



ASCLS-NE

# Leadership Handbook

# Table of Contents

## **INTRODUCTION ----- 3**

Purpose  
Guiding Policy  
Updates  
Requirements

## **OFFICERS**

President -----	6
President-elect -----	14
Past President -----	17
Secretary -----	20
Treasurer -----	24
Senior Board Member -----	34
Junior Board Member -----	39
First Year Professional -----	41
Student Forum President -----	43

## **PUBLICATION & DOCUMENTATION COMMITTEES**

Historian -----	46
FILTER Editor -----	48
WebMaster -----	51
Bylaws Chair -----	53

## **PROFESSIONAL DEVELOPMENT COMMITTEES**

Leadership Development Chair -----	56
Membership Development Chair -----	61
PAC/GAC Chair -----	66
PACE -----	70
Scholarship and Loan Chair -----	74

## **PROFESSIONAL PROMOTION COMMITTEES**

Promotion of the Profession Chair – Coming Soon!  
Professional Recruitment Chair – Coming Soon!  
Fundraising Chair – Coming Soon!  
Public Relations Chair – Coming Soon!  
Events Chair – Coming Soon!

# Table of Contents

## **STUDENT FORUM**

Student Forum Adviser -----	78
Student Forum Secretary -----	84
Student Forum Treasurer -----	87

## **SPRING MEETING COMMITTEE**

Speaker Chair -----	90
Awards Chair -----	97
Moderator Chair – Coming Soon!	
Vendor Chair – Coming Soon!	
Registration Chair – Coming Soon!	

<b>PARLIAMENTARY PROCEDURES -----</b>	<b>103</b>
---------------------------------------	------------

# Introduction

## LEADERSHIP HANDBOOK PURPOSE

The purpose of this handbook is to guide ASCLS-NE leadership in their proper duties throughout the ASCLS-NE year. The handbook is an extension of the ASCLS Leadership Academy *Help Explaining Leadership Positions in a Book* (H.E.L.P. in a Book). The guidelines provided are not all inclusive. Leaders are expected to explore and research their leadership position to continuously improve each leadership position and contribute to the Leadership Handbook. Extensive information is available on the [www.ascls.org](http://www.ascls.org).

## GUIDING POLICY

Leaders of this society have the privilege of serving the members of this society. Service includes, but is not limited to, providing a face and a voice of the Medical Laboratory Science profession.

## UPDATES

Officers and Leadership Chairs should email the ASCLS-NE Leadership Development Chair (LDC) with suggested updates to this manual by July 31 of each year. The LDC shall present all suggested changes of the manual to the ASCLS-NE Board of Directors at the Winter Board Meeting for approval. Updates should be submitted by email to the board for review at least two weeks prior to the scheduled Winter Board Meeting in order for the board to review updates prior to meeting. All updates and changes must be approved by the ASCLS-NE Board of Directors before updating the manual. The LDC shall make official changes after board approval. The LDC should then submit the revised files to the Webmaster to post on the ASCLS-NE website. All guidelines in this manual must comply with the ASCLS-NE Bylaws and Standard Operating Procedures <http://www.ascls-ne.org/bylaws.html>.

## REQUIREMENTS

### A. Elected Officers

1. All elected officers are required to be members of ASCLS and ASCLS-NE.
2. Any member of the society is eligible for nomination after serving as an active member (serving as a committee chair or committee member) for at least one year.
3. The term of an officer elected at an annual meeting will begin at the conclusion of the House of Delegates at the ASCLS Annual Meeting towards the end of July.
4. Terms of each officer are stated under elected position.

# Introduction

## B. Committees

1. All appointed leaders are required to be members of ASCLS and ASCLS-NE.
2. Appointments are made by the current ASCLS-NE President. Term of office may begin at the conclusion of the House of Delegates at the ASCLS Annual Meeting or immediately following appointment if the appointed position is vacant.
3. Terms last until leader resigns from the position or is asked to resign by the ASCLS-NE board of directors.

# President

## TERM

Following a one year term as President-elect, the President shall serve a one year term in the office of President and then automatically succeed to the office of Past-President.

## TIME COMMITMENT

20 hours/month

Weekend trip to Region VI meeting in November (This is typically to Kansas City. If not available to go, must ensure another ASCLS-NE leader take your place)

Week-long trip to ASCLS Annual Meeting in July (This location always TBA. If not available to go, must ensure another ASCLS-NE leader take your place)

## DUTIES

- As chief executive officer of ASCLS-NE and chair of the board of directors as defined by the ASCLS-NE Bylaws, set the dates, prepare the agenda, and preside at all ASCLS-NE board of directors meetings.
- The President shall be an ex-officio member of all committees.
- Be familiar with the duties of all other leaders, elected and appointed, by means of the ASCLS-NE Leadership Handbook.
- Be familiar with the information documented in the ASCLS-NE Bylaws, SOP, and website. All items can be found at [www.ascls-ne.org](http://www.ascls-ne.org)
- Appoint all committee chairs.
- With board approval, establish special committees as needed and appoint chairs.
- Represent ASCLS-NE on the President's Council of ASCLS.
- Represent ASCLS-NE on the Region VI Council.
- Uphold communication with ASCLS-NE members by submitting a "President's Message" entry to every published Filter.
- Uphold communication between members, state, regional, and national leadership. <sup>2</sup>
- Submit reports to the constituent society membership, regional director, and ASCLS as requested. <sup>2</sup>
- Update, maintain, and organize the ASCLS-NE president's email account ([president@ascls-ne.org](mailto:president@ascls-ne.org)) and files. <sup>2</sup>
- Monitor and evaluate the activities of all ASCLS-NE committees and chairs. <sup>2</sup>
- Authorize constituent society expenses and reimbursements. <sup>2</sup>
- Advise and consult with the ASCLS-NE Annual Meeting Chair on arrangements for the meeting.
- Submit nominations for ASCLS and ASCLS-NE awards and recognition.
- Submit nominations for ASCLS committees and positions.
- Select, submit, and preside over a delegation to BEST represent ASCLS-NE at the ASCLS Annual Meeting.
- Update ASCLS executive office with changes in the ASCLS-NE Leadership Directory.

# President

## **SUGGESTED SCHEDULE**

Actual due dates and event dates can be found each year in the President's Manual of the American Society for Clinical Laboratory Science:

<http://www.ascls.org/resource/collection/B49A0B39-57DC-4EEB-9931-AAF0AA4E5D94/StatePresidents.pdf>

August

Conduct ASCLS-NE Leadership Conference

FILTER Deadline August 15: Submit President's Message

September

Fall Board Reports Due to Region Director

October

November

Represent ASCLS-NE on the Region VI Council during the Region VI Council Meeting (Usually held in the Kansas City area)

FILTER Deadline November 15: Submit President's Message

December

January

Nominations for ASCLS Elected Positions Due to Nominations Chair

Winter Board Meeting

February

National Award nominations due

Interim Board Report due to Region Director

FILTER Deadline February 15: Submit President's Message

March

State Award nominations due

Legislative Symposium in Washington DC

Forward nominations to members submitted by the Nominations Committee

April

ASCLS-NE Spring Educational Meeting

ASCLS-NE Annual Board Meeting and Elections

National Medical Laboratory Professionals Week

Select and submit delegates for House of Delegates

May

National Key to the Future nominations due May 1

FILTER Deadline May 15: Submit President's Message

# President

## June

ASCLS-NE Leadership Roster for upcoming year due to Nationals June 1 (President-elect to submit)  
Annual Reports Due

## July

Teleconference with those attending ASCLS Annual Meeting to make assignments  
ASCLS Annual Meeting  
Give Leadership Development Chair updates for the President section of the ASCLS-NE Leadership Handbook.

## August

ASCLS-NE Leadership Conference (You are now Past-president! Meeting to be conducted by new President ☺ )  
-Pass on any physical items on to new ASCLS-NE President.  
-Give new ASCLS-NE President the password to the [president@ascls-ne.org](mailto:president@ascls-ne.org) account.

## Ongoing

Maintain and encourage communication between membership, state leaders, Region VI leaders, and national leaders.  
Participate in Region VI Teleconferences and meetings as scheduled.  
Participate in ASCLS-NE committee meetings and teleconferences as requested.

## HELPFUL TIPS

National Awards included for the February nomination deadline include:

CLS Distinguished Author  
Constituent Society Publications (Newsletter)  
Gloria "Mike" Gilbert Applications  
Professional Achievement  
Member of the Year  
Omicron Sigma -- Constituent Society  
Robin H. Mendelson Memorial Award  
Student Forum Leadership Award  
Theriot Creativity Award

## Leadership Roster:

The roster will be posted on ASCLS website as submitted. Include:

Name  
Leadership Position  
ASCLS Member Number  
Preferred Mailing Address  
Work Phone  
Home Phone  
Fax



# President

## Email Address

Do NOT delay sending roster if not complete. Submit information known by June 1 of each year. Send updates as received.

## ASCLS-NE Leadership Conference:

Coordinate date and agenda with LDC. Include a Board Meeting in the agenda. Invite incoming and outgoing leadership, as well as, students and potential leaders that attended the national meeting. Incoming and outgoing leadership should hand off items and exchange ideas. Leadership should set goals and deadlines for the upcoming year. Students and leaders that attended national meeting can share information and excitement gathered.

## Reports:

All reports should be submitted on ASCLS-NE letterhead. See Leadership page for report templates. In reports, note ASCLS-NE progress on activities, requests for action, policy changes, and issues of concern. Requests for Action must be discussed with the Region VI director BEFORE submitting the report. Please phrase request as a parliamentary motion, "I move that the ASCLS Board of Directors . . ." If the request is financial, please include estimated costs in the motion. Electronic or hard copies should be forwarded to the Region VI Director. Please do not fax. Reports should not exceed two single sided pages. If including attachments, please note so at end of report.

At the end of the year, two reports should be emailed to the Region VI Director: one to the House of Delegates and one to the ASCLS Board of Directors. Reports submitted for the Board of Directors will be summarized in the Region Director's report. The report should include a summary of the year's activities since the Interim report was submitted. It should also include concerns and requests for action. Reports submitted for the House of Delegates will be reproduced in entirety for the Annual Meeting. The report should be a summary of the year's activities. It should NOT include any issues of concern but may include a request if the request is related to ASCLS policy.

## Communication:

The ASCLS-NE President will manage the [president@ascls-ne.org](mailto:president@ascls-ne.org) account. All communication by the ASCLS-NE President should be processed through this account. Sent and received emails should be saved in appropriate folders in the account for future use and referral. Emails greater than five years old may be printed on August 1 of each year and given to the ASCLS-NE Historian at the ASCLS-NE Leadership Conference. The President should also give the password to this account to the incoming ASCLS-NE President following the conclusion of the House of Delegates at the ASCLS Annual Meeting. The account should only be used for ASCLS-NE communication to ASCLS members and leadership at the state, regional, and national levels. The account may NOT be used for personal communication or communication other than related to ASCLS/ASCLS-NE.

The ASCLS President and Region VI Director will communicate with the ASCLS-NE President through the [president@ascls-ne.org](mailto:president@ascls-ne.org) account. The information given should be passed on to ASCLS-NE leadership as necessary. ASCLS-NE President should respond as necessary to any request or question applicable. All communication

# President

with leadership should be copied to the ASCLS-NE President-elect. Notify ASCLS-NE leadership of ASCLS Leadership Postings. The ASCLS-NE President should e-mail monthly updates to the Region VI director by the last day of each month. ASCLS-NE President should also notify Region VI director and ASCLS office of FILTER deadlines.

## Membership:

### Roster Access

Membership reports are available on the ASCLS website at [www.ascls.org](http://www.ascls.org)

To access these rosters

1. Log in to the ASCLS website using your personal username (email) and password.
2. Scroll down the homepage. Under Participate, click on ASCLS Member Community.
3. Under My Dashboard, click on My Groups.
4. Click on State Society Leaders.
5. Click on the Resources tab.
6. To the left of the name of your state, click on the sheet of paper icon.
7. Click on the green Download Resource button.
8. The roster will open in an Excel spreadsheet format.
9. See tabs at bottom of spreadsheet for current vs. lapsed members.
10. Save the file to your computer.

Note: Roster access is limited to state presidents, state treasurers, and state membership chairs.

A list of recently joined members or renewed members will accompany every state dues check sent to the ASCLS-NE Treasurer each quarter.

Emeritus membership recognizes continuous long-term commitment to ASCLS.

Honorary membership recognizes individuals who cannot qualify for any other membership category but have contributed extensively to ASCLS. The ASCLS-NE President may submit a formal motion along with a letter of recommendation outlining the qualifications to the ASCLS Secretary-Treasurer. A copy should also be sent to the Region VI Director. The ASCLS President may approve the nomination to be on the ASCLS Annual Meeting House of Delegates Agenda. A majority vote of the House is required for honorary membership approval. ASCLS-NE may only nominate one candidate each year providing that the number of honorary members does not exceed 1% of the total membership. The approved Honorary Members will be notified by the ASCLS Secretary-Treasurer.

## Meetings:

ASCLS-NE members **MUST** be notified of every board meeting two weeks in advance of each board meeting. Two weeks prior to each board meeting, send an email to the ASCLS-NE membership. In the email include an agenda, date, time, and location. All members are invited and encouraged to attend all meetings held by ASCLS-NE including the ASCLS-NE Leadership Conference.

The Board of Directors must hold two meetings each year. One meeting may be in conjunction with the annual educational meeting. During each meeting review the

# President

structure of ASCLS from national, to regional, to state organization. Also during the meeting, each leadership chair and board member should briefly explain their leadership role prior to their committee update.

All decisions made at meetings as well as all electronically completed voting must comply with ASCLS-NE Bylaws. All electronic voting needs to be copied to the Bylaws Chair to ensure all outcomes comply with ASCLS-NE Bylaws and SOPs. All electronic voting MUST be recorded and tracked as meeting minutes. The ASCLS-NE Secretary keeps track of the electronic voting minutes and presents those minutes at the soonest following in-person meeting for meeting minute approval. These minutes, as well as any other minutes, must be posted on the ASCLS-NE website for membership review.

## Annual ASCLS Meeting:

At the ASCLS-NE Annual Board meeting explain society expectations of delegates and members attending the ASCLS Annual meeting. Also explain the ASCLS-NE travel and reimbursement policy. Ask for names of those interested in attending the meeting. Give electronic copy of travel policy to all interested travelers.

Each state is entitled to at least four delegates (two delegates-at-large, one new professional, and one student delegate). Each state is also entitled to one more delegate per each 50 professional and emeritus members. The official count of membership shall take place on May 31 of each year. Typically the ASCLS-NE President and President-Elect will fill the two delegates-at-large. The ASCLS-NE First Year Professional should fill the new professional delegate spot, and the ASCLS-NE Student Forum President should be the student delegate.

If these four leaders are not able to attend, the ASCLS-NE President should choose other ASCLS-NE Leaders, an alternate New Professional, or an alternated student as necessary to represent ASCLS-NE at the House of Delegates. The replacement for the New Professional Chair must be a “new professional” within the last five years. The person filling in for the ASCLS-NE President should take on the President’s responsibilities at the ASCLS Annual Meeting. Additional leaders and representatives should be selected based on the ASCLS-NE membership total and the number of ASCLS-NE members attending the ASCLS Annual meeting. It is in the best interest of the ASCLS-NE society to fill all allowed delegate spots for ASCLS-NE. It is wise to have alternate delegates for last minute changes.

Hold a meeting/teleconference in early July with those that will be attending the ASCLS Annual Meeting. Include student members that will be attending in this meeting. Confirm travel and hotel arrangements with participants. Offer suggestions, tips, and encouragement to those attending their first ASCLS Annual Meeting. If this is your first ASCLS Annual Meeting, consider inviting a previous participant to the teleconference/meeting to offer suggestions and support. Make sure those selected to serve as delegates are aware of their responsibilities.

Delegates must attend and stay until the end of the House of Delegates meeting. Make delegates aware that they must bring their membership card and registration form. All attendance should wear their badges at meetings. For all ASCLS-NE members attending (especially student members), assign or request for volunteers to attend NAACLS and NCA update sessions, committee meetings, and Scientific Assembly

# President

section meetings. During these meetings they may collect information and ideas for the committee chairs of ASCLS-NE. The information they gather should be brought to share at the ASCLS-NE Leadership Conference in August.

At the ASCLS Annual Meeting, the ASCLS-NE President should pick up and distribute Credentials as directed. The president should also attend the President's Seminar. Other meetings of interest include the Pre-House Board Meeting, National Committee Meetings, Issues Update, Awards Ceremony, Keynote sessions, Candidates Presentation (opportunity to meet and talk with candidates for all ASCLS elected positions), and Region VI Caucus. An ASCLS-NE Caucus should also be held for the delegates to discuss candidates, issues, and elections procedure. As a delegate, the ASCLS-NE President should participate in elections and notify the other delegates of any run-off election.

In preparation for the House of Delegates, all delegates should print their own copy of the Agenda Book from the ASCLS website and bring their copy to the Annual Meeting. The book contains information to be considered by the House of Delegates. Each delegate should be familiar with the contents or delegates can be assigned to portions to review and report back to delegation at the ASCLS-NE Caucus.

Region VI holds a "Rho-Sigma" dinner each year on one evening of the ASCLS Annual meeting. The responsibility for this dinner rotates through the five states that make up Region VI. There is also a "Rho-Sigma" award. Please take note at the Annual Region VI meeting if ASCLS-NE is in charge. Plan accordingly. Nominate someone for the award! ☺

President pins are available for purchase at the ASCLS Annual Meeting. A pin may be purchased for the incoming ASCLS-NE president.

## RESOURCES

1. ASCLS-NE Bylaws <http://www.ascls-ne.org/bylaws.html>
2. President's Manual of the American Society for Clinical Laboratory Science <http://www.ascls.org/resource/collection/B49A0B39-57DC-4EEB-9931-AAF0AA4E5D94/StatePresidents.pdf>

## APPENDIX

Board Meeting Agenda Template  
Board Meeting Minutes Template  
Board Report Template  
Committee Report to the Board Template

Original documents (Word, Excel, & PDF) on ASCLS-NE website

## ACKNOWLEDGEMENTS

Tracey Vrba  
Linsey Donner  
Roxanne Alter

# President-elect

## **TERM**

The President-elect will serve a one year term, then automatically succeed to the office of President for a one year term, and then automatically succeed to the office of Past-president for a one year term.

## **TIME COMMITMENT**

10 hours per month

Attend week of ASCLS national meeting in July (If able)

Attend weekend of Region VI Council meeting (If able)

See also: Time Commitment of President and Past-president

## **DUTIES**

- Become familiar with the duties of President.
- Become familiar with the duties of all elected and appointed ASCLS-NE leaders by reviewing the ASCLS-NE Leadership Handbook.
- Become familiar with the ASCLS-NE Bylaws, SOP, and website at [www.ascls-ne.org](http://www.ascls-ne.org)
- Represent ASCLS-NE on the Region VI Council and the President's Council of ASCLS.
- Maintain and encourage communication between ASCLS-NE members and leadership.
- Update, maintain, and organize the [president-elect@ascls-ne.org](mailto:president-elect@ascls-ne.org) email account

## **SUGGESTED SCHEDULE**

August

ASCLS-NE Leadership Conference -- retrieve any items from previous President-elect

November

Represent ASCLS-NE on the Region VI Council during the Region VI Council Meeting (Usually held in the Kansas City area)

January

Winter Board Meeting

February

Assist Past-president and LDC with finding Nominees for open positions for upcoming election

Also start working with LDC to fill committee positions that will be open for the following year. Roosters are due to national JUNE 1. (Leadership year begins at the end of the ASCLS National Meeting)

March

# President-elect

State Award nominations due  
Legislative Symposium in Washington DC

April

Attend ASCLS-NE Spring Education Meeting  
ASCLS-NE Annual Board Meeting and Elections  
National Medical Laboratory Professionals Week

June

ASCLS-NE leadership roster due to national June 1st

July

Start working with LDC to plan and schedule upcoming ASCLS-NE Leadership Conference (to be held in August/September)  
Early July -- telephone conference to discuss ASCLS Annual Meeting  
Attend ASCLS Annual Meeting  
At the ASCLS Annual Meeting, attend the President-Elect's Seminar and other meetings as requested by the ASCLS-NE President  
Represent ASCLS-NE on the President's Council  
Recommend updates for the President-Elect section of the Leadership Handbook to the Leadership Development Chair.

August

Conduct ASCLS-NE Leadership Conference – pass on any items to the new President-elect . . You are now President!! 😊

Ongoing

Contact the ASCLS-NE leadership for updates on goals and activities once each month.  
Participate in Region VI Council teleconferences as scheduled.  
Participate in ASCLS-NE committee meetings and teleconferences as requested.

## **HELPFUL TIPS**

Leadership Roster

Will be posted on ASCLS website as submitted

Include:

Name

ASCLS Member Number

Preferred Mailing Address

Work Phone

Home Phone

Fax

Email Address

Do NOT delay sending roster if not complete. Submit information known by June 1 of each year. Send updates as received.

# President-elect

ASCLS-NE Leadership Conference

Coordinate date and agenda with LDC

Invite incoming and outgoing leadership, as well as, students and potential leaders that attended the national meeting.

Incoming and outgoing leadership should hand off items and exchange ideas.

Leadership should set goals and deadlines for the upcoming year.

Students and leaders that attended national meeting can share information and excitement gathered.

## **RESOURCES**

## **APPENDIX**

## **ACKNOWLEDGEMENTS**

# Past President

## **TERM**

The Past-President shall serve one year in office following one year as President-elect and one year as President

## **TIME COMMITMENT**

10 hours per month

See also President and President-elect positions

## **DUTIES**

- Assist and mentor current President and President-elect
- Represent ASCLS-NE on the Region VI Council
- Serve as ASCLS-NE Nominations Committee Chair
- Take on the role of President if the office of President becomes vacant
- Update, maintain, and organize the [past-president@ascls-ne.org](mailto:past-president@ascls-ne.org) email account

## **SUGGESTED SCHEDULE**

August

Attend ASCLS-NE Leadership Conference to obtain physical items from the previous Past-President

November

Represent ASCLS-NE on the Region VI Council during the Region VI Council Meeting (Usually held in the Kansas City area)

Start reviewing nomination position openings for both state & national

Filter deadline November 15: request nominations for open leadership positions for next year

January

Nominations for ASCLS Elected Positions Due to Nominations Chair

Winter Board Meeting

February

National Award nominations due

Filter deadline February 15: Submit Nomination information to Filter editor for ASCLS-NE members to review

March

State award nominations due

Legislative Symposium in Washington DC

April

ASCLS-NE Spring Educational Meeting



# Past President

## ASCLS-NE Annual Board Meeting

Conduct ASCLS-NE Board elections at the ASCLS-NE Annual board meeting.  
National Medical Laboratory Professionals Week

## July

Teleconference for those attending ASCLS Annual Meeting

ASCLS Annual Meeting

Give Leadership Development Chair updates for the Past-President section of the ASCLS-NE Leadership Handbook.

## August

ASCLS-NE Leadership Conference

-Pass on any physical items on to new ASCLS-NE Past-President.

## Ongoing

Assist and mentor current President and President-elect as needed.

Recruit new members to ASCLS-NE.

Recruit new leaders for ASCLS-NE Leadership.

## **HELPFUL TIPS**

### Nominations Committee (From ASCLS-NE SOP)

The Nominations Committee shall prepare and submit candidates and their qualifications to the society for each elective position under consideration. The committee is not responsible for presenting qualifications of persons nominated from the floor.

The nominations committee shall consist of the immediate Past President (Chair of Nominations Committee), the current President, and the Leadership Development Chair.

In the event that the Past-President is unable to serve, the President shall become Nominations Committee Chair and appoint one more qualified person to serve on the committee for the rest of the term.

When a committee member vacancy occurs, the President will appoint a qualified person to serve the rest of the term.

The committee should initiate and maintain direct contact with qualified persons to ensure a full slate of candidates for the society.

The committee should present a list of all nominated offices and candidates and their qualifications to the membership of the society no less than two weeks in advance of the annual business meeting.

## **RESOURCES**

1. ASCLS-NE Bylaws

## **APPENDIX**

Past President

**ACKNOWLEDGEMENTS**

# Secretary

## TERM

The Secretary shall serve a two year term to be elected opposite years of the Treasurer.

## TIME COMMITMENT

8 Hours per month

## DUTIES

- Serves as recording secretary at all meetings of the Board of ASCLS-NE<sup>1</sup>
- Maintain the ASCLS-NE Secretary email.
- Prepares and distributes agenda for meetings with the assistance of the President.
- Keep a permanent record of all meetings and electronic board voting<sup>1</sup>
- Perform other duties as required by the ASCLS-NE President or by ASCLS<sup>1</sup>
- Provide to the board electronic copies of board meeting minutes within 30 days of meetings<sup>2</sup>
- Submit approved minutes to Webmaster for electronic posting and to FILTER editor for publication<sup>2</sup>
- Prepare to read minutes of previous meetings, if necessary<sup>2</sup>
- Prepare to discuss items from previous meetings or be able to locate the information if necessary<sup>2</sup>
- Assist ASCLS-NE President, Board of Directors, and Committee Chairs with correspondence to the membership as necessary<sup>2</sup>
- Mentor incoming Secretary
- At the end of term, assist Historian in printing hard copies of minutes, Treasurer's Reports, and all other reports for permanent record at the UNMC Library<sup>2</sup>
- Update, maintain, and organize the [secretary@ascls-ne.org](mailto:secretary@ascls-ne.org) email account

## SCHEDULE

August

Attend ASCLS-NE Leadership Conference to obtain physical items and email password from the last Secretary as applicable

Take minutes during meeting

Write up Minutes and Distribute electronically to Board of Directors for electronic approval

Submit approved Minutes to Webmaster and FILTER Editor

Filter Deadline August 15

February

Attend ASCLS-NE Winter Board Meeting

Take minutes during meeting

Write up Minutes and Distribute electronically to Board of Directors for electronic approval

# Secretary

Submit Minutes to Webmaster and FILTER Editor  
Filter deadline February 15

April

Attend ASCLS-NE Spring Educational Meeting  
Attend ASCLS-NE Annual Board Meeting  
Take minutes during meetings  
Write up Minutes and Distribute electronically to Board of Directors for electronic approval  
Submit Minutes to Webmaster and FILTER Editor  
Celebrate National Medical Laboratory Professionals Week!

May

Filter Deadline May 15

July

ASCLS Annual Meeting  
Give Leadership Development Chair updates for the Secretary section of the ASCLS-NE Leadership Handbook by July 31.

August

Attend ASCLS-NE Leadership Conference. Take minutes during meeting.  
Write up minutes and distribute electronically to Board of Directors for electronic approval.  
Submit Minutes to Webmaster and Filter Editor.  
Filter deadline August 15  
Pass on any physical items on to new ASCLS-NE Secretary, if applicable  
Mentor new Secretary, when applicable  
At the end of term, assist historian in printing all minutes, treasurer reports, and all other reports for permanent record.

## ONGOING

Votes may be held electronically by the ASCLS-NE Board of directors between scheduled board meetings. These votes must also be documented. Keep record of all electronic motions and votes as minutes. Present these minutes at the next board meeting for approval. Approved electronic minutes should then be sent to the Webmaster to be posted on the ASCLS-NE website for the membership to view and sent to the Filter editor to be published in the next upcoming Filter.

## Helpful Tips

Keep detailed records of all meetings. Minutes should include names of all those in attendance, all official business, and the record of each vote. Official vote records should include the motion made, the name of the person making the motion, the name of the person seconding the motion, and all names in favor or opposed to the motion. Keep electronic copies of all minutes in the ASCLS-NE Secretary email. All minutes are

# Secretary

to be printed at the end of each two year term by the ASCLS-NE Secretary and placed at the UNMC Library Archives Department by the ASCLS-NE Historian.

All decisions made at meetings as well as all electronically completed voting must comply with ASCLS-NE Bylaws. All electronic voting needs to be copied to the Bylaws Chair to ensure all outcomes comply with ASCLS-NE Bylaws and SOPs. All electronic voting MUST be recorded and tracked as meeting minutes. Keeps track of all electronic voting minutes and present those minutes at the soonest following in-person meeting for approval. These minutes, as well as any other minutes, must be posted on the ASCLS-NE website for membership review.

## Minute Tips:<sup>2</sup>

Take minutes on a laptop or use tape recorder

Get electronic copies of committee reports to include in minutes without having to re-type or scan reports

Examine and edit, if necessary, motions, resolutions, etc for correct spelling or words, but never make an alteration that will change the context

Have forms available for motions (see appendix)

## From Parliamentary Law, Robert's Rules

“Minutes: the minutes should contain a record of what is done at each meeting, and not usually what is said. The object is to have a permanent record of what has actually been done. Therefore, it is unnecessary to enter all secondary motions and the names of speakers in debate, etc. All main motions (except withdrawn motions), whether adopted or rejected, should be entered. Minutes of the meetings may include brief summaries of the discussions from which the actions resulted. Care should be used to keep these reports brief, objective, and representative of all views presented.”

## Robert's Rules of Order:

### Basic Types of Motions:

1. Main Motions: The purpose of a main motion is to introduce items to the membership for their consideration. They cannot be made when any other motion is on the floor, and yield to privileged, subsidiary, and incidental motions.
2. Subsidiary Motions: Their purpose is to change or affect how a main motion is handled, and is voted on before a main motion.
3. Privileged Motions: Their purpose is to bring up items that are urgent about special or important matters unrelated to pending business.
4. Incidental Motions: Their purpose is to provide a means of questioning procedure concerning other motions and must be considered before the other motion.

## RESOURCES

1. ASCLS-NE Bylaws
2. H.E.L.P. in a Book by the ASCLS Leadership Academy

# Secretary

Robert's Rules of Order  
<http://www.robertsrules.org>

## **APPENDIX**

Motion Form Template  
Board Meeting Agenda Template  
Board Meeting Minutes Template  
Committee Report to the Board Template

Original documents (Word, Excel, & PDF) on ASCLS-NE website

Instructions for Motion Form

Motion # {fill in beginning with the number 1 at the start of each meeting}  
Motion Made by: {Individual making motion fills in name and motion below}  
Moves: {Fill in motion}  
Seconded by: {fill in individual who made second}  
Motion:        Passed                      Failed                      {Circle result of vote on Motion}

## **ACKNOWLEDGEMENTS**

# Treasurer

## TERM

The Treasurer shall serve a two year term to be elected opposite years of the Secretary.

## TIME COMMITMENT

10 hours/month

## DUTIES

1. Assure the receipt and expenditure of funds in accordance with the directives established by the Board of Directors. <sup>1</sup>
2. Submit to the membership at the annual meeting a statement of all receipts and expenditures of the Society for the year. <sup>1</sup>
3. Annually submits financial records for an internal review as requested by the budget committee (Treasurer-chairperson, Current President, & Incoming President).
4. Submits financial records for an external audit.
5. Advise ASCLS-NE President regarding the financial status on a regular basis as deemed by the current president. <sup>2</sup>
6. Monitor expenditures in each budget line and notify the board if requested expenditures will exceed the budgeted amount for a specific line item. <sup>2</sup>
7. Verify that membership dues have automatically deposited into ASCLS-NE account.
8. Receive and deposit ASCLS-NE Student Forum funds.
9. Obtain Tax ID number from past-treasurer. <sup>2</sup>
10. With approval of the Board of Directors, open new bank accounts when necessary. Ensure checks are personal checks (not business style checks) printed with ASCLS-NE.
11. Maintain and track all account information (checking, savings, money market, CD, Student Forum) <sup>2</sup>
12. Pay all bills promptly. <sup>2</sup>
13. Ensure bank account signature cards are properly signed annually by the President and Treasurer. <sup>2</sup>
14. Maintain accurate records of all financial transactions. <sup>2</sup>
15. Prepare quarterly finance reports for the ASCLS-NE board meetings and for submission to the Filter.
16. Serve as Treasurer for the Spring Education Conference as applicable.
17. Present the annual budget for Board approval at the Annual Board Meeting.
18. Prepare and file Federal Income Tax form by November 15. <sup>2</sup>
19. Provide statements of income and expenditures as requested by President, Finance Committee, Board of Directors, and Committee Chairs.
20. Submit Region VI Assessment. <sup>2</sup>
21. Secure bonding of Treasurer and President. <sup>2</sup>

# Treasurer

22. At the end of two-year term, transfer all accounts, financial reports, finance records, debit card, and all treasurer documents to the incoming Treasurer and President.<sup>2</sup>
23. Serve as an official member of the Budget Committee during term.
24. Mentor incoming Treasurer throughout term and for one year following term.
25. Mentor and assist Student Forum Treasurer
26. Update, main, and organize the [treasurer@ascls-ne.org](mailto:treasurer@ascls-ne.org) email account

## SUGGESTED SCHEDULE

### July – Fiscal year begins July 1

1. Determine members attending the national meeting as decided by ASCLS-NE Board through travel application...see #2.
2. Contact members going to national meeting and clarify their expenses. See Travel Policy for more information. Remind them to submit all expenses ASAP.
3. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).
4. Prepare end of year treasurer's report, updated budget with expenses incurred, and updated itemized budget form for year just finished. Email the treasurer's report to board members and the Filter editor.
5. Print Quicken report for July 1 to June 30 and file with June 30 bank statement, when it arrives.
6. Bank of the West needs new signature cards whenever the President or Treasurer changes. These signature cards must be filled out for ALL accounts: ASCLS-NE Checking, ASCLS-NE Money Market, ASCLS-NE Savings CD, Legislative and Scholarship CD, Spring Meeting Checking, Student Forum checking accounts.
7. If ASCLS-NE Treasurer is also the Spring Meeting treasurer: Transfer ASCLS-NE income from the Spring Meeting into the ASCLS-NE Money Market, and send checks to other organizations if it was a joint meeting (CLMA, IA, ASCP etc).
8. Begin work on electronic filing for IRS. To subscribe to updates, go to [www.irs.gov/eo](http://www.irs.gov/eo) and click on EO Newsletter. This form is due Nov 15 of every year. See computer access instructions below:
  - a. <http://epostcard.form990.org/>
  - b. Need to get login & password from previous treasurer
9. The Savings CD matures every year on July 19.
  - a. Determine how money should be handled.

### August

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).



# Treasurer

2. Watch for bill from Inspro Insurance for the fidelity bond (covers the President and Treasurer).
3. Watch for electronic deposit from ASCLS for ASCLS-NE membership share into the money market savings account.
4. Watch for Region VI assessment. ASCLS-NE president should get this bill and forward to treasurer for payment.
5. Electronic filing with IRS if not already done. Due Nov 15.
6. Transfer funds to the Student Forum account for the national meeting. Amount should match student forum fundraised amount up to and not to exceed the ASCLS-NE budgeted amount. DO NOT transfer funds before July 1, the beginning of the fiscal year.
7. Reimburse members for the ASCLS National Meeting according to Travel and Reimbursement SOP.
8. Update yearly income report once income from spring meeting has been determined.
9. Attend ASCLS-NE Leadership Conference
10. Filter Deadline August 15: Submit end of year Treasurer's Report.

## September

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).
2. Watch for Region VI assessment if not already received.
3. Electronic filing with IRS if not already done. Due Nov 15.

## October

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).
2. Prepare first quarter treasurer's report, update budget with expenses incurred, and updated itemized budget form. Submit to Filter editor.
3. Watch for Region VI assessment if not already received.
4. Electronic filing with IRS if not already done. Due next month, Nov 15.
5. Scholarship CD matures October 16 each year. Original amount \$10000. Move interest into Money Market account (if money market interest rate is better than CD interest rate...check with the bank). The CD renews automatically each year.

## November

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).
2. Watch for PACE bill, and send payment to ASCLS.

# Treasurer

3. November 15 of each year: Electronic notice to IRS is due.
4. Email ASCLS-NE members in regards to submission of travel application for the Legislative Symposium. Remind members to review Travel and Reimbursement SOP and to submit travel application three months before meeting.
5. Filter Deadline November 15: Submit first quarter Treasurer's Report.

## December

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).
2. Forward all travel applications to ASCLS-NE President.

## January

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).
2. Prepare second quarter treasurer's report, update budget with expenses incurred, and updated itemized budget form.
3. Attend winter board meeting.

## February

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).
2. Determine who is attending Legislative Days in March via ASCLS-NE Board decision on travel applications.
  - a. Advise them to get hotel/air ASAP to avoid high fees. Need a roommate. Let them know what the Leg Days budget amount is.
3. Watch for bill from State of Nebraska for State Charter (nonprofit status). It is due in February or March of each odd numbered year. So, it is budgeted only for each odd numbered year. Failure to pay results in loss of nonprofit status.
4. Attend ASCLS-NE Winter Board Meeting
5. Filter Deadline February 15: Submit second quarter Treasurer's Report.

## March

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).

# Treasurer

2. Begin review of current year, and make draft of budget for next year based on spending this year.
3. Contact Awards chairperson to let them know what their budget is. Award of Excellence, Tech Support Award of Excellence and poster award are each \$100; more is budgeted for engraving etc.
4. Contact scholarship chairperson and let them know what their budget is (usually \$500 budgeted and split CLS/MT and CLT/MLT student...one each).
5. Email ASCLS-NE members and students in regards to submission of Travel Application for ASCLS National Meeting. Remind members to review Travel and Reimbursement SOP and submit travel application three months before meeting. Also include information for the Beckman-Coulter Scholarship Application.
6. Forward all travel applications to ASCLS-NE President.

## April

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).
2. Prepare third quarter treasurer's report, update budget with expenses incurred, and present during ASLCS Spring Board Meeting. Submit to Filter Editor.
3. Have draft of budget ready for review at the ASLCS Spring Board Meeting. Budget must be in place before the national meeting, so everyone knows what their spending limit is.
4. 11 month Legislative CD matures 4/19. Original amount \$5000. Move interest into Money Market account (or keep in CD based on interest rates), renew the rest.

## May

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).
2. Filter deadline May 15: Submit third quarter Treasurer's Report.
3. Determine what members are going to national meeting based on travel application.
  - a. Remind approved members to send in registration by registration date. Late registration fees will not be reimbursed by ASCLS-NE.
  - b. Send all approved members the travel reimbursement policy and travel reimbursement forms.
4. Have travelers be looking for airline fees. Must book within 6-8 weeks to avoid high rates.

June - Fiscal year ends June 30.

# Treasurer

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).

## July

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).
2. Mentor new ASCLS-NE Treasurer if applicable
3. Conduct terminal audit if a new Treasurer is taking over
4. Submit any updates for the Leadership Manual to the Leadership Development Chair

## August

1. Balance checking account (non-interest bearing) and money market savings (interest-bearing) accounts (also spring meeting checking account and student forum account if the treasurer is handling those accounts also).
2. Attend ASCLS-NE Leadership Conference. Hand off applicable physical items to new ASCLS-NE Treasurer. Continue to mentor new treasurer as needed.

## As needed:

1. Transfer money from checking account (non-interest bearing) to savings account (interest-bearing).
2. Renew Legislative CD and Scholarship CD. Determine shortest term/best interest rate. If the interest rate for the CD's is better than the interest rate in the Money Market, leave all money in the CD's. If ASCLS-NE needs more cash, remove the interest earned and deposit it in either the Money Market or the Checking Account. See below for opening balances of the Certificate of Deposits to determine how much interest has accrued.
3. Pay all bills submitted as soon as possible.
4. Update yearly income report "1996 to present" at end of the fiscal year.

Taxpayer ID number:        get from previous treasurer

## Bank of the West Contact:

Brandon Burns

402-918-5255

# Treasurer

[Brandon.Burns@bankofthewest.com](mailto:Brandon.Burns@bankofthewest.com)

## HELPFUL TIPS

### Membership Roster Access

Membership reports are available on the ASCLS website at [www.ascls.org](http://www.ascls.org)

To access these rosters

1. Log in to the ASCLS website using your personal username (email) and password.
2. Scroll down the homepage. Under Participate, click on ASCLS Member Community.
3. Under My Dashboard, click on My Groups.
4. Click on State Society Leaders.
5. Click on the Resources tab.
6. To the left of the name of your state, click on the sheet of paper icon.
7. Click on the green Download Resource button.
8. The roster will open in an Excel spreadsheet format.
9. See tabs at bottom of spreadsheet for current vs. lapsed members.
10. Save the file to your computer.

Note: Roster access is limited to state presidents, state treasurers, and state membership chairs.

### Student Travel

The line items in the budget for Legislative Days Travel and ASLCS National Meeting Travel are not to be used for any student traveling expenses. There will be a separate line item for 'ASCLS national meeting student travel expenses.' The student travel expenses for the National Meeting from the ASCLS-NE budget are decided on a yearly basis. The budget committee decides how much to budget. The budgeted amount is only matched if the students raise that same amount. The matched amount is transferred to the student account to reimburse the students from the Student Forum account.

### Spring Educational Conference

The participant and vendor registration chairs should collect all registration fees and turn them in to the ASCLS-NE Treasurer or the Spring Meeting Treasurer as assigned. Create a separate spreadsheet for Spring Meeting profits and expenses.

### Student Forum

The Student Forum should elect a Student Forum Treasurer. The SFT should collect all fund raised money from the students. The money along with a spreadsheet of students and their funds raised should be given by the SFT to the ASCLS-NE Treasurer. The ASCLS-NE Treasurer should also work with the SFT to pay for expenses such as student socials, state meeting, and reimbursement for the national meeting.

The following is directly from H.E.L.P. in a book by the ASCLS Leadership Academy:

The Must Do's Duties:

# Treasurer

- Keep details records of all transactions.
- Keep accounts balanced.
- Remember that Fiscal year is July 1<sup>st</sup> to June 30<sup>th</sup>.

Form a relationship with the bank:

The Society may have a bank of choice; however the treasurer should always be looking for the best bank and accounts to ensure the best protection and growth for the Society's funds. It is important to make a habit of visiting the bank in person and forming a relationship with someone trusting to advise you on account options.

Things to consider when picking a bank or account: monthly fees, minimum balance requirements, maximum account transfers, maximum deposits, interest accrual, maturation period, check reprinting fees, fees for copies of deposits/photocopies of checks.

Report for Board should include:

Treasurer should provide quarterly treasury reports for Board of Directors and the state newsletter, as well as be a resource for information on an as-needed basis. Quarterly reports should include: a detailed report of all income and spending since the previous meeting, and a proposed budget for the upcoming fiscal year that includes the previous year's budget, the actual amounts that were spent, specific funds activity, and reconciliation of accounts. See Templates for example reports.

End of the Year Report:

Compile the annual statement of assets, liabilities and fund balances-cash basis and the related statement of support revenue, and changes in fund balances-cash basis, at the end of the fiscal year and submit the report to the President. All Bank accounts that the Society holds are included in the statement. Please see Templates for sample board report.

Budget Proposal:

Preparing next year's budget is one of the Treasurer's primary responsibilities. Examine money spent during the previous and current years and determine if changes should be made. Be sure to consider current projects, travel, etc. Travel reimbursements should be modified annually to reflect the movement of the national meeting across the nation, i.e. some years it will be closer than others. Budget will always require approval by the Board of Directors; however it is wise to approach the finance committee and President/President-Elect prior to the Board of Directors for preliminary approval.

Bonding:

Bonding insurance will provide repayment of any stolen funds by the Treasurer or President.

This is done through a commercial crime insurance policy. The insurance agent should be contacted when a change in the President or the Treasurer occurs.

Filing Taxes:

# Treasurer

Society must file taxes (Form 990); even though it is a non-profit organization by November 15<sup>th</sup>. Please follow below link for further instructions:

IRS: Tax Information for Charities & Other Non-Profits

<http://www.irs.gov/charities/index.html>

## Miscellaneous Tips:

- Request (go to bank) all accounts have an activity closing date of the last day of the month.
- Use Quicken!
- Must assume “the voice” of treasury at Board of Director Meetings: despite personal opinions, you must consistently consider what is best for the financial standing of society.
  - “Where will the money for that come from?”
- Attempt to have incoming Treasurer on Finance Committee and mentor throughout term.
- Negotiate any penalty fees.
- Have a procedure in place for unexpected expenses: Board of Directors vs. President Approval.

## RESOURCES

1 ASCLS-NE Bylaws

2 H.E.L.P. in a book by the ASCLS Leadership Academy

Basic Guide to Non-Profit Financial Management (an amazing resource)

[http://managementhelp.org/finance/np\\_fnce/np\\_fnce.htm](http://managementhelp.org/finance/np_fnce/np_fnce.htm)

IRS: Tax Information for Charities & Other Non-Profits

<http://www.irs.gov/charities/index.html>

Wikipedia: Bank

<http://en.wikipedia.org/wiki/Bank>

Ultimate Money Skills

<http://www.ultimatemoneyskills.com/start/default.asp>

Bank Rate.com

<http://www.bankrate.com/>

<http://www.bankrate.com/glossary/>

Financial Terminology Glossary

<http://www.etfinancial.com/financialterms.htm>

Investorwords.com (Glossary)

<http://www.investorwords.com/>

# Treasurer

Excel Tutorials

<http://exceltutorial.info/>

Quicken (Free Online or Free Trial Version Available)

<http://quicken.intuit.com/>

Quicken Tutorials

[http://financialsoft.about.com/od/quickenforbeginners/4\\_Quicken\\_Tutorials.htm](http://financialsoft.about.com/od/quickenforbeginners/4_Quicken_Tutorials.htm)

## **APPENDIX**

### **ACKNOWLEDGEMENTS**

Linsey Donner

Marnie Imhoff

Karen Keller

Roxanne Alter



# Senior Board Member

## TERM

The Senior Board Member will serve a one year term after serving a one year term as Junior Board Member.

## TIME COMMITMENT

15 hours per month

## DUTIES

- Arrange and plan the ASCLS-NE Spring continuing education meeting.
- Plan scientific sessions
- Contact exhibitors
- Notify membership and Nebraska laboratory managers of meeting
- Make or oversee all other arrangements necessary for a successful meeting
- Mentor Junior Board Member
- Maintain and utilize [springmeeting@ascls-ne.org](mailto:springmeeting@ascls-ne.org) account

## SUGGESTED SCHEDULE

April

- After the Spring Meeting, the committee should get together to recap how the meeting went, suggestions for future meetings, etc.
- Start talking about where you want to have the next meeting
- Decide on a date for the next meeting
- 

May

- Scout locations for the next meeting and book a place by the end of the month
  - When working on contract with facility, have contract reviewed and approved by the spring meeting planning committee and current ASCLS-NE President from previous year.
- Work with location on a contract for hotel rooms, etc.

June

- Put together meeting contract (if there are other state societies and professional organizations i.e. ASCP, CLMA involved)
  - Be specific of the duties assigned to each professional organization
    - Example: Who is in charge of speakers, Treasurer, Registration, Social, PACE, Chair of the Meeting. How many speakers are each organization responsible for finding.
    - Designate one main Chair/contact from each state or organization for making major decisions
- Get meeting contract signed and establish a Spring Meeting bank account with seed money

# Senior Board Member

## July

Put out a call for those who are interested in being on the meeting planning committee – you'll need people to be in charge of speakers, moderators, vendors, registration (CLMA is good at and has Constant Contact, etc.), social, program & printing, PACE (ASCLS-NE PACE Chair), treasurer (ASCLS-NE Treasurer), Webmaster, Scholarship, Loans, and Awards: Awards and Awards luncheon schedule, ASCLS-NE Events Chair: Social, ASCLS-NE Public Relations Chair: Publications and advertising

## August

Attend Annual Leadership Conference

FILTER Deadline August 15

- Put together vendor prospectus and send out by the end of the month
- Start recruiting speakers for the meeting

## September

- Talk with Streck about donating bags, etc. to be used for the meeting; sometimes they will donate money for a lunch; contact their marketing department and ask for Cindy Christensen

## October

- Hold teleconference

## November

- Hold teleconference
- Send out a Meeting Save the Date to membership and lab managers, also post on website
- Put up meeting details on the website
- Send information to all lab managers
- Put out a call for award nominations on the website, send to lab managers, etc.

FILTER Deadline November 15: Give Filter Editor as much information as possible regarding Spring Meeting

Start sending Spring Meeting Information to Hospitals

Make sure website is started

## December

- Hold teleconference

## January

- Hold teleconference
  - Make sure Scholarships, Loans, and Awards Chair has started working on Awards and the Awards Luncheon
  - Note that ONLY major contributors or chairs of meeting will get registration comped

## February

- Hold two teleconferences

# Senior Board Member

FILTER Deadline February 15: Give Filter editor as much information as available for Spring Meeting

Winter Board Meeting: Meet with planning committee same day if possible

March

ASCLS Legislative Days in Washington DC

Develop and print evaluation (include a section to suggest/recommend speakers/topics for next year)

- Hold teleconferences weekly to finalize all details
- All PACE forms need to be in (PACE coordinator will let you know by what date); schedule should be finalized

Awards need to be decided and made

April

- Meeting usually takes place the week before Lab Week
- Do not hold meeting the week UNMC, etc. is graduating
- Hold teleconference/last minute preparations
- Meet the night before at the meeting location to stuff bags, get things together, etc.
- Typically, Friday is student day and the day we do the awards, Vendor Exhibits are on Thursday, NE Business Meeting is on Friday morning
- When bill is received review to confirm all charges are valid. Have each Spring Meeting Chair review for their individual charges.

Attend Annual Business Meeting

End of April/Beginning of May hold a "re-cap" meeting to discuss and record what worked and what didn't, costs, evaluation results, etc

May

Start Mentoring JBM during initial plans for next year's meeting

FILTER Deadline May 15

June

July

ASCLS National Meeting

Give updates for ASCLS-NE Leadership Handbook to Leadership Development Chair

August

Attend Annual Leadership Conference

FILTER Deadline August 15

## HELPFUL TIPS

Get meeting listed on ASCLS website,

[www.ascls.org/conferences/conf\\_ad.asphttps://mums.bestcare.org/exchweb/bin/redirect.asp?URL=http://www.ascls.org/conferences/conf\\_ad.asp](http://www.ascls.org/conferences/conf_ad.asphttps://mums.bestcare.org/exchweb/bin/redirect.asp?URL=http://www.ascls.org/conferences/conf_ad.asp)

# Senior Board Member

[https://mums.bestcare.org/exchweb/bin/redirect.asp?URL=http://www.ascls.org/conferences/conf\\_ad.asp](https://mums.bestcare.org/exchweb/bin/redirect.asp?URL=http://www.ascls.org/conferences/conf_ad.asp)

Notes from Previous Meetings:

Determine what speaker expenses will be paid. Will mileage or airfare and meals be reimbursed? What about a hotel room, if needed? Will hotel room charges be reimbursed or charged to the conference's account? If a master account will be used, who will check what is being charged to it?

## Moderator Chair

Appoint a Moderator Chair. This person will take care of getting moderators for each speaker. The moderator chair should begin looking for moderators as soon as the schedule has been completed. Once moderators are scheduled for each session, the moderator chair should email all moderators with instructions to follow the day of their session to moderate. Each moderator needs to pick up the moderator packet for each session, which should include PACE evaluation forms, PACE assigned number, and handouts if necessary. The PACE chair should prepare the moderator packets and include moderator instructions. Someone at the registration desk will need to check to see that the moderator has picked up the speaker's packet and that the speaker has checked in for each session.

At each change of session, the Moderator Chair should be available in the educational session area to answer questions and assist moderators or speakers. Participants may have questions about what topic was in each room. The Moderator Chair can also check to see if moderators/speakers needed anything and close doors when the hallway is clear and speakers begin.

## Speaker Bags

Request Registration Committee or select a volunteer to purchase gifts and thank you notes for speakers. Speaker gift should remain about \$10.00 per speaker. In the past, chocolates or items made in Nebraska have been used. Hand written thank you notes are more heartfelt than printed. Thank you notes can also be signed by several committee members. Thank you notes should be tied to or included in the speaker's registration bag. The bag should also include the gift and conference information. Bags are typically put together the night before the conference begins by volunteers and Spring Meeting Committee members. The registration volunteers should give the bags to the speakers when they check in for the conference.

## RESOURCES

List of Nebraska Hospitals and Addresses:

[http://www.nhanet.org/resources/hospital\\_members.htm](http://www.nhanet.org/resources/hospital_members.htm)

## APPENDIX

# Senior Board Member

2011 Spring Meeting Brochure  
2012 Meeting Timeline

Original documents (Word, Excel, & PDF) on ASCLS-NE website

## **ACKNOWLEDGEMENTS**

Chelsea Reischl  
Shirley Noble

# Junior Board Member

## **TERM**

The Junior Board Member (JBM) is elected by the ASCLS-NE membership. It is a one year term that automatically succeeds to Senior Board Member.

## **TIME COMMITMENT**

15 hours per month

## **DUTIES**

- Fill one of the Spring Meeting Chair positions as appointed by the Senior Board Member and complete all duties as assigned (refer to appointed chair position for more information)
- Become familiar with Senior Board Member Duties
- Assist Senior Board Member with the planning and execution of the ASCLS-NE Annual Spring Meeting

## **SUGGESTED SCHEDULE**

August

Attend Annual Leadership Conference:

- Retrieve info from outgoing JBM

FILTER Deadline August 15

September

October

November

FILTER Deadline November 15

December

January

February

FILTER Deadline February 15

ASCLS-NE Winter Board Meeting

March

April

Spring Educational Meeting

Attend Annual Business Meeting

Attend Follow-up meeting after Spring Meeting

# Junior Board Member

See Senior Board Member section to start working on next year's Spring Meeting!

May

FILTER Deadline May 15

June

July

Give updates for JBM section of ASCLS-NE Leadership Handbook to the ASCLS-NE Leadership Development Chair by July 31

August

Attend Annual Leadership Conference: Pass materials on to new JBM. You are now officially Senior Board Member!

FILTER Deadline August 15

Ongoing

Attend all ASCLS-NE board meetings

Attend all ASCLS-NE Spring Meeting Planning Committee meetings

Assist Senior Board Member with Spring Meeting planning as needed

## **HELPFUL TIPS**

## **RESOURCES**

## **APPENDIX**

## **ACKNOWLEDGEMENTS**

# First Year Professional

## **TERM**

The First Year Professional (FYP) is a one year term. The Student Forum President (SFP) should advance to the FYP. If the SFP is unable to succeed to the FYP, the Student Forum Secretary or Student Forum Treasurer may advance to FYP by nomination and election by the ASCLS-NE membership. The FYP is encouraged to advance to an appropriate committee chair position as appointed by the ASCLS-NE President.

## **TIME COMMITMENT**

2 hours per month

## **REQUIREMENTS**

The First Year Professional should be a graduate of the most previous CLS or CLT class.

## **DUTIES**

Become familiar with all ASCLS-NE Leadership positions and duties

Be an active member of one ASCLS-NE committee

Attend committee meetings as scheduled

Attend all ASCLS-NE board meetings

Serve as a voting member of the ASCLS-NE Board of Directors

Serve as the ASCLS-NE New Professional Delegate at the House of Delegates meeting during the ASCLS Annual Meeting (If unable to attend, the FYP will assist the ASCLS-NE President in finding a suitable replacement.)

Maintain and utilize the [newprofessionals@ascls-ne.org](mailto:newprofessionals@ascls-ne.org) account

## **SUGGESTED SCHEDULE**

August

Attend Annual Leadership Conference

FILTER Deadline August 15

September

October

November

FILTER Deadline November 15

December



# First Year Professional

January

February

FILTER Deadline February 15

Winter Board Meeting

March

ASCLS Legislative Days in Washington DC

April

Attend ASCLS-NE Annual Spring Meeting

Attend Annual Business Meeting

May

FILTER Deadline May 15

June

Participate in conference call to prepare for ASCLS Annual Meeting

July

Attend ASCLS Annual Meeting

Serve as ASCLS-NE New Professional Delegate

Submit any updates for the FYP section of the ASCLS-NE Leadership Handbook to ASCLS-NE Leadership Development Chair.

August

Attend Annual Leadership Conference

FILTER Deadline August 15

## **HELPFUL TIPS**

## **RESOURCES**

## **APPENDIX**

## **ACKNOWLEDGEMENTS**

Linsey Donner

Ashley Collins

# Student Forum President

## **TERM**

The Student Forum President is elected by the Student Forum and serves a one year term from time of election until the next Student Forum President is elected. The Student Forum President is encouraged to advance to the First Year Professional (FYP) position on the ASCLS-NE Board of directors. If unable or unavailable to serve on the board as FYP, the Student Forum Secretary or Treasurer may fill the position upon nomination and election by the ASCLS-NE membership.

## **TIME COMMITMENT**

10 hours per month

## **REQUIREMENTS**

Student Forum President should be a current student in a CLS/CLT program.

## **DUTIES**

Become familiar with ASCLS

Attend and conduct Student Forum meetings

Encourage student involvement in Student Forum and ASCLS-NE

Attend ASCLS-NE Annual Board meeting during the ASCLS-NE Spring Meeting

Attend all ASCLS-NE Board meetings as able

Act as a voting member of ASCLS-NE Board of Directors

Attend the ASCLS National Meeting in July and represent as the ASCLS-NE Student Delegate to the ASCLS House of Delegates.

Progress to First Year Professional following the ASCLS National Meeting. If the Student Forum President is unable or unwilling to continue on to the FYP position, the Student Forum Secretary or Treasurer may fill the role upon election.

Maintain and utilize [studentforum@ascls-ne.org](mailto:studentforum@ascls-ne.org) account.

## **SUGGESTED SCHEDULE**

August

Attend ASCLS-NE Leadership Conference if available

FILTER Deadline August 15: If you have had your first Student Forum Meeting, Submit article. Include names of Student Forum President, Secretary, Treasurer, and representatives. Include Husker Ticket Raffle information if available.

Assist Student Forum Adviser with arranging and conducting the first Student Forum meeting

- 1 Begin planning first fundraiser (usually sell raffle tickets to win tickets to Husker football game).

Sell raffle tickets and encourage other students to sell tickets as well

September -November

# Student Forum President

FILTER Deadline November 15: Submit article. Include Husker Ticket Raffle information (winners if drawing completed), student social information if available, and other student forum activity.

Sell raffle tickets and encourage students to sell raffle tickets

Schedule and arrange teleconference with SF Adviser input

Plan and execute Fall or Winter Social

- Maybe one in Omaha and one out West?
- Depending on how much money fundraised can spend \$200-\$500
- Events held in the past: Vala's campfire
- Contact event sites for information
- May hold 'vote' by students to decide on location
- Book location
- Make other preparations and execute social

December

1 Schedule and arrange teleconference with SF Adviser input

2 Conduct Teleconference

- Discuss second fundraiser
- T-shirt, Polo, Scrub designs (maybe tote bag, mug, water bottle, etc.)
- May do an alternative fundraiser. New ideas always encouraged!

3. Email all students to come up with design

- have students email designs to Student Forum President
- email all designs to all Student Forum Leaders
- SF vote on which design to use

4. Develop T-shirt design on-line (work with Student Forum

Treasurer)<http://www.customink.com/>

5. Email design and order forms to ALL Students so ALL students can sell

6. Set deadline for merchandise sales in February. Order merchandise in February with enough time for delivery prior to the ASCLS-NE Spring Educational Meeting (usually the first or second week of April).

January

Sell merchandise for second fundraiser

Encourage other students to sell fundraiser merchandise

February

FILTER Deadline February 15: Submit article. Include Fall/Winter social recap, fundraising information, and any other student forum activity.

1. T-shirt forms and money due

2. Ensure order is placed (by SF Treasurer) for fundraiser merchandise

ASCLS-NE Winter Board Meeting

March

# Student Forum President

Schedule and conduct teleconference with SF Adviser input

Agenda items:

-Second Fundraiser sales

-spring meeting info

-national meeting info

Student Forum leaders should meet when merchandise arrives to sort and distribute

April

Schedule and conduct teleconference with SF Adviser input

Agenda items:

-Recap second fundraiser sales/distribution

-spring meeting info/who is attending?

-national meeting info/who is interested in going?

Attend ASCLS-NE Annual Spring Meeting

Attend Annual Business Meeting

May

FILTER Deadline May 15: Submit article. Include second fundraiser total information and experience or student attendance at ASCLS-NE Spring Meeting.

June

Teleconference for those attending ASCLS national meeting

July

ASCLS National Meeting

August

Advance to FYP

Attend ASCLS-NE Leadership Conference

## **HELPFUL TIPS**

## **RESOURCES**

## **APPENDIX**

SF Agenda Template

Original documents (Word, Excel, & PDF) on ASCLS-NE website

## **ACKNOWLEDGEMENTS**

Linsey Donner

Ashley Collins

# Historian

## **TERM**

Historian is a position appointed by the ASCLS-NE President. The term is one year and may be repeated until the ASCLS-NE President appoints a new leader or the current Historian resigns

## **TIME COMMITMENT**

2 Hours per month

## **DUTIES**

Chair the Publication and Documentation Committee.

Ensure that the FILTER is published and distributed quarterly.

Ensure that the ASCLS-NE Website is up-to-date with the most current information.

Keep permanent hard copy records of all applicable ASCLS-NE publications and documentation in the ASCLS-NE files in the Archives Department of the University of Nebraska Medical Center Library.

Update, maintain, and organize [historian@ascls-ne.org](mailto:historian@ascls-ne.org) email account

## **SUGGESTED SCHEDULE**

August

Attend the ASCLS-NE Leadership Conference to collect hard copy records from the officers and leaders

Filter deadline August 15

September

October

November

Filter deadline November 15

December

January

February

Winter Board Meeting

Filter Deadline February 15

March

April

ASCLS-NE Spring Educational Meeting

# Historian

ASCLS-NE Annual Board Meeting and Elections  
National Medical Laboratory Professionals Week

May

Filter Deadline May 15

June

July

ASCLS Annual Meeting

Give Leadership Development Chair updates for the Historian section of the ASCLS-NE

Leadership Handbook by July 31

August

Filter deadline August 15

ASCLS-NE Leadership Conference

-Pass on any physical items on to new ASCLS-NE Historian

- collect hard copy records from the officers and leaders

Print off previous year's FILTER editions, meeting minutes, and Treasurer Reports as applicable

Organize documents and submit for filing to the Archives Department of the UNMC Library.

## **HELPFUL TIPS**

ASCLS-NE records are stored at the UNMC Library in the Archives Department. The records become property of the library once submitted. However, we may review them at any time.

Items to file in the ASCLS-NE records:

FILTER editions

Meeting Minutes (If not included in FILTER edition -- coordinate printing with ASCLS-NE Secretary)

Treasurer Reports (If not included in FILTER edition – coordinate printing with ASCLS-NE Treasurer)

Bylaws (Only when updated)

Legal Documents

A copy of any publication, flier, or email sent to ASCLS-NE members

Documents deemed appropriate by ASCLS-NE Officers and Committee chairs/leaders

## **RESOURCES**

## **APPENDIX**

## **ACKNOWLEDGEMENTS**

Shirley Noble

# FILTER Editor

## **TERM**

FILTER Editor is a position appointed by the ASCLS-NE President. The term is one year and may be repeated until the ASCLS-NE President appoints a new leader or the current FILTER Editor resigns.

## **TIME COMMITMENT**

16 hours quarterly

## **DUTIES**

Produce and distribute an ASCLS-NE newsletter quarterly  
Maintain [filter@ascls-ne.org](mailto:filter@ascls-ne.org) email

## **SUGGESTED SCHEDULE**

A FILTER edition should be published and distributed each Winter, Spring, Summer, and Fall

July

National ASCLS Meeting

Request information from ASCLS-NE Leadership

Attend ASCLS-NE Leadership Conference to obtain information and ideas from previous FILTER editor (as applicable)

August

FILTER Deadline August 15

Compile received information and assemble Summer FILTER edition.

September

Distribute Summer FILTER edition

October

Request information from ASCLS-NE Leadership

November

Compile received information and assemble Fall FILTER edition.

FILTER Deadline November 15

December

Distribute Fall FILTER edition

January

Request information from ASCLS-NE Leadership

# FILTER Editor

## February

Compile received information and assemble Winter FILTER edition  
FILTER Deadline February 15

## March

Distribute Winter FILTER edition.  
Legislative Days in Washington DC

## April

Attend Annual Spring Meeting and Annual Business Meeting  
Take photos and gather information at Spring Meeting regarding new leaders and award winners.  
Request information from ASCLS-NE Leadership

## May

Compile received information and assemble Spring FILTER edition  
FILTER Deadline May 15

## June

Distribute Spring FILTER edition

## July

Request information from ASCLS-NE Leadership  
Give Leadership Development Chair updates for the FILTER Editor section of the ASCLS-NE Leadership Handbook.  
Attend ASCLS-NE Leadership Conference to pass on information to new FILTER editor (as applicable)

## **HELPFUL TIPS**

Leaders and members should email all entries to the Filter to the [filter@ascls-ne.org](mailto:filter@ascls-ne.org) address. The FILTER is then distributed electronically from [filter@ascls-ne.org](mailto:filter@ascls-ne.org) to each member, except to those members who request a hard copy in the mail, and also posted on the ASCLS-NE website. Email an electronic version of each FILTER to the ASCLS-NE President, to all ASCLS-NE members, and to the ASCLS-NE Webmaster to post on ASCLS-NE website. Also, post the link to the FILTER on [www.ascls-ne.org](http://www.ascls-ne.org) on the ASCLS-NE Facebook page. The FILTER editor is responsible for mailing out hard copies to those members who wish to receive them. There is a link on [www.ascls-ne.org](http://www.ascls-ne.org) for members to email the ASCLS-NE Filter Editor if they would like a paper copy. Keep a record of those who wish to receive the hard copies in the [filter@ascls-ne.org](mailto:filter@ascls-ne.org) email file.

Items of importance to include yearly in each FILTER

## Summer

Photos and recap of ASCLS National Meeting



# FILTER Editor

Recap of Leadership Conference  
New leaders and their new roles

Fall  
Fall Board Meeting Minutes  
Happy Holidays from ASCLS-NE!

Winter  
Spring Meeting information: theme, dates, location, how to register, registration deadlines etc.  
Leadership positions open for nominations. Also, include any candidates that have already been nominated with their qualifications.  
Information and deadlines for submitting award nominations.  
Information regarding Leg days  
Winter Board meeting minutes

Spring  
Recap of Leg days.  
Award winners from ASCLS-NE Spring Meeting  
Photos and recap of ASCLS-NE Spring Meeting  
Scholarship winners  
Congrats to recent MLS graduates  
Annual Board Meeting minutes  
Information regarding ASCLS National Meeting

ASCLS-NE Officers and Committee Chairs should help by supplying you with the above information and more!

ASCLS gives out two awards for publications. One category is for the traditional paper newsletter and the other is for a web-based newsletter. If interested in competing, visit [http://www.ascls.org/?page=Awards\\_Pubs](http://www.ascls.org/?page=Awards_Pubs) for more information and be sure to use your creativity!

## **RESOURCES**

## **APPENDIX**

## **ACKNOWLEDGEMENTS**

Andrea Schank

# WebMaster

## **TERM**

WebMaster is a position appointed by the ASCLS-NE President. The term is one year and may be repeated until the ASCLS-NE President appoints a new Web Master or the current WebMaster resigns.

## **TIME COMMITMENT**

10 hours per month

## **DUTIES**

Develop and update ASCLS-NE website

Monitor ASCLS-NE FACEBOOK accounts

Create and monitor ascls-ne.org email accounts

Update, maintain, and organize the [webmaster@ascls-ne.org](mailto:webmaster@ascls-ne.org) email account

## **SUGGESTED SCHEDULE**

August

Update Leadership page with new leader roster. Contact Leadership Chair or President for information.

Attend Annual Leadership Conference

FILTER Deadline August 15

September

Retrieve Filter edition from Filter editor and post.

Retrieve meeting minutes from Leadership Conference from Secretary and post.

October

November

FILTER Deadline November 15

December

Retrieve Filter edition from Filter editor and post.

Post Spring Meeting information and Legislative Days information as soon as available.

January

February

FILTER Deadline February 15

Winter Board Meeting

March

Retrieve Filter edition from Filter editor and post.

# WebMaster

Retrieve Winter Board Meeting minutes from Secretary and post.  
ASCLS Legislative Days in Washington DC

April

Attend ASCLS-NE Annual Spring Meeting  
Attend Annual Business Meeting

May

Update awards page to include award winners from Annual Spring Meeting  
Retrieve Annual Business and Board meeting minutes from Secretary and post  
FILTER Deadline May 15

June

Retrieve Filter edition from Filter editor and post.

July

ASCLS National Meeting  
Submit updates for ASCLS-NE Leadership Manual to LDC by July 31

August

Attend Annual Leadership Conference  
FILTER Deadline August 15

Ongoing

Update website as requested by ASCLS-NE Leadership.  
Keep website as updated as possible

## **HELPFUL TIPS**

## **RESOURCES**

## **APPENDIX**

## **ACKNOWLEDGEMENTS**

Martin Steinbeck

# Bylaws Chair

## **TERM**

The Bylaws Chair is appointed by the ASCLS-NE President. Term is a minimum of one year and may be repeated until ASCLS-NE President appoints a new chair or chair resigns from position.

## **TIME COMMITMENT**

5 hours per month

## **DUTIES**

Read and be familiar with ASCLS-NE Bylaws and Standard Operating Procedure  
Attend all ASCLS-NE meetings to ensure all business conducted is in conjunction with the ASCLS and ASCLS-NE Bylaws  
Remain in contact with ASCLS Bylaws committee  
Be cognizant of changes in the ASCLS Bylaws and Standard Operating Procedures  
Prepare any needed proposals for ASCLS-NE Bylaws and SOP as required to ensure conformity to the ASCLS Bylaws and SOP  
Receive and prepare proposed changes to the ASCLS-NE Bylaws and Standard Operating Procedures for consideration  
Ensure that current copies of the ASCLS-NE Bylaws and Standard Operating Procedures are electronically available and posted on [www.ascls-ne.org](http://www.ascls-ne.org)  
Conduct a review every five years of the ASCLS-NE Bylaws and Standard Operating Procedures

## **SUGGESTED SCHEDULE**

August

Attend Annual Leadership Conference: Retrieve any information from previous Bylaws Chair as applicable  
FILTER Deadline August 15

September

October

November

FILTER Deadline November 15

December

January

February

FILTER Deadline February 15

# Bylaws Chair

Attend Winter Board Meeting

March

ASCLS Legislative Days in Washington DC

April

Attend ASCLS-NE Annual Spring Meeting

Attend Annual Business Meeting

May

FILTER Deadline May 15

June

July

ASCLS National Meeting

Give Leadership Development Chair updates for the Bylaws Chair section of the ASCLS-NE Leadership Handbook by July 31

August

Attend Annual Leadership Conference

FILTER Deadline August 15: Pass on information to new Bylaws Chair as applicable

## HELPFUL TIPS

Each current President-elect should read and review the ASCLS-NE Bylaws and SOP. Please remind and encourage him/her to do so.

All modifications to the ASCLS-NE Bylaws and SOPs must be made in accordance with Article XIII: Amendments, found in the ASCLS-NE Bylaws and Standard Operating Procedures <http://www.ascls-ne.org/bylaws.html>

The following information is from the ASCLS Bylaws Committee

- \* The rationale for revision must be in keeping with the National ASCLS Bylaws.
- \* The amendment date must be on the document.
- \* The process for amending a bylaw includes:
  1. The proposed amendment is voted on by the constituent society BOD
  2. The proposed amendment is submitted to the ASCLS Bylaws Committee for approval
  3. The proposed amendment is submitted to the constituent society members within the established timeframe (per the CS bylaws) for consideration
  4. The proposed amendment is voted on by the Constituent Society members

# Bylaws Chair

5. The final amended document is submitted to the ASCLS Bylaws Committee Chair and to the ASCLS Executive office with the amended date present on the document
- What is the process to amend your bylaws?
    1. Proposed bylaw amendments are brought in writing to the representative constituent society leadership; i.e. Board of Directors.
    2. Discussion is held at the BOD level and decision to proceed is made; if this concern affects only this constituent society the above procedure takes place (as detailed in section I)
    3. If the proposed amendment will affect the Regional or National level of the society, the constituent society President (or designee) refers the amendment to the Region Director for review by the Region Council
    4. If approved, the Region Director refers the proposed amendment with recommendation for action (in the form of a motion) to the ASCLS BOD.
    5. If approved at the BOD, the proposed amendment is submitted in writing to the ASCLS Bylaws Committee no less than 120 days prior to the next session of the HOD.
    6. The Bylaws Committee submits proposed amendment to the members of the Society no less than 60 days prior to the annual session of the HOD and adoption of the proposed amendment requires a two-thirds vote of the delegates present at the HOD.

Within 30 days after adoption of the amendment to the Bylaws of the Society, the chair of the Bylaws Committee must send a report of the adoption to the chief administrative officer of the Society for publication

## RESOURCES

ASCLS-NE Bylaws and Standard Operating Procedures, <http://www.ascls-ne.org/bylaws.html>

ASCLS Bylaws and Standard Operating Procedures, [http://c.ymcdn.com/sites/www.ascls.org/resource/collection/B49A0B39-57DC-4EEB-9931-AAF0AA4E5D94/ascls\\_bylaws\\_sop.pdf](http://c.ymcdn.com/sites/www.ascls.org/resource/collection/B49A0B39-57DC-4EEB-9931-AAF0AA4E5D94/ascls_bylaws_sop.pdf)

## APPENDIX

Bylaws Amendments Template

Original documents (Word, Excel, & PDF) on ASCLS-NE website

## ACKNOWLEDGEMENTS

# Leadership Development Chair

## **TERM**

The Leadership Development Chair is a position appointed by the President. Term minimum is one year. Term may last until leader resigns from position or is replaced by new appointment by current President.

## **TIME COMMITMENT**

18 hours per month

## **DUTIES**

Recruit and encourage members to take on roles in leadership.  
Encourage and support ASCLS-NE leaders by assisting with orienting new leaders and helping current leaders develop leadership positions.  
Assist President and Past-President in filling leadership positions at state, regional, and national levels.  
Serve as a member of the ASCLS-NE Nominations Committee.  
Update Leadership Handbook and Leadership page on ASCLS-NE website as needed.  
Assist President with Keys to the Future nominations.  
Suggest applicants for the Leadership Academy.  
Oversee Leadership Recognition program.  
Oversee Member Mentoring program.  
Maintain and organize all communication regarding leadership development in the LDC email

## **SUGGESTED SCHEDULE**

August

Attend ASCLS-NE Leadership Conference. Retrieve any items from outgoing LDC. (As applicable)

Email Leadership Recognition forms to newly elected and appointed leaders. Deadline for submission is September 30.

Summer FILTER Deadline August 15: Submit Leadership Roster

Send updated leadership roster to Webmaster to post on Leadership page.

Assist State President and out-going officers and committee chairs in orienting new leaders.

Update list of "entry level" committee assignments to suggest for new members.

September

Begin organizing Leadership Handbook updates for ASCLS-NE Board to view prior to update vote during Winter Board Meeting

Leadership Recognition forms due September 30.

October

# Leadership Development Chair

Submit topics/speakers for leadership training sessions to state and regional program chairs.

Encourage spring education meeting committee to plan activities that facilitate interaction between students/new members and existing members.

Work on Leadership Recognition letters and articles.

## November

Send articles about leaders to Filter editor and to leader's selected local newspaper as indicated.

Fall FILTER Deadline November 15.

Send recognition/appreciation letters to employers of current slate of officers and committee chairs as indicated.

Start reviewing state, regional and national leadership openings for the following year.

## December

Submit updates to the Leadership Handbook to the ASCLS-NE Board of Directors by December 1. Board should review updates for a vote to be held at the Winter Board Meeting in January.

## January

Nominations for ASCLS Elected positions are due to Nominations Chair. Keep copies of nominations forms for future recognition letters.

Assist President with nominations for Key to the Future Awards

Encourage leaders to apply to the Leadership Academy

Winter Board Meeting: Board to vote on Leadership Handbook updates.

Make all changes as approved by ASCLS-NE Board. Submit corrected material to Webmaster to post on the website.

## February

Filter deadline February 15: Assist Past-President to submit state nominations for members to view. Keep copies of nomination forms for future recognition letters.

Key to the Future Award Deadline: February 15

## March

State award nominations due

Legislative Symposium in Washington DC

## April

Assist President-elect in selecting committee chairs

ASCLS-NE Spring Educational Meeting

ASCLS-NE Annual Board Meeting

National Medical Laboratory Professionals Week

## May



# Leadership Development Chair

Send graduation cards or emails to students encouraging continued involvement in society. If students are continuing in leadership involvement, request updated non-school email address.

## July

Assist incoming President with planning ASCLS-NE Leadership Conference  
Review ASCLS-NE Leadership Handbook LDC section for needed updates. Remind all leaders to submit updates for the handbook. Recommendations are due by July 31.  
ASCLS Annual Meeting

## August

If outgoing: ASCLS-NE Leadership Conference: hand of any items/information to incoming LDC.

## Ongoing

Get list of new members monthly from ASCLS website.  
Recruit and orient mentors for new members.  
Assign a mentor to each new member.  
Communicate good ideas, problems, issues, success stories, and requests for action from the ASCLS Board to the regional LDC Chair.  
Encourage development of position descriptions for all offices and committee chairs.

## **HELPFUL TIPS**

### Leadership Roster

ALWAYS submit the incoming leadership roster (board members and committee chairs) to the Filter Editor for posting in the Summer Filter, deadline August 15. The roster should be submitted for membership to view, to keep a record for the society, and for leadership to keep track of service for credits. When Filter is distributed, remind all leaders to save and print a copy for their records. Serving on a state/regional/national board or committee earns 2 CMP points per year.

### ASCLS-NE Leader Recognition Program

Purpose: To bring recognition to ASCLS-NE leaders for their contributions to the society.

Responsible party: ASCLS-NE Leadership Development Chair (LDC)

### Procedure:

-ASCLS-NE Leader Recognition Program form and release of information form should be emailed to newly elected officers and appointed committee chairs by August 15 of each year by the current/incoming LDC.

-The officer/chair has the option to fill out the forms. Forms should be completed and submitted by email to the LDC by September 30.

# Leadership Development Chair

- Upon receipt of the information and release forms, the LDC will prepare appropriate letters and press releases as designated by the officer/chair.
- Press releases should be submitted to indicated local newspapers and also to the Filter Editor by November 15.
- Recognition letters should be sent as indicated by November 30.
- If applicable, officer/chair may forward copies of any letters of acknowledgement to the LDC for ASCLS-NE records.
- LDC retains all forms, copies of letters and press releases, and letters of acknowledgement in the LDC email Leadership Recognition folder.
- All letters should be printed with ASCLS-NE logo/letterhead

## Members Mentor Program

TO BE DEVELOPED With development of District Reps

Tip for getting new members involved or assigned to a mentor right away: Turn on the setting in groups to get notification of any new member to ASCLS-NE. Write them a welcome message and invite them to become active or inquire if they would like a mentor.

## RESOURCES

<http://www.ascls.org/leadership/ldc/LDCManual-2003-04.pdf>

Leadership Development Chair Manual <http://www.ascls.org/leadership/ldc/LDCManual-2003-04.pdf>

ASCP BOR Certification Maintenance Program Booklet <http://www.ascp.org/PDF/BOC-PDFs/CMP/CMPBooklet.aspx>

## APPENDIX

Email for Leadership Recognition Program Template  
Press Release Template for Elected Officer or Appointed Committee Chair  
Letter to Employer of New Officer Template

## ACKNOWLEDGEMENTS

# Leadership Development Chair

# Membership Development Chair

## TERM

The Membership Development Chair is appointed by the ASCLS-NE President and serves a one year term. The term may be repeated until the MDC resigns or the ASCLS-NE President appoints a new MDC

## TIME COMMITMENT

15 hours per month

## DUTIES

On the national ASCLS Committee structure, Membership responsibilities are divided between two committees – Member Recruitment and Member Services. However, it may be necessary to combine both of these committee responsibilities at the state level into one committee, which for this manual is titled Membership Chair<sup>1</sup>

Above all, if one is overwhelmed and having difficulty meeting responsibilities, contact the ASCLS-NE President or the National Committee Chair for assistance. Do not hesitate to do this. Any delay can be detrimental to our recruitment and retention programs, as well as you own self confidence.<sup>1</sup>

### Member Recruitment Duties

- Update, maintain, and organize the [membership@ascls-ne.org](mailto:membership@ascls-ne.org) email account
- Works with Treasurer to use the membership budget for recruitment and retention activities into ASCLS-NE
- Maintains and distributes a supply of membership applications and other materials for recruitment efforts.<sup>1</sup>
- Designs, staffs, directs and monitors a membership recruitment area at each annual state society meeting. Acquires any materials needed from the national office to display.<sup>1</sup>
- Initiates, maintains and oversees all membership recruitment programs in the state.<sup>1</sup>
- Creates and maintains the membership display. Uses display wherever and whenever there is an opportunity to attract new ASCLS members. Acquires information from the ASCLS website.<sup>1</sup>
- Proposes new mechanisms for membership recruitment and retention.<sup>1</sup>
- Participates in student recruitment; fall and spring are a good time to do this. Goes to Colleges and Universities and does presentations about ASCLS with Student Forum Adviser when needed.<sup>1</sup>
- Reads the ASCLS Membership Development Manual to find ideas and helpful hints.<sup>1</sup>

### Membership Services Duties

# Membership Development Chair

- Keeps electronic documents of current and lapsed membership throughout the year. Maintains all state membership records.
- Sends welcome email or letter to new members each month. Things to include are: <sup>1</sup>
  - Contact Information
  - New Member Guide to ASCLS  
[http://www.ascls.org/images/Leadership/Student\\_20New\\_20Professional\\_20Guide.pdf](http://www.ascls.org/images/Leadership/Student_20New_20Professional_20Guide.pdf)
  - State Society Website
  - State Meeting Information
  - A Copy of the Most Recent Newsletter
  - A Check-Off List of Ways to Become Involved at the Local Level
  - New Member Information Form
- Adds new members to the state member list serve.
- Notifies area contacts of new members. <sup>1</sup>
- Submits the names of new members and renewing members to the state newsletter editor for publication. <sup>1</sup>
- Maintains communication with the local societies, the regional membership chair, and national Membership Services Committee. <sup>1</sup>
- Prepares a written report of activities to the State Board of Directors. <sup>1</sup>
- Prepares a written report of activities to the Regional Membership Chair. <sup>1</sup>
- Submits articles concerning membership activities and benefits to the Filter newsletter editor as often as appropriate. <sup>1</sup>
- Drafts and sends emails or post cards to lapsed members, renewed members, new members and students in a timely manner. <sup>1</sup>
- Distributes list of lapsed members to area contacts for follow-up. <sup>1</sup>
  - May include but not limited to a survey to lapsed members on why they did not renew their membership and what can be done to get back
- Prepares certificates of recognition for years of service awards to be recognized at Awards Luncheon of Spring Educational Conference. <sup>1</sup>
- Retains retired members by suggesting Emeritus status. <sup>1</sup>
- Establishes a mentoring system so that a change in committee members and/or chair can be accomplished smoothly and without interruption in the state's membership goals. (A Vice Chair can address this situation. By establishing a Vice Chair, the Chair will have the opportunity to pass on committee knowledge throughout the year while the Vice Chair will have time to get accustomed to the responsibilities and duties of the Chair). <sup>1</sup>
- Communicates with other state officers, state chairs and handles requests for supplies, printed material, etc., pertinent to membership. <sup>1</sup>
- Reads the ASCLS Membership Development Manual to find ideas and helpful hints. <sup>1</sup>

## SUGGESTED SCHEDULE

August

Participate in student recruitment if needed by Student Forum Advisor

# Membership Development Chair

## Attend Annual Leadership Conference

-retrieve any information from outgoing MDC

-Provide membership report to the board

FILTER Deadline August 15: Write membership update. Include names of new members.

Contact new members and welcome them to ASCLS.

Contact lapsed members.

## September

Contact new members and welcome them to ASCLS.

## October

Contact new members and welcome them to ASCLS.

Contact lapsed members

## November

FILTER Deadline November 15: Write membership update. Include names of new members.

Contact new members and welcome them to ASCLS.

Prepare report of activities for Regional Membership Chair.

## December

Contact new members and welcome them to ASCLS

## January

Contact new members and welcome them to ASCLS.

Update member list, deleting those who have not renewed.

## February

FILTER Deadline February 15: Write membership update. Include names of new members.

Winter Board Meeting: Provide membership report to the board

Contact new members and welcome them to ASCLS.

Organize membership promotion station for state meeting.

## March

Contact new members and welcome them to ASCLS.

Prepare certificates of recognition for years of service awards to be given at Spring Meeting Awards Luncheon. Coordinate program with Awards Chair.

## April

Attend ASCLS-NE Annual Spring Meeting

Organize and staff membership booth at meeting

Attend Annual Business Meeting: Prepare report of activities

Contact new members and welcome them to ASCLS.

# Membership Development Chair

## May

Send 'New Graduate Welcome Letter' to new graduates.

FILTER Deadline May 15: Write membership article for newsletter. Include new members.

Prepare report of activities for Regional Membership Chair

## June

Contact new members and welcome them to ASCLS

Send 'Membership Renewal Letter' to all members

## July

Contact new members and welcome them to ASCLS

Retain retired members by suggesting Emeritus status

ASCLS National Meeting

Send 'Membership Renewal Thank You Letter' as members renew

Submit updates for ASCLS-NE Leadership Handbook to Leadership Development Chair

## August

Attend Annual Leadership Conference

FILTER Deadline August 15: Write membership article for newsletter. Include new members.

Send 'Membership Renewal Thank You Letter' as members renew

Contact new members and welcome them to ASCLS

## Ongoing

Add new members to ASCLS-NE List Serve

## HELPFUL TIPS

### Membership Roster Access

Membership reports are available on the ASCLS website at [www.ascls.org](http://www.ascls.org)

To access these rosters

1. Log in to the ASCLS website using your personal username (email) and password.
2. Scroll down the homepage. Under Participate, click on ASCLS Member Community.
3. Under My Dashboard, click on My Groups.
4. Click on State Society Leaders.
5. Click on the Resources tab.
6. To the left of the name of your state, click on the sheet of paper icon.
7. Click on the green Download Resource button.
8. The roster will open in an Excel spreadsheet format.
9. See tabs at bottom of spreadsheet for current vs. lapsed members.
10. Save the file to your computer.

# Membership Development Chair

Note: Roster access is limited to state presidents, state treasurers, and state membership chairs.

The Must Do's Duties:

- Set goals for yourself and your committee.
- Keep the state mailing list up to date using the member rosters that each state's designated point of contact person can generate directly from the ASCLS website.
- At the state meeting, have a membership roster available for people to check and verify their personal information.

Try to produce personalized emails to each individual. Letters should present a professional image. Avoid a product that looks mass produced.

Membership Recruitment Materials can be found at [www.ascls.org/ascls-leadership/leadership-resources](http://www.ascls.org/ascls-leadership/leadership-resources) Have materials available during the Spring Meeting and any time the membership display is utilized.

Attend as many state board meetings as possible. If the chair or a committee member cannot go to the meeting to deliver a report, send a written report to the president prior to the board meeting. Include activities, membership counts, goals concerns and requests for action in the report. <sup>1</sup>

## RESOURCES

[www.ascls.org/ascls-leadership/leadership-resources](http://www.ascls.org/ascls-leadership/leadership-resources)

Recruitment documents as well as the ASCLS Committee Chair Manual can be found at the website above.

H.E.L.P. in a Book by the Leadership Academy

## APPENDIX

Welcome and New Member Letter Template  
New Member Information Form  
Membership Renewal Letter Template  
Membership Renewal Thank you Letter Template  
Recruitment Letter Template  
Recruitment Flyer Template  
New Graduate Welcome Letter Template  
Lapsed Member Letter Template

Original documents (Word, Excel, & PDF) on ASCLS-NE website

## ACKNOWLEDGEMENTS



# PAC/GAC

## TERM

PAC/GAC Chair is appointed by the ASCLS-NE President and serves a one year term. The term may be repeated until the chair resigns or the ASCLS-NE President appoints a new chair.

## TIME COMMITMENT

20 hours per month

## DUTIES

Educate ASCLS-NE membership about state, local, and national issues impacting the laboratory science profession

Act as the liaison between regional/national GAC representatives and state members.

Forward information to state members as disseminated from the regional/national level including meeting minutes, e-newsletters, etc

Prepare reports for Region VI and ASCLS as requested

Provide information and updates for ASCLS-NE business meetings and for the FILTER.

Provide information and expectations to those attending the Legislative Symposium to be held in March of each year in Washington, D. C.

Keep GAC/PAC binder up to date with the latest meeting minutes, newsletters, articles, emails, and information.

Give presentations throughout the state and during the ASCLS-NE Spring Meeting

Update, maintain, and organize the [government@ascls-ne.org](mailto:government@ascls-ne.org) email account

Duties as defined by National GAC For State Society GAC Chair:

- Keep state leadership and members informed of legislative and regulatory activities and decisions occurring at both the national and state levels. Utilize various means of communication to include email updates, postings on state web site, newsletter articles, posters at spring conferences, presentations at annual state membership meetings, blogs, and regular reports to state Boards of Directors and Regional Councils.
- Establish (identify, recruit, nominate state society members), in consultation with the state president, and maintain a member communication network (AKA key contact network). Give priority to appointing key contacts to those Senators and Representatives serving on key congressional committees pertinent to the Society's interests.
- Activate the network as needed in response to national or state action alerts and other requests. Identify state legislative and regulatory activity that affects laboratories, laboratory personnel and/or professional schools, and initiate contact to communicate these activities.
- Encourage members to maintain relationships with state and national legislators.
- Assure that all appointed key contacts fulfill their responsibilities on behalf of the Society.

# PAC/GAC

- Study/monitor federal and state government publications, and keep informed on current and potential federal and state legislative and regulatory issues. (Note: examples of publications are included in the “Resources” section at the end of this document).
- Serve as a resource for input on current legislative and regulatory activity and its possible impact on labs for: members; state and national ASCLS leadership; state and national legislators and other government officials; laboratory organizations; and hospitals, clinics, independent labs.
- Serve as a resource for drafting legislation, testimony, and editorials.
- Serve as a resource for educating state and national legislators.
- Attend ASCLS Legislative Symposium and ASCLS Annual Meeting whenever possible.
- Attend state and regional conferences, as well as Region Council and state Board of Directors meetings to communicate information to leadership and members.
- Develop and/or participate in a state government affairs committee.
- Serve as the primary (but not exclusive) contact between ASCLS, the national GAC and state-level contacts concerning legislative and regulatory activity at both the national and state level.
- Provide updates to national GAC on any planning for legislative activities relating to state licensure or other regulation of all levels of laboratory personnel. Utilize, as appropriate, the *ASCLS Guide Bill for Licensure* and other resources.
- Prepare reports related to government affairs activities for the state leadership, as requested (i.e. board meetings, membership meetings, newsletters and websites).

## **SUGGESTED SCHEDULE**

August

Attend ASCLS-NE Leadership Conference to obtain information from previous PAC/GAC

FILTER deadline August 15

November

Prepare report for Region VI

FILTER deadline August 15

December

January

February

Arrange appointments with Congressmen and Representatives for the Legislative Symposium. Forward appointment and contact information to those members attending the Legislative Symposium.

Winter Board Meeting

FILTER Deadline February 15.

# PAC/GAC

## March

Prepare report for Region VI meeting

Attend Legislative Symposium in Washington DC

Complete debriefing following the Legislative appointments and forward to the chairpersons in Washington, D.C. immediately following Leg Days

Send thank you notes and talking points to Congressmen and Representatives immediately following Leg Days

Prior to ASCLS-NE Spring Meeting Submit PAC pin order form.

## April

Be a visible advocate at annual spring meeting for both GAC and PAC-solicit donations, complete donation log sheet, complete donation receipts, and hand out PAC pins.

Following spring meeting submit solicitations and return extra PAC pins.

Send a personal thank you to those individuals who donated to PAC. Recognizing their contribution might encourage them to make another donation next year.

ASCLS-NE Spring Board Meeting at Annual Spring Education Conference

## May

FILTER deadline May 15.

## June

## July

Attend the GAC meeting at the beginning of each annual ASCLS meeting if possible

Give updates for the ASCLS-NE Leadership Handbook to Leadership Development Chair by July 31

## August

Attend ASCLS-NE Leadership Conference

If you will be moving on from the GAC/PAC position, mentor the incoming GAC/PAC chair. Please remember to pass on the GAC/PAC information binder and the PAC solicitation binder to the next chair.

## **HELPFUL TIPS**

PAC money raised during the Legislative Days and the ASCLS-NE Spring Meeting counts towards a competition among all ASCLS states. The top three state societies with the most funds raised receives a plaque and photo during the ASCLS National Meeting.

PAC money raised during the ASCLS National Meeting counts towards a competition among regions. The region with the most funds raised wins a breakfast during the following regional caucus.

Submit information from ASCLS to Filter Editor.

# PAC/GAC

Work with neighboring states' GAC/PAC chairs on fundraising events!!

## RESOURCES

- Some examples of publications:
  - Washington G-2 Reports
  - Federal Register
  - State government publications
  - ASCLS GAC articles (emails, e-newsletters, *ASCLS Today*, *CLS*; and federal departmental publications)
- Thomas.loc.gov web site
  - Legislative process
  - How Laws Are Made
  - Enactment of Laws
  - Congressional Glossary
- ASCLS Government Affairs Program Manual (TBD – update historical version of manual)
- ASCLS Position Papers
- Legislative Symposium Documents (Issue papers, “Leave behinds”)
- Government Advocacy Center postings
- Other – CapWiz

For more information, as well as, brochures, newsletter fillers, PAC pin request form, signs, and slides, visit: [www.ascls.org/about-us/voice-your-opinion/pac](http://www.ascls.org/about-us/voice-your-opinion/pac)

## APPENDIX

### Acknowledgements

Andrea Schank  
Roxanne Alter  
ASCLS GAC

# PACE Chair

## **TERM**

PACE Chair is an appointed position. The term is one year and may be repeated until the PACE Chair resigns or the ASCLS-NE President appoints a new PACE Chair.

## **TIME COMMITMENT**

10 hours per month during the months of June-December

20 hours per month during the months of January-May

## **DUTIES**

The Program Administrator is responsible for reviewing program information for each presentation, including educational content, speaker credentials, contact hour calculation, level of instruction, correct wording of measurable objectives and correlation to level of instruction, and review of brochure/flyer content for compliance with P.A.C.E.<sup>®</sup> policies. In addition, the program administrator is responsible for filing Quarterly Reports and maintaining P.A.C.E.<sup>®</sup> documentation. (Taken from the ASCLS Professional Acknowledgment for Continuing Education Provider Application and Manual)

Update, maintain, and organize the [pace@ascls-ne.org](mailto:pace@ascls-ne.org) email account

## **SUGGESTED SCHEDULE**

August

Attend ASCLS-NE Leadership Conference

FILTER Deadline August 15

Suggest speakers/topics to speaker chairperson of meeting planning committee

September

Give Template for speaker information to speaker chairperson to mail to speakers.

Submit quarterly activity report to ASCLS, if applicable

October

November

FILTER Deadline November 15

December

Submit quarterly activity report to ASCLS, if applicable

January

February

FILTER Deadline February 15

# PACE Chair

## Winter Board Meeting

Review PACE Forms as they are turned in and edit objective wording as needed

## March

Review PACE Forms as they are turned in and edit objective wording as needed

Forward edited PACE Forms to the person assembling the brochure

Set up PACE with CE Organizer for spring meeting

Prepare moderator packets to include Session Evaluation, Session Tally Sheet, and Instructions for Session Moderators.

Prepare program information, PACE CE Organizer letter to attendees, and Continuing Ed Session Record for attendees' packets.

Submit quarterly activity report to ASCLS, if applicable

## April

Night prior to first day of meeting meet to stuff attendees' packets

Attend ASCLS-NE Annual Spring Meeting

Bring Moderator packets

After meeting collect moderator packets

Tally session evaluation sheets as needed

Attend Annual Business Meeting

## May

FILTER Deadline May 15

## June

Submit quarterly activity report to ASCLS for the Spring Meeting

## July

Submit updates for ASCLS-NE Leadership Handbook to LDC

## August

Attend ASCLS-NE Leadership Conference to pass on materials and mentor incoming PACE Chair as applicable

FILTER Deadline August 15

## Ongoing

Submit Quarterly Activity Reports

Work with ASCLS-NE Membership Chair and PAC/GAC Chair to develop other PACE opportunities throughout the year

Approve and submit other PACE activities throughout the year

## **HELPFUL TIPS**

Refer to Appendix for Examples and Templates

# PACE Chair

## Instructions for PACE Program Administrator

1. ASCLS PACE manual from ASCLS website (<http://www.ascls.org/professional-development/p-a-c-e/54-p-a-c-e>) has blank forms that can be used.
2. **Logos** for ASCLS-NE, ASCLS-IA, CLMA and ASCP are available for use.
3. Template for **Speaker Information Form**. Whoever is in charge of organizing speakers should be given an updated copy of this, and will mail it to all speakers. At least three objectives must be filled out in order for PACE credit to be available. Form should be returned to the speaker chairperson, and then forwarded on to the PACE program administrator.
4. **Speaker information form example** properly filled out with minimum of three objectives. Use these forms to make up session evaluation forms (#5).
5. **Example of a filled out session evaluation form**. This needs to be updated for EACH speaker with their objectives, multiple copies printed out and given to moderators to hand out during the session for attendees to fill out. The attendee should fill it out and hand it in at the end of the session. Moderator tallies results (#14 below) and returns completed forms to the registration desk.
6. Program information –**Description of sessions**. The example is actually incomplete. The description for each session should include the objectives from the speaker information form (#3). Session descriptions should be used by the Speaker Chair to post on the meeting website for the spring meeting and also placed in the spring meeting program. During additional PACE opportunities, session descriptions may be handed to each participant.
7. Template for **Moderator Instructions**. Needs to be completed FOR EACH SESSION by the PACE chair and included in the session packet.
8. Completed **Moderator Instruction Example**.
9. Template for **Continuing Education Session Record Master Codes**. This form is of great use to the PACE program administrator when setting up PACE in CE Organizer. This is NOT to be distributed to attendees. Master session codes are to be inserted into the moderator instructions (#7) and read out loud at the end of the session. Master session codes should be 5 numbers long, no letters, and random. Use [www.randomizer.org](http://www.randomizer.org) and selected “randomize now” to come up with the possible numbers. REMEMBER: DO NOT DISTRIBUTE THIS LIST.
10. **Attendees’ Continuing Ed Session Record Example**. This is a .pdf of what attendees got for the 2010 meeting instead of what is described in #9 above. The only difference between #9 and #10 is that #10 does not have the 5-digit session codes. Attendees use this form to write the session code the moderator reads aloud at the end of the session they are attending. They should use this form when using the ASCLS CE Organizer to find the session code that needs to be entered in to obtain their PACE credits.
11. **CE Organizer Instructions from ASCLS**.
12. Specific **CE organizer instructions for the Nebraska PACE program administrator**. The steps provided must be followed for EACH session for which PACE credit is given. It is very important that date/time of the sessions are accurate. If a speaker changes day/time after the Continuing Education Session Record (#10) has

# PACE Chair

been printed, the PACE program administrator must update to the correct date/time in CE Organizer. It is more important that CE Organizer is correct than to have the attendee's continuing education session record accurate. Date/time changes do NOT affect the 5-digit master session codes or the program #.

13. **CE Organizer instructions for attendees.** This is an example of a letter included in each attendee's packet so they know how to get their PACE credits.

14. **Session evaluation tally sheet.** At the end of the session if time permits, the moderator should tally the session evaluation forms from #5 above and return to the registration desk with the session evaluation forms.

15. A quarterly summary must be sent to ASCLS in any quarter when PACE credit has been awarded. The form to fill out for EACH session is called the **Roster Cover**, and a template is here.

## RESOURCES

Download the P.A.C.E Manual and Application by visiting:

<http://www.ascls.org/professional-development/p-a-c-e/54-p-a-c-e>

## APPENDIX

See HELPFUL TIPS for direct links to APPENDIX

Original documents (Word, Excel, & PDF) on ASCLS-NE website

## ACKNOWLEDGEMENTS

Karen Keller



# Scholarship and Loans Chair

## **TERM**

Scholarship and Loans Chair is appointed by the ASCLS-NE President and serves a one year term. The term may be repeated until the chair resigns or the ASCLS-NE President appoints a new chair.

## **TIME COMMITMENT**

8-10 hours per month

## **DUTIES**

Distribute, Receive, and review Scholarship applications  
Award annual ASCLS-NE MLS/MLT Scholarships  
Receive and review Loan Applications  
Maintain communication with loan account manager at First National Bank  
Present loan account requests to ASCLS-NE board for review and decisions  
Maintain loan records  
Maintain records of loan recipients  
Submit scholarship applications to ASCLS-NE Board for review and selection  
Submit scholarship winners to ASCLS-NE Treasurer to prepare checks for awards  
Present scholarships to students during the spring meeting as deemed appropriate  
Update, maintain, and organize the [scholarships@ascls-ne.org](mailto:scholarships@ascls-ne.org) email account

## **SUGGESTED SCHEDULE**

August

Attend Annual Leadership Conference  
FILTER Deadline August 15

September

Check the website for the scholarship information. Check that your name, address, and email are on the scholarship page. Also, check that your information is on each application form. Start on this process early.

October

Notify students (via Student Forum Advisor, Website, and Facebook pages) of Scholarship eligibility requirements (must be member of ASCLS or have submitted application for membership by November 1) and scholarship deadline.

November

FILTER Deadline November 15: Put information about Scholarships in the Filter. Include link to scholarship page.

December

# Scholarship and Loans Chair

January

February

FILTER deadline February 15th

Winter Board Meeting

March

Scholarship Application Deadline March 1

- 1 Review and organize all Scholarship Applications
- 2 Submit Scholarship applications to ASCLS-NE BOD for vote
- 3 Submit Scholarship award winner names to ASCLS-NE Treasurer
- 4 Prepare award winner names , bios, checks, and certificates for awards luncheon

April

Attend ASCLS-NE Annual Spring Meeting

Attend Annual Business Meeting

May

FILTER Deadline May 15: Submit photos of and information about scholarship winners.

Submit photos and information to the Webmaster to update the Scholarship page

June

July

ASCLS National Meeting

Submit updates for ASCLS-NE Leadership Manual to LDC

August

FILTER Deadline August 15

ASCLS-NE Leadership Conference

-Pass on any physical items on to new SLC.

## **HELPFUL TIPS**

ASCLS-NE Scholarship Information

Application guidelines are posted on the ASCLS-NE website.

Two scholarships are awarded each year. The amount of each scholarship is determined by the ASCLS-NE BOD and is written into the annual budget.

The application deadline is March 1 of the current academic year. At this deadline, review and organize all applications. Send applicant information to BOD for review and an electronic vote. The officers should send their votes to the Scholarship Chair. Officers that are associated with the CLS/MLT programs or related to one of the applicants should not submit a vote. The Student Forum President is not eligible to vote for scholarship winners.

Once the scholarship winners are chosen, notify the ASCLS-NE Treasurer who will write out checks for winners and the Awards Chair who will announce the winners. Also, send a short bio of each scholarship winner to the Awards Chair for introduction

# Scholarship and Loans Chair

purposes. Scholarship winners are announced during the Awards Luncheon during the Spring Meeting held in April of each year.

## ASCLS-NE SCHOLARSHIP ELIGIBILITY REQUIREMENTS:

- 1 The applicant must be a member of ASCLS (or have applied for membership) by November 1, of year prior to scholarship award.
- 2 The applicant must be enrolled in the final year of a NAACLS accredited program in Nebraska.
- 3 The applicant must demonstrate scholastic achievement by presenting a cumulative GPA of at least 3.3 on a 4.0 scale.

## APPLICATION INSTRUCTIONS:

- 1 Prepare a letter of application that documents your fulfillment of the eligibility requirements. Acceptable documentation includes:
  - A ASCLS membership may be documented by providing your membership number with the date joined or by including a copy of your membership card or by including a copy of your canceled check to ASCLS.
  - B Give the name of your program and your expected graduation date.
- 2 Ask your Program Director to provide us with documentation of your scholastic achievement.
- 3 Ask a faculty member or program official to provide us with a letter of reference evaluating the applicant's professional characteristics such as leadership skills, community service, work experience, etc.
- 4 Prepare a one-page essay describing a Clinical Laboratory Scientist that you admire. Please do not identify this individual, but be specific about the qualities that you appreciate in this person.
- 5 Please include an e-mail address.
- 6 Please submit applications via e-mail to: [scholarships@ascls-ne.org](mailto:scholarships@ascls-ne.org)

## LOANS

The funds for the ASCLS-NE loans come from a trust set up at First National Bank. The Scholarship and Loans Chair (SLC) acts as a liaison between the students and the First National Bank. The last will and testament of the trust donor states that students enrolled in a Nebraska CLS program. Applications are maintained and distributed by the CLS program director at UNMC.

Completed loan applications are submitted by students directly to the SLC. The application is reviewed by the SLC for completion. If the application is incomplete, the SLC works with the student to complete the application. If the student fails to return a fully completed application, the loan is denied. All completed applications are then reviewed for approval.

The full requested amount can be approved or the requested amount can be edited for partial request approval. If approved, the SLC signs the application as a representative

# Scholarship and Loans Chair

of ASCLS-NE and forwards the application to the loan manager at First National Bank. Once First National Bank receives the application, they take over with the distribution of the loan and the collection of the loan as well.

The SLC is the ASCLS-NE contact person for the financial manager of the loan account at First National Bank. The loan manager consults the SLC with any investment changes, delinquent loan payments, or any other routine business decisions. If necessary, the SLC should take the information to the ASCLS-NE Board to make decisions regarding the requests or inquires.

The SLC will receive a monthly paper statement from First National Bank that includes the current balance and activities of the account. The SLC should maintain a spreadsheet of loan recipients in order to have a record of past and present loan disbursements. Copies should be saved of all communication between the SLC and First National Bank, the original and amended last will and testament of Frieda Oltmans, and a 10-year record of loan statements. The SLC will also maintain a hard copy of the original loan application.

ASCLS-NE must abide by the stipulations of the last will and testament of Frieda Oltmans in order to continue to utilize the trust. Note that if ASCLS-NE is at some point dissolved, the trust will be then maintained by ASCLS as defined by the will.

## **RESOURCES**

ASCLS-NE Bylaws <http://www.ascls-ne.org/bylaws.html>

<http://www.ascls-ne.org/bylaws.html>

ASCLS Scholarships and Awards Page <http://www.ascls.org/about-us/celebrate/scholarships-and-awards>

## **APPENDIX**

## **ACKNOWLEDGEMENTS**

Andrea Schank

Anita Smith

# Student Forum Adviser

## **TERM**

Student Forum Adviser is a two year term appointed by the ASCLS-NE President.

## **TIME COMMITMENT**

15 hours per month

## **REQUIREMENT**

It is best, but not required, to have previous experience with the Student Forum. It is also best but not required for the Student Forum Adviser to reside in the Omaha area in order to attend meetings typically held at UNMC and interact with the students in person. The Student Forum Adviser is also encouraged to travel to Lincoln and other areas to meet with students in person.

## **DUTIES**

Inform CLS/CLT students about ASCLS/ASCLS-NE  
Encourage students to be members of ASCLS/ASCLS-NE  
Encourage student members to be active in ASCLS-NE Student Forum  
Hold election for Student Forum President, Student Forum Secretary, and Student Forum Treasurer  
Arrange and conduct initial Student Forum meeting and mentor Student Forum President in conducting all other meetings  
Mentor and guide Student Forum President throughout year to lead Student Forum through planning of fundraisers and events  
Be familiar with responsibilities of Student Forum President, Secretary, and Treasurer  
Mentor Student Forum President, Secretary, and Treasurer  
Ensure Student Forum Meetings are held regularly throughout the year  
Uphold communication between Student Forum and ASCLS-NE Leadership  
Submit moneys collected by Student Forum Treasurer to ASCLS-NE Treasurer  
Encourage students to attend ASCLS-NE Spring Educational meeting  
Encourage Student Forum President, Secretary, Treasurer, and Representatives to attend ASCLS-NE board meetings  
Encourage students to attend the ASCLS National Meeting in July  
Assist students in preparation for ASCLS-NE Spring Educational Meeting and ASCLS National Meeting  
Mentor incoming Student Forum Adviser

## **SUGGESTED SCHEDULE**

July

1. Give a presentation to CLS and MLT students about ASCLS and ASCLS-NE.
  - Make sure to emphasize importance of continuing membership
  - Give instructions on how to become members

# Student Forum Adviser

- Describe ASCLS-NE Student Forum. Ask for volunteers for leadership (have them email you—give them about a week to think about it).
  - Direct interested students to review the Student Forum President, Secretary, and Treasurer sections of the ASCLS-NE Leadership Handbook.
2. Create ASCLS-NE Student Forum
    - Usually have 2-3 reps from each area (Methodist, UNMC, Affiliate sites, NP, and SECC).
    - Have Student Forum vote on President, Secretary, and Treasurer (Can discuss during first meeting). If no one volunteers, contact Program Directors for suggestions or appointments.
    - Keep list of email/contact info for each student forum leader (President, Secretary, Treasurer, and all Representatives).
    - Send list of student forum leadership email/contact info to ASCLS-NE President and Leadership Development Chair.
  3. Encourage Student Forum Leaders to review *Beginners Guide to ASCLS*  
[http://www.ascls.org/images/Leadership/Student\\_20New\\_20Professional\\_20Guide.pdf](http://www.ascls.org/images/Leadership/Student_20New_20Professional_20Guide.pdf)
  4. Assist Student Forum Treasurer in finding donated Husker Football tickets for raffle
    - Start search by asking ASCLS-NE Leadership and program contacts below
  5. Notify program contacts of names of students on ASCLS-NE Student Forum and ask what date/time is best for teleconferences.

## August

Attend ASCLS-NE Leadership Conference: retrieve any info from outgoing Student Forum Adviser or pass on info as applicable. Submit report and update leadership on Student Forum activity.

Filter deadline August 15 (If Student Forum has met, Student Forum President should submit article. If first meeting has not yet been held, the Student Forum Adviser will need to submit an article containing names of Student Forum leaders and any available information about the Husker Football Raffle.)

1. Set up first meeting/teleconference
  - [www.freeteleconference.com](http://www.freeteleconference.com)
  - Notify everyone of date/time
2. Have first meeting/teleconference
  - Explain ASCLS-NE and ASCLS
  - Discuss importance of membership
  - Discuss roles of being an ASCLS-NE Student Forum Rep. (ex: keeping all fellow students informed of activities/events and important issues, fundraisers, Spring Meeting, National Meeting, Student Socials, etc.).
  - Have students think of Fundraising Ideas

# Student Forum Adviser

3. Have students begin Husker Football Raffle.

September -- November

Can plan meeting throughout—depends on what you have going on

1. Advise and mentor students through planning Fall or Winter Social
2. Collect Husker Ticket Raffle Money and fundraising spreadsheet from Student Forum Treasurer. Give money to ASCLS-NE Treasurer to deposit

December

1. Teleconference

- Have students discuss and begin planning Second Fundraiser
- T-shirt, Polo, Scrub designs (maybe tote bag, mug, water bottle, etc.) or alternative ideas
- SF President should request design ideas from students and submit designs to SF leaders for a vote
- Develop T-shirt design on-line
- [www.customink.com](http://www.customink.com)<http://www.customink.com/>
- Set sales deadline for February (decide date based on how long order will take to receive. Need to receive merchandise prior to ASCLS-NE Spring Meeting.

2. SF President should email design and order forms to ALL Students so ALL students can sell

February

ASCLS-NE Winter Board Meeting: Submit report and update on Student Forum Activity

1. T-shirt forms and money due
2. SF Treasurer should order shirts so can hand out by Spring Meeting

March

1. Hold meeting/teleconference

- Discuss Spring Meeting and National Meeting: encourage students to attend both.
- Discuss T-shirt sales

April

1. Hold final meeting

- Discuss importance of continuing membership and leadership in ASCLS-NE
- Encourage students to attend ASCLS-NE Annual Board Meeting during the ASCLS-NE Spring Educational Meeting

# Student Forum Adviser

- Find out if anyone is interested in going to National Meeting
2. Lab Professionals Week
    - If enough funds can order gifts for students
    - Send an email to ALL students about Lab Week
  3. Attend Spring ASCLS-NE Meeting. Help orient students to meeting
  4. ASCLS-NE Annual Business Meeting. Submit report and update on Student Forum activity

## May

Send 'Congratulations' emails to new graduates

Encourage graduates to continue membership with ASCLS and active leadership with ASCLS-NE

Get new email/contact info for graduates interested in continuing leadership

Find out which students/graduates are interested in attending ASCLS National Meeting

- Students that are members of ASCLS may use fundraised funds if available (and also ASCLS-NE Budgeted amount)

## June

Assist students/graduates with preparing for ASCLS National Meeting

## July

ASCLS National Meeting: If able to attend, help orient students/graduates.

Mentor incoming NPCA

Submit any updates to the Student Forum Adviser, President, Secretary, or Treasurer sections of the ASCLS-NE Leadership Handbook to the ASCLS-NE Leadership

Development Chair by July 31.

See 'July' above if continuing for another year

## Ongoing

Ensure that Student Forum President, Secretary, and Treasurer are carrying out their given tasks and duties.

## HELPFUL TIPS

Contacts:

Methodist: Julie Richards, Program Director,

[Julie.Richards@nmhs.org](mailto:Julie.Richards@nmhs.org)

UNMC: Linsey Donner, Microbiology Instructor,

[Imdonner@unmc.edu](mailto:Imdonner@unmc.edu)

SECC: Janis Bible, Program Director, [jbible@southeast.edu](mailto:jbible@southeast.edu)



# Student Forum Adviser

NP: Martin Steinbeck, Program Director,  
[steinbeckm@hotmail.com](mailto:steinbeckm@hotmail.com)  
<mailto:steinbeckm@hotmail.com>

Each year create two email lists:

- 1 ALL students
  - a Have reps from each site gather emails from students at that site
- 2 Student Forum Leadership only

Students receive professionalism points for serving as Student Forum Representatives and Leaders. Inform students at the beginning of the year that program contacts will be notified if student representatives and leaders are not participating as expected. Contact program directors if students are not participating as expected.

Student Forum Secretary should maintain:

Facebook Page for ASCLS-NE students and new professionals

ASCLS-NE website Student Forum Page (With assistance from ASCLS-NE Webmaster)

Student Forum Secretary should keep minutes of meetings, request approval of minutes, and distribute approved minutes to ASCLS-NE webmaster and Filter Editor. Please also distribute to each school contact and ASCLS-NE Leadership.

Prepare students for ASLCS-NE Spring Educational Conference

As soon as online registration is available, send an email to ALL students (CLS and MLT) with information on how to register for the ASCLS-NE Spring Educational Conference. If enough funds have been raised through student fundraising AND the student is an ASCLS-NE member, their attendance fee for the Spring Meeting will be paid for via these funds.

- \* Send a copy of the email to the program contacts.
- \* Include a link to the meeting website.
- \* Students must register on-line by the registration deadline and select 'Pay by check.'
- \* If a student is not a member of ASCLS-NE, they can still join now to get the conference discount. Typically this time of the year, ASCLS has a special that allows a few 'free' months of membership. Typically the special includes joining during the spring months for membership until summer the following year.
- \* Students must notify the Student Forum Adviser that they have registered and also give the SFA their ASCLS number.
- \* The SFA should keep a list of the ASCLS-NE student members registered for the meeting. The list should be submitted to the ASCLS-NE Treasurer one or two weeks prior to the conference. The ASCLS Treasurer will then write one check for all of the ASCLS-NE student members attending the meeting.

# Student Forum Adviser

- \* Encourage the students attending the conference to also attend the social. The social may be free for students for networking purposes. Check with the Senior Board Member for verification.
- \* Students need to inform the SFA if they will be attending the social by the registration deadline. The SFA should let the SBM know the total number of students that will be attending the social one week after the registration deadline for planning purposes.
- \* Pass on hotel information to out-of-town students. If coming from far distances, students may want to stay Thursday night only. Rooms must be booked by a deadline. Students should remember to give the ASCLS-NE Meeting Block code (if one is available) when booking their room.
- \* Typically Friday of the conference is a student day. Programs will typically plan to let their students off the bench to attend on that day. Each program will inform their students of their options for that specific day.
- \* Encourage all Student Forum Representatives and leaders to attend the ASCLS-NE Board and Business meetings.
- \* Be available during the social and on student day to help orient students to the conference and answer questions. This may be their very first professional conference and they may need a little guidance or direction for proper conduct during conferences.

## **RESOURCES**

## **APPENDIX**

## **ACKNOWLEDGEMENTS**

Linsey Donner  
Ashley Collins  
Ashley Urbach

# Student Forum Secretary

## **TERM**

The Student Forum Secretary is elected by the Student Forum and serves a one year term. The SFS is encouraged to advance to a position as a member on any ASCLS-NE committee.

## **TIME COMMITMENT**

5 hours per month

## **REQUIREMENTS**

Student Forum Secretary should be a current student in a CLS/CLT program. As with all committee positions, the SFS must be a current member of ASCLS.

## **DUTIES**

Attend all Student Forum Meetings

Take minutes during ASCLS-NE Student Forum Meetings

Email minutes to Student Forum Leadership for approval

Submit approved minutes to all students, Student Forum Adviser, ASCLS-NE

Webmaster to post on website, and to Filter Editor

Submit Articles or Fundraising advertisements/information to Filter Editor as needed

Keep Student Forum page of ASCLS-NE Website and ASCLS-NE Student Forum

Facebook page up to date with latest Student Forum News and Fundraisers

Assist with other duties as needed or assigned by the Student Forum Adviser or

Student Forum President

Attend Annual ASCLS-NE Board meeting and other ASCLS-NE meetings as available

## **SUGGESTED SCHEDULE**

August

Student Forum Meeting: Take minutes, email minutes to Student Forum Leadership and Adviser for approval, distribute approved minutes to Student Forum Adviser,

Webmaster, and Filter Editor

FILTER Deadline August 15: Submit minutes from first Student Forum meeting if approved and available.

Begin Selling raffle tickets

Encourage fellow students to sell raffle tickets

September—November

Sell raffle tickets

Encourage fellow students to sell raffle tickets

Request Webmaster to update Website with fundraiser information

Post updated fundraiser information on ASCLS-NE and ASCLS-NE Student Forum Facebook pages.

# Student Forum Secretary

Student Forum Meeting: Take minutes, Email minutes to Student Forum and Student Forum Adviser for approval, Distribute approved minutes to Student Forum Adviser, Webmaster, and Filter Editor

FILTER Deadline November 15: Submit article. Include Husker Football ticket raffle information (winners if drawing completed), social information, and other Student Forum activity. May submit previous meeting minutes as well.

Plan and attend Student Forum Fall/Winter Social

Post Student Forum Fall/Winter Social information on Student Forum page of ascls-ne.org and on the ASCLS-NE Student Forum Facebook page

December

Student Forum Meeting: Take minutes during Student Forum Meeting, email minutes for approval, and distribute approved minutes to Student Forum Adviser, Webmaster, and Filter Editor

Start planning second fundraiser

Post fundraiser information on website and ASCLS-NE and ASCLS-NE Student Forum Facebook pages as soon as available

January

Sell fundraiser merchandise

Encourage other students to sell fundraiser merchandise

February

Sell fundraiser merchandise

Encourage other students to sell fundraiser merchandise

FILTER Deadline February 15: Submit meeting minutes.

ASCLS-NE Winter Board Meeting

Fundraiser forms and money due

March

Student Forum Meeting: Take minutes during Student Forum Meeting, email minutes for approval, and distribute approved minutes to Student Forum Adviser, Webmaster, and Filter Editor.

Meet to organize and distribute fundraiser merchandise

April

Final Student Forum Meeting: Take minutes, email minutes for approval, and distribute approved minutes to Student Forum Adviser, Webmaster, and Filter Editor.

Attend ASCLS-NE Annual Spring Meeting

Attend Annual Business Meeting

May

FILTER Deadline May 15: Submit article. Include minutes from previous meeting.

June

# Student Forum Secretary

Prepare for ASCLS National Meeting if attending

July

ASCLS National Meeting

August

Attend Annual Leadership Conference

FILTER Deadline August 15

## HELPFUL TIPS

- Email minutes to student forum reps and president for review and approval
- Distribute approved minutes to all students and ASCLS-NE Student Forum Adviser
  - Student Forum Adviser should email minutes and report to ASCLS-NE Leadership
  - Request ASCLS-NE webmaster to post minutes on the Student Forum page of [www.ascls-ne.org/studentforum.html](http://www.ascls-ne.org/studentforum.html) and Filter Editor to post in upcoming Filter.
  - Email addresses for Student Forum Adviser, Webmaster, and Filter Editor can be found at [www.ascls-ne.org/leadership.html](http://www.ascls-ne.org/leadership.html)

## RESOURCES

### APPENDIX

Student Forum Meeting Minutes Template

Original documents (Word, Excel, & PDF) on ASCLS-NE website

## ACKNOWLEDGEMENTS

Linsey Donner

Ashley Collins

# Student Forum Treasurer

## **TERM**

Student Forum Treasurer is elected by the Student Forum and serves a one year term. The Student Forum Treasurer is encouraged to advance to a member position on any ASCLS-NE committee.

## **TIME COMMITMENT**

5 hours per month

## **REQUIREMENTS**

Student Forum Treasurer should be a current student in a CLS/CLT program.

## **DUTIES**

Attend all Student Forum meetings  
Encourage students to participate in fundraising  
Keep a spreadsheet of revenues (funds raised) and expenditures  
Collect money and order forms from students during fundraisers  
Keep a spreadsheet of students and their funds raised  
Submit collected funds, copies of all order forms, and copies of spreadsheets to Student Forum Adviser to submit to ASCLS-NE Treasurer  
Assist with other duties as requested by Student Forum Adviser or Student Forum President  
Attend ASCLS-NE Annual Board Meeting in April and other ASCLS meetings as able

## **SUGGESTED SCHEDULE**

August  
First Student Forum Meeting  
Find Husker Football Tickets to raffle  
Begin Husker Football Ticket Raffle: Sales will go towards a Fall/Winter Social  
Sell raffle tickets  
Encourage fellow students to sell  
Collect money and ticket stubs from students for Raffle: Keep track of all sales and totals

September – November  
Sell raffle tickets  
Encourage fellow students to sell  
Collect money from Husker Ticket Raffle: Keep track of all sales and totals  
Submit money to Student Forum Adviser as able  
At conclusion of raffle submit remaining money and copy of fundraising spreadsheet to Student Forum Adviser  
Student Forum Meeting: Report on sale totals of Husker Ticket Raffle

# Student Forum Treasurer

Draw name of Husker Ticket Raffle winner  
Distribute Husker Tickets to Winner(s)  
Plan Fall/Winter Social

December

Student Forum Meeting:

Report on total sales of Husker Ticket Raffle, Costs of Fall/Winter Social  
Begin planning second fundraiser (T-shirt or other product sales)

January

Sell Fundraiser merchandise  
Encourage other students to sell merchandise  
Collect money and forms as completed

February

ASCLS-NE Winter Board Meeting  
Winter Fundraiser money and order forms due: set deadline and collect money and forms  
Order t-shirts (etc) so they arrive by ASCLS-NE Spring Meeting  
Submit copies of order forms and money collected to Student Forum Adviser

March

Student Forum Meeting: Report on Winter Fundraiser totals  
Pick up merchandise  
Student Forum leaders should meet to organize and distribute merchandise to students for delivery to customers

April

Student Forum Meeting: Report on total funds available for students to attend meetings  
Attend ASCLS-NE Annual Spring Meeting  
Attend Annual ASCLS-NE Board Meeting

June

Prepare for ASCLS National Meeting if attending

July

ASCLS National Meeting

August

Attend Annual Leadership Conference

## **HELPFUL TIPS**

Husker Ticket Raffle

-ASCLS-NE Leaders and MLS/MLT Program directors and instructors often donate tickets for the raffle (ask Student Forum Adviser to assist in finding tickets)

# Student Forum Treasurer

- Consider volleyball or other tickets to raffle off as well
- Typically there is one set raffled to people in the Omaha area (by UNMC students) and another set raffled to people in the Lincoln area (by SCC students)
- Often gift cards to Lincoln restaurants are also donated and raffled. One gift card with each set of Husker tickets.

## T-shirt Fundraiser

Previously used sites for creating and ordering t-shirts:

[www.customink.com](http://www.customink.com)

[www.imagemarket.com](http://www.imagemarket.com)<http://www.imagemarket.com/>

<http://www.imagemarket.com/>

For T-shirt design:

Keep as broad as possible

Do NOT include ASCLS-NE or ASCLS in design

Avoid using MT or MLT

Consider using Medical Laboratory Professional or Medical Laboratory Science

## RESOURCES

### APPENDIX

Fundraising Totals Spreadsheet

Revenue/Expenditure Spreadsheet

Original documents (Word, Excel, & PDF) on ASCLS-NE website

## ACKNOWLEDGEMENTS

Linsey Donner

Ashley Collins



# Speaker Chair

## **TERM**

Speaker Chair is a position appointed by the Senior Board Member.

## **REQUIREMENTS**

Previous experience in leadership or supervisory roles and customer service is optimal. Previous experience in Spring Meeting planning is also beneficial. Fulfilling the Speaker Chair duties is crucial to the success of the Spring Meeting. Selecting and recruiting speakers may take several phone calls or emails. Having connections is also a plus for this position.

## **TIME COMMITMENT**

15 hours per month

## **DUTIES**

- Find, contact, and recruit potential speakers for spring meeting
- Work with Senior Board Member and Spring Meeting Committee to create Speaker Reimbursement Guidelines.
- Follow speaker reimbursement guidelines approved by the Senior Board Member and Spring Meeting Committee.
- Send out and retrieve PACE Forms from speakers.
- Prepare session descriptions provided by speakers for Spring Meeting Program and Website.
- Give Session Descriptions to webmaster and person preparing spring meeting program.
- Retrieve speaker handouts from speakers and give to webmaster to post on website.
- Be available during Spring Meeting to answer questions and field issues regarding speakers and sessions.
- Organize and prepare session schedule for spring meeting.

## **SUGGESTED SCHEDULE**

August

Attend Annual Leadership Conference:

- Request ASCLS-NE leadership and other involved society leaders to start thinking of suggestions for topics and speakers for spring meeting
  - Good time to ask those who attended ASCLS Annual Meeting for speaker or topic ideas

**FILTER** Deadline August 15

Discuss and Decide with Senior Board Member and Spring Meeting Committee the speaker guidelines such as:

# Speaker Chair

- Honorariums
- Mileage
- Registration fees or admission
- Meals

## September

Request ASCLS-NE leadership and other colleagues to contribute suggestions for topics and speakers for spring meeting

## October

Begin contacting potential speakers: Upon first conversation get an idea of a potential topic as well as a range of possible presentation times.

Once you have an interested speaker, send FIRST correspondence LETTER (see Helpful Tips for detailed letter information).

## November

FILTER Deadline November 15

As you receive speaker forms back

- Review PACE Forms for completion
- Make sure that CV, Resume or Biosketch of the speaker is included
- Forward reviewed and completed PACE Forms to the PACE Chair
- Forward handouts to the conference webmaster to post on website

## December

## January

Send SECOND correspondence letter to speakers by end of the month.

As you receive speaker forms back

- \* Review PACE Forms for completion
- \* Make sure that CV, Resume, or Biosketch of the speaker is included
- \* Forward reviewed and completed PACE Forms to the PACE Chair
- \* Forward handouts to the conference webmaster to post on website

## February

PACE Form Deadline: Two months prior to conference date

As you receive speaker forms back

- \* Review PACE Forms for completion
- \* Make sure that a CV, Resume or Biosketch of the speaker is included
- \* Forward reviewed and completed PACE Forms to the PACE Chair
- \* Forward handouts to the conference webmaster to post on website
- \* Begin schedule once majority of PACE Forms have been received
- \* Offer to assist speakers in completing their forms if they have not yet been completed. Doing so may be worth the extra effort.

FILTER Deadline February 15

ASCLS-NE Winter Board Meeting

# Speaker Chair

Session Descriptions online Deadline: One month prior to registration deadline  
have all session descriptions sent to the webmaster for posting on the website.

March

Send THIRD correspondence letter

Handout deadline: One month prior to conference

April

Spring Educational Meeting

Attend Annual Business Meeting

Attend follow-up meeting after Spring Meeting

May

FILTER Deadline May 15

June

July

ASCLS National Meeting

Give updates for Leadership Handbook to LDC

August

Attend Annual Leadership Conference

FILTER Deadline August 15

Ongoing

Attend ASCLS-NE board meetings

Attend all ASCLS-NE Spring Meeting Planning Committee meetings

## **HELPFUL TIPS**

Correspondence Letters

FIRST LETTER:

Send a personal e-mail and then attach a flyer with the information that speakers need to know as well as a PACE Form for them to fill out and return. The ASCLS-NE PACE Chair can provide the most updated PACE Form. Send this email as soon as you have a speaker willing to speak at the meeting.

- Give the length of time for session. If no time has been determined, ask for preference.
- Give date, location, directions to conference (conference website if available)
- List equipment provided: laptop, screen, projector, remote, etc.

# Speaker Chair

- Encourage speakers to bring their presentations on flash drives or CD's.
- Supplied handouts will be posted on the meeting website. Give a handout deadline for speakers who wish to submit handouts for posting on the website (one month prior to conference).
- Request PACE form to be returned by a given deadline. PACE Form deadline should be two months prior to conference date. As the PACE Form is the Speaker's official confirmation, inform speakers to submit as soon as possible if there is a preference for speaking times.
- Request a CV, Resume or Biosketch in addition to the PACE form.
- Include speaker reimbursement guideline information as approved by Spring Meeting Committee
- Speaker Chair email address will be included on the PACE Form. Include email address and other contact information (if desired) in the main email in case the speaker has questions.

## SECOND LETTER

Send two months before conference or as soon as web site is available

- Refer speakers to the conference website for information.
- Dates and location of conference
- PACE forms due now. Let speakers know that this form is needed as soon as possible in order to schedule session times and therefore to get their requested date and time to speak. The PACE form also has a section for reimbursement requests. Therefore, it is also needed in order to document, approve, or deny requests based on speaker reimbursement guidelines.
- Include speaker reimbursement guideline information as approved by Spring Meeting Committee
- Deadline date for the handouts: one month prior to conference
- Speaker Chair contact information

## THIRD LETTER

3 – 4 weeks prior to the conference.

# Speaker Chair

- If speaker has failed to send in PACE forms or has not responded to your communications – call and talk to the person directly.
- Include speaker reimbursement guideline information as approved by Spring Meeting Committee
- Request speaker to check in at registration before their session.
- Website for information
- Information on social and information to buy a ticket (if necessary)
- Handouts are due now
- Speaker Chair contact information

## PACE Forms

PACE Forms should be sent out with the first letter to each speaker. PACE Forms will include information such as speaker credentials, address, and correct spelling of the speaker's name. The current PACE Chair can supply the most recent form. Speakers should return the completed form as soon as possible to the Speaker Chair. The deadline for speakers to return PACE Forms should be two months prior to the conference date. The Speaker chair should review the forms as they are returned and fill in the date and time of the session as well as any other information that is missing. The form will also include the "Description of Session" in the speaker's own words. The given "Description of Session" should be posted as "Session Descriptions" on the conference website as soon as possible and no later than one month prior to the registration deadline. The Speaker Chair should then send the completed form on to the ASCLS-NE PACE chair.

## Speaker Reimbursement Guidelines

Speaker Reimbursement Guidelines should be set forth and approved by the Spring Meeting Committee. Guidelines should include decisions made on such things as reimbursement for travel, mileage, or hotel, reduced or free registration fees for the day of presentation, free meals, or free admission to the social. Reimbursement for speaker expenditures must be approved by the Senior Board Member and/or the entire Spring Meeting Committee. The Spring Meeting Committee or the ASCLS-NE Board of Directors should set guidelines as early as possible. Work with the Senior Board Member and ASCLS-NE/Spring Meeting Treasurer to follow the approved guidelines. Be careful not to accidentally verbally offer a speaker a reimbursement (etc) that has not been approved by the

# Speaker Chair

SBM and/or Spring Meeting Committee. Some speakers may be sponsored by vendors. In these cases, the vendor would provide reimbursements to the speaker.

## Session Descriptions

The Speaker Chair is responsible for submitting session descriptions to the webmaster to post on the website. The Session Descriptions should be on the conference website as soon as possible. Conference participants review Session Descriptions to help decide which sessions to attend. Session Descriptions should be taken from the "Description of Session" section of the PACE Form filled out by the session speaker, so that the description is in the speaker's own words. Session Descriptions should be posted on the conference website no later than one month prior to the registration deadline. The one month cushion allow for potential participants to view what educational opportunities are available prior to registering.

## Handouts

Session handouts can be uploaded to the conference website. The speaker should email the handout to the Speaker Chair. The Speaker Chair should keep an electronic copy and also forward the handout to the conference website webmaster. If the handouts are extremely large in size, contact the webmaster for help in getting the files transferred properly. When telling the speakers about posting their handouts, ask them to save their presentation in a "handout format" and submit that. Contact the webmaster for other helpful suggestions for large presentations.

Some speakers may not want their handouts posted online and may prefer to bring copies to the conference. Set a deadline date for handout submission for website one month in advance of the conference. Process the handouts as soon as they are submitted. A handful of speakers do not wish to submit a handout. It is not necessary for PACE. Webmaster may post a reminder that handouts need to be printed by registrants themselves and a disclaimer that not all speakers will supply a handout.

## Schedule Tips

In 2011, Thursday morning was set aside for CLMA speakers and then Thursday afternoon became "management" topics. There were four sessions at one time on Wednesday and Friday. Thursday there were three sessions at one time and the exhibits. If you go with a three day conference, then use three sessions at each time slot. Sessions should be at least an hour with some "passing time". In 2010 we used 75 minute session periods and then had 15 minutes for

# Speaker Chair

room/speaker changes. It works much better to have 60 minute sessions, with three concurrent sessions. 5 sessions at a time is too many and the conference center generally makes us guarantee with food costs how many rooms we have at a time. Student day is typically on Friday. When working with another group or groups, spell out in the contract how many speakers they will provide even if ASCLS-NE is providing the speaker chair.

Speaker gift/ Thank you

Submit list of speakers to the registration committee or to a selected a volunteer to prepare speaker gifts and thank you notes.

Spring Meeting

As soon as schedule is completed, forward to webmaster and person putting together program to post. Also forward to the Moderator Chair. The Moderator Chair should begin looking for moderators as soon as the schedule has been completed.

At the Spring Meeting be available to answer questions regarding speakers and topics. Have speaker list available if unforeseen problems arise. Know that people have emergencies and cancel. Just post changes in the schedule when they happen.

## **RESOURCES**

### **APPENDIX**

Speaker List Template  
Speaker Schedule Example

Original documents (Word, Excel, & PDF) on ASCLS-NE website

## **ACKNOWLEDGEMENTS**

Shirley Noble  
Roxanne Alter  
Chelsea Reischl

# Awards Chair

## **TERM**

Awards Chair is appointed by the Senior Board Member and serves a one year term.

## **TIME COMMITMENT**

15 hours per month

## **DUTIES**

Distribute, receive, and review awards nominations  
Submit awards nominations to ASCLS-NE Board for review and selection  
Submit award winners to ASCLS-NE Treasurer to prepare checks for awards  
Order plaques and awards for winners  
Notify award nominees of nomination  
Invite award nominators and nominees to awards luncheon  
Prepare schedule and programs from awards luncheon  
Moderate awards ceremony at luncheon  
Update, maintain, and organize the [awards@ascls-ne.org](mailto:awards@ascls-ne.org) email account

## **SUGGESTED SCHEDULE**

August

Attend Annual Leadership Conference  
FILTER Deadline August 15

September

Check the website for the awards information. Check that your name, address, and email are on the awards page. Also, check that your information is on each nomination form. Start on this process early.

October

November

FILTER Deadline November 15: Put information about Awards in the Filter. Include link to awards page.

December

January

Send out the letter to the laboratory managers and supervisors asking for nominations for the Award of Excellence and the Technical Support of Excellence.

February

Submit information regarding nominations to the FILTER editor by February 15th.



# Awards Chair

Encourage leaders, ASLCS-NE members, co-workers, and other colleagues to submit nominations.

FILTER Deadline February 15: Put information about Awards in the Filter. Include link to awards page.

Winter Board Meeting

March

State Award nominations deadline March 1

- 1 Gather nomination information.
- 2 Submit nominations to the board for awards selection.
- 3 Voting can be completed electronically. Set a deadline early enough to prepare plaques etc
- 4 Notify nominees
  - a Notify nominees and invite them to the meeting.
  - b Nominees may attend the awards luncheon at no charge.
  - c Send letter to nominators thanking them for their nomination and encourage them to attend the award ceremony to show support for their nominee. Check with the Senior Board Member for the cost of the luncheon if nominators are not registered for the meeting. Give cost information to nominator as well.
  - d Submit a head count of nominees and nominators (that are not registered for the meeting) to the Senior Board Member for extra lunches to provide.

Prepare for Awards Luncheon

- 1 Order Key to the Future pin. (Previously have used Brown Industries, Inc. Allow at least 2 weeks or pay extra for a rush order)
- 2 Obtain the traveling plaque for the Filter Award. It needs to be engraved with the new winner's name.
- 3 Make a list of all plaques that need to be engraved, including the traveling plaque. Order from Graphic Concepts, Inc. 3924 N. 90<sup>th</sup> Street Omaha NE. 402 572-6868. They have on file what we usually get for plaques. Allow a couple of weeks to get this done. Fax information to Beth. They may ship plaques for a \$10 fee. Double check the plaques for correct spelling of names.
- 4 Get a silver tray engraved for the Filter Award Winner. Previous winners' trays have been round silver plates, engraved with the year, ASCLS-NE FILTER AWARD, and the name of the winner.
- 5 Create nomination award certificates for the Award of Excellence and Technical Support of Excellence on the computer.
- 6 Obtain checks from the ASCLS-NE Treasurer for the Award of Excellence winner and the Technical Support of Excellence winner.
- 7 Prepare a schedule and print programs

April

Present awards to winners at Awards Luncheon.

Attend ASCLS-NE Annual Spring Meeting

Attend Annual Business Meeting

Send emails to award winners for recognition program

# Awards Chair

May

FILTER Deadline May 15: Submit photos of and information about award.  
Submit photos and information to the Webmaster to update the Awards page  
Write letters to the employers of the award winners and submit press release to newspapers as indicated on recognition forms.

June

July

ASCLS National Meeting  
Submit updates for ASCLS-NE Leadership Manual to LDC

August

Attend Annual Leadership Conference  
FILTER Deadline August 15  
ASCLS Annual Meeting  
Give Leadership Development Chair updates for the Awards Chair section of the ASCLS-NE Leadership Handbook.  
ASCLS-NE Leadership Conference  
-Pass on any physical items on to new Awards Chair

## HELPFUL TIPS

Please review awards page (<http://www.ascls-ne.org/awards.html>) for information and nomination forms. Work with webmaster to update page and nomination forms each year.

Award of Excellence  
Technical Support Award of Excellence  
Filter Award  
Key to the Future Award  
Exhibitor Appreciation Award

ASCLS-NE traditionally uses Graphic Concepts, Inc. 3924 N. 90<sup>th</sup> Street Omaha NE. 402 572-6868 to make the awards.

Send or email applications to each hospital laboratory in Nebraska as these nominations come from laboratory team leaders, supervisors, and directors. (I don't see email contacts on this website. Do we have a list of these contacts somewhere?? Have we been mailing applications to hospitals recently or???)

[http://www.nhanet.org/resources/hospital\\_members.htm](http://www.nhanet.org/resources/hospital_members.htm)

National Awards

All information, guidelines, and applications for national awards can be found at [www.ascls.org/about-us/celebrate/scholarships-and-awards](http://www.ascls.org/about-us/celebrate/scholarships-and-awards). The following is just a small sampling.

Keys to the Future Recognition Program

# Awards Chair

## PURPOSE:

This award serves to recognize and reward newly active members of ASCLS-NE who have demonstrated leadership potential by their contributions to our organization. Directing a task force/project or chairing a committee with significant tasks, the outcome of which is considered to be outstanding, creative or of high quality may be used as a guide to determining leadership potential. Officers of ASCLS-NE are not eligible. The Key to the Future winners are selected by the ASCLS-NE BOD. Three winners may be chosen each year. Each person may only receive this award once in a lifetime.

ASCLS-NE recognizes Key to the Future award winners during the Awards Luncheon during the Spring Meeting. Announce all names of award winners during Awards Luncheon. A unique item designed for this purpose could be presented at this time also. Publish names of winners along with all other award winners in the Spring edition of the Filter.

Submit ASCLS-NE Key to the Future award winners for national ASCLS Key to the Future nominations. Application deadline is April 30 of each year. National recipients receive recognition and a unique Key to the Future pin at the annual ASCLS meeting. Up to three awards per state are given. Visit [www.ascls.org/student-center-ascls/53-scholarships-and-awards/99-keys-to-the-future](http://www.ascls.org/student-center-ascls/53-scholarships-and-awards/99-keys-to-the-future) for more information and application form.

## SELECTION CRITERIA:

- 1 The nominee must be a newly active member of ASCLS-NE.
- 2 The nominee should be someone who has demonstrated leadership potential by his or her contributions to our society.
- 3 Officers of ASCLS-NE are not eligible for this award.

## INSTRUCTIONS:

- 1 Complete the information below as thoroughly as possible.
- 2 If you wish, an essay of no more than 200 words explaining why you think the nominee merits the award can be added to the back of the nomination form.
- 3 Return both forms to: (name and address of awards chair)  
Or email to: [awards@ascls-ne.org](mailto:awards@ascls-ne.org)
- 4 All nominations must be postmarked or emailed by March 1. All responses after this date will be ineligible.

## Publications

ASCLS gives out two awards for publications. One category is for the traditional paper newsletter and the other is for a web-based newsletter. If interested in submitting state newsletter for award visit <http://www.ascls.org/about-us/celebrate/scholarships-and-awards>

<http://www.ascls.org/about-us/celebrate/scholarships-and-awards>

Omicron Sigma

Deadline for State Society President nominations: March 1

# Awards Chair

Opportunity for society presidents to recognize members for outstanding service.

Other National Award Opportunities:

Alpha Mu Tau Scholarships  
Board of Directors  
Promotion of the Profession Fundraising Competition  
CLS Distinguished Author  
Constituent Society Membership Awards  
Education and Research Fund Scholarships, Grants, and Awards  
Education Scientific Assembly Student Paper Award  
Forum for Concerns of Minorities  
Keys to the Future  
Member of the Year  
New Professional of the Year  
Scientific Research  
Bio-Rad Professional Achievement  
Student Forum Leadership  
Theriot Award

Region VI Award

Rho Sigma

Awards Luncheon

While planning the Awards Program, be sure to select someone to take photos for publications!!!

Also allow time for Membership Development Chair to present 'Years of Membership' pins.

Have ASCLS-NE President assist with handing out awards.

## RESOURCES

ASCLS-NE Bylaws <http://www.ascls-ne.org/bylaws.html>

<http://www.ascls-ne.org/bylaws.html>

ASCLS-NE Awards Page <http://www.ascls-ne.org/awards.html>

<http://www.ascls-ne.org/awards.html>

ASCLS Scholarships and Awards Page <http://www.ascls.org/about-us/celebrate/scholarships-and-awards>

## APPENDEIX

Press Release Template

# Awards Chair

Award Winner Recognition Template  
Letter to Employer of Award Winner Template

Original documents (Word, Excel, & PDF) on ASCLS-NE website

## **ACKNOWLEDGEMENTS**

Anita Smith  
Joyce Columbe

# Parliamentary Procedures

A. Robert's Rules of Order: [www.robertsrules.org](http://www.robertsrules.org)

B. Presiding Officers

- a. A list of ASCLS-NE Presiding Officers and the definition of a quorum can be found in the ASCLS-NE Bylaws and SOP, Articles VII and VIII  
<http://www.ascls-ne.org/bylaws.html>