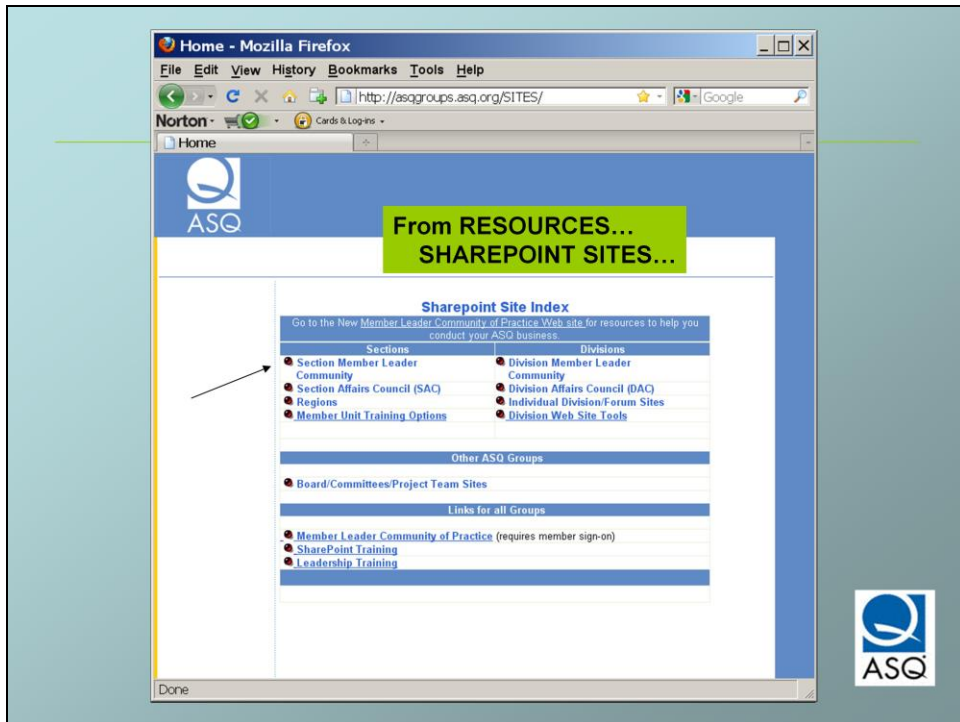
Initiatives.....

Tap into the “Big Picture” things that the Society is doing.
Think “big picture”... then act locally
Spread the word... get the Section... yourself... involved!



News and Dates.....

**Note ML Community of Practice
Friday Fast Facts archive
Calendar**

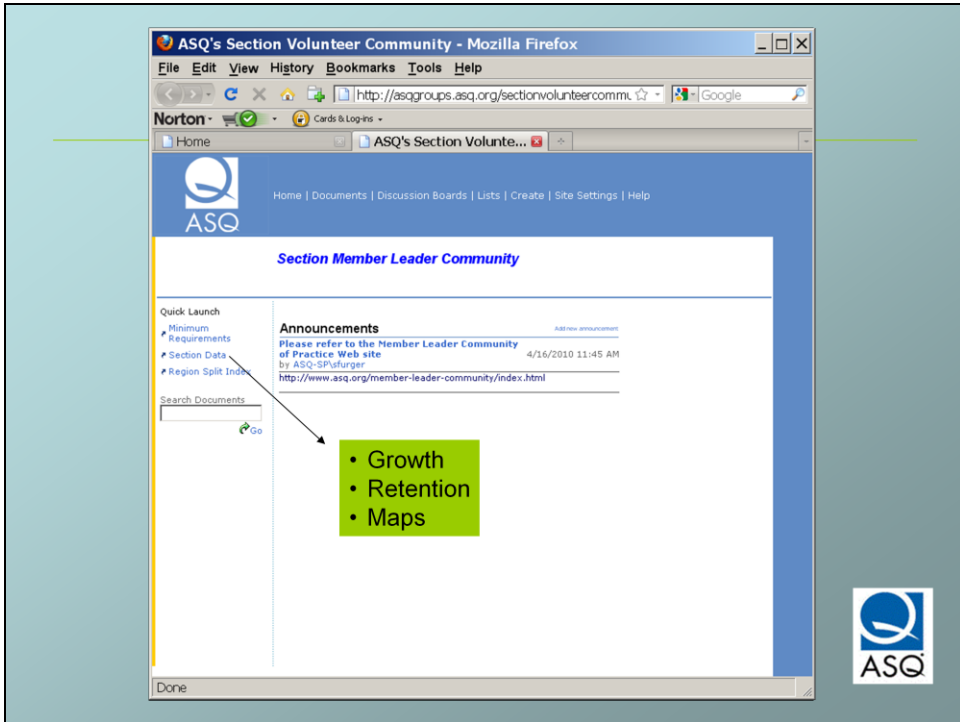


From the RESOURCES page, access the SHAREPOINT site.

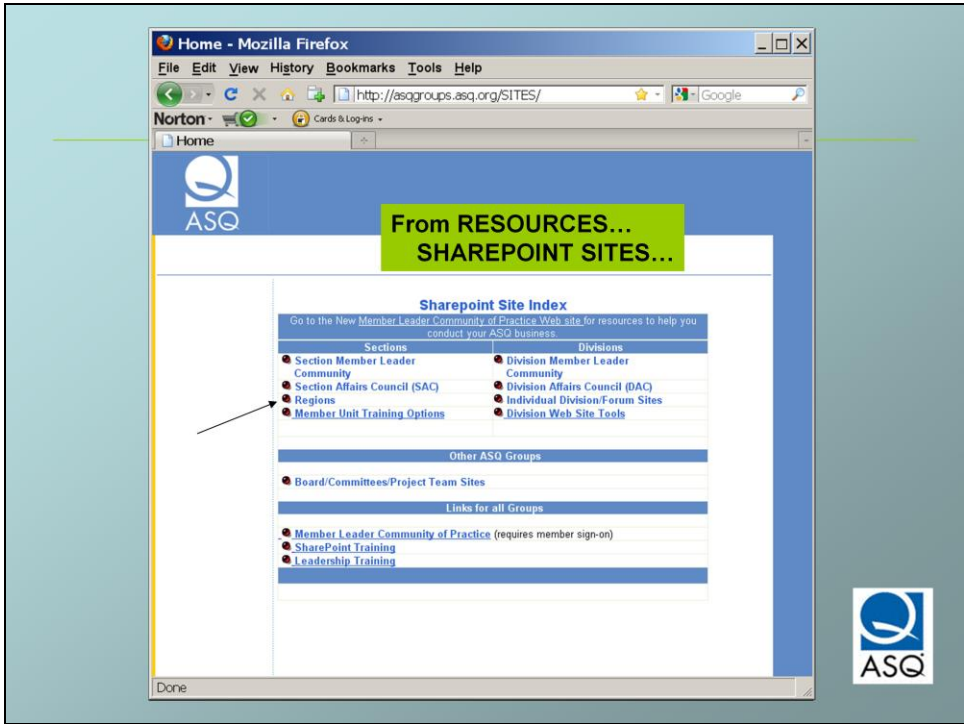
**Sharepoint is a folder & list oriented document management system.
Our electronic filing cabinet.**

The Region has a Sharepoint site.

So does each Section



Under Section Memberleader Community item... some key info



Under Regions.....


Region Sharepoint Site Index
ASQ Sections

Sharepoint Site Index

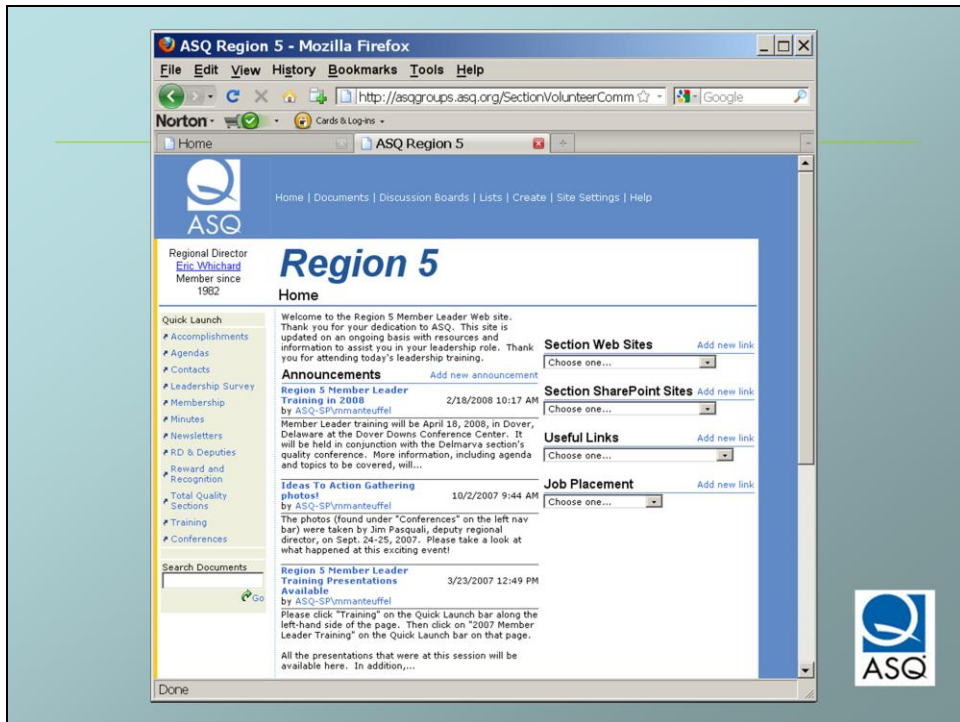
- SVC
- SAC
- DVC
- DAC
- ASQ Volunteer Area (of ASQ.org)

Region Site Links	Regional Director <small>Click for e-mail Point for phone number</small>	ASQ Administrator <small>Click for e-mail Point for phone number</small>
Region 1 (sections)	Diane Dixon	Cynthia Nazario
Region 2 (sections)	Dan Sniezek	Cynthia Nazario
Region 3 (sections)	Herbert Goldstein	Cynthia Nazario
ASQ Canada (sections)	Gary Gehring	Cynthia Nazario
Region 5 (sections)	Eric Whichard	Jessie Kasberger
Region 6a (sections)	Chris Hayes	Shiri Furger
Region 6b (sections)	Neal Kuhn	Shiri Furger
Region 7 (sections)	Elias Monreal	Cynthia Nazario
Region 8 (sections)	Marc Kelemen	Kim Thompson
Region 9 (sections)	William LaFollette	Shiri Furger
Region 10 (sections)	Darlene Stoddard Deane	Linda Milanowski
Region 11a (sections)	Eric Hayler	Linda Milanowski
Region 11b (sections)	Frank Golden	Linda Milanowski
Region 12 (sections)	Steven Schuelka	Kim Thompson
Region 13 (sections)	Robert Herhold	Kim Thompson
Region 14a (sections)	Belinda Chavez	Cynthia Nazario
Region 14b (sections)	John Brockling	Cynthia Nazario

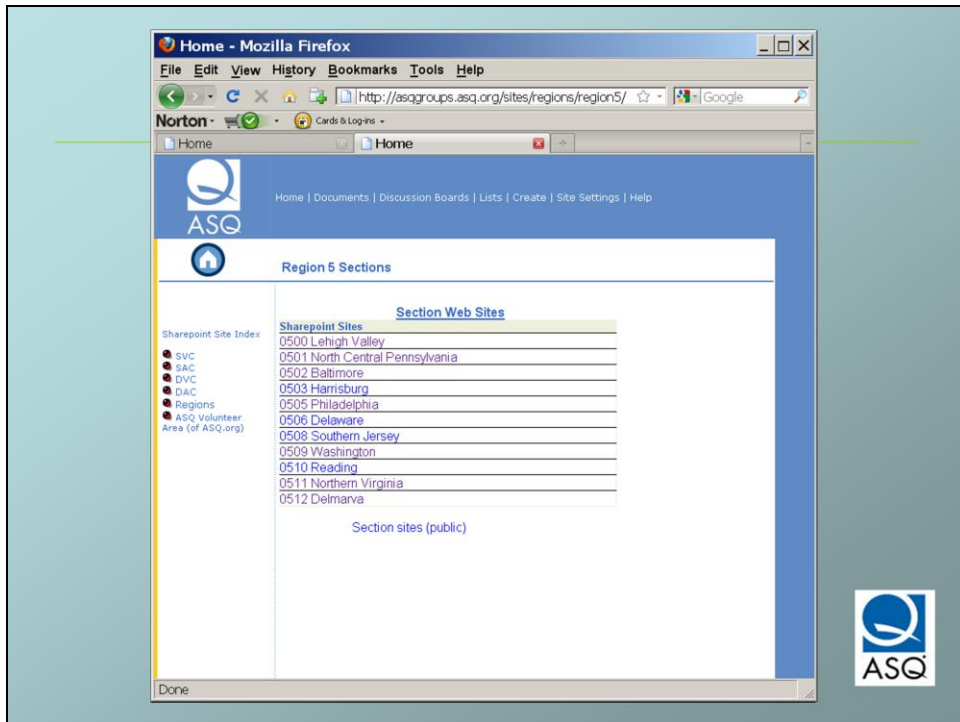
Done



Under REGIONS item... your RD and support person.
Also, click REGION 05 for the Region 05 site
Or, click (sections) to access your Section's site



Region 05 site... which has been updated. This is an old screen shot.



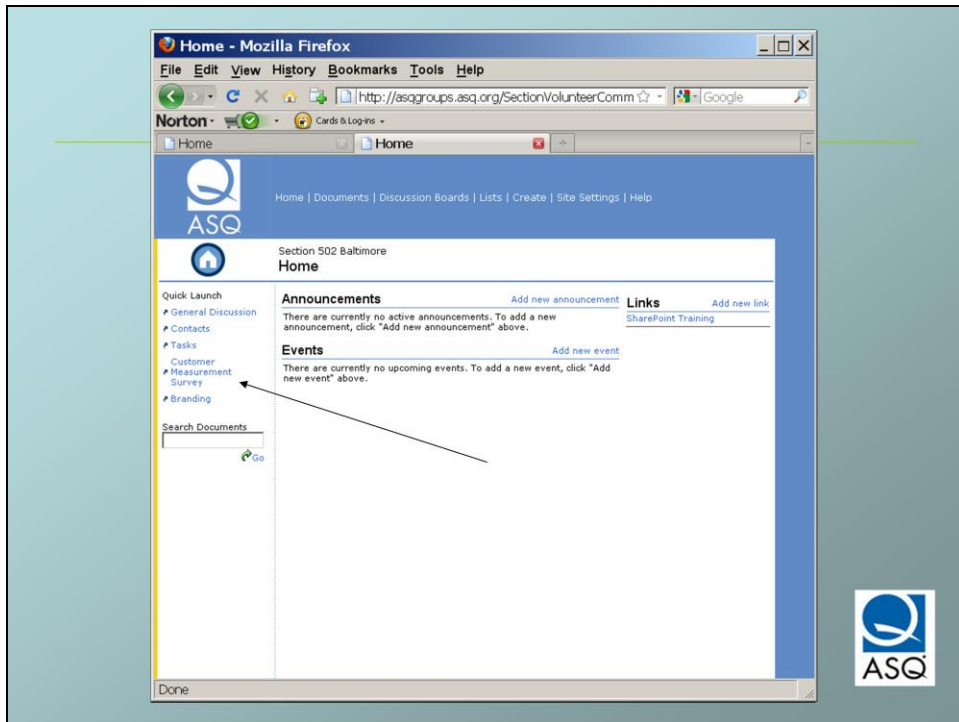
Region 05's sections.

You should be able to access yours.

RD, DRDs should be able to access all of them.

Some are used, some are not.

See Philly's... DC's

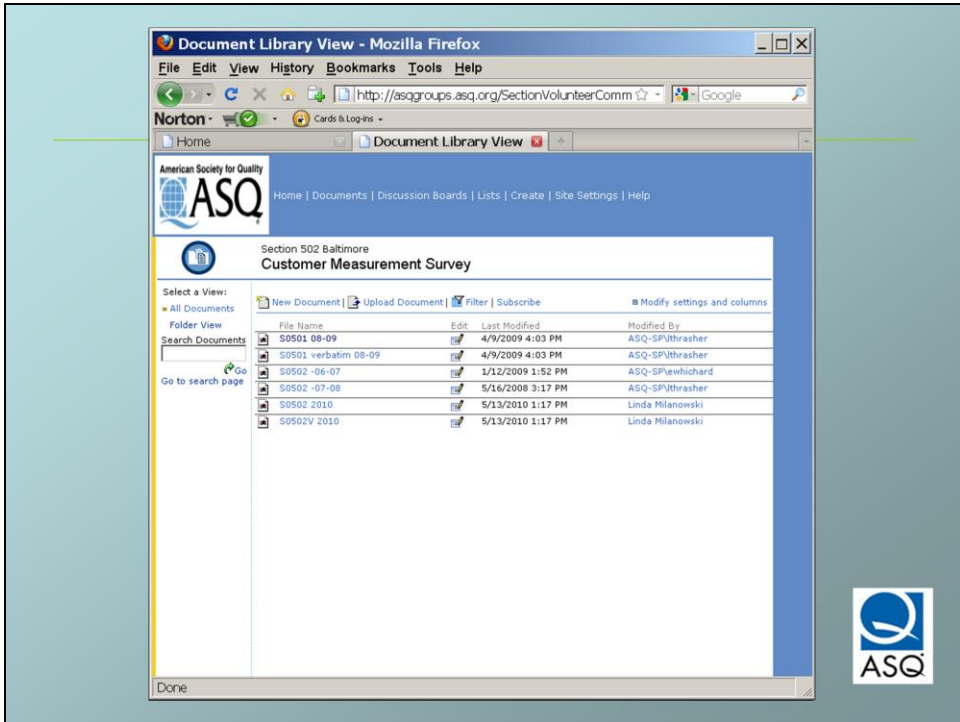


**Here's Baltimore's
Not actively used**

BUT --- this is where the Section finds its Customer Measurement Survey results.

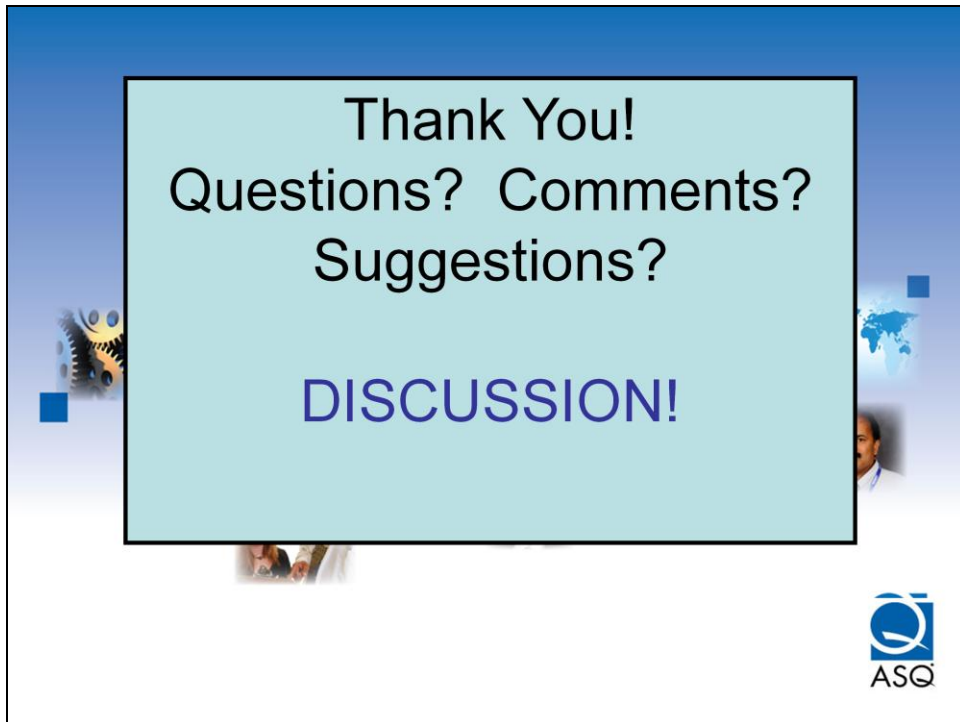
With the CMS, plus the growth / retention report, you can see eg. why your section

was awarded Silver Excellence... but not Gold.



The CMS archive

And..... in closing.....



Thanks for your attention.

If you need to call your section Chair, or your DRD, or your RD for help on this, please do!

Or note questions for the Q&A session.

Thanks very much for your time and participation in this important part of your leadership role!

Eric

J. Eric Whichard
Regional Director, ASQ Region 05
Member, ASQ Board of Directors
JE Whichard & Associates
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