

# You're in charge. Now what?

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## What every board needs to know.

# Welcome

## Presentation materials:

- Download the presentation from the AAUW California website home page.
- The meeting recording, a summary Q&A document and example documents will be posted following the meeting.

## Questions:

- Use the Q&A function to pose a question. We'll stop periodically to answer general questions.
- Chat has been disabled.

Check here for answers to all questions.

Question and Answer

All questions (1) My questions (1)

You 09:45 AM

Where can I download the presentation?

Collapse all (1) ^

AAUW AAUW California 09:46 AM

Chat has been disabled. Use the Q&A function

Type your question here...

Type your question here.

Chat Q&A Leave

# Agenda

What should you consider when planning?

- Five-Star Program
- 2021-2022 Marketing Initiatives
- Diversity, Equity and Inclusion (DEI)
- AAUW Strategic Plan

How do you identify your branch priorities?

- SWOT
- Thought Shower
- Survey

How can you use technology to support your plan?

Additional resources

Your #1 job  
Plan your year!

# THE AAUW PROGRAM

## Five-Star Program

### Areas of Focus

Contact: [branch@aauw-ca.org](mailto:branch@aauw-ca.org) Carol Holzgrafe, Director



# The Five-Star Recognition Program

Rewards affiliates (states, branches and other organizations) for aligning their work with the AAUW strategic plan and other initiatives that foster the organization's mission of advancing gender equity for women and girls.

- 3 stars 
  - Danville-Alamo Walnut Creek
- 4 stars 
  - Beach Cities
  - Healdsburg
  - Palo Verdes Peninsula
- 5 stars 
  - AAUW California!!!!
  - Citrus Heights-American River
  - Danville-Alamo-Walnut Creek
  - Long Beach
  - Marin
  - Mid-Peninsula
  - Palos Verde Peninsula
  - San Clemente-Capistrano Bay
  - Orinda-Moraga-Lafayette



# Areas of Focus

Programs
Advancement
Communications and External Relations
Public Policy and Research
Governance and Sustainability

## National program description

- Criteria & Resources
- Submission Form
- Benefits of achieving star levels

Track your progress with the Five-Star Tracking document.

Program time frame July 2021-June 2022



# Programs

- **Appoint a Diversity Officer** to lead diversity and inclusion planning on behalf of the branch with the support of the board. Note: The Diversity Officer does not need to be a board member and does not require a change in bylaws.
- **Host at least four mission-based programs** that align with the AAUW national strategic plan.
  - At least two programs must have a DEI focus.
  - At least one must be in collaboration with one or more branches in your state.

State requirement:

- At least 90% of the branches hold 2-4 programs with a strategic plan focus.

Mission-based programs examples

- Tech Trek
- Lobby day
- Title IX
- Equal Pay Day



# Advancement

- **Raise \$30 per member** in FY22 towards the Greatest Needs Fund.
- **Increase contributions to the Greatest Needs Fund** by 25% from the last fiscal year.
- **Retain at least 90% of your branch membership.**
- **Increase the Legacy Circle Membership** in your branch by 10% over previous fiscal year.
- **Make a branch affiliate contribution to the Greatest Needs Fund** in honor of AAUW's 140th anniversary.

State requirement:

- At least 10% of branches participate in the Five-Star program.

Only three required for a star in this area





# Communications and External Relations

- All existing websites and social media accounts use current AAUW branding and have 3-5 postings with a DEI focus in FY22. (Use the DEI Toolkit.)

State Requirement:

- None additional

National will be rolling out the new branch websites which should use the AAUW logo.

Social Media: Awaiting National creations of branch social media logos.



# Public Policy and Research

- **Conduct an annual meeting with a member of Congress, Governor, or a member of their staff around a strategic plan focus.** Branches in the same state can work in coalition to achieve this goal.
- **Appoint a branch public policy chair** who collaborates with the state public policy chair.
- **Host at least one event** where there is an opportunity to **sign up for the Action Network**.

## State Requirements:

- Ensure that at least 60% of branches have a public policy chair.
- Host a lobby day.

## Resources:

- Action Network [LINK](#)
- 3/22 AAUW California Lobby Day



# Governance and Sustainability

- **Branch board institutes a succession plan** to ensure new ideas and perspectives are included in future leadership.
- **Branch board develops and uses a strategic plan** that aligns with AAUW national strategic plan.

## State Requirement:

- None additional

## Resources

- [Succession Plan Template](#)
- [AAUW Strategic Plan](#)

# AAUW California

## 2021-2022 Marketing Focus

Contact: [marketing@aauw-ca.org](mailto:marketing@aauw-ca.org) Sandi Gabe, President Elect

# M&M's - Marketing and Membership

## Goals

- Raise the visibility of AAUW California across the state.
- Encourage younger members to join AAUW and support AAUW's mission.
- Use social media to greatest advantage.
- Build coalitions with like-minded organizations.

## AAUW California webinars

- [She Who Thrives, Survives](#)
- [Upcoming - 11/16: Finders Keepers-Recruiting and Retaining Members](#)

# Marketing Survey

## Key Survey Findings

- Most recipients elected "very important" for our issues.
- The top three reasons they would join an organization like ours:
  - Advance their career
  - Network with other women
  - Enhance leadership skills
- The least likely reason they would join:
  - Support political advocacy

- Held six focus groups
- Surveyed 202 respondents to test focus group findings:
  - Age: 18 – 29 y/o 38%
  - Age: 30 – 44 y/o 62%
  - Gender: Female
  - Total household income: Majority between \$25,000 and \$74,999
  - Not AAUW specific: “an organization like”

# Marketing Workgroups Launched

## Working Age Recruitment

- Evaluate interest with 2-3 initial programs.
- Develop online branch infrastructure to manage members.
- Develop networking opportunities such as:
  - speed networking
  - mentoring program
  - mastermind groups
- Develop strategy to share and educate branches.

## Retirement Age Recruitment

- Create a toolkit for branches with tips for sourcing and recruiting newly retired employees from large employers and universities.
- Update California brochure.
- Create content to answer newly retired members.
- Develop strategy to share and educate branches.

## University and Organization Collaboration

- Identify organizations.
- Identify connection points.
- Determine how to leverage the relationship.
- Connect with C/U to engage undergrad, grad, faculty and staff.
- Develop strategy to share and educate branches.

## Social Media Content

- Develop a brand voice.
- Identify process to source social media campaign content from branches.
- Develop strategy to share and educate branches.

# DIVERSITY, EQUITY & INCLUSION (DEI)

## Mission

### How to get started

### Resources available

Contact: [diversity@aauw-ca.org](mailto:diversity@aauw-ca.org) Elaine Johnson and Janice Lee,  
Co-Chairs



# Bringing the DEI Mission to your Branch

AAUW seeks to promote inclusion and awareness for all members to create an equitable, sustainable and inclusive membership reflective of today's world.

- DEI resources aim to identify best practices for promoting diversity, equity and inclusion within AAUW and serve as guidelines. It is meant to start the inclusion conversation and incorporate ways for inclusive practices into their branches and daily life.

# DEI - How To Get Started

1. Identify DEI coordinator for your branch to create DEI program and to work with the State DEI Co-Chairs.
2. Review the [DEI Toolkit](#).
3. Develop a branch plan.

## DEI Coordinator

- Applies in-depth knowledge of diversity principles and practices to deliver solutions in areas such as inclusion, member engagement, training and communication
- Serves as key contact for all external diversity partnerships
- Partners with internal AAUW entities to set annual strategies
- Serves as the diversity liaison with key partners: Branch, State, National
- Takes on other diversity projects as assigned

# DEI - Toolkit

## Contents

- Diversity Structure & Planning
- Key Terms & Concepts
- Dimensions of Diversity & Identity
- Getting Started with Difficult Conversations
- Plug & Play DEI Programming

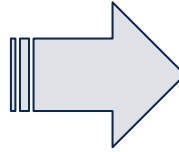
## AAUW California webinars

- [Cultural Diversity, Education and Dignity – Women Globally](#)
- [Racial Injustice: Understanding It, Recognizing It, Talking About It.](#)

# DEI - Diversity Structure & Planning

## Step by Step Process

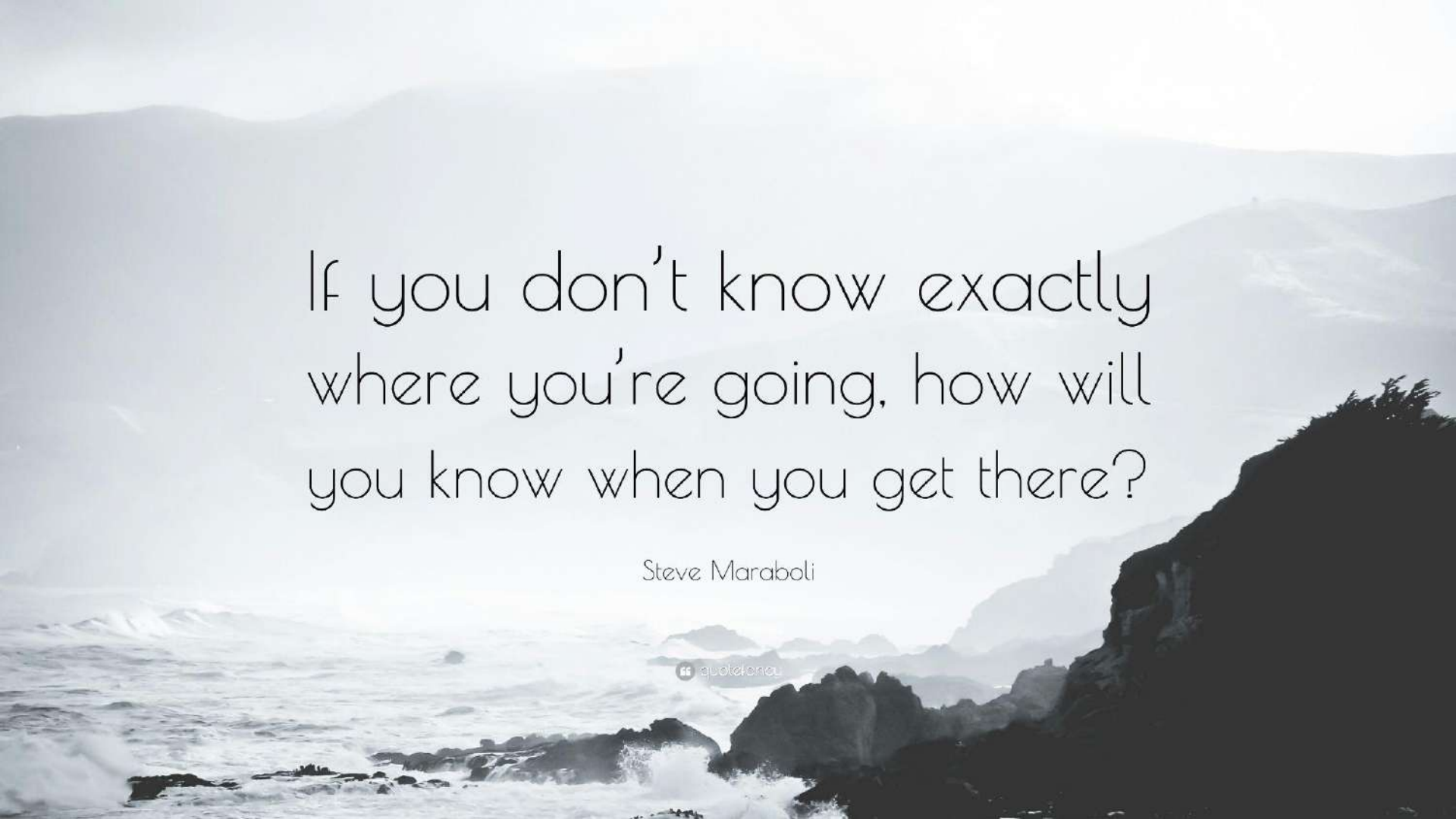
- ▷ Environmental Scan
- ▷ Establish the Scope
- ▷ Determine your Timeline
- ▷ Materials Needed



- Introduction and Community Agreement Review [10 MIN]
- Understanding Organization Inclusiveness [25 MIN]
- Examine Your Current Progress [45 MIN]
- Identify Your Current Stage [30 MIN]
- Create an Action Plan [60 MIN]
- Set Next Steps [10 MIN]

# Strategic Planning

Bring these big ideas into your branch.



If you don't know exactly  
where you're going, how will  
you know when you get there?

Steve Maraboli

“ quote@ncu

# Strategic Planning

In addition to Five-Star Criteria, a marketing focus, DEI and your branch budget and membership resources, your plan should be guided by:

- AAUW National strategic plan
- Branch priorities

## Resources

- [AAUW Strategic Plan](#)
- [Strategic Planning Presentation](#)
- [Strategic Planning Handout](#)

# Economic Security

Shrink the gender pay gaps.

- Champion pay equity federally and in all U.S. states and territories.
- Lead nation in providing salary negotiation programs for employees and tools for employers, reaching 1 million women.

Bolster inclusive career pathways for women in skills and training.

- Develop blueprint and scalable plan for women of color to access STEM careers.
- Expand Empower career development series for women in the workforce by at least 15%.
- Support employers with tools and best practices to create inclusive pipelines and pathways for women, particularly women of color.



# Leadership

Expand number of women in leadership, particularly in STEM.

- Encourage early and mid career women of color to pursue leadership pathways.
- Showcase the impact of leadership development for advancing women, particularly women of color.
- Advocate for leadership transparency & change in education and nonprofit sectors.

# Governance & Sustainability

Implement continuous improvement and best practices in governance, inclusion and organizational functioning.

- Embody the goals and spirit of equity, inclusion, diversity and intersectionality across all AAUW activities and participants, prioritizing women of color. Conduct a SWOT of AAUW's work to ensure inclusion and equity lens and review of structural racism in all work.
- Evaluate and competitively assess AAUW's governance model, ensuring best practices in nonprofit board structure and service.
- Modernize AAUW's technology infrastructure and build strategic, integrated, comprehensive, forward-looking communications and program platforms.

Enhance financial sustainability by increasing and diversifying revenue.

- Complement existing membership model with new modes to engage new audiences, increase donor populations, and achieve greater impact through partnerships.
- Showcase ways affiliates can support national initiatives and priorities in ways that round out the local impact affiliates are making.
- Explore feasibility of a fundraising campaign that will embolden national priorities.

# Education & Training

Champion equal access in education, emphasizing STEM.

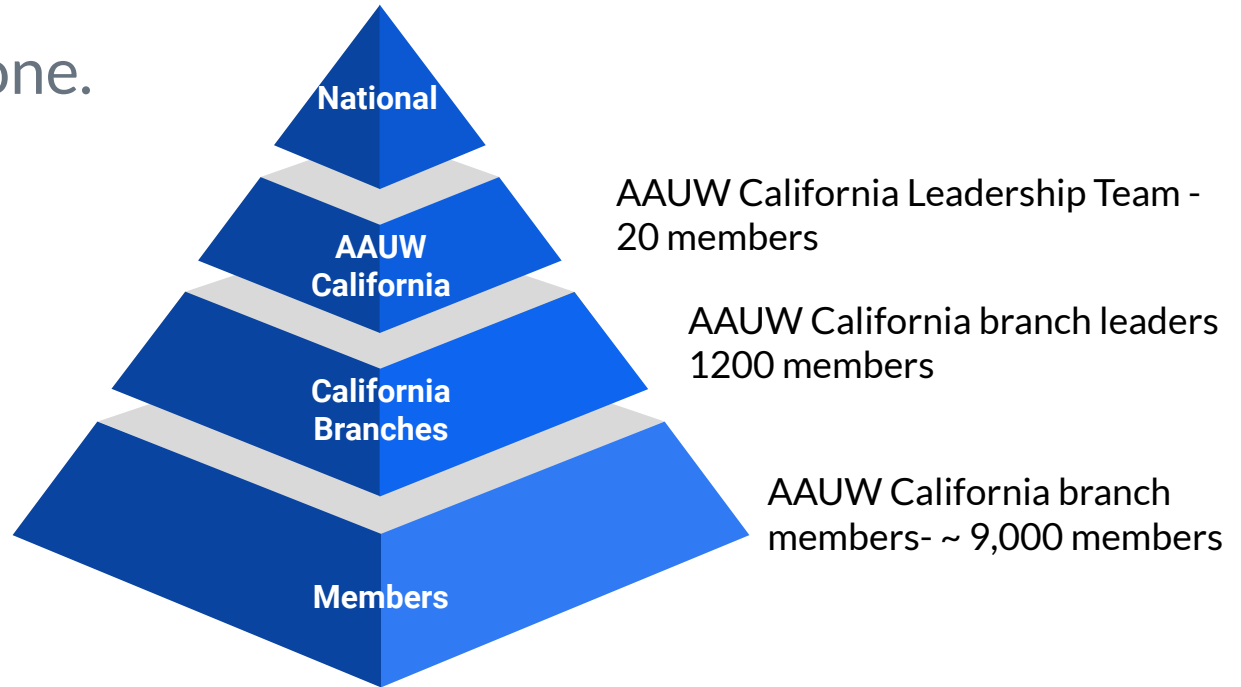
- Increase success for girls and women of color in STEM through improvement of and access to learning environments.
- Support educational pathways for women and girls, particularly STEM and with increased focus for women and girls of color.

Ensure education at every level is free from sex discrimination.

- Protect and expand compliance with Title IX and other civil rights laws across all U.S. states and territories.

# Harness the Power

You're not alone.





# Planning is a Team Effort

How do you get people to help?

- Have fun!
- Engage them.
- Lead them.
- Reward them.
- Match opportunities with interests & skills.
- Be truthful.
- Pare down your branch's activities to what you can support.

Resources:

- [AAUW Leadership Handout](#)
- [Developing and Sustaining Effective Leadership](#)
- [Board Member Rights & Responsibilities](#)
- [Let's Get Disruptive](#)

AAUW California webinar

- [The Care and Feeding of Volunteers](#)

# How to Identify Your Branch Priorities

- SWOT analysis
- Thought Shower
- Branch survey





# SWOT Analysis

Use this process to identify your branches internal strengths and weaknesses, as well as its external opportunities and threats.

Advantages:

- Flexible
- Collaborative
- Invites diverse points of view
- Simple or complex
- Proven

Resources:

- [SWOT YouTube video](#)
- [Example Branch Action Plan](#)
- [Example SWOT Analysis](#)

AAUW California Webinar

- [She Who Thrives, Survives](#)



# SWOT Results - XYZ Branch

## INTERNAL FACTORS

### Strengths

- Leadership team Committed/actively pursuing new projects
- Tech Trek
- Speech Trek

### Weaknesses

- Small membership
- Aging membership
- Weak technology skills

### Opportunities

- Community engagement with projects
- Increased awareness of branch events and projects

### Threats

- Other, active women's organizations – better funded
- Covid-19 related challenges
- Wildfires; floods...

## EXTERNAL FACTORS





# Thought Shower Exercise

Let your members rain their ideas on you.

1. Hold an agenda-less “all hands” member meeting.
2. Find out where you’re starting from. Have your branch leaders share:
  - Two things that went well
  - Two pain points
3. Hang blank sheets on the wall.
  - What should we KEEP?
  - What should we STOP doing?
  - What NEW things should we do?



This can be easily conducted online with a “virtual” whiteboard at [Ideaboardz](#)



# Thought Shower Exercise (continued)

4. Give members sticky notes and five minutes to write unlimited thoughts on any topic (one per sticky) and place them on the sheets.
5. Read the stickies aloud. Do a “dot vote.” Members place one to three adhesive dots (per sheet) on the stickies that they support on each sheet.
6. Group together similar ideas. Rank order the stickies with the most stars.
7. Discuss the results: Is that a good priority at this time? Achievable? Fills a need? Supports Five-Star? Gives members opportunities?

## Trigger Topics for Sticky Notes:

- Branch projects
- Programs
- Communications
- Publicity
- Member opportunities
- Community presence
- Fundraising
- Interest groups
- Member gatherings
- Administration
- Mission
- Other



# Branch Surveys

Surveys are useful tools to get the pulse of your members. They serve many functions:

Help you understand your members' interests

- What projects do your members support?
- Why did they attend (or did not attend) events?

Help you organize your branch

- Interest group/section signups

Help you evaluate your programs

- Periodic check in

## Resources

- [Sample branch survey](#)



# Constructing a Branch Survey

- Keep it simple and short.
- Know what information you really need and why. Ask yourself:
  - Will I use this information?
  - How will I use it?
- Use multiple choice, check boxes and drop down lists.
- Stay away from asking double-barreled questions. Separate into two questions.
- Test your survey before you send it and verify you can use the output.

## Other Considerations

- Confidentiality

## Sending options

- Send a link via email
- Send it via email
- Embed it into a webpage



# Sample Demographic Questions

- How long have you been a member?
- How old are you? (choose a decade)
  - 20-30
  - 30-40
  - 40-50
  - 50-60
  - 60-70
  - Over 70



# Sample Programs Questions

- Which programs were you able to attend last year?
- What were the reason(s) you might have missed a program?
- Should we change the structure of the programs?
- What do you think of the program topics over the past couple of years?



## Sample Involvement and Volunteering Questions

- Which of our service projects and fundraisers were you able to help with last year?
- Do any of our service projects tap YOUR passions?
- How well do we communicate our volunteer needs?
- In general, how would you describe your level of involvement?
- If you feel you are not very engaged, what might be the reason?



# Sample Communication Questions

- Overall, how well do you feel you're kept in the loop?
- When you want to see what's going on, where are you most likely to look?
- How regularly do you read the newsletter?
- If you don't read it regularly, why not?
- How frequently should we publish a newsletter?
- How would you like to receive the newsletter?
- What parts of the newsletter do you generally read?
- Do we send email communications at the right frequency?
- Do you want to continue to receive robocall reminders?





# Sample Event/Project Questions

- How likely would you be to attend a monthly meeting?
- If you wanted to attend monthly meetings, what day(s), time(s) location(s) would you prefer?
- Which of these member events were you able to attend (or participate in) last year?
- What were the reason(s) you might have missed a member event?
- Which of our community service projects do you feel most strongly about?

# Using Technology

Contact: [webteam@aauw-ca.org](mailto:webteam@aauw-ca.org) Sandi Gabe, AAUW California Webmaster

# Technology Can Make a Difference

- Maintain your branch website.
- Invest in Google Workspace.
- Use social media.
- Hold meetings virtually with Zoom:
  - [Basic](#) and [advanced](#)
- Gather feedback using survey tools:
  - Survey Monkey
  - Google Forms
- Remind members of upcoming events with Phonevite.





# Branch Website Basics

Key information to include:

- Links to your social media tools: Facebook, Instagram, Twitter, LinkedIn.
- Links to AAUW California and AAUW National.
- Branch description on the front page.
- Join and donate information. Make it easy. Don't bury the links.
- Current [Logos](#) - New AAUW National logo is available. Note: Branch logos not yet available.

## Getting started

- No charge
  - AAUW National set up - no charge
  - Maintain your site
- \$119/year -AAUW maintains your site
- National contact: [siteresources@aauw.org](mailto:siteresources@aauw.org)

## AAUW California Webinar

- [Website Maintenance](#)

Keep it up to date! Limited resources? Keep it *evergreen*.



# Website - Join information

- Provide a link to the [AAUW National website join page](#).
- Gather branch specific information when you welcome them to the branch.

The screenshot shows the AAUW Mariposa Branch website. The navigation menu includes HOME, ABOUT, COMMUNITY PROJECTS, CALENDAR, FUNDRAISERS, INTEREST GROUPS, NEWSLETTERS, and MEMBERS. The 'ABOUT' menu is expanded, showing options for BRANCH LEADERSHIP, MEMBERSHIP INFORMATION, and JOIN NOW. The 'JOIN NOW' button is highlighted with a red box. Below the navigation, there is a search bar and a section titled 'Why should I join?' with a bulleted list of benefits. A section titled 'Should I join even if I can't attend meetings?' follows, with a paragraph explaining the value of membership. At the bottom, there is a section for 'AAUW's Value Promise' and another 'MEMBERSHIP Join Now' button, also highlighted with a red box. On the right side, there is a calendar for the AAUW Mariposa Branch, showing events for December 14, January 7, 8, and 14, 2020.



# Website - Invite Donations

- [Create a PayPal Account.](#)
  - You'll need to know your bank account information.
- Set up a PayPal donation button.
- Send the embed code to [siteresources@aauw.org](mailto:siteresources@aauw.org) and request that they post it on the website.





# Social Media - Use the Right Tool

Facebook	Instagram	Twitter	LinkedIn
Inclined towards recent updates. Encourages users to share fun elements.	Dedicated mainly to pictures	Sharing serious elements such as news.	LinkedIn is the place to find other professionals and be found by other professionals.
Most popular social network among <b>middle-aged</b> (in internet terms) users.	Users tend to be very young—in their <b>teens and twenties</b> —and very active and loyal.	Audience <b>skews younger than Facebook's</b> and is primarily a source for news.	60.1 percent of global LinkedIn audiences are between <b>25 and 34</b> years old.

## Reminder: Do not post:

- Anything endorsing a political party or political candidate. AAUW is legally nonpartisan and cannot support or endorse any candidate or party.
- Anything that could be offensive on the basis of race, creed, sexual orientation, gender identity, national origin, religion, disability, age, or any similar grounds.
- Anything that is not in line with AAUW's mission.

# Google Workspace

## Google Workspace

- Create an account with a generic username ([admin@aauwbranch.com](mailto:admin@aauwbranch.com)).
- Create email aliases for your key positions (president@aauwbranch.com.)
- Create groups for your Interest Groups ([book@aauwbranch.com](mailto:book@aauwbranch.com)).
- Set up file folders to share documents.
- Create a branch calendar and share it on your website.

- Manage your communication needs for \$6/month!
- Assure continuity from year to year by storing and sharing documents.





# Survey Tools

- [Google forms](#) - great for easy questions. Included with Google Workspace.
- [Survey Monkey](#) - for more complicated questionnaires (\$32/month).
- [Zoom poll](#) - included with Zoom. Can be set up before event. Limited to single choice and multiple choice questions.
- [Zoom survey](#) - included with Zoom or link to an external survey.



# Phonevite

- Send short, timely communications and reminders for key branch events.
- Pay only 5 cents per call, which means you can reach 100 members for only \$5.00.
  - Set up a free account and fund it with a few dollars on a credit card.
  - Upload a file of all your members' phone numbers.
  - “Ask” the Phonevite system to call you to record (and re-record and re-record!) your message on your phone until you like it.
  - Schedule when you want the calls to be placed. You can set up a call for that very day or weeks in advance.
- Use this service judiciously and to limit your calls to a maximum of 30 seconds as a courtesy. If the member is not home, [Phonevite](#) will leave the message on the answering machine.

# Additional Resources

# Branch Activity of the Year Awards

## Looking for inspiration?

- Take a look at last year's submissions for novel, inspirational, reproducible programs that promote AAUW's mission and image.

## Want to apply?

- This year we'll honor three to five branches. Watch for the application in October.

# Branch Newsletters

Branch newsletters are a valuable source of information for branches, Interbranch Councils and the state board of directors.

- Share your branch newsletter so others can glean valuable ideas from your successful programs and events. Send a copy of your newsletter to [branchnewsletters@aauw-ca.org](mailto:branchnewsletters@aauw-ca.org).
- Subscribe to the branch newsletters. Send a request to [webteam@aauw-ca.org](mailto:webteam@aauw-ca.org) to be granted permission to the email box and you'll receive an email any day that contains links to the newsletters received in the past business day. Note: An archive can be located [HERE](#). You must be an AAUW California member to subscribe to and view newsletters.



# Finance

The AAUW California fiscal year:  
July 1st - June 30th

- The **liability insurance** protects the directors and officers of AAUW California as well as the branch elected officers from being sued personally.
- **Directors and Officers (D&O) Insurance** indemnifies directors and officers of nonprofit organizations for damages and defense costs arising from lawsuits alleging various “wrongful acts.”

## Resources:

- [Branch Treasurer Resources](#) (includes insurance form)
- [Financial Documents and Deadlines](#)
- [Branch Insurance Q&A](#)

## AAUW California Webinars

- [How to be a branch treasurer](#)
- [Show Me the Money: Fundraising Ideas For a COVID World](#)

# Communication Tools

## [Board to Board](#) (B2B)

Monthly publication from the AAUW California leadership team to branch boards

## [California Connection](#)

Monthly publication to all AAUW California members

## [Directory](#)

Find a branch or state leader

## [State Committees](#)

Learn about the scope of each committee

A graphic for AAUW of California's 'Ask Us First' initiative. It features a dark blue background with the text 'ASK US FIRST' in large white letters. To the right is the AAUW of California logo. Below the text is a white wavy line with small colored dots. At the bottom is an orange banner with the email address 'AskUsFirst@aauw-ca.org'. Below the banner is a dark blue box containing white text for 'Key Contacts' and three underlined links: 'About the Leadership Team', 'Board connection with IBCs/Branches', and 'Board connection with IBCs/Branches'.

Key Contacts

[About the Leadership Team](#)

[Board connection with IBCs/Branches](#)



# Let's Take a Drive on the Website

- Where can you find key information?
- How is it organized?
- How can you list your branch/IBC events on the calendar?
- Where can you find upcoming and past webinars?