Setting the Standard for Automation™

ISA Staff Resources for Section Leaders

Speaker: Graham Nasby (ISA Hamilton Section)

Standards
Certification
Education & Training
Publishing
Conferences & Exhibits

ISA District 13 Leadership Conference (DLC)
Friday Apr 29 – Sunday May 1, 2016
Toronto, Ontario, Canada

About the Speaker

Graham Nasby, P.Eng., PMP, CAP, FS.Eng. (TUV)

- Water SCADA & Security Specialist
- City of Guelph Water Services
- Guelph, Ontario, Canada

- ISA18 “Alarm Management” Standards Committee – Voting Member
- ISA18 Working Group 7 “packaged systems” – committee co-chair
- IEC-TC65 committee responsible for IEC-62682 – named Canadian expert

- VP-elect of Industries and Sciences, ISA
- **WebMaster & Past-President, ISA Hamilton**
- Newsletter Editor, ISA Water/Wastewater Technical Division

- Has published over 30 papers and articles on automation topics
- 2014 Mid-Career Achievement Award, University of Guelph School of Engineering
- 2013 ISA society awards for Volunteer Leader, Division Leader & Division Excellence
- 2011 ISA “Keith Otto” award for best article of year in InTech “SCADA Standardization”
- Background in various industry sectors including municipal water/wastewater

- Contact: graham.nasby@grahamnasby.com

WELCOME

- **HOW CAN I BE A GREAT ISA SCTION VOLUNTEER?**
- **WHAT TOOLS AND RESOURCES ARE AVAILABLE TO ME AS AN ISA LEADER?**

ISA VOLUNTEER

Volunteer leaders are essential to the success of ISA.

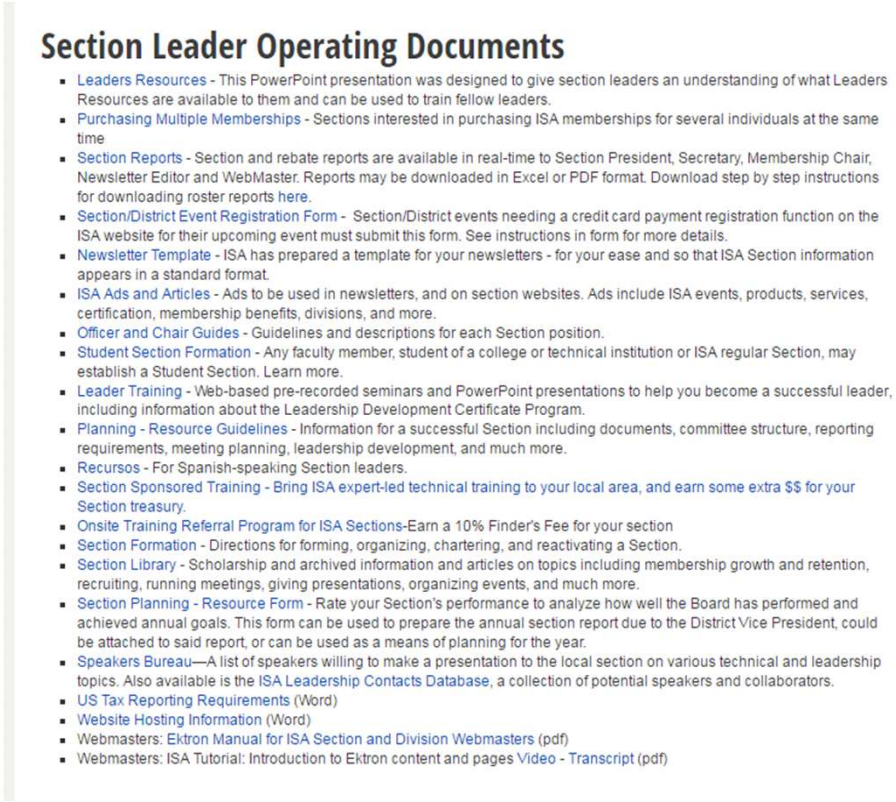
- Whether you are a Section President, Secretary, Treasurer, Program Chair, Webmaster, or any other position, ISA has guidelines that can help you become a successful volunteer.

ISA LEADER RESOURCES

Online Resources at www.isa.org

- www.isa.org/leader-resources/
- Or

  www.isa.org ➡ Membership ➡ Already a Member? ➡ Leadership Resources



Section Leader Operating Documents

- Leaders Resources - This PowerPoint presentation was designed to give section leaders an understanding of what Leaders Resources are available to them and can be used to train fellow leaders.
- Purchasing Multiple Memberships - Sections interested in purchasing ISA memberships for several individuals at the same time
- Section Reports - Section and rebate reports are available in real-time to Section President, Secretary, Membership Chair, Newsletter Editor and WebMaster. Reports may be downloaded in Excel or PDF format. Download step by step instructions for downloading roster reports here.
- Section/District Event Registration Form - Section/District events needing a credit card payment registration function on the ISA website for their upcoming event must submit this form. See instructions in form for more details.
- Newsletter Template - ISA has prepared a template for your newsletters - for your ease and so that ISA Section information appears in a standard format.
- ISA Ads and Articles - Ads to be used in newsletters, and on section websites. Ads include ISA events, products, services, certification, membership benefits, divisions, and more.
- Officer and Chair Guides - Guidelines and descriptions for each Section position.
- Student Section Formation - Any faculty member, student of a college or technical institution or ISA regular Section, may establish a Student Section. Learn more.
- Leader Training - Web-based pre-recorded seminars and PowerPoint presentations to help you become a successful leader, including information about the Leadership Development Certificate Program.
- Planning - Resource Guidelines - Information for a successful Section including documents, committee structure, reporting requirements, meeting planning, leadership development, and much more.
- Recursos - For Spanish-speaking Section leaders.
- Section Sponsored Training - Bring ISA expert-led technical training to your local area, and earn some extra $$ for your Section treasury.
- Onsite Training Referral Program for ISA Sections-Earn a 10% Finder's Fee for your section
- Section Formation - Directions for forming, organizing, chartering, and reactivating a Section.
- Section Library - Scholarship and archived information and articles on topics including membership growth and retention, recruiting, running meetings, giving presentations, organizing events, and much more.
- Section Planning - Resource Form - Rate your Section's performance to analyze how well the Board has performed and achieved annual goals. This form can be used to prepare the annual section report due to the District Vice President, could be attached to said report, or can be used as a means of planning for the year.
- Speakers Bureau—A list of speakers willing to make a presentation to the local section on various technical and leadership topics. Also available is the ISA Leadership Contacts Database, a collection of potential speakers and collaborators.
- US Tax Reporting Requirements (Word)
- Website Hosting Information (Word)
- Webmasters: Ektron Manual for ISA Section and Division Webmasters (pdf)
- Webmasters: ISA Tutorial: Introduction to Ektron content and pages Video - Transcript (pdf)

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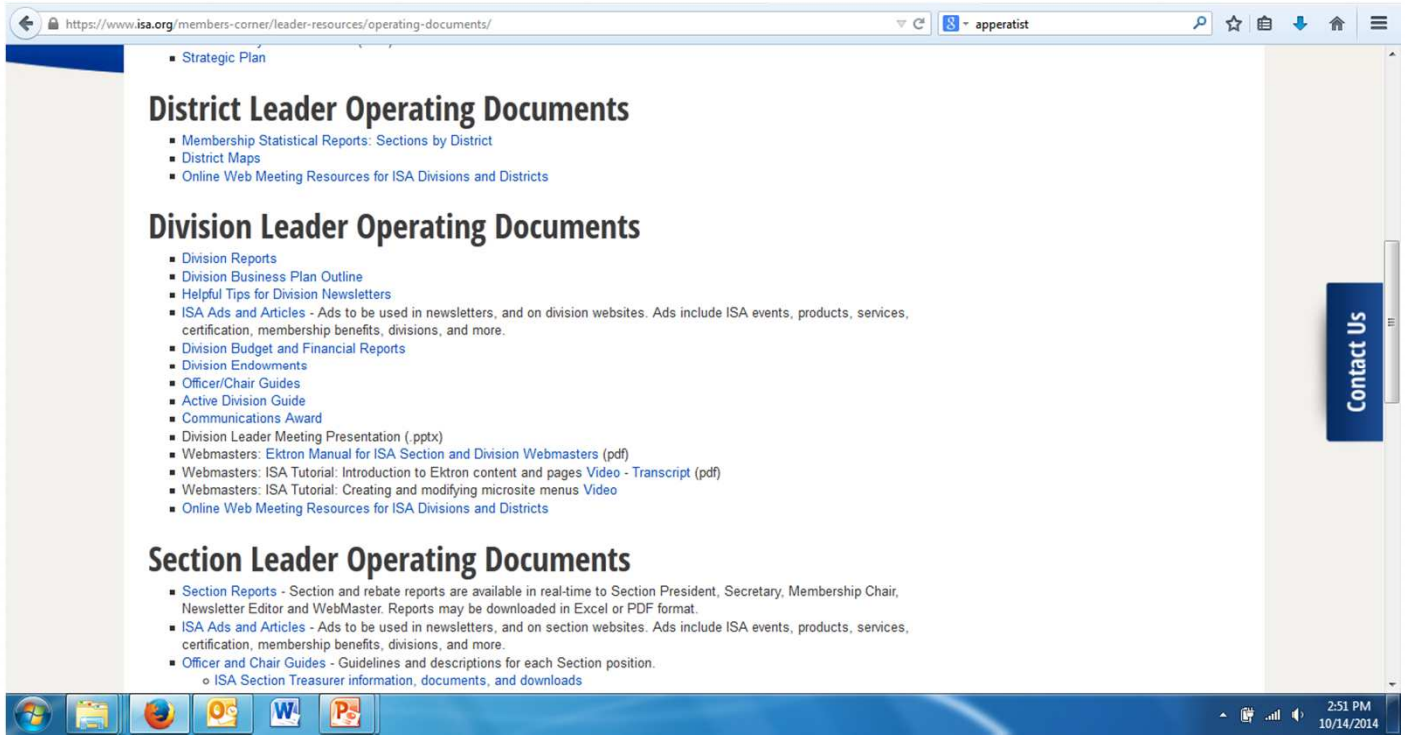
LEADERSHIP TOOLS & RESOURCES

Remember to always refer to:

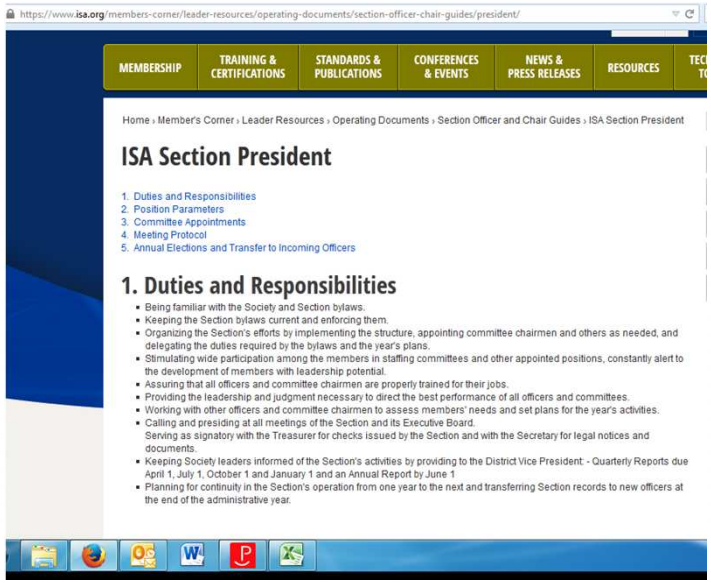
- Bylaws and the MOP for guidance
- Operating Documents – Officer and Chair Guides

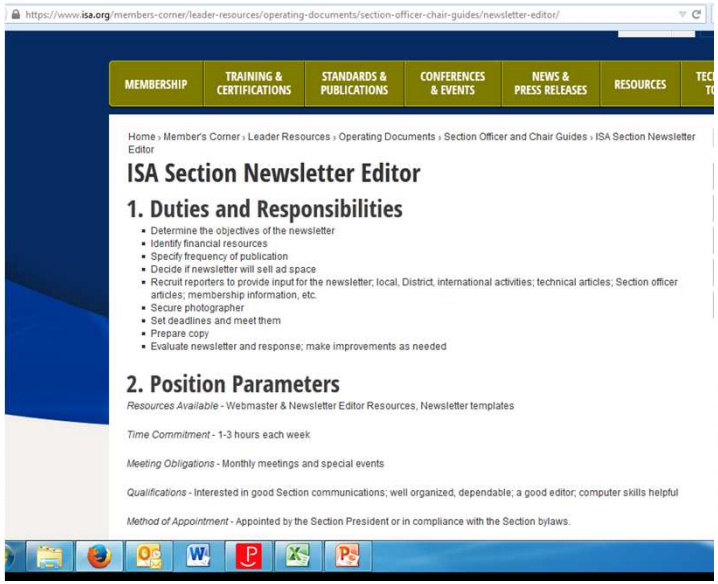
  www.isa.org ➡ Memberships ➡ Leadership Resources ➡ Operating Documents ➡ Officer and Chair Guides



SECTION OFFICER AND CHAIR GUIDES

- President
- Secretary
- Treasurer
- Legal Issues and Insurance
- Delegate
- Education Chair
- Exhibit Chair
- Marketing Chair
- Membership Chair
- Newsletter Editor
- Program Chairman
- Section-Division Liaison
- Standards & Practices Chairman
- Webmaster
- How To Manage Your Section Web Site





SECTION TREASURER

The Section Treasurer shall have general supervision of the funds and financial records of the Section:

- Establish and maintain proper accounting procedures for all Section funds
- Prepare financial statements and reports for the Section
- Assist in preparing the Section's budget.
- Close the Section's books at the end of the fiscal year
- Various Templates

Section Treasurer Tools and Resources:

www.isa.org ➡ Memberships ➡ Leader Resources ➡ Operating Documents ➡Summary of Section Treasurer's Duties

WEBMASTER – BEST PRACTICES

- Consistent use of ISA Brand (logo)
  - ISA's brand must be used consistently
- Microsites
  - All ISA Divisions and Sections should consider h .se contact Kaycee Heyer kheyer@isa.org to have your microsite initially set-up.
  - Use the Ektron Manual for ISA Section and Division Webmasters to setup your microsite

  www.isa.org ➡ Memberships ➡ Leader Resources ➡ Operating Documents

- Section Websites: (e.g., www.isahamilton.com)
- Sites need to be kept up-to-date!!
  - Recruiting new members and retaining members is key….keeping the site up-to-date will benefit those efforts!
  - Quarterly at a minimum

REPORTS

District Leaders and Section Presidents, Secretaries, Memberships Chairs, Newsletter Editors, and Webmasters can retrieve Rosters IF THEY ARE CODED in the ISA database by:

- Logging into the ISA website – Roster reports are available in real-time

  www.isa.org ➡ Memberships ➡ Leader Resources ➡ Operating Documents

  Section Leader Operating Documents – click on Section Reports

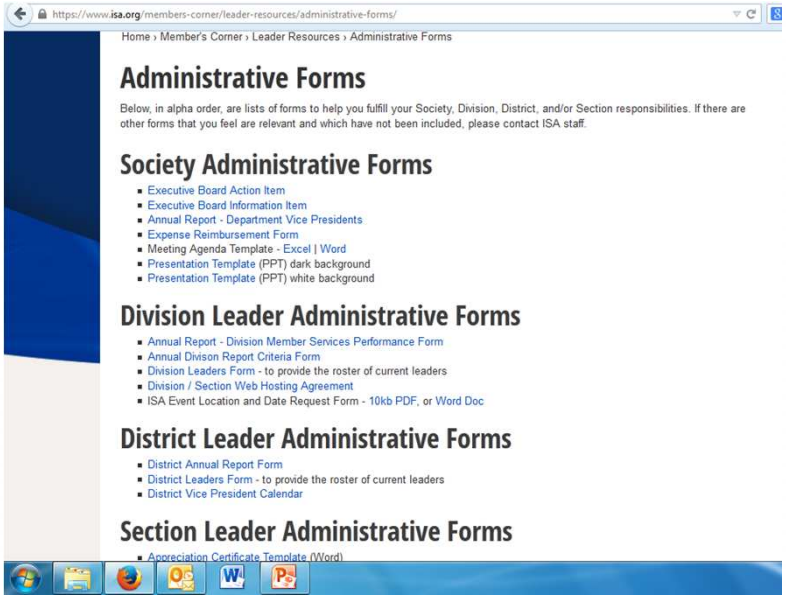
  Step by Step instructions are provided for downloading a roster report

  Rebate reports are currently unavailable on the website. For current rebate reports please email Rachael McGuffin at rmcguffin@isa.org

WHAT TOOLS ARE AVAILABLE TO ME?

Administrative forms:

- Annual Report Form
- Appreciation Certificate Template
- Leaders Form
- New Member Welcome Card
- Presentation Template
- Professional Development Hours Certificate Template
- Professional Development Hours Guide
- Planning - Resource Form
- Quarterly Report Form
- Requirements for an Active ISA Regular Section
- Supplies Order Form
- Section Web Hosting Agreement
- Section Yearly Activity Plan



www.isa.org ➡ Memberships ➡ Leader Resources ➡ Administrative Forms

TOOLS & RESOURCES FOR ALL OTHER IMPORTANT LEADERS

- Secretary, Membership Chairs, Program Chairs, and Education Chairs
  - Templates, forms and information
    - Letterhead
    - Business cards
    - Welcome postcards
    - Certificates

- Webmaster / Newsletter Editors
  - Logos
  - Advertisements
  - Articles for reprint – *InTech and Insights*

www.isa.org ➡ Memberships ➡ Leader Resources ➡ ISA Logos, Templates and Brochures

SOCIETY REPORTING REQUIREMENTS FOR SECTIONS

- ISA Manual of Procedures (MOP) Requires:
  - 30 Professional Members
  - New Leaders form due annually upon leader expiration
  - Budget & Business Plan – ***September 30***

- Submission of documents need to be sent to District Vice President (DVP), DVP-elect, and Member Services Administrator, Rachael McGuffin, rmcguffin@isa.org
  - Quarterly reports are recommended

- Section Delegate
  - Section Delegate – Council of Society Delegates (CSD) meeting at Fall Leaders' Meeting
    - A delegate must be selected by your Section in order to have representation at the CSD meeting. The delegate must be coded by mid-July in order to receive information about agenda items for the CSD.
    - Best practice is to have a delegate named and submitted on the new Leaders form annually

WHAT HAPPENS IF I DON'T SUBMIT REPORTS?

- A Section that has not submitted a new leaders' form will not have access to information on the ISA website
  - Leaders not coded do not have access to reports
  - Potential members wanting to contact the Division / Section will not have that information
  - **<u>Section cannot seat a delegate at the Council of Society Delegates</u>**

- A Section that does not submit a budget and business plan
  - Coded Inactive
  - Sections will not receive rebates

- A Section that remains inactive for 3 years can be de-chartered

WHAT OTHER RESOURCES DOES ISA HAVE?

Mentors

Speakers Bureau

Leadership Development Certificate Program

Brochures and Printed Materials

Sponsored Training

InTech Plus

ISA Connect

ISA Staff at your service!!

ISA STAFF CONTACTS – THEY WORK FOR YOU!

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Note:
Many thanks to
Rachael McGuffin
for her help with putting
together this presentation!

Questions

ISA WANTS YOU

TO SUCCEED!!