

# Affiliate Leader Webinar Trainings 2018-2019



Any affiliate or district leaders are welcome to attend live training session or access webinar recordings.

## JUNE 2018

### **Presidents and Presidents-Elect: Welcome and Orientation**

*Kick off the start of the new membership year by learning how to navigate the new position of President and President-Elect and access resources to help in the role.*

**Date: June 27, 2018**

Summary:

- President, Presidents-Elect and Board Roles/Responsibilities
- Introduction to Governance Management (Bylaws, Policies, Strategic Planning)
- Leadership and Working with Volunteers
- Affiliate Trainings and Resources (DMIS, Community of Interest, Governance Management Website, Affiliate Manual)
- Recommendations and tips for preparing for a successful year.

### **Treasurers: Welcome and Orientation**

*Kick off the start of the new membership year by learning how to navigate the new position of Treasurer and access resources to help in the role.*

**Date: June 28, 2018**

Summary:

- Treasurer, Treasurer-Elect and Finance Committee Roles/Responsibilities
- Budget and Program of Work Development and Management
- Financial Statements and Forecasting
- Understanding and Managing Savings/Reserves
- Academy Rebates and Insurance
- Policies and Internal Controls
- Affiliate Trainings and Resources (DMIS, Community of Interest, Governance Management Website, Affiliate Manual)
- Recommendations and tips for preparing for a successful year.

## JULY 2018

### **Fundraising/Foundation Chair Welcome and Orientation**

*Fundraising/Foundation Chairs engage with the Academy's Foundation and may also fundraise for the affiliate. Learn more about the Academy's Foundation and the role of this position.*

**Date: July 19, 2018**

Summary:

- The Academy's Second Century
- Academy Foundation Update
- Maximizing the Role of the Affiliate Fundraising Chair
- Fundraising Ideas and Tips
- Available Resources

## **Project Management**

*Take your leadership to the next level and learn how to leverage information collection to keep your affiliate on track. Learn about basic project management techniques to help keep your volunteers on track, organize your committees, and ensure everyone is on the same page.*

**Date: July 26, 2018**

Summary:

- Project Management Overview
- Report compilation and utilization
- Translating your strategic plan to actionable goals
- Project management tools

## **AUGUST 2018**

### **Administrative and Organizational Tips**

*Pulling all the tools and resources available to you is a daunting task. Learn how to leverage Academy and affiliate resources to keep yourself and your volunteers organized.*

**Date: August 16, 2018**

Summary:

- Translating mission and vision into goals
- Setting volunteer goals, expectations and fostering engagement
- Board and volunteer organizational chart
- Developing a volunteer structure and determining volunteer positions
- Committee structure and management
- Planning and leading a successful meeting

## **SEPTEMBER 2018**

### **Sponsorship and Revenue Generation**

*Learn how to develop a sponsorship and revenue generation plan to help support your affiliate financially.*

**Date: September 20, 2018**

Summary:

- Developing a prospectus
- Developing a sponsorship evaluation policy
- Sponsor engagement
- Board involvement and expectations
- Best practices for revenue generation

## **OCTOBER 2018**

No webinars scheduled for October – President and President-Elect, and Executive Director networking events at FNCE® are planned

## NOVEMBER 2018

### **Awards Process**

*Awards Chairs can learn how to manage the awards process in the affiliate and engage with the Academy's national awards.*

**Date: November 8, 2018**

Summary:

- Explanation of Academy National Awards and Honors
- Explanation of Academy/Affiliate Awards and Criteria
  - Awards Timeline
  - Process to Submit Winners
  - Academy Congratulatory Letters and Certificates
  - Ways to Recognize Award Winners

## DECEMBER 2018

No webinars scheduled for December – happy holidays

## JANUARY 2019

### **Program of Work & Budgeting – A Closer Look**

*Treasurers and affiliate leaders will take a closer look into budget planning as introduced during the treasurers' orientation in June. Learn how to use a budget as a tool to help drive success within the affiliate.*

**Date: January 17, 2018**

Summary:

- Managing a Budget and Program of Work
- Preparing a New Fiscal Year Budget
- Actuals and Forecast Numbers
- Financial Policies
- Academy Recommended Costs
- Audits and Internal Reviews

### **Nominations and Volunteer Recruitment**

*Nominating Committee members learn how to engage prospective volunteers, engaging your board to help solicit nominations, and best practices for the election process.*

**Date: January 24, 2018**

Summary:

- Nomination and election timeline
- Engaging prospective volunteers
- Volunteer recruitment cycle
- Board engagement in volunteer recruitment
- Election best practices

## FEBRUARY 2019

## **Ins and Outs of Contracts and Contractors**

*Learn what to look for when evaluating contract, services, and contractor performance. Protect your affiliate from contract loopholes, and learn how best to solicit contract work.*

**Date: February 21, 2019**

Summary:

- Basics of contracts – Academy recommendations and templates
- Requests for Proposals (RFPs)
- Evaluations for contracted services
- Managing contractors

## **MARCH 2019**

No webinars scheduled for March – President-Elect training in Chicago.

## **APRIL 2019**

### **Public Relations and Social Media**

*Learn skills for effective communication via social media for marketing and public relations campaigns.*

**Date: April 18, 2019**

Summary:

- Social media overview – platforms and best types of information they convey
- Member versus public accounts
- Developing member communication campaigns throughout the year
- Public relations campaigns to engage with consumers and the public

## **MAY 2018**

### **Membership and Fiscal Year Transition**

*Prepare for the upcoming transition of officers and what needs to be wrapped up at the end of the year.*

**Date: May 16, 2019**

Summary:

- Volunteer Transition, Orientation and Onboarding
- End of Fiscal Year Budget Wrap-up and Transition
- Membership Numbers
- Membership Satisfaction and Exit Surveys
- Annual reports
- Principles of Affiliation

## **Archive and Pre-Recorded Webinar Trainings**

All live webinars will be recorded and available on the affiliate Governance Management Website under "Training/Resources". Training materials may be shared with other leaders within the affiliate. (Note, only key leaders have access to the website. If you wish to share the materials, it is recommended that you download and distribute them.) Log into the Governance Management Website with the same login/password combination used for [www.eatrightpro.org](http://www.eatrightpro.org).

### **Archived Webinar Trainings**

Archived webinar trainings are accessible on the Affiliate Governance Management website. You may listen to the recording or access presentation slides. [Access the trainings.](#)

- DMIS Training and How-To
- Event Planning and Management
- Newsletters and Publications
- Strategic Planning
- District/Regions Management
- Conflict Resolution
- Effective Communication
- Leveraging Academy Teams
- Developing and Managing Volunteers
- Lifelong Learning and CDR
- 101 and 201 membership sessions

### **Pre-Recorded Webinar Trainings**

Throughout the year, new webinar trainings that have been pre-recorded will be made available. These presentations aimed at more specific topics will range from 10 to 30 minutes. Stay on the lookout for announcements when recordings are available. [Recordings will be posted here.](#)

- Academy Resources and Support
- Collecting and Leveraging Member Feedback
- Developing and Utilizing Policies
- Fraud Protection
- Academy Membership Categories and Who Qualifies
- Subscriber and Supporter Memberships
- Succession Planning
- Website Policies and Best Practices
- What is Governance?
- Why Associations Fail