ANNUAL PLANNING AND SPEND LIMIT PROCESS FOR FY20

The process to submit your group’s annual plan will begin in the next couple of weeks. Please note some slight changes to the process for this year:

New deadlines for submitting plans

To help expedite processing and reporting, the annual plan deadlines have been changed as follows:

- All Division annual plans, or any other plan with expenditures over $100K - due May 31
- All other annual plans – due June 30

New Annual plan budget template will be submitted with your plan

This template will give your Group Leadership Team, as well as ASME, a better understanding of your planned activities and help organize your events schedule and tasks for FY20.

- This new template (Excel file) will be submitted as an attachment with your annual plan in the Volunteer Portal.
- Templates will be available for Sections and Divisions/Research Committees.

In the coming weeks, staff will be providing the Annual Plan Budget Templates and additional information regarding the 25% spend limit for the new program year. In the meantime, please continue planning your activities based on your estimated spend limit from last year, or by using your activities as a guideline for approximate budgetary information for your plan.

OUR GOAL FOR FY20 – MORE FLEXIBILITY FOR SECTION ACTIVITIES

We realize the limitations the current planning process places on groups. We listened to your feedback and will be putting together some recommendations for the Group Engagement Committee and the Board of Governors to consider regarding the group planning process. This includes points like the spend limit, and the types of activities you can conduct, and most importantly, appropriate ways to raise funds to replenish your accounts.

We will keep you updated on this effort over the course of the next program year.

SECTION FUNDING MONIES STILL AVAILABLE FOR THIS YEAR + UPCOMING CHANGES TO THE PROGRAM

There are still funds available in the Section Activity Funding Program for this year! Please have a look at the program requirements and apply!

To provide sections with better operational flexibility, we have made two changes to the Section Funding Program. These changes include (1) an increase in funding amounts, and (2) the ability for any Section, regardless of account balance, to apply. We will provide an update on these program changes once they are fully approved by the Board of Governors in June. This new funding program would become effective July 2019.
LEADERSHIP UPDATES DUE JUNE 30

Many groups are currently working through the process of securing and/or retaining leadership for the new program year. Please make sure to submit your leadership updates prior to July 1 in the Volunteer Portal.

Just go to Submit Request, General Admin Task and select Leadership Update for the question, *What is your request related to?* Complete the request form and click Submit. Click here for more information on submitting leadership.

Tip: Use the Volunteer Leadership Directory to see the current list of volunteers we have recorded for your group.

Contact us if you have any questions or need assistance.

UPDATING POST-ACTIVITY REPORTS

Please make sure you have completed post-activity reports for your activities this year. This allows your group, as well as ASME, to get a complete picture of your activity results. To update a Post-Activity Report, visit the Post-Activity Report section of each activity request, and complete the open fields in the ticket.

REMINDER FOR U.S. SECTIONS - UNIT REGISTER CODING

Just a reminder to make sure your group has coded all transactions in the Unit Register prior to the end of the current program year. (http://unitregister.asme.org) If you haven’t already, now is also the perfect time to speak with any new volunteers about the Consolidated Banking process, or to inform ASME Treasury, if any signatories on the group’s bank account will change.

KNOWLEDGEBASE UPDATES

The following new content has been added to the portal Knowledgebase for your reference:

- Membership brochures for download
- ASME Graduation stoles still available
- Member benefit – Up to 50% off at the ASME Dell Store until May 10!
- Using your ASME.org group page with GMEC
- Preference Center Instructions – How to set ASME Preferences to Receive Group Communications
- Additional Preference Center FAQ’s

Please check the Knowledgebase for the most recent content for groups.

MOBILE CREDIT CARD READERS FOR SECTION ACTIVITIES

ASME Treasury is working on the final details for using the mobile credit card readers for section activities. We expect to have this available for sections to request for the upcoming program year! Please keep an eye out of further communications regarding this new feature.
NEW ASME WEBSITE COMING IN JUNE

ASME will be redesigning its website, with the first round of improvements scheduled to take place in late June. These upgrades are focused on improving key areas of ASME.org, like the homepage and My Account function. Keep an eye out for further announcements from us in May regarding these exciting improvements.

ASME COMMUNITY STATUS

We realize the importance of improving the tools you use for your ASME work, like the ASME community space. After reviewing our upgrade options for the existing platform, it seems it’s in our best interest to replace the entire platform instead of upgrading to the latest version.

We expect to begin discussions about this in July-August 2019 timeframe. We will provide you with periodic updates on this effort. You can continue to use the existing group page platform in the meantime.

For those that have reported issues with group pages – we are working with the vendor to try and resolve the various issues that have been reported over the past months. While we’ve had some successes, it appears that other issues may only be solvable with an upgrade. If you experience any problems using the community space, please contact Chrissy Johns for assistance.

We hope to provide you with an even better platform soon!

GMEC & GMEC REPORTING

If you didn’t have the opportunity to attend the GLDC, you may have missed GEC Member and Oregon Section volunteer Pasquale Dell’Aquila’s live demo on how to submit a GMEC request! We are working on getting a video tutorial created so you can view these steps at your own pace. It is expected to be available for the start of the new program year, earlier if possible. We also expect to conduct more trainings on our tools in the late summer. In the meantime, if you need help, please check the portal Knowledgebase for our GMEC-related help content. We will be in touch with any new content and training dates.

As a reminder – reporting is available for your individual GMEC deployments. We can also provide you with a contactable summary report for the section. Please contact Chrissy Johns if you would like any GMEC or communications-related reporting.

MEMBERS RECEIVING EMAILS / PREFERENCE CENTER

We have received inquiries from some volunteers regarding members who are not receiving emails from their sections or divisions.

As of May 2018, members have had the ability to choose the types of ASME communications they wish to receive, including section communications by visiting the ASME Preference Center. Members who have updated their selections in the Preference Center receive only the email communication types they have selected.

ASME is currently running an ongoing opt in campaign to those members that haven’t updated their information yet. While many members have not updated their preferences, and while the campaign is ongoing, ASME is honoring their pre-May 2018 list serve selections. No member has been removed from the mailing list if they haven’t opted in yet, and they will still receive section emails.
We are not able to email members who have explicitly opted out of receiving communications however, we are working on other ways to re-engage. This includes but is not limited to direct mail campaigns, adding option to opt in during membership renewal process and additional access to the Preference Center on the website.

If any members of your section or division indicate they are not receiving emails but would like to, please direct them to update their preference by visiting the ASME Preference Center. Making selections is fairly intuitive however, we have created instructions that can be shared with your members at events or other functions. Any questions or issues can be emailed to Chrissy Johns.

**REMINDER – PROVIDE YOUR CONSENT IN THE VLD - IT’S DIFFERENT THAN THE PREFERENCE CENTER!**

The Volunteer Leadership Directory (VLD) is a public directory that enables members, other volunteers and the general public, to find and message volunteer leaders of a group for the purpose of ASME-related activities. The names of all volunteer leaders will be displayed in the directory however, the ability to contact a leader will not be available until the volunteer’s consent has been provided. This is a separate process from setting your communication preferences in the ASME Preference Center.

Volunteers can view, provide and update their consent to be contacted for the VLD at http://preferences.asme.org/vld. This consent link is not advertised, but it is mentioned in VLD-related content in the portal. We suggest all volunteers visit the link to provide consent so you can connect with other volunteers and members.

As a reminder, messages sent through the directory can be from anyone, and will go to the email address affiliated with your member record. You can access the VLD here: http://vld.asme.org

**VLD – NEW COMMITTEES TO BE ADDED**

New committees are being added to the VLD. These additions will be available by the new program year:

- Group Engagement Committee, VOLT
- All Segment Leadership Teams
- Sector Leadership for Technical Events & Content, Student & Early Career Development, and Public Affairs & Outreach

Please utilize the VLD to connect with these volunteers!

**Contact Us if You Need Assistance!**

**TY BOOKER, BOOKERT@ASME.ORG** – FOR ASSISTANCE WITH ACTIVITY REQUESTS, PROGRAM PLANNING & BUDGETING, FUNDING, ENGAGEMENT OPPORTUNITIES, AWARDS & RECOGNITION PROGRAMS

**CHRISTINA JOHNS, JOHNSC@ASME.ORG** – FOR ASSISTANCE WITH THE VOLUNTEER PORTAL, GMEC, ASME PREFERENCE CENTER, VLD, ASME COMMUNITIES/ASME.ORG WEB, OTHER ONLINE TOOL ASSISTANCE, LEADERSHIP & COMMITTEE UPDATES, MEMBERSHIP DATA/REPORTING, COMMUNICATIONS/OUTREACH ASSISTANCE

**VIEW ADDITIONAL CONTACTS AT ASME**