Some years ago, ISA required an Annual Report from Sections. Well, required is loose use of the word. No consequences resulted from non-compliance. After motivating a precious few Sections to participate over a number of years, the effort was abandoned.

What remained obvious, however, is that ISA Sections need to know what the society is about and how membership can be enhanced at the Section level. There was a lot of good information in the annual report form about activity opportunities within ISA, and the guidelines provided solid direction for organizing a Section. For that reason, the guidelines and form are available as a training tool and resource for development of Section goals and objectives. The guidelines follow this introduction, and the Planning Resource Form (old annual report form) can be easily accessed. There are several ways to use these resources. Here are a few. You may think of others.

1. Before you begin to set goals and objectives for the coming year, read through the Planning Resource Guidelines. Then, use the Planning Resource Form to identify the activities you want to consider for inclusion in your new action plan.
2. At the end of the Section year, use the Planning Resource Form to remember the activities accomplished or attempted during the year.
3. Refer to the completed Planning Resource Form when you apply for the Section Performance Award. The format will be helpful as you review your successes – and challenges.
4. Give a copy of these completed forms to the incoming Section President: Planning Resource Guidelines, Planning Resource Form, and Section Performance Award (summary sheet, application, and guidelines). All of these materials are on the Leaders Resources page on ISA web site www.isa.org.

Important Documents

As you think about the upcoming year, locate these documents for reference:

1. Newsletters from the past year
2. Section's Constitution & Bylaws
3. Section's Articles of Incorporation, if incorporated
4. Certificate of Insurance for General Liability and/or Officers & Directors Liability
5. Agenda and minutes from the Section's last planning meeting
6. Section's annual plan (goals & objectives) AND RESULTS REPORT
7. Minutes from each Board Meeting (for the year)
8. Annual Planning Calendar (www.isa.org

Member's Corner › Leader Resources › Administrative Forms

Getting Started

ISA is a complex organization. There are many facets – Sections, training opportunities, Divisions with their symposia, Standards development, exhibits, District events, conferences, and more. Each facet is seen as an opportunity for Members, and each facet is exciting and complex. These various opportunities need to be identified, recognized, evaluated, and promoted at the Section level, in accordance with their importance to local Members and industry.

Sections frequently are the Member's first contact with ISA. Although there is an extensive ISA web site and many, many opportunities for developing careers, the ability of the local Section to present these options and facilitate access to them is critical to educating Members about their society and its benefits. Sections strive for Member satisfaction.

The Planning Resource Form, when completed at the end of the Section year, will give you a good idea of which opportunities you have brought to the Membership and which ones have been overlooked during the past year. Providing this information to the incoming leadership gives them a quick review of local service to Members and industry. This knowledge enables better planning for the coming year.

Planning is the key to success. Yes, it does take time to work through ideas and options and identify the ones best suited for your Section. But it is also your road map to a positive experience as a Section leader. Plan now and celebrate later!

Planning Resource Guidelines

Following are three of the key categories ISA thinks Sections need to address successfully: Management; Leadership Development; and Services. The guidelines correspond to the areas identified on the Planning Resource Form.

SECTION MANAGEMENT

General Section management is important to the success of a Section. The Planning Resource Form provides a format for verifying these activities:

SM 1 - Annual Planning Meeting

ISA is convinced that Sections can best serve their members by having a well-planned, well-supported plan of action. PowerPoint presentations and pre-recorded Web-seminars on planning are online for your review. Go to www.isa.org and login: Member's Corner › Leader Resources › Leader Training. Scroll down the page to review the various training formats available. The PowerPoint presentations are grouped under key headers. Look into Section Operations & Communications for the sessions on planning. A specific planning format is not mandated. The important thing is to commit to the planning process and have some formal planning meeting/function to outline the Section's action plan. In addition to the resources mentioned, Section leaders should contact their Staff Administrator at ISA Headquarters and their District leaders for assistance, ideas, and the names of other Sections which have had success in this area.

Suggestion: Print the Section Performance Award Guidelines and Form to use as a guide through the year. Track where you can earn points.

SM 2 - Budget and Tax Responsibility

The submission of the Sections annual budget is **REQUIRED**. Also, tax responsibility must be acknowledged when applicable. The Section Treasurer's Guide included online under Section Officer and Committee Chair Guides (See Member's Corner › Leader Resources › Operating Documents › Officer and Chair Guides for Sections) gives budget guidelines, sample budgets, other financial statement information, and a list of resources to assist Sections.

SM 3 - Section Organization and Leadership Protection

Even the smallest Sections undertake programs and financial transactions that place their leaders in a position of legal responsibility. ISA strongly encourages Sections, which are separate legal entities from the Society, to incorporate, obtain General Liability Insurance, and purchase Officers and Directors Liability Insurance. This not only protects the Section and its leaders, it also encourages leadership participation by members who would be reluctant to do so without this protection (due to employer/company policy or personal preference). ISA can provide information on how to incorporate, what coverage to consider and where to get this insurance. The Section Treasurer's Guide, online under Section Officer and Committee Chair Guides (See Member's Corner › Leader Resources › Operating Documents › Officer and Chair Guides for Sections), also covers this area.

SM 4 - Keep Accurate Minutes of All Board Meetings

This seems like a common sense activity, but it is included here because it is so critical to the Section's operations. Guidelines for the proper (suggested) format for taking minutes are included in the Section Secretary Guide (online). The Section minutes are a major part of the Section's continuity, as well as part of its legal requirements.

SM 5 - Prepare and Send an Agenda Prior to All Board Meetings

Sending agendas prior to the Board meetings does three things: 1) it shows that the Section President is prepared and organized (and allows Board members to prepare effectively); 2) it promotes Board attendance at meetings; and 3) it meets the legal requirements for running a Section. Agendas should highlight actions to be taken as well as decisions that need to be made.

SM 6 - Hold Board Meetings Regularly

While ISA does not encourage meeting for the sake of having another meeting, it is important that the Section leaders meet regularly to assess progress, make and implement policy, and carry out the legal and practical leadership functions of the Section. Section Boards should try to meet at least once a quarter.

LEADERSHIP DEVELOPMENT

If Sections are to be successful in their goal of better programming, then the Section leaders will have to be successful in their individual and collective roles. ISA wants to provide every opportunity for Section leaders to gain the skills and confidence they need to have a good year. As an incentive for Sections to provide information and training to Section leaders, ISA includes leadership development on the Section Performance Award Form.

LD 1 - Section Leaders Attending ISA Leadership Programs, including Web-based leader training.

These meetings provide leadership skills training, as well as the opportunity to share ideas and experiences with others facing the same challenges. Sections that send their leaders to leadership programs are certain to benefit. Each year, leader training is offered at both the Spring and the Fall President's Meeting. Web-based leader training also is available.

LD 2 - Section Leaders in Attendance at District/Region Leadership Conferences/ Meetings

Each year ISA sponsors District/Region Leadership Conferences, bringing Section leaders together for updates on programs and services and providing training for local leaders. The real strength of these area meetings is the opportunity for Section leaders from the same geographic area to meet and compare notes on what works - and what doesn't. The training and orientation sessions, along with the chance to meet with ISA Staff and Executive Board members, are other benefits of attending.

LD 3 - Report Section Leader Names to ISA

This is another of the required activities. If ISA is to provide strong support to volunteer leaders, it needs to know who these people are and what they need. Submitting the names of all key Section leaders to ISA by the start of the section's fiscal year ensures that they will not miss out on any of the ongoing leadership development programs and regular communications.

LD 4 - Transition System in Place

The ability to move from one Section administration to another without having a reduction in service and member satisfaction is a big challenge. The Sections that are most likely to do this effectively are those that have some specific system for ensuring a smooth changeover. Refer to the article *Organizing for Success* in the Section Library (Member's Corner › Leader Resources › Operating Documents › Section Library).

LD 5 - Section Leaders in Attendance at Other ISA Meetings

President's Meetings (Spring and Fall) provide excellent training and experience for current and potential Section leaders. Providing a Delegate to represent your Section at the Council of Society Delegates Meeting held each fall is a key way of participating in Society business.

SECTION SERVICE

ISA understands that all Sections are different in terms of the resources (both financial and manpower) available to support programs and services. Regardless, there are some basic organizational steps Sections can take to ensure at least a minimum level of member service and communication.

SS 1 - Active Committee Chairpersons

Having committees just for the sake of filling in an organizational chart is not what ISA encourages. Effective committees can be the building blocks for a strong Section. All appointed committees should be active. By active, ISA means that a committee should have at least three to five members (including an appointed chair); adopt a set of committee goals and a plan of action; and meet at least three times during the year. The suggested Section committees include: Education/technical; Program; Newsletter; Membership; Nominating; Finance and Budget; Student Involvement; Publicity; Honors and Awards; and Exhibit.

SS 2 - Hold Section Member Meetings on Schedule

Without question, the Section meeting is the most important activity within the Section. Ideas for running good meetings are online in the Section Library. Programming ideas are in the Program Chairman's Guide online. A minimum of three Section Meetings are required annually to maintain active Section status.

SS 3 - Section Communications

Communication is one of the primary functions of leadership. Members (especially those who don't attend Section meetings) need to know what is happening in their Section and throughout ISA. Guidelines for putting together and distributing an effective Section newsletter are in the Newsletter Editor Guide. Sections are encouraged to have a newsletter that is distributed at least quarterly. Additional ways of communicating are through a mail list and web page. Review the Webmasters Guide for more information. Each Section has a Web page at www.isa.org, Membership › Participate in a Local Section. You are encouraged to develop this page to the benefit of your Members. If your Section does not have a Listserv mail list and would like to establish one, contact your Staff Administrator at headquarters. ISA can establish the list, but the Section is responsible for populating and maintaining the list.

SS 4 - Student Member and Student Section Support

A majority of ISA's Student Sections receive some form of support from a Regular Section. If there is no Student Section for a Student Member, the person is encouraged to become involved in the local Regular Section. The challenge is to find a way to provide the encouragement, leadership, and technical and financial support that all Student Members and Student Sections need to succeed and be active in ISA. We want to nurture students, involve them and enjoy their leadership for years to come. Spinning students off from your Section to start a Student Section is commendable and will be appreciated.

SS 5 - Section Support

An established Section is in a unique position to assist a formative group (Regular or Student) or to guide reactivation of an inactive neighbor. Providing service to the member is the primary motivator for reaching out with guidance, manpower, or financial support to a forming or struggling group. By the same token, establishing a sub-group within your Section also may improve service to your Section Members. This is particularly effective where a large number of Section Members choose to meet around a specific topic, or there are enough Members in a remote location to justify separate meetings.

SS 6 - Education Program

Education is at the root of ISA's existence. Training and education are why the Society was established. Offering training opportunities to benefit local members and industry will strengthen ISA's image in your area and contribute to an effective program for your members. Contact ISA about co-sponsored training opportunities and/or` support for the various certification programs.

SS 7 - Honors and Awards

Volunteers have limited discretionary time, yet their involvement is crucial to the continuance of local Section activity. Recognizing those who served on the Section Executive for the past year is important. Sections usually say "thank you" to officers and committee chairs and recognize outstanding members when appropriate. Additionally, Sections are in a perfect position to nominate qualified members for election to ISA Fellow and to nominate local talent for Society Awards - both service and technical awards.

If you have questions or concerns please contact the ISA Members Services Administrator:

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