Association of American Geographers
Specialty and Affinity Group
HANDBOOK
2016 - 2017

AAG Specialty & Affinity Group Handbook Table of Contents

a) Organizational/Definitional Issues

a. Structure/Purpose of AAG Specialty and Affinity Groups

AAG Specialty and Affinity Groups are voluntary associations of AAG members who share interests in regions, topics or affinities. They are not independent entities separate from the Association of American Geographers. They do not have separate legal organizational standing.

b. Establishment of AAG Groups in AAG Constitution

Article VII of the AAG Constitution, called "Specialty Groups" enables the establishment of these groups:

> *"Groups with special interest in specific subfields of geography may be formed by the Association, under such rules and procedures and with such support as the Council may prescribe, to sponsor professional activities designed to advance the collective state of knowledge in those subfields."*

c. Procedures for Formation of new Groups

The AAG Council is the entity which has the sole authority to receive, consider, and recognize the formation of Specialty and Affinity Groups. They hold two meetings per year at which any requests submitted may be considered, once each Fall, and also each Spring just prior to the AAG Annual Meeting.

The formal procedures to create a new AAG Specialty or Affinity Group are to collect original signatures of at least 50 current paid members who support the creation of the new group and its mission. These original signatures should be submitted along with the group's creation documents (mission statement, by-laws, and constitution; see section 1.d for more information) and the names and contact information of the group's organizing committee.

The request packet should be submitted as a complete set and should be mailed to the AAG office a few weeks in advance of the next Council meeting where the group requests it to be placed on the Council agenda for consideration. However, it is recommended for group organizers to communicate directly with the AAG Staff well in advance, to consult about procedures, establish a reasonable date for submission, and coordinate the process. Digital copies of the packet, except for the original signatures, are also encouraged to be sent by email to the appropriate staff person.

The AAG Council renders decisions weighing a number of factors, including whether the activities are already well established within existing specialty or affinity groups or whether the new group would truly represent a new area that needed to be addressed within the kind of framework, system, and character of AAG Specialty and Affinity Groups. AAG Council is receptive to any and all topics and subjects related to geography and the geography

community. However, the AAG Council has established a clear policy not to encourage proliferation of new groups unnecessarily or take away from the activities of existing healthy groups. Careful consideration should be paid to the proposed scope and wording of the group's description/purpose, rationale, and so on in creation documents. Organizers are also encouraged to consult with existing groups to determine whether the desired goals, activities, or mission would be considered in the framework or ongoing activities of those existing groups. It bears noting that the formal creation of a specialty group is not necessary for organizing sessions around particular focused topics at the AAG Annual Meetings or for other informal activities, special events, or exchanges among groups of members.

Organizers are notified of the decision of the AAG Council by the AAG Staff shortly after the meeting at which it was considered.

d. Specialty and Affinity Group Mission Statement, Constitution and Bylaws

The creation and governing documents of each group are to be made explicit in its formation and should include the following:

A mission statement or a very brief description of the group's purpose, articulated for both the members of the group and for a broader audience. It should focus on what is important about the group and be written in a way that communicates a sense of direction for the group.

A group constitution should be composed that identifies fundamental organizational statements about structural elements of the group, i.e. characteristics that are not subject to frequent change. It should contain the fundamental principles which govern the group's identity and operation, such as, but not limited to the name of the group, purpose, membership requirements, officers, meetings, provisions for amendments to the constitution, and requirements for adopting the document.

The bylaws should provide more detailed guidance on the methods of operation, particularly policies that are best documented in written form. Bylaws prescribe specific procedures to conduct business in an orderly manner and can be changed more easily as the needs of the organization change. They should not contradict the constitution, and may address such topics as membership responsibilities, dues, duties of officers, and other specific policies and procedures as necessary.

The AAG Office does not automatically preserve governing or other documents for specialty and affinity groups (e.g. bylaws or annual reports), although some may be found in the AAG Archives and/or submitted for inclusion to the AAG Archivist for consideration.

e. Officers of Groups

It is anticipated that each newly recognized Specialty Group will hold an organizational meeting at the next annual meeting of the Association, after its approval. The organizational meeting typically is called and chaired by a member of the organizing committee and should have as one of the first order of business the election of its officers.

Each Specialty Group elects officers with clearly defined roles, defined terms and limits on the number of consecutive terms. Normally, a Specialty Group Board consists of a Chair, possibly a Vice-Chair or Co-Chair, a Secretary/Treasurer, and from two to five activity directors or coordinators. Normally, officers should serve two-year terms and the Chair should serve no more than two consecutive terms. All officers must be regular AAG members. Student representation on Specialty Group Boards is encouraged.

Contact information for officers should be maintained up to date at all times on the AAG website (for details on how, please refer to this document, section 5, communications).

f. Liaison with AAG Staff and AAG Council

The Chair of the Specialty or Affinity Group is responsible for keeping up to date information on officer contact details, finances, meeting plans, and other matters with the respective responsible person on AAG Staff. It is important in order to avoid confusion, that all correspondence includes the full name of the group, rather than just an abbreviation, since there are often a number of groups with the same possible acronym. The Chair also receives information from the AAG office and shares information with other chairs via the Specialty Group Chairs community on the AAG Knowledge Communities at http://community.aag.org/sgchairs/. Section 5 provides further details on electronic forums for information exchange.

The AAG Council usually coordinates direct communication with groups through the AAG Staff and/or the Chair of the National Councillors. (See also section 2.a).

g. Difference between Affinity Groups and Specialty Groups

The AAG Council at their Meeting in November 2005 unanimously confirmed that the procedure for establishing and maintaining Affinity Groups is identical to that for establishing and maintaining Specialty Groups.

b) Group Activities and Responsibilities

      a. Typical Group Activities

The activities of a Group might include, but are not limited to, the organization of sessions, field trips and/or workshops for national and/or regional meetings; organization of special seminars, symposia, and infrequently, mini-conferences; communication with members via listservs and/or AAG Knowledge Communities; offering of student paper awards, travel grants, or other recognitions; publication of a regular newsletter; and other publications.

      b. Reports to AAG Council

Each Group is expected to report annually to the AAG Council. Reports are uploaded at any time to the online system (see section 5) after each AAG Annual Meeting (in the Spring). The AAG National Councillor Chair, in coordination with the AAG Office, monitors the activities of the Specialty and Affinity Groups via these written reports submitted online, and compiles and reports findings to the AAG Council directly at each Fall Council meeting. The summary usually includes whether each group is operating in a manner per the current guidelines established by the AAG Council.

Groups are encouraged to upload updated reports as soon as possible after each Annual Meeting so that information can be captured and recorded more easily. If a change of officers occurs at the annual meeting, the outgoing chair should be responsible for submitting the report. It is critical that new officer contact information is uploaded to the online system as soon as possible to be sure communication reaches the appropriate leader, as this is the only way that AAG Staff and Council are aware of who is Chair. Once the contact information for officers is updated online, the new Chair will be added to the Specialty Group Chairs community by AAG Staff.

A reminder to ensure that the reports are updated prior to their review by Council each Fall is sent to known current Chairs through the Specialty Group Chairs community by AAG Staff. If groups have already updated their reports and information following the last meeting, the reminder may be disregarded. The AAG Office does not keep digital or hard copies of reports from year to year, so each group should retain copies of their own annual reports in their archives and in the documents library of their AAG Specialty Group Knowledge Community.

The following outline provides a guideline for what to include in Specialty and Affinity Group reports to Council:

- Mission Statement
- Dues Information
- Chair/ Board of Directors / Officers Listing / Newsletter Editor / etc
- Accomplishments (past year)
- Activities Scheduled (coming year)

- Future Plans and Directions
- News from the Business Meeting at the most recent AAG Annual Meeting
- Student Paper Awards or other Recognitions, if applicable
- Newsletter information
- Plans for the next AAG Annual Meeting
- Membership and Participation
- Financial Report (If funds are being managed by AAG, statements can be requested from the AAG Membership Director directly for inclusion in the report. If funds are held externally, the report must include the name, account number, and bank where the account is held.)
- Suggestions for Council

c. Organizing Sessions at AAG Annual Meeting

It is expected that Each Specialty Group organizes at least one session or workshop at each annual meeting of the Association, subject to scheduling by the Program Committee and AAG Staff, who retain final responsibility for the program of the meeting.

Further information about Specialty and Affinity Group activities related to AAG Annual Meetings in Section 3.

d. Meeting Once per Year

It is expected that each Group meet annually. The AAG Conference Director will automatically schedule a business meeting for each Specialty and Affinity Group during the AAG Annual Meeting in time slots reserved for business meetings on the conference agenda. Requests for changes in schedule should be directed as soon as possible to the Conference Director. Great effort is taken to avoid overlap in scheduling meetings at the same time among groups with large numbers of members in common. Joint business meetings are encouraged.

e. Membership

Specialty and Affinity Groups with one hundred or more members will be considered active per current resolutions established by the AAG Council. A Specialty or Affinity Group with fewer than one hundred members in a given three years from its first year (or from 1993 for those groups originating before that time) will be urged to attract at least 100 members, merge with another group, or may be declared inactive after careful consideration by the AAG Council.

The AAG Office includes a list of all Specialty and Affinity Groups with annual renewal forms, membership applications, and online.

AAG members may elect to be members of a total of up to six (6) Specialty or Affinity Groups by paying the dues each group has established. AAG members who join by way of an Associate

Membership Program, which are processed by the sister organization, do not have a means of automatically signing up for Groups, unless the sister organization offers this option. To ensure these members have the opportunity to join AAG Specialty or Affinity Groups, a message will be sent as the membership commences, inviting them to consider joining AAG groups, with instructions on how to do so. Also, AAG members who join by way of the AAG Developing Regions Membership Program may do so free of charge, unless a particular Specialty or Affinity Group opts out of the waiver program.

Chairs can obtain up-to-the-minute tallies and listings of its membership by online access via the password-protected group webpage administration pages (more detail below in section 5).

f. *Ex Officio* Representation on AAG Committees

Chairs or their designees of the regionally-oriented Specialty Groups are also named as *ex officio* members to the AAG International Research and Scholarly Exchange Committee. These include the Chairs or Designees of the Africa Specialty Group; Asian Geography Specialty Group; Canadian Studies Specialty Group; China Specialty Group; Development Geographies Specialty Group; European Geography Specialty Group; Latin American Specialty Group; Middle East Specialty Group; and the Russian, Eurasian, and Eastern European Specialty Group. A current charge to this committee is available from the AAG Office.

The AAG Council is solely responsible for appointing *ex-oficio* positions as well as all members of AAG Committees. However, Specialty and Affinity groups are encouraged to submit nominations for AAG Committees for vacancies each year to the AAG Secretary prior to the Spring Council meeting.

g. Use of the AAG Logo/Seal

Use of the AAG seal by regional and specialty group publications requires Council approval (per resolution at the April 1978 meeting).

h. Decommissioning Process and Disposal of Excess Funds

Per current AAG Council resolution, groups with one hundred or more members will be considered active. A group with fewer than one hundred members in a given three years from its first year (or from 1993 for those groups originating before that time) will be urged to attract at least 100 members, merge with another group, or may be declared inactive upon consideration by AAG Council.

A group that has not submitted an annual report to AAG Council within the last three years may be approached by the AAG National Councillor Chair to determine status of the group and identify a future course of action.

In the event that a Specialty or Affinity Group is declared inactive by the AAG Council, the AAG

Secretary will notify the current or last known chair of the Council's action. In the event that a Specialty or Affinity Group is declared inactive, its funds revert to the AAG, per council resolution at their April 2005 meeting.

c) **Annual Meeting Matters**

   a. **Field Trips and AAG Policy**

AAG Annual Meeting field trips organized by Specialty or Affinity Groups will be managed in a manner identical to other AAG field trips, in coordination with the AAG Conference Director. If any net income is generated, it will revert to the Association per existing Council resolution.

In keeping with the AAG's effort to promote the fair and equal treatment of members, field trips organized by AAG members or specialty groups at the annual meeting will, as a rule, be open to all members of the AAG. In instances where a member or specialty group wishes to organize a field trip that explicitly excludes any group of AAG members, the organizer will petition the AAG Council for an exception to this policy by the date when field trip proposals are due. If Council grants the exception, notice will be given in the AAG website, along with an explanation of the reason for the exception, per AAG Council resolution in April 2005.

   b. **Workshops**

Although it is less common for Specialty & Affinity Groups to organize workshops at annual meetings, they are welcome to do so.   Annual meeting workshops organized by Specialty & Affinity Groups will be managed in a manner identical to other AAG workshops, in coordination with the AAG Conference Director. Groups will be responsible for the content of workshops they sponsor. All workshop participants must register for the annual meeting at which the workshops are held. AAG may cancel any workshop for which registration is insufficient.

   c. **Sessions**

It is expected that Specialty Groups sponsor or co-sponsor at least one session at each annual meeting. A census of attendance taken at meetings indicated specialty or affinity group sponsorship tended to increase attendance at particular sessions. Still, the AAG Council urges groups to work on maximizing the quality rather than the quantity of specialty or affinity group sessions. Specialty & Affinity Groups are also encouraged to coordinate and co-sponsor sessions with other groups to promote greater attendance and to foster intradisciplinary collaboration.

Sessions must receive official sponsorship by specialty groups in order to be so listed in the annual meeting program. Sponsorship is indicated by selecting the appropriate group name listed as sponsoring organizations on the drop-down menu for submitting papers, panels, and posters in the AAG online abstract submission console.

While most papers that are submitted but not already linked to an organized session are grouped by the annual meeting committee directly into sessions, Specialty and Affinity Groups may be requested to include them in existing Specialty or Affinity Group sessions.

Specialty and Affinity groups are encouraged to organize sessions at AAG Regional Division Meetings. Specialty and Affinity groups are also encouraged to continue to cross-promote and organize special sessions at meetings of cognate disciplines. Specialty and Affinity groups are encouraged to organize 'state of the art' sessions at annual meetings, featured in the program as highlighted sessions (see also 3.e).

(Items formally resolved in this section arise from the AAG Council Meeting in March 2002).

d.   Business Meetings

The AAG Conference Director will schedule a business meeting for each Specialty and Affinity Group during the AAG Annual Meeting. Great effort is taken to avoid overlap in scheduling meetings at the same time among groups with large numbers of members in common. Joint business meetings between or among related groups are encouraged. Any request for changes to the business meeting schedule should be addressed immediately to the Conference Director.

If audio-visual equipment such as LCD projector, Slide Projector or Overhead Transparency Projector is needed for business meetings, a request should be made to the AAG Conference Director. This equipment will not necessarily be already available in meeting rooms, to keep annual meeting costs down.

e.   Highlighted Sessions in the Program

Specialty and Affinity Groups are invited to each identify a highlighted session that they would like most to be featured prominently in the AAG Annual Meeting Program. Those sessions should be brought to the attention of the AAG Conference Director for inclusion during the submission process. A message inquiring about highlighted sessions is generally circulated in the weeks prior to the AAG Annual Meeting.

f.   Specialty and Affinity Group Chairs Meetings

Each year a meeting of the Specialty and Affinity Group Chairs during the AAG Annual Meeting is organized by the AAG Staff and presided over by the AAG National Councillor Chair. This meeting typically occurs at the beginning of the week, so Chairs may be able to share information exchanged at that time with attendees of their respective Group Business Meetings that are held throughout the week.

The agenda usually contains the following items:
- Call to Order
- Welcome by AAG National Councillor Chair
- AAG Spring Council Meeting Update
- Specialty Group Membership Services
- Online Specialty Group Information Update Request
- AAG Education, Research, and Outreach Program News
- General Information on the AAG Annual Meeting (Attendance, Special Group Session Sponsorship, AAG Awards Luncheon, Specialty Group Highlighted Sessions, Other information)
- Other Business
- Adjourn

Chairs are strongly encouraged to attend. Incoming chairs are also encouraged to be present. If the Chair(s) are unable to attend, another officer or group representative should be in attendance.

In addition, the AAG often also offers an additional technical orientation by request so that newly elected or incoming chairs in particular may be briefed on the services and functions that the AAG provides in support of groups. These meetings will be publicized in the onsite conference program and in advance via the knowledge communities.

g. Registration for AAG Annual Meetings

All current AAG policies regarding registration remain in effect for all meeting attendees, including participants invited by groups. Specialty and Affinity Groups do not have the authority to waive, reduce, or otherwise alter the registration policy of the AAG; however, they may choose to sponsor part or all of the registration and/or travel costs of any attendee from their group financial accounts.

AAG Groups are also encouraged to utilize the existing programs within the Association to help defray the costs of annual meeting attendance, such as by submitting applications to the AAG Enrichment Fund, the Conference Assistants Program, or other mechanisms publicized on the AAG website.

h. AAG International Reception

In keeping with past tradition, regionally-oriented Specialty Groups are encouraged to co-sponsor and participate in the AAG International Reception.

i. AAG Awards Luncheon

Please see information below, section 4.c.

d) Specialty and Affinity Group Paper Competitions and Awards

    a. SG/AG Paper Competitions or Travel Awards

Specialty and Affinity Groups may offer student or other paper or poster competitions and/or travel support programs. Each group will manage their own competition(s) at their discretion, including but not limited to defining eligibilities, issuing announcements, organizing reviews, making selections and giving awards. The AAG Office can support these processes. Groups are encouraged to post information on their homepages, to which the main AAG Annual Meeting webpage provides hyperlinks.

(For information on announcing awardees in the newsletter, see 4.d).

    b. Group Awards Creation and Administration

Specialty and Affinity Group awards should be approved by the AAG Council.   They should be administered by the groups themselves, with support from the AAG Office as needed for things such as printing calls and news on the AAG website. Awards that provide cash prizes or travel support should ensure that sufficient funds are available in the respective group account.

    c. AAG Awards Luncheon

Specialty or Affinity Group awards may be conferred at the Association's annual awards ceremony or at another event such as the group's business meetings at the discretion of each group.

If any one or more of the following is desired: that the award be either 1) conferred at the AAG Awards Luncheon, or 2) accompanied by funds from a group bank account that is held with the AAG office. It is **imperative** that an AAG Awards Form is completely and legibly filled out for each award. Some information (such as a funding recipient's mailing address) is required by law for the AAG to collect, and other information (such as the phonetic pronunciation of uncommon names) assists the AAG in conducting a quality event.

Digital versions of the Award Forms are provided to all Chairs through the AAG Knowledge Communities few weeks prior to the annual meetings, along with detailed instructions and deadlines. Copies may also be obtained at the AAG Registration Desk on site at the meetings. A form-fillable pdf version of the current form is posted on the documents library of the Specialty Group Chairs Knowledge Community at http://community.aag.org/sgchairs/.

The only awards that will be announced at the AAG Awards Luncheon are those for which the recipient will be present at the luncheon to receive his or her award in person. Please check the box on the form indicating recipients who will attend the awards luncheon. However, all

Specialty and Affinity Group Awards for which forms are received, regardless of whether they are formally presented at the annual meeting or require award checks, will be announced on the AAG website. AAG will request this information on the form or to be submitted by email in order to be included in this announcement.

Please give completed award forms to the AAG staff member on duty and indicated on the form as soon as the award recipients are identified. If the award will be presented at the AAG Awards Luncheon during the conference, luncheon attendance of the awardee should be confirmed prior to submission. Checks drawn upon group bank accounts managed by the AAG can be requested on these same forms. Forms should be submitted no later than the time indicated on the form the evening prior to the luncheon (this is typically in the afternoon or on the evening prior to the luncheon). Awards received after the deadline unfortunately cannot be announced.

Items to accompany a group's awards (certificates, plaques, etc.) should also be given to the designated AAG Staff member before the deadline along with the form. Both the name of the group awarding the honor and the recipient of the award should be clearly identified on any accompanying items.

If the award will be presented at some other event, meeting, or session at the AAG Annual Meeting, and if it carries a check drawn from a group's bank account that is managed by the AAG office, the form (requesting the check) should be submitted with as much time in advance as possible to the designed AAG Staff member to allow sufficient time for printing and signing of checks for the other event. Alternatively, checks can also be later mailed to recipients.

Balance inquiries of group's bank accounts managed by the AAG require that the **Chair or Treasurer** must contact the AAG Membership Director ahead of time.

Groups are encouraged to pay the cost of the luncheon for those receiving their awards at the event. Sign-up is available when registering online or on the events form if already registered. The events form is also available at the AAG Registration Desk onsite at the conference or knowledge community.

d. *Awards Information Published on AAG Website*

Announcements for group competitions with deadlines on or before the AAG Annual Meeting abstract deadline should be sent to newsletter@aag.org. Announcements should be limited to about 250 words. If desired, a URL may be included, where interested individuals may obtain detailed application instructions.

All Specialty and Affinity Group Awards, for which forms are received, regardless of whether they are formally presented at the annual meeting, will be announced on the AAG website. Thus, copies of the award form should be completed and submitted to the Membership Director for all awardees to be included in the website listing.

e) **Communications**

a. **AAG Website SG/AG Display**

All current AAG Specialty and Affinity Groups, with links to their websites are listed here: http://www.aag.org/cs/membership/specialty_groups.

b. **Individual SG/AG Websites (offsite)**

Groups may post descriptions and a message from the Chair, along with officer contact information and current dues on the AAG Specialty Group Knowledge Community display page. Individual webpages not hosted from the AAG Knowledge Communities may be linked from the Specialty Group community display page.

c. **SG/AG Admin Login Instructions**

You may log on to the AAG Specialty and Affinity Group Knowledge Communities using the following information:

- Go to http://community.aag.org
- Click the blue "Sign In" button in the upper right hand corner
- Enter your AAG username and password and click the "Login" button. Please email password@aag.org if you need assistance with your username or password.
- Once you have logged on, you'll be able to make any necessary edits to officers, subscription dues, etc, by clicking on "settings" button next to community name (See Appendix 1 for an example). Only those with admin access will see the settings button and have access to editing and reporting functions. Please note to formally change your dues charged when members sign up for your group, you must have the Treasurer or Chair contact the Membership Director.
- Once notified of a new chair, AAG staff assigns the chair admin access. Chairs can then grant admin access to other officers. Appendix 3 gives detailed instructions on granting or removing admin status.

d. **Password and Password Retrieval**

If you forget your AAG username or password, please send a message to password@aag.org to have your credentials reset.

e. **SG/AG Membership Lists**

After logging on to the AAG Knowledge Communities at http://community.aag.org and navigating to your Specialty Group's community page, you may download a file of your current active members by clicking on the settings button and selecting reports. There are several report options but Current Community Members will give you the up to the minute

membership roster for your group. Appendix 4 gives detailed instructions on pulling and formatting membership rosters. Please note that all AAG staff will appear as part of your roster. You must remove them to get a true membership count.

f. AAG SG/AG Chair Knowledge Community

The Chair of the Specialty or Affinity Group is responsible for keeping up to date information on officer contact details by uploading this information to the display page (see also 5a and 5c). Email addresses from Chairs and Co-Chairs from this display page are added to the AAG Specialty and Affinity Group Chairs Knowledge Community by AAG Staff. The Chair(s) receive information from the AAG office and can share information with other chairs via this Specialty and Affinity Group Chairs Knowledge Community. Please ensure that your spam filter or other email security settings allow messages to come from Mail@connectedcommunity.org.

g. Individual SG/AG Knowledge Communities

All members of the AAG Specialty and Affinity Groups may access their respective group Knowledge Communities as follows: Log on to the AAG Knowledge Communities from the link on the homepage at **http://community.aag.org**. On successful login, click on the **"Communities"** tab and then "**My Communities**". A list of the Specialty group communities to which you are affiliated is displayed. Please click the appropriate link to view current postings. Newly registered AAG members will have their settings set as a default to receive real time email alerts of news or posts to the Knowledge Community discussions. They may opt-out if desired.

All group members may post a discussion or reply to a discussion. The steps to post a message are detailed in Appendix 2.

h. Other Group Publications

Use of the AAG seal by regional and specialty group publications requires Council approval (per resolution at the April 1978 meeting).

i. AAG Membership Form

AAG members may elect to be members of a total of up to six (6) Specialty or Affinity Groups by paying the dues each group has established, and generally do so using an AAG Membership Form. The AAG Office is responsible for updating the membership form, both online and in hard copy. New group additions or removals are automatically processed by AAG Staff. Any changes in dues, minor changes in formal Group names (that do not alter the mission or purpose of the SG/AG and thus do not need AAG Council approval), or other information that appears on these forms can be made upon request to the AAG Membership Director.

j. *AAG News* – Specialty Group News Section

The AAG News section **frequently** features a special section reserved for publicizing news from Specialty and Affinity Groups, including but not limited to awardees, calls for participation, calls for applications, announcements of sessions or special events, and so on. Generally items are about 250 words and are sent directly to newsletter@aag.org. More information and guidelines for submitting articles can be found at http://news.aag.org/about/editorial-guidelines/

6. Financial Matters

a. AAG Financial Services: Bookkeeping, Accounting, Check writing

The AAG provides optional financial and accounting services to Specialty and Affinity Groups. Groups are encouraged to maintain their accounts with the AAG for ease of bookkeeping, accounting, and check writing. Groups with accounts managed by the AAG may obtain the latest balance or other information by written request from the **Chair or Treasurer** to the AAG Membership Director. Payments, such as checks to awardees, etc., may also be requested by the **Chair or Treasurer** to the AAG Membership Director at any time, pending adequate funds. The AAG manages all funds according to currently accepted accounting practices, including conducting an annual audit.

b. Separate Account Management

If a Specialty or Affinity Group chooses to hold a separate bank account rather than with the AAG, all legal and fiscal laws, rules, and guidelines must be strictly followed. In addition, it is important to note that separate financial accounts must be established and the name on the account should include the name of group (e.g., Joe Doe, Specialty Group on Geography). Money orders or bank checks should be used for disbursements from accounts without checking privileges. Funds must not be commingled with the personal funds of an officer or member.

In these cases, the annual report of each Group must also include the name, account number, and bank where group's account is held. Groups whose fund-management procedures that are found in nonconformance with AAG requirements will be notified and will be required to come into compliance to receive dues. Officers of a Group must notify the AAG Office immediately if either gross assets or annual income exceed $10,000.

Also, affinity and special group chairs must adopt a consistent **calendar year** reporting period both for activities and finances, with their reports due on 1 February each year. Their financial reports should include, at minimum, income for the year, expenditures for the year, and fund balance at the end of the year. These affinity and specialty groups with separate bank accounts will receive their dues payments only after annual reports are submitted (starting in 2003). A financial penalty may be exacted on the dues of groups that do not submit their reports by deadline (per Council meeting in March 2002).

Independent reporting to the IRS is not required for these groups since they are not legally independent organizations. For this reason it is critical that bank and account details are communicated to the AAG Accounting Director.

c. Dues and Policies

The AAG Office will collect Specialty and Affinity Group dues of at least $1.00 when members join or as part of the annual AAG membership renewal process. Groups may set dues higher than the $1.00 minimum, if it wishes, and may choose to raise dues at any time. Student dues should also be at least $1.00.

Specialty and Affinity Groups may use membership lists for purposes consonant with the goals of the Association and the Group. Groups may not rent or sell their membership lists or make or permit any use that would infringe on the privacy of their members.

d. AAG Developing Regions Membership Program Dues Waiver

Specialty and Affinity Groups dues are waived for all eligible members joining under the AAG's Developing Regions Membership Program, unless a particular group requests to opt out.

e. Funding of Group-Sponsored Activities

Most group-sponsored activities are paid for from revenue generated through individual group dues. Because AAG Specialty and Affinity Groups do not have legal, fiscal status, they are not entities eligible to receive grants, funds, or donations directly as a separate organization. Chairs seeking to generate funding proposals in the name of the AAG Specialty or Affinity Group to external agencies must contact the AAG Staff.

7. Where to Direct Questions / Contact Information

General inquires to the AAG from Specialty Groups may be made to any staff person, who will direct the question to the appropriate person. However, as a helpful guide, the following positions may be directly approached on matters related to their role at the AAG:
- For questions on finances, bank account balances, check requests, etc.: AAG Membership Director, Michelle Ledoux, mledoux@aag.org
- For questions about membership, forms, dues, listings, rosters, etc.: AAG Membership Director, Michelle Ledoux, mledoux@aag.org
- For questions about the website, AAG Knowledge Communities, log-in, passwords, etc.: AAG Technical Support, techsupport@aag.org
- For questions related to the AAG Annual Meeting, organizing sessions, registration, scheduling business meetings: AAG Conference Director, Oscar Larson, olarson@aag.org

- For questions related to governance, establishing groups, decommissioning groups, Council, or other operational issues: AAG Senior Manager, Program Development, Candida Mannozzi, cmannozzi@aag.org

Current names and contact information for AAG Staff can be found on the AAG website at http://www.aag.org/cs/staff.

A digital copy of this handbook is available online for download from the SG Chairs Knowledge Community Library at http://community.aag.org/sgchairs/.

APPENDICIES

APPENDIX I
AAG Website SG Display

Example of a landing page for a Knowledge Community

APPENDIX 2
AAG Discussions/ Posting a message to the Discussion Board

From the main page, click on "Discussions" to read messages posted to the discussion board or to post a thread. Threads are organized by date, with the most-recently posted threads located at the top of the list. To post a message, click on the "Post New Message" button located on the main page.

You will then be taken to the following screen:

APPENDIX 3
Granting/Removing Admin Status

To add or remove administrators, select the settings button and choose members.
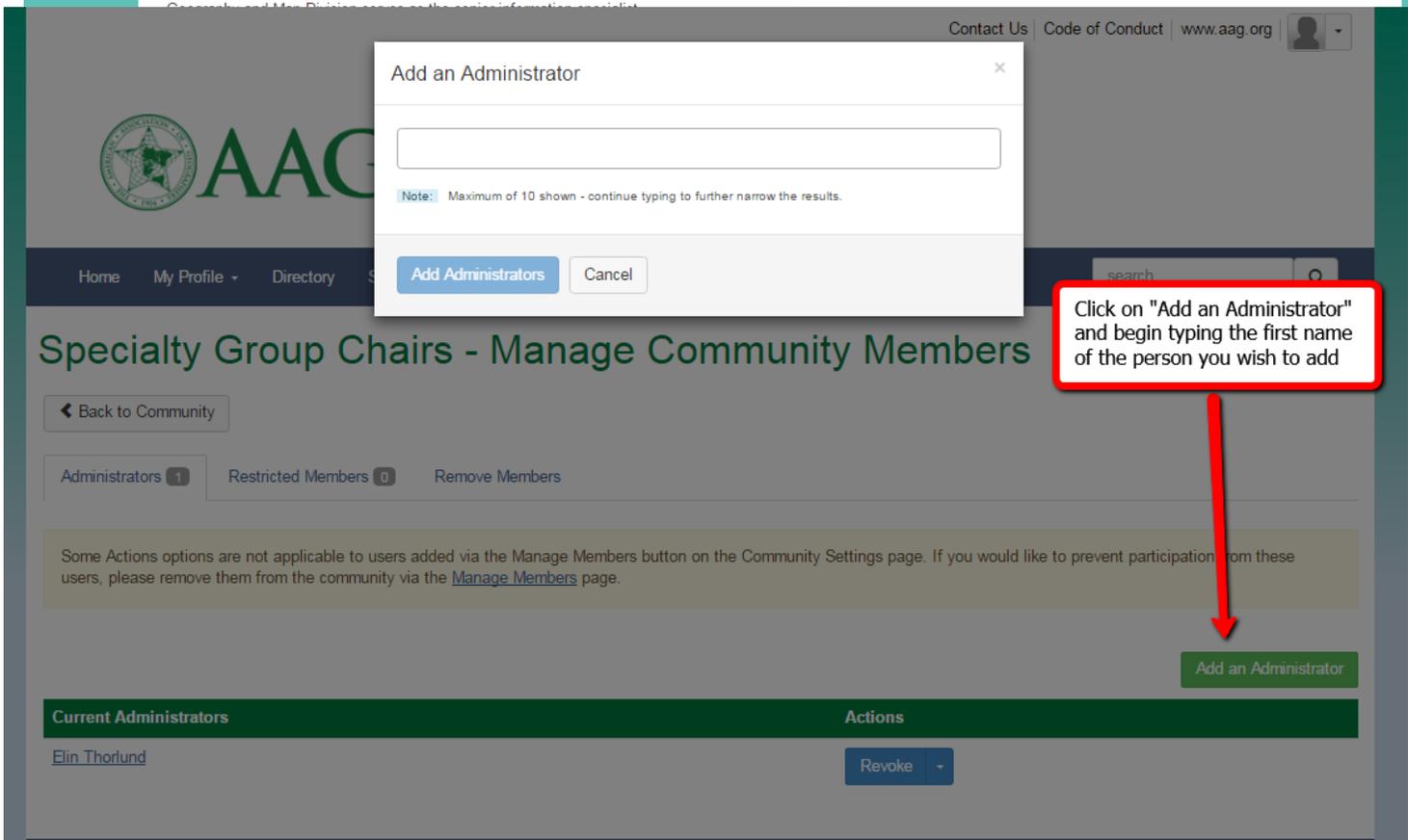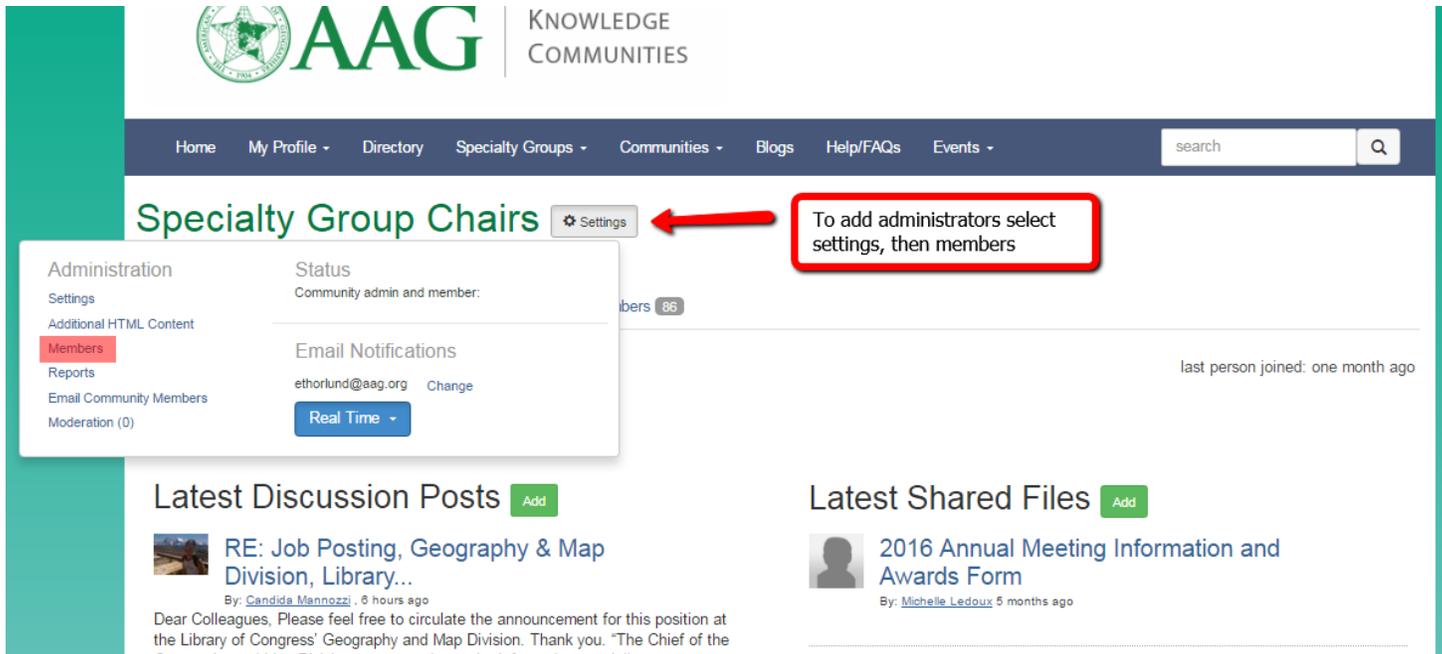
APPENDIX 4
Generating Reports

1. Select "Reports" from the Admin drop-down menu:

2. Select "View Report" for **Current Community Members** to get a full list of members

3. The following screen ("Report Viewer") will pop up. Download this data by click on the save disk icon and selecting "Excel"

4. Open the downloaded excel document. This list of members includes AAG Staff so you will need to delete AAG staff members in order to have an accurate membership count.

To remove AAG staff from list:

a) Click on the DATA tab
b) Click on column D to select all E-mail addresses
c) Click on "Filter" button
d) Click on the downward arrow to set a filter for AAG staff emails
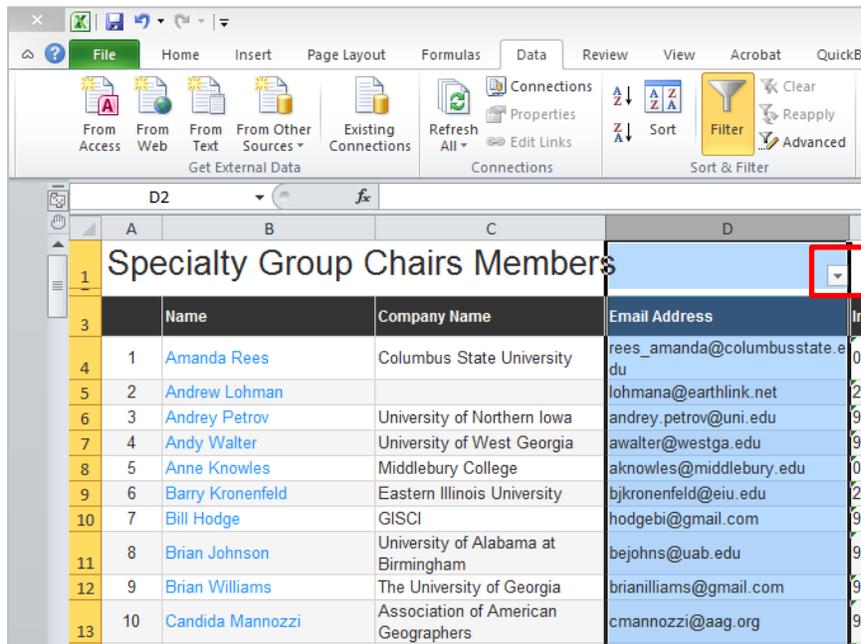
e) Type in "@aag.org" in the text bar, click OK
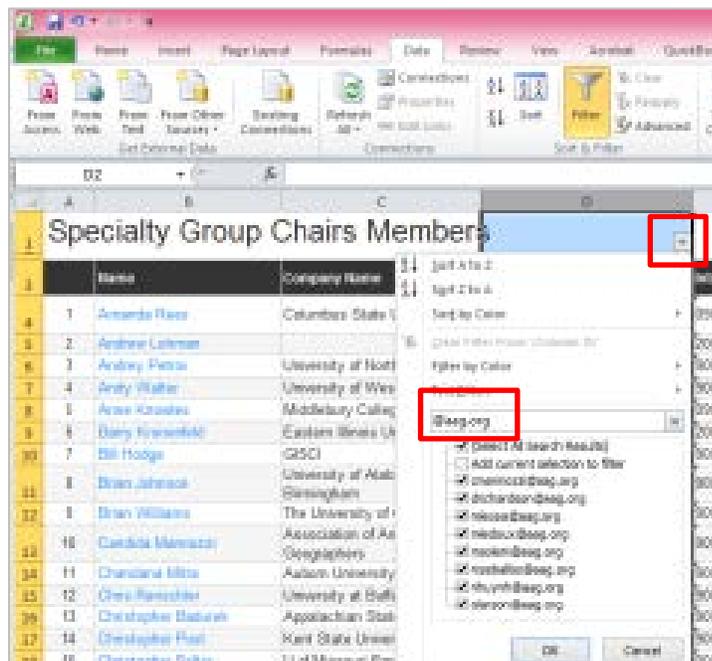
f) A list of AAG staff will appear, delete AAG staff information line by line

g) Once all AAG staff information has been deleted, click on the "Filter" button to return to the SG Chairs member list

This handbook was last updated August 2016. ∎