IDSA

Welcome to the 2020 Chapter Clinic!

Thank you for committing to serve as an IDSA leader in your community!

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Today's agenda

- SCARFs

- Event Best Practices

- Chapter Funding & Accounting
  - Seed Money
  - Chapter Credit Cards
  - Invoice Payments
  - Expense Reimbursements
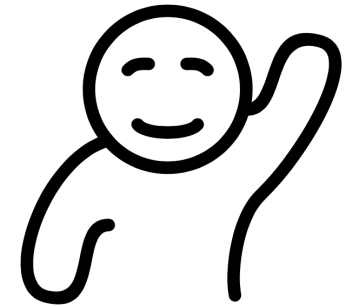 - Reports/Reporting

- Your Chapter

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A few quick housekeeping notes

Please mute your phone/video
unless you are speaking

Use the chat within Zoom for
quick questions and answers

Be sure to introduce yourself!

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Section Chapter Activity Request Form

What is a SCARF?

SCARFs are used to alert IDSA Staff of all upcoming events.

They provide critical information to our team so that we can best support your local team.

Chapter leaders 'submit a SCARF' by using the online form found at:

idsa.org/SCARF

When to submit a SCARF?

<u>Before</u> your event!

As soon as you have basic information about the event and/or need assistance from IDSA staff in helping organize your event.

What information is in a SCARF?

- Basic description – What you are planning to do
- Date / Time / Location
- Topic / Content / Presenters
- Estimated attendance
- Estimated expenses
- Estimated revenue
- Need for contracts
- Need for insurance

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Chapter Events & Activities

There is a wide spectrum of activities you can organize for your chapter. Here are just a few examples. When in doubt, keep it simple! Quality over quantity is the general rule.
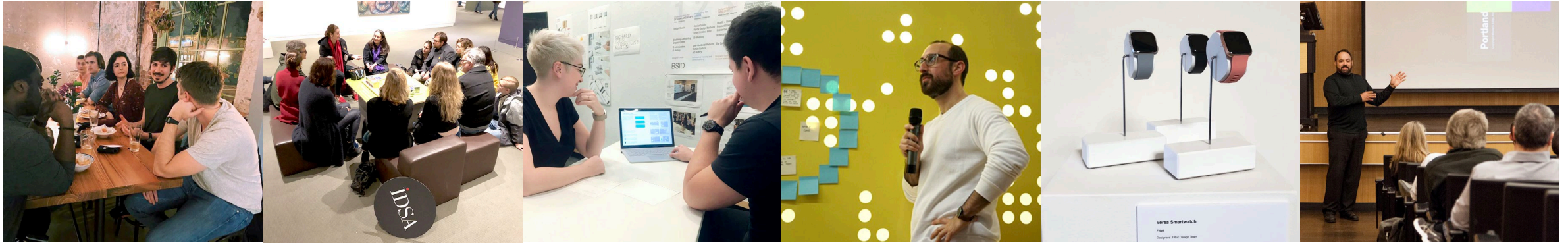
EASY ←————————————→ **COMPLEX**

- Happy hour meet up at a local pub

- Gathering at a museum, art gallery, or area craft fair

- Portfolio review with students from local schools and area professionals

- Evening panel discussion or speaker presentation

- Local area studio, manufacturing, fabrication, corporate office tour

- Gallery show featuring local area designers and their products on display

- Day long event with multiple speakers and 100+ attendees

Tips – How To Run Successful Events

Plan in advance	Let people know	Execute the event

Plan in advance

- Determine your budget
- Content (speakers, panelists, demos, discussion topic)
- Find a location & date
- Food & refreshments
- Submit a SCARF with all known event details

Let people know

- Create event graphics & description
- Create an EventBright page for the event with an eye-catching graphic and complete event details
- Use email service like MailChimp to let your local members know about the event
- Have event posted to your chapter page on idsa.org
- Use Twitter, Facebook, Instagram, LinkedIn etc. to build awareness
- IDSA HQ can help promote your events too!

Execute the event

- Arrive early to prepare and set up the space
- Details matter, you are creating an experience
- Use social media during the event to let members across the world engage
- Take pictures / video!
- Take notes of what went right and what can be done better to improve your next event

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Chapter Funding & Accounting – Seed Money

Every chapter starts the year with $1,400 in funds provided by IDSA to use for your chapter events!

- These funds come from (in part) your annual membership dues

- All funds are kept in an account managed by IDSA headquarters

- Chapters can use these funds at your discretion, with approval via SCARFs

- It's the chapter's responsibly to manage and track expenses/revenue throughout the year to keep a positive balance (IDSA staff support this effort)

- Any positive balance remaining at the end is carried over to the next year on a three-year rolling accrual method

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Chapter Funding & Accounting – Credit Cards

IDSA issues one credit card per chapter to use for expenses related to chapter events and activities.

- Chapter expenses incurred for SCARF approved events can be paid for with your Chapter credit card

- You may also make purchases that relate to your Chapter team planning and organizational activities

- There is a $250 spending limit – this may be temporarily increased with approval from IDSA headquarters

- KEEP ALL RECIEPTS - You'll need to send them to IDSA headquarters at the end of each month

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Chapter Funding & Accounting – Invoice Payments

A local vendor may send you an invoice to be paid for their services related to a chapter event or activity.

Chapter expenses incurred for SCARF approved events will be eligible for invoice payment under the following conditions:

- Expenses which are not charged to the chapter credit card or to an individual

Chapter Funding & Accounting – Expense Reimbursements

IDSA will pay you back (reimburse you) for approved personal expenses associated with a chapter event or activity.

- Photograph your receipts using your cell phone and send them Korie

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Chapter Funding & Accounting – Chapter Reports

It is important to keep an open and regular line of communication between chapter leaders and the IDSA headquarter team.

Reporting goes two ways - from us to you and from you to us. Things we work to keep updated are:

- A current general ledger and account balance

- A current Chapter roster of the IDSA members in your Chapter

- Updates on what other Chapters are doing

- Updates on what IDSA headquarters is doing

- Chapter event plans

- Post-event reports / stories for publication on the IDSA network

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Your Chapter

Next Steps

- **Officer transition**
  Access to all documents, files, and social media credentials (usernames/passwords) connected to your chapter.

- **Update chapter page on idsa.org**
  are all your officers represented?

- **Chapter credit card**
  Determine a who will be the 'holder' of your chapter card, complete form

- **Goals for this year**
  As a chapter team, draft some goals you'd like to achieve for the year

- **Chapter clinic**
  Schedule your appointment with Korie

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Open discussion / questions

Anything else to cover?

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THANK YOU

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Appendix

Supplemental information you might find helpful

Organizational Structure
IDSA Board of Directors (2020-2021 term)

Qin Li, IDSA
Board Chair
San Francisco, CA

Jason Belaire, IDSA
Chair Elect
Denver, CO

Lee Fain, IDSA
Treasurer/Secretary
Charlotte, NC

Jordan Bahler, IDSA
Chapter Director
Indianapolis, IN

Jeevak Badve, FIDSA
Director At Large Conferences
Detroit, MI

Stephan Clambaneva, IDSA
Sections Director
New York, NY

ClayVon Lowe, IDSA
Director At Large Awards
Charlotte, NC

Verena Paepcke-Hjeltness, IDSA
Education Director
Austin, TX

Dorothy Dunn, IDSA
Design Foundation President
New York, NY

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Organizational Structure
IDSA Staff

Chris Livaudais, IDSA
Executive Director
San Francisco, CA

Philip (Phil) Assante
Membership Manager
Herndon, VA

Lisa Brenner
Sr Dir Finance & Accounting
Herndon, VA

Bridget Brooks
Accounting & HR Coordinator
Herndon, VA

Austin Del Gallo
Events Coordinator
Herndon, VA

Allan Gordan
Dir Customer Info Systems
Herndon, VA

Erin Fiorelli
Mgr Awards & Competitions
Herndon, VA

Carrie Green
Dir Events & Biz Dev
Herndon, VA

Carl Guo
Visual Brand Designer
San Francisco, CA

Jerry Layne
Sr Dir Operations
Herndon, VA

Leah Pickett
Communications Manager
New York, NY

Jill Richardson
Admin Coordinator
Herndon, VA

Korie Twiggs
Community Manager
Herndon, VA

PRIMARY CONTACT

SECONDARY CONTACT

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Organizational Structure
Districts Committee

Jordan Bahler, IDSA
Chapter Director

Cori Rowley, IDSA
Central District

Angela Corrado, IDSA
Northeast District

Henry Hiltner, IDSA
West District

Shawn Egan, IDSA
Midwest District

John McCabe, IDSA
South District

CENTRAL DISTRICT	NORTHEAST DISTRICT	WEST DISTRICT	MIDWEST DISTRICT	SOUTH DISTRICT
OHC – Central Ohio	BOS – Boston	AZ – Arizona	CHI – Chicago	ATL – Atlanta
OHN – Northern Ohio	CNY – Central New York	LA – Los Angeles	IN – Indiana	CAR – Carolina
OHS – Southern Ohio	MDT – Mid Atlanta	NW – Northwest	KC – Kansas City	FL – Florida
KY – Kentucky	NYC – New York City	OR – Oregon	NL – Northern Lakes	TX - Texas
MI – Michigan	RI – Rhode Island	RMT – Rocky Mountain	STL – St Louis	
WPA – Western PA		SF – San Francisco		

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Organizational Structure
Districts and Chapters
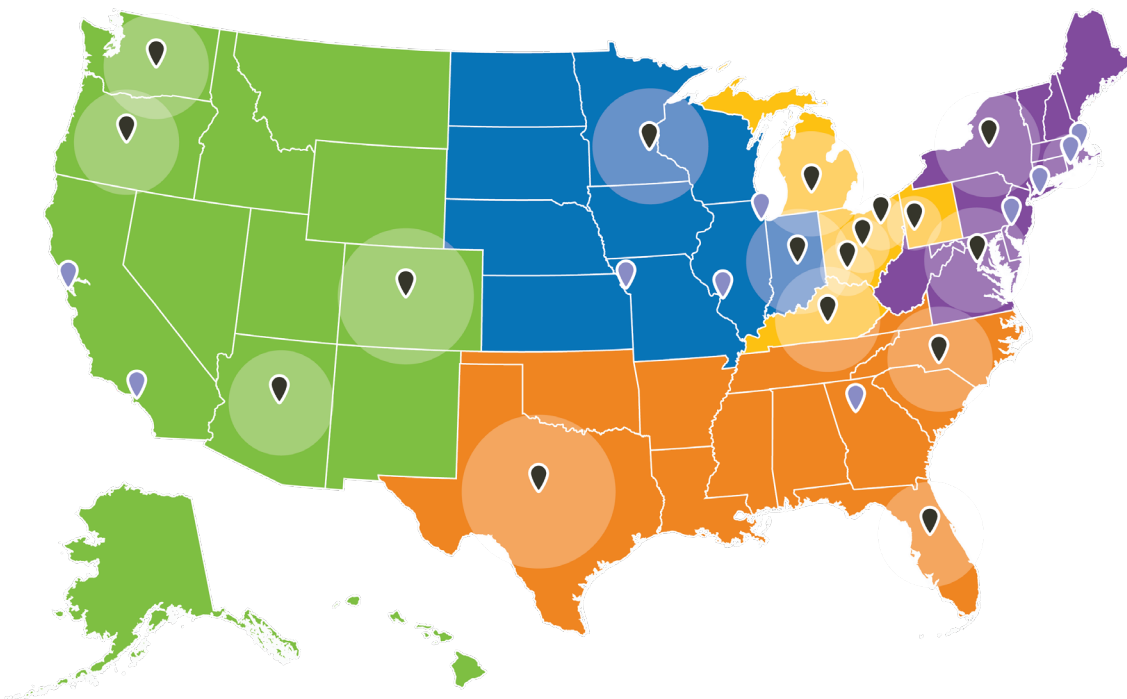
Professional Chapters
27 and counting
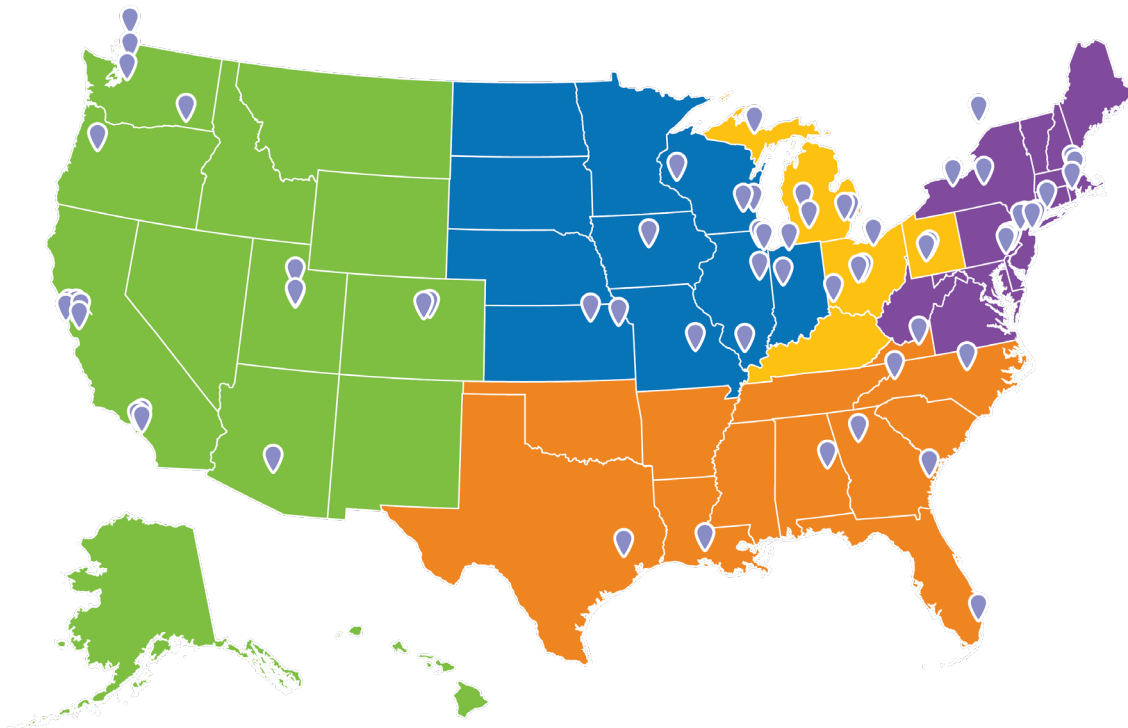
Student Chapters
70+ and counting

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| CENTRAL DISTRICT | NORTHEAST DISTRICT | WEST DISTRICT | MIDWEST DISTRICT | SOUTH DISTRICT |

Organizational Structure
Chapter Officer Roles

Chair
(Bylaws Required)

Chief elected officer of the chapter who is ultimately responsible for its actions. Provides the vision and management skills to preside at chapter meetings, oversee volunteers and guide them to reach definitive goals.

Vice Chair
(Bylaws Required)

Second in command to chair. May be delegated by the chair to represent him/her or the chapter at events or in engagements with other groups.

Secretary/Treasurer

Manages chapter budget through finance and accounting. Keeps minutes of chapter meetings and other duties as delegated by the chair.

Other
(As needed by the chapter)

Filled by election/other method for defined roles, though not chapter officers.

Examples from other Chapters:
- Social Media
- Graphic Designer
- Community Outreach

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Chapter Officer Resources

A one stop source for key chapter leadership information and 24/7 support.

idsa.org/COR
or find it under the 'RESOURCES' drop down

- Contact information
- SCARFs
- Contracts
- Credit cards
- Reimbursements
- Invoices
- Funding
- Document downloads