

American Association of University Women (AAUW) of Virginia

Branch Essentials Notebook

**AAUW advances equity for women and girls
through research, education, and advocacy.**

What is the Branch Essentials Notebook?

This is an evolving document meant to educate prospective and current AAUW members about branch position roles and general branch responsibilities. It will reflect new and/or amended procedures as adopted.

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President/Administrator

Congratulations on being elected to lead your branch! You have probably been involved with the American Association of University Women (AAUW) for some time by now and held other offices. Each role has given you skills and knowledge to get you ready to lead. Many of us former branch presidents feel that the first year was the most challenging. (You were elected for a two-year term and may serve no more than two consecutive terms.) You probably know much of the information that follows but it is the sincere hope of the AAUW-VA board that Branch Essentials will help you be more productive, make your job easier, and yes, more fun. Even in year one.

Thank you for taking on this vital role. The position is *literally* fundamental since, according to the AAUW Bylaws, affiliates such as state organizations and branches are required to have only two officers: president and finance chair. You are important because our organization's mission of gender equity and economic security for all is critical, and you are responsible for creating the path for your members to accomplish this important work.

Responsibilities:

- The president and/or administrator conducts the business of AAUW and develops, implements, and oversees AAUW activities within the affiliate and community. To do this you need to know and adhere to the branch, [state](#) and [national](#) bylaws, and policies and procedures. (This document is *not* the bylaws – it's a road map.)
- You will also represent your branch within your community. Always keep in mind our nonpartisan stand. We are a trusted voice, and it is up to you to protect our brand.
- Convene a board of directors to plan and implement activities that advance AAUW priorities and issues while engaging members, supporters, and community friends.

How-To's:

- **The Team: Your board members.** Leadership styles vary. There may be some overlap in what works in a for-profit corporation – in both you must *lead* and encourage teamwork – but there are serious differences between that space and managing in a volunteer environment. Our members are “paid” in satisfaction from working to solve extremely important issues. Over and over our board and branch members say they feel a part of a family with AAUW. Certainly, we make friendships that last decades. Your job as president or administrator is to be sure the board and branch decision-making regarding goals, expectations, and use of resources is conducted in a positive atmosphere. Make everyone feel welcome. Be sure all the voices in the room are heard. Recognize all contributions. Thank the board and branch members for their work and time, understanding how busy we all are. Be on the look-out for office holders or committee chairs that need help. Some may need a “co-chair” and others might need volunteers to do legwork. We are among friends and are informal, but we still conduct branch business according to our organization’s bylaws and our commitment to inclusivity.
- **Who does what?** (These are covered in more depth in other notebook sections.)
 - Vice President for Programs: Most months of the year your branch will hold a program, in which you should focus on “issues-based programming,” or some other type of membership meeting – like an annual meeting, a Fall meet and greet, or maybe a holiday luncheon. Incorporate membership development, public policy advocacy, and fundraising into branch programs. These are mostly handled by the VP for Programs after the schedule has been set by you and the board.
 - Finance Officer or Treasurer: Who will review and monitor fiscal health and sign off on expenditures as appropriate. She will handle your financial accounts as dues money comes in from AAUW national or directly from members.
 - College/University Chair, sometimes called “Campus Outreach Chair: She seeks and maintains collaborative relationships with local

colleges/universities and students. The AAUW-VA president, administrator, and College/University co-chairs decided we would work with all colleges in the branch's vicinity. Not just those who are c/u partners with national AAUW. These co-chairs hold regular meetings for the branch counterparts and serve as a resource for you.

- o AAUW Funds Chair: Many branches have *legacy* fundraisers. They hold these successful, fun events each year. Many have an in-person fundraiser, like AAUW-Alexandria and Mount Vernon's sponsorship of a play at a community theater. Some have fundraisers without the event. Some branches have both. We recommend the branch use the proceeds for AAUW's Greatest Needs Fund. Your branch may choose to support a local scholarship or some other project, or to split the proceeds.
- o Historian: Responsible for your archives and records retention. See your AAUW-VA Bylaws for more information.
- o Communications Chair: Some branches have a "newsletter editor" and others are large enough to have this plus a social media manager.
 - When it comes to newsletters, that buck stops with you. Does it present the organization just the way you want it to?
 - Send a copy to AAUW-VA's webmaster and post it on your branch website. Since it will be public, take care in giving home addresses, etc. That information can be provided in response to an RSVP.
- **Planning Your Calendar**: Board meetings, membership meetings (like program meetings and your annual meeting) and fundraiser(s), legacy programs and new meetings. An effective leader uses her time wisely by planning ahead and delegating responsibilities. Many branches hold a "planning meeting" in the summer to develop a month-by-month calendar. Look at the [Five Star requirements](#) and shoot for all five.
 - o Branch bylaws require that you conduct board meetings throughout the year, either virtual or in-person. Publicize the dates and let members know everyone is invited. Agenda examples are on the following pages.
 - o Elections: Each year you will select a nominating committee, approved by the board. Speaking of elections, think about succession planning and mentoring. Build a bench!

- **The larger team – branch members:**
 - Communicate regularly with members. The president's letter in your e-mail will not be enough. Important information often must be emailed. Use BCC (blind carbon copy) when emailing your branch. This serves two purposes: it makes us less likely targets of spam and prevents a deluge of e-mails hitting members' mailboxes with responses that really only need to come to you when recipients use *Reply All* instead of *Reply*.
- **Belonging:** Commit to diversity. It is not just something you do; it is who we are.
 - Seek opportunities for inclusion of individuals and groups. Participate in community collaborations that advance AAUW's mission.
 - Weed out any habits that perpetuate an *inside* group and an *outside* group. For instance, include AAUW on email subject lines. Do not assume new members know the sender. And watch your use of acronyms that only the *inside* group would be able to decipher.
 - Acknowledge whose land it is for the sites where you meet. For a searchable map of Indigenous People go to: <https://native-land.ca/>.
- **Vision to Reality:**
 - Think strategically. Develop a plan with measurable goals and objectives that might include membership recruitment and retention, program activity, public policy, diversity, leadership development, and AAUW Fund initiatives. Do not try to be all things to all people. There are many important issues that *other* organizations will need to take on. AAUW-VA president and/or administrator will conduct this program for your branch when you are ready.
- **You are part of an even larger team:**
 - Maintain regular contact with the state president and/or administrator and keep her informed of branch activities. All members of the AAUW-VA board are eager to help and see that you succeed. Most have been where you are now! You will hear from them regularly, but if you need help, do not wait.

- o AAUW-VA state conferences rotate between our four districts – when the conference is in your district your branch will be called on to help.
- o Regional conferences are planned for the coming years. Look for more information on this.

Resources:

- Toolkits (for advocacy, DE&I, bylaws, etc) can be found on aauw.org. Do not try to reinvent the wheel.
- [AAUW national speaker request form](#) – Use this for planning your annual meeting or any event where you need a speaker. (The national staff is smaller than you would believe considering all they do, so ask early and be understanding and flexible.)
- [Office hours](#) – are held twice per week by AAUW National’s Sr. Manager, Connect, and the Advancement & Partnerships Department to help you with membership problems, including with the Community Hub.
- [AAUW-VA District Representatives](#) are a wonderful resource. Each branch has a liaison from the state board. Both will be reaching out to you regularly.

Thank you for taking on this important job. You inspire others every day!

Public Policy Chair/Officer

Thank you for serving as your branch's Public Policy Chair/Officer.

AAUW was established in 1881 to advance economic equity and security for women and girls. AAUW's advocacy efforts have contributed to many laws including the Equal Pay Act, first proposed in 1945 and finally passed in 1963; Title IX of the Education Amendments of 1972; the Family and Medical Leave Act in 1993; the Lilly Ledbetter Fair Pay Act in 2009; and the Paycheck Fairness Act, which passed the U.S. House of Representatives in 2019, but awaits action in the U.S. Senate. In Virginia, AAUW-VA's efforts to educate our elected officials in Richmond about the Equal Rights Amendment (ERA) contributed to its passage by the General Assembly (GA), making Virginia the 38th and last state needed to enact the ERA. In recent years, AAUW-VA's lobbying has contributed to modest advances on pay equity, paid sick days and paid family and medical leave in the VA GA. At the same time, we successfully opposed efforts to roll back legislation that eased access to voting, as well as efforts to divert public funds away from public schools in the Commonwealth.

NONPARTISAN BUT POLITICALLY ENGAGED

AAUW's nonpartisan policy means that the organization does not endorse political party-nominated candidates nor engage in partisan campaigns. However, even though we are nonpartisan, because AAUW does engage in issue-based advocacy and endorses legislation, we are political. AAUW has always taken political stands on the critical issues of the day, as dictated by the member adopted [Public Policy Priorities](#). AAUW works with any policymaker from any political party who cares about our priority issues and shares our goals — even if that policymaker differs with us on another facet of the AAUW Public Policy Priorities.

AAUW's Public Policy Priorities have driven the organization's programs and advocacy efforts from its founding to the present time. AAUW-VA's Public Policy Priorities are derivative of the National priorities, but may reflect priorities,

legislation and opportunities unique to Virginia. As a member of your branch's board, you help your branch support this foundational mission.

It's an exciting and important time to be an AAUW branch public policy chair (BPPC). As a BPPC you are instrumental in driving advocacy strategy and organizing AAUW-VA members and supporters to have an impact at the local, state and federal levels.

Branch Public Policy Chair (BPPC) Responsibilities:

The Branch Public Policy Chair/Officer serves on the Branch Board of Directors and other committees as assigned. If there is not already a position for you on your branch board, ask the branch president to create one. If there is interest in your branch, consider setting up a branch public policy committee. In this position, the BPPC will:

- Work with other Board officers and branch members to further AAUW and AAUW-VA public policy goals by keeping members informed of current public policy priorities, national and state legislative goals and updated on advocacy efforts and opportunities.
- Communicate relevant information on a timely basis through branch newsletters and public policy-focused emails.
- Consider setting aside a few minutes at each branch meeting to discuss priority public policy issues and the corresponding action that should be taken, or even including the action in the meeting itself.
- Look for opportunities in the community to cooperate/collaborate with other AAUW-VA branches and other nonpartisan organizations, e.g., League of Women Voters, to advance public policy and legislative objectives. "Many hands make light work!"
- Work in coordination with AAUW-VA's Co-Vice Presidents for Public Policy (aka State Public Policy Chairs or SPPCs) to support and promote legislative goals at the state level and encourage branch members to engage in related activities and actions.
- Ensure that branch members understand the difference between "nonpartisan" and "political" activity and the importance of that distinction in any activity conducted under the auspices of AAUW-VA. See the [AAUW Policy Leaders Manual](#) for more on nonpartisanship.

- Ensure public policy priorities, including Get Out the Vote (GOTV) plans, are included in your branch's annual plan.
- Recruit branch members and supporters to take action (rallies, lobby days, in-district meetings, letters to the editor, GOTV and more) on priority policy issues. You can't do it all yourself — recruit others to help you!
- Coordinate advocacy efforts with your state public policy chair(s) (SPPC) and fellow branch public policy chairs (BPPCs), including filling out the [AAUW Advocacy Event and Activity Report Back Form](#), sharing successful advocacy strategies and participating in state and federal advocacy campaigns.
- Contribute to the legislative monitoring process managed by your SPPCs to help advance AAUW's Public Policy Priorities.

Ways to Incorporate Advocacy at the Branch Level:

AAUW's superpower is its public commitment to, issue expertise in and active promotion of gender and economic equity and security for women and girls. As BPPC, you are a key resource for your Branch members on the many issues that drive AAUW advocacy. (See resources below.) A first step is to become familiar with AAUW and AAUW-VA's public policy priorities and the resources available at AAUW.org that provide detailed information and arguments supporting each priority. Whether you want to work on equal pay, paid sick days, college affordability, education policy, reproductive rights, GOTV, or all these issues, there are many ways you can raise awareness about public policy and engage your members! Here are some ideas.

- AAUW establishes its public policy priorities every two years with input from members nationally who contribute recommendations and vote on the recommended priorities. Advise branch members when these reviews and voting are underway and encourage them and branch board members to participate.
- AAUW-VA establishes its own list of priorities based on National's list and input from its members on areas where activism and legislative fixes in the Commonwealth are particularly needed. As BPPC, encourage branch members to participate in this effort as well.

- Encourage branch members to participate in advocacy activities in person, virtually and in writing with Virginia’s elected officials in Richmond and Washington, DC, as well as local lawmakers.
- Explain the value and ease of “lobbying” under the auspices of AAUW National and encourage branch members to sign up to become [AAUW Two-Minute Activists](#) so that they will get regular alerts from AAUW National about emails and texts they should send to their Members of Congress and other officials about pending legislation.
- Help members access resources about the “how-tos” of writing Letters to the Editor (LTEs) in local papers. Consider hosting a virtual workshop with other branches on how to write an LTE.
- Working with AAUW-VA Co-Vice Presidents for Public Policy, encourage branch members to support AAUW-VA State Lobby Days by making information available about the issues to be addressed and the various ways to participate.

Reach out to other Public Policy Chairs/Officers in your District and seek ways to leverage your advocacy work.

- The AAUW National public policy staff is available to support and strengthen your advocacy efforts. Keep them in the loop by filling out the event report-back form [AAUW Advocacy Event and Activity Report Back Form](#). If there are questions your SPPC is unable to answer, you can contact them (remember to copy your SPPC).
- If you meet with members of Congress or the VA General Assembly, please fill out the interactions form so AAUW National public policy staff can track our interactions and follow up if needed.

Timeline:

The following is a **national** timeline for public policy-related activities. This does not reflect all dates and deadlines for AAUW and AAUW-VA public policy events and activities. Some dates and some events will vary from year to year.

- January – VA GA convenes in Richmond; Pre-GAAAUW-VA Public Policy Zoom meeting; AAUW-VA State Lobby Day and Women’s Legislative Reception (both in-person)
- February – AAUW-VA State Lobby Day (virtual or in-person, TBD)
- March – International Women’s Day (3/8); Women’s Equal Pay Day.*

- April – Post-GA AAUW-VA Public Policy Zoom meeting; Asian American, Native Hawaiian and Pacific Islander Women’s Equal Pay Day*
- July – AAUW-VA Public Policy Zoom Meeting; Black Women’s Equal Pay Day*
- August – Mom’s Equal Pay Day,* Women’s Equality Day (8/26); Anniversary of the 19th Amendment (8/26).
- September – Early in-person voting begins in VA.
- October – Latina’s Equal Pay Day*
- November – Native American Women’s Equal Pay Day*

* “Equal Pay Day was originated by the National Committee on Pay Equity (NCPE) in 1996 as a public awareness event to illustrate the gap between men's and women's wages.” It “...symbolizes how far into the year women must work to earn what men earned in the previous year. The actual dates of Equal Pay Days vary from year to year because they are based on the latest U.S. Census figures.

Resources:

Many issue-specific resources are available on AAUW’s and AAUW-VA’s websites. The following is a sample:

[AAUW Policy Leaders Manual](#)

AAUW Public Policy Priorities:

<https://www.aauw.org/resources/policy/aauw-public-policy-priorities/>

AAUW-VA Public Policy Priorities:

<https://aauw-va.aauw.net/files/2022/06/AAUW-VA-2022-2024-Public-Policy-Priorities-final-approved-by-Board.pdf>

AAUW Advocacy Event and Activity Report Back Form: <https://www.aauw.org/resources/policy/advocacy-toolkit/aauw-advocacy-event-and-activity-report-back-form/>

The Gender Pay Gap: <https://www.aauw.org/resources/research/simple-truth/>

Women and Student Debt: [_https://www.aauw.org/issues/education/student-debt/](https://www.aauw.org/issues/education/student-debt/)

The STEM Gap: [_https://www.aauw.org/issues/education/stem/](https://www.aauw.org/issues/education/stem/)

Title IX: [_https://www.aauw.org/issues/education/title-ix/](https://www.aauw.org/issues/education/title-ix/)

ERA: [_https://www.aauw.org/resources/policy/position-era/](https://www.aauw.org/resources/policy/position-era/)

Paid Family/Medical/Sick Leave: <https://www.aauw.org/resources/policy/position-paid-leave/>

Public Education/School Vouchers: <https://www.aauw.org/resources/policy/position-vouchers/>

Voting Rights/GOTV: <https://www.aauw.org/resources/policy/position-voting-rights/>

LTEs vs. Op-Eds: <https://www.aauw.org/resources/policy/advocacy-toolkit/lte-vs-oped/>

Two-Minute Activist – Sign Up!: <https://www.aauw.org/act/two-minute-activist/>

PR & Outreach

Purpose:

- The purpose of the PR & Outreach board position is to promote the mission of the AAUW as well as objectives of the branch through various outlets in collaboration with the Vice President of Communications and/or Committee (if applicable).

Responsibilities:

- Manage partnerships with other organizations and media outlets.
- Determine appropriate lines of communication between AAUW branch members, board members, and state and national AAUW entities.
- Evaluate previous branch PR and communications efforts and access current needs.
- Post events on social media platforms and the branch's website.
- Ensure coordination between items on the newsletter, website, and social media pages.
- Ensure correct information is presented in press releases.
- Make sure that the diversity statement is clearly visible on the branch's newsletter and website.
- Make sure website resources are visible and accurate.

Timeline:

- Be familiar with how much advance notice local media sources require before specific events or printing of letters to editors/public forums, etc.

How-To's:

- Be sure to familiarize yourself with the branch bylaws and understand that any type of communication with the public must be nonpartisan.
- Make sure to stay organized and keep a calendar of important dates.
- Use traditional media as often as possible but don't rely on it. Become familiar with all opportunities for disseminating information. Large urban

media sources are covering less “local” news and smaller communities have few if any media coverage.

- Develop credibility and a reputation so that others look to your branch for leadership and information. Word of mouth is an excellent PR tool.
- We are up against a changing news culture; local news sources and resources are disappearing; thus, you should prepare to utilize every social media outlet, email and physical mail campaigns, text campaigns, presentations to other organizations, and word of mouth.

Resources:

- Toolkits (for advocacy, DE&I, bylaws, etc.) can be found on [aauw.org](https://www.aauw.org).
- Institutional partners that you may collaborate with are found here: <https://www.aauw.org/about/our-partners/>.
- When connecting with the media, including an example of a press release, follow the tools found here: <https://www.aauw.org/resources/policy/advocacy-toolkit/work-with-media/>.
- An example of an AAUW press release is found here: <https://www.aauw.org/resources/news/media/press-releases/aauw-analysis-of-u-s-census-bureau-and-u-s-bureau-of-labor-statistics-gender-pay-gap-data-reveals-little-progress/>
- You can use a free version of Canva for designing projects, media, announcements, etc. <https://www.canva.com/>

Finance Officer

Welcome to the management team for your branch! The Finance Officer (Treasurer) is an important and satisfying job. Most of what you will need to do the work is listed below, but if you should encounter something that is not covered, check the website, aauw.org; it contains a wealth of information. If you still can't find what you need, you can email connect@aauw.org with your question. You can also sign up for "office hours" on Tuesday at 3:00 pm or Thursday at 3:30 pm. This is done in the "Community Hub: Tools & Resources" section of the website. As a last resort, call 800-326-2289.

The branch calendar:

- The fiscal year goes from July 1 to June 30. Review the regular events that take place each year that involve money, starting in July. You will be in the middle of collecting dues, but there will probably be other events as well. These events might be a fundraiser that happens yearly, or a yearly holiday luncheon. Consider how the finance officer is involved and consult with the chairman of the event if there is one.
- Your branch will have a certain time when the budget is prepared for the next year. Be ready for this.
- You will need to be involved in collecting dues for next year. This used to be done in April for the year beginning in July, but now it is
- changing to an all-year program.

Items Related to finances

- Open and/or maintain a checking account
 - Follow bank procedures for getting your name on the checking account and getting a debit card. If you are opening an account, consider who is on it besides you. There has to be at least one other person. If you are the finance officer for a while, review these other people periodically with the board to see if they need to be changed.
- Consider a savings account
 - If the branch has enough of an ongoing balance in the checking account, a savings account should be considered. Discuss it with the board.
- Prepare a budget

- This is done once a year at a time specified by the bylaws of the branch. Find out when it needs to be done. When it is time, take the current year's budget as a place to start. Modify each item on the budget as necessary, depending on what has happened or is happening in the current year. Add or delete items as necessary. Balance the budget by adding a line that takes money from or gives money to the cash reserve. Present it to the board for further discussion and modification. Eventually it will need to be passed by the branch.
- Write checks and make deposits in a timely fashion as needed
 - Remember to take the checkbook to any branch events where it might be needed.
- Do a periodic treasurer's report
 - The idea of a treasurer's report is to report on how the branch is doing compared to the budget. This is best done on a spreadsheet. Generally, on the treasurer's report it is a good idea to show the budget, the income and expenses for the past month (or since the last board meeting) and the income and expenses to date for the fiscal year. If there are several different expenses making up one line item on a particular report, you might mention the amounts of the individual items when you present the report. A sample report is located here: https://docs.google.com/spreadsheets/d/17JAiUH-4T7GR_HER-9de8YujP2hwG8gb/edit?usp=drive_link&ouid=111825683670829806280&rtpof=true&sd=true. This is just an example. Yours could be more or less complicated, and probably will have different line items.
- Balance the checkbook
 - The checkbook should be balanced periodically, at least before every treasurer's report. Debits for National and State dues, credits for branch dues, plus any other direct debits should be accounted for.
- Know what papers to have and keep
 - Ask your board if you have any questions about this. Some examples of items that might be kept on file are receipts, applications for membership, contracts, lists from National regarding dues or contributions, etc.
- Collect dues
 - Dues used to be payable every July 1, the beginning of the fiscal year, for all members. Members paid directly to National with a charge card or a bank link, or they paid by check to the branch, which was handled by the finance officer. However, as of 2022 going forward, a new person's anniversary date is the first of the month closest to when they joined, so dues will be collected all year long. On the other hand, the bulk of the dues will still be due July 1 for the foreseeable future. The finance officer will be involved in deciding on the protocol for

reminding people when it comes time to renew, along with the membership chair. AAUW National is currently sending out three reminders to everyone. People currently have a 3-month grace period past their due date before they are no longer a member.

- Financial review
 - The branch board will know what is customary for the branch; a financial review yearly, every other year, or some other schedule. It is probably in the by-laws. Your records must be organized so that the reviewer can understand what you have done.

Membership Items

Members can generally manage their own accounts; they can edit their information and express their preferences. They can pay for dues or make a donation with a credit card, debit card, or a direct withdrawal from their checking account. However, they may prefer that you take care of things for them. Also, you will be responsible for branch donations.

- Manage roster
 - You will need to help keep the member roster current in the Community Hub, AAUW's management program. Log into AAUW.org. From your Personal Snapshot screen, click "Affiliations" from the list of items on the left. Click the blue square by your branch. Click "Manage Roster." you can add information, change information, or delete members in your branch by clicking the blue square next to their name on the list that comes up.
- Manage officers
 - You may be responsible for keeping the list of officers current in the Hub. Check this with the board. If this is part of your job, update the new officers before June 30 of each year as necessary. Click "Manage Roster." Choose "Committee Management" from the boxes at the top of the page and follow instructions.
- Join someone who writes a check for dues
 - See above for getting into "Community Hub: Tools and Resources." Scroll down until you see "How to Add/Join New and Lapsed Members in the AAUW Community Hub" and click on this for instructions.
- Join a Shape the Future member
 - A Shape the Future member is someone who joins at a monthly meeting and gets a credit of half their National dues. This must be done within 10 days of the meeting. For every two Shape the Future members who join, the branch gets a free National membership, up to three in a fiscal year. Joining Shape the Future member is the same as joining a new

member, except there is a code you must enter in the application process which is found in the online instructions for joining. To read more about the Shape the Future program, go to the website, click “membership” in an upper right corner, click “Governance and Tools,” then “State and Branch Tools,” then “learn More About AAUW’s Shape the Future Campaign.”

- Renew members who write a check for their dues
 - This is done on the computer. It is necessary to have a debit card tied to the branch checking account. Log onto AAUW.org. Click “Membership” in the upper right. Click “Governance & Tools” from the list on the right. On the next screen, click “Community Hub: Tools & Resources.” Scroll down until you see “How to Handle Renewals and Donations in the AAUW Community Hub.” Click on this and follow the instructions. The procedure for renewals will become familiar and eventually you will be able to go directly to “Affiliations” from your login page to enter people.
- Make contributions to National AAUW written as a check to your branch
 - Individual contributions from members can be made at the same time as renewing their membership or at a different time. Follow instructions for renewing membership but enter the contribution under “donation amount” on the roster. If a person donates in this way, their contribution automatically goes to the Greatest Needs Fund. If a person wants to contribute to another fund, the procedure is the same as is done for a branch contribution, described below, only using the person’s name, not the branch. A branch contribution is made currently by writing to connect@aauw.org with the “Express Link Request” in the subject line. Include the branch, amount, and designated fund in the email. They will get back to you with what to do.
- Lifetime members
 - There are two types of lifetime members: honorary lifetime and paid lifetime. Honorary lifetime members have been members for 50 years and they fill out a form from National to request to be designated. You may need to help them get this form. They are exempt from National and State dues and many branches have excused branch dues as well. Find out what your branch does. Paid lifetime members no longer pay National dues but are still required to pay State and branch dues. However, their names show up as paid on your branch roster whether or not they have actually paid their branch dues, so keep track by some means.
- Answer membership questions for members
 - There are several ways to get information. One is to check the website, particularly the FAQ in the Community Hub section. Another is to write

to connect@aauw.org. If you don't get a satisfactory answer, or any answer, you can sign up for Office Hours, a weekly Zoom meeting. The information on how to sign up is as follows: log onto AAUW.org. Click "Membership" on the upper right. Click "Governance & Tools" from the list on the right. On the next screen, click "Community Hub: Tools & Resources." Scroll all the way down until you see the options for the virtual Office Hours. Click the one you are interested in, Tuesday or Thursday, and it will take you to the screen where you sign up. You may have to wait a week or two to get in if they are very busy, but you generally get an answer. The last resort is to call 800-326-2289.

- Remind people to pay dues when it is time
 - With the board and the membership person, design a plan for reminding people about dues. This can consist of one or more targeted emails and/or phone calls. Remember, National is currently sending three reminders about dues. This may be enough, but you will probably have to do more. You really cannot count on everyone to renew without being reminded.

Taxes

- Prepare a 990-N, 990-EX, or 990 form when it is due
 - You will get several notices, but it must be done after April 15th and before October 15th. The 990-N is done by going to "My Affiliations," clicking the blue square, and choosing "Tax Information." You are generally the principal officer on this form. If your branch income is above \$50,000, AAUW cannot file for you, and you will need to investigate 990-EZ or 990 separately.
- Know the tax-deductible part of amounts spent on various AAUW items
 - The main item is dues. The deductible part is the National dues, less than \$3. National dues were \$72 in 2023-2024, so the deductible part was \$69. Student dues are \$18.81 and \$16.81 is tax deductible. All of a lifetime membership payment is tax deductible. State and branch dues are not deductible. Donations to the branch are not, unless the contribution is forwarded onto the National or the branch has registered as a 401 (c) (3) corporation, which is not usual.
- Exemption from sales tax
 - Make sure the branch has the letter from Virginia AAUW stating that items purchased with a branch check or debit card are not subject to sales tax. A copy can be found here: https://drive.google.com/file/d/1qHd13zRIZqC-eWfHgiWzob5lbDzPR02s/view?usp=drive_link. If the vendor asks for a signature, sign it with your name on behalf of Huynh Nguyen, or whoever is listed at the time.

Understand the Community Hub

The Community Hub is the way of handling all things financial for National. Check out the various sections in “Community Hub: Tools and Resources.”

Insurance

The board may or may not choose to have insurance for the members of the board. Insurance is expensive in comparison to the income of many branches, so many will choose not to have it. However, if they do, it is generally paid yearly. A good place to start for information about obtaining insurance is to talk to the insurance agency for Virginia AAUW, Carol Rohde at AHT Non-Profits, 703-737-2248.

Fundraising

Processes:

1. Identify goal of fundraising
 - To raise funds
 - To collect gift cards
 - To collect material goods
 - To sell tickets
2. Identify stakeholders
 - Recipients – who is the beneficiary of funds raised
 - Identify potential parties of interest (donors)
3. Organize to receive
 - Select a point of contact
 - Determine start and end dates
 - Select a venue (if necessary)
 - Advertise
 - Send reminders
 - Final event, collection report or presentation
4. Review
 - Was the process good – announcements, leadership, participation etc.?
 - Was it successful in meeting goals?
 - Will this event be used again?
 - Need to try something else?

Yearly contribution:

1. Each calendar year, for every \$500 contributed by the Branch and its members, the Branch can name a member(s) as an Honoree(s). However, the

Branch may decide not to name any Honorees or simply name one or two members. This decision is at the Board's discretion. An Honoree may be a current or deceased member of the Branch. Apart from the naming of Branch Honorees, the Treasurer will send a check to National for the Branch's monetary contributions for the calendar year, no later than December 31.

2. The Board decides the nomination criteria for selecting Honorees. It may solicit nominations from the Branch membership through whatever medium(s) it identifies. Once Honoree nominees are identified, the Board votes on the names to be submitted by the Branch ETF Chair to the State AAUW Funds Chair, no later than March 1.
3. Honorees will have their names printed in the annual spring State Convention/Conference program brochure and will receive a Certificate of Appreciation; typically, presented at the Branch's annual meeting. Printed Honoree certificates are provided by the State Funds Chair for presentation; blank certificates are also available free from the National AAUW. We have been submitting the names when they are requested to give them time to have certificates printed before the conference.

Membership

What is membership? It is the key ingredient for success in any organization. The following materials are presented to allow you flexibility in your membership drives and offer a variety of approaches for every branch.

Membership Chair:

- Elected for a two-year term on even numbered years for a maximum of two consecutive terms.
- Serves on the Board of Directors of the branch and chair of the Membership Committee.
- Facilitates the recruitment and retention of members of the branch.
- Invitations for branch programs should be extended to any potential member.
- Activities for recruitment should include social and business events, e.g. voter forums, luncheons, etc.
- Engage in community activities to promote our mission, e.g. voter registration drives.

AAUW Community Hub:

- The Add/Join Members application allows the finance officers (as well as president/administrators and membership vice presidents) to process dues and donate on behalf of members who pay their dues to the branch by check.
- Shape the Future code: FY24: This promotion allows new members to pay half price national dues.
- Weekly Office Hours with AAUW National: Register to contact AAUW on matters of registration, etc. These meetings allow you to ask questions and clarify membership issues. Tuesdays @ 3 pm & Thursdays @ 3:30 pm.
- Connect@aauw.org
- Register for Membership Webinars when available <https://www.aauw.org/>

Resources:

- AAUW website:
<https://www.aauw.org/resources/member/governance-tools/state-branch/>
- Social media:
<http://www.facebook.com/pages/AAUW-of-Virginia/182801968411607>
o <https://www.youtube.com/c/AAUW>
- AAUW of Virginia: Use our website to stay up to date and connect with the state board. The AAUW State website is one of the best resources for your branch: <https://aauw-va.aauw.net/>

AAUW of Virginia Vice President for Membership:

- Laura Browning Greenfield (2023 – 2025)
- 757-291-5705
- ocassions2@gmail.com
- Contact VP Membership for assistance with recruitment ideas.
- Transmit membership numbers as requested

Recruitment Approaches:

- Utilize the materials created by the State Board, e.g. Join us Brochure and the Flyer for membership.
- Here is the link: <https://aauw-va.aauw.net/>

[Join Us Brochure](#)

[Membership Flyer](#)

- These materials are excellent tools for recruiting new members. Each branch can edit the information to reflect their branch programming information.

Suggestions from Branches:

- Sponsor a membership event, e.g. Tea, Dinner, or Social at a convenient time for working women.
- Set monthly meetings at convenient times for all.

- Sponsor an Orientation Meeting to integrate new members and revitalize current membership.
- Gather short biographies for each member and post them on the branch website.
- Keep the branch's programming calendar up to date on their website.
- Have a "friendly foursome" lunch with two new members and two established members to create friendships.
- Friendships are the cornerstone of membership. Remember that identification and association will create bonds of friendship.
- Everyone enjoys being associated with like-minded people.
- Give each new member a mentor/buddy to assist with assimilation into the branch. Personal contact information is a must.
- Plan a movie night to enjoy together. Make it relevant to our mission. Follow up with drinks or dessert, whichever works for your branch.
- Create a book review club.

Ideas shared by several branches for your reference:

Small branch: 30 or less

Portsmouth: We're trying weekday lunchtime meetings at a restaurant because all members are retired. Our book group is very successful with 10 members, most of whom are active members of the branch.

Wytheville: Our membership has grown in the past two years since the pandemic. We have been very successful with personal invitations to prospects for a "Meet & Greet" at a local pottery shop and invites to our September Potluck Membership Dinner. All our meetings are open to guests. We have also highlighted female-owned businesses as venues for recruitment and socializing. We use branch photos to advertise our activities in the local newspaper, e.g. Voter Registration, STEM, Dinners, etc. Our most well-known event in the community is our STEM Event for middle school girls which allows us to introduce AAUW to their moms.

Medium branch: 31-50

Harrisonburg: We have lately added a couple of members but struggle as I'm sure many chapters do to keep and increase numbers. We tried a couple of ideas for outreach that didn't yield fruit. I think for us the most effective method of

attracting new members is personal contact with friends and acquaintances. In addition, providing high interest programs and having some meetings as basically just a good social time seems to be working for us.

Winchester: Face-to-face contact helps build the branch. Names are gathered from our many community activities, and they are invited to meet for coffee downtown. Our branch has great success getting new & younger members through this. We're lucky to have Shenandoah University here, so I've also connected with people there; I'm working with another AAUW member to find a new faculty sponsor to reignite the on-campus AAUW.

As for how I meet them: our Winchester visitor center has Welcome Events for newcomers with many groups on site - our rec department, local museums, etc, and I always set up a table, chat with them, ask if they'd like to receive our latest newsletter - I think this is critical as I'm not asking them to become a member that night, but to encourage them to come to one of our many activities. We've added many more community activities, from sponsoring a candidate forum, to cultural events at museums, and community 'field trips.' I make it a point to attend as many as possible and chat with the participants.

Large branch: 51+

Springfield-Annandale: We are the Springfield-Annandale branch, with a membership of 54. We don't really consider that large because in past years we have had 60+members. Our membership is aging, and several longtime members have died or moved to assisted living and are unable to participate. Our youngest member is in her early 40s. The remainder of us are an assortment of retirees in our 60s, 70s, 80s, and 90s. We attempt to have meetings that appeal to younger women by having some meetings on Saturday afternoons or via Zoom. We have found that although they might be interested, their work and family lives do not leave time to participate in AAUW.

Smith Mountain: We encourage members to bring friends and neighbors to our branch meetings, especially our annual fashion show fundraiser. At these events, we let the guests know that if they sign up THAT DAY, they can take advantage of the Shape the Future program where they get 50% off the National Portion of the dues.

Retention

New Member small group luncheons;
Classics Book club;
International Studies group;
Summer Day trips;
Many opportunities for committee memberships

Reston-Herndon: Since the end of the pandemic, the Reston-Herndon branch has held events encouraging members to attend in person. We have also encouraged them to bring a friend and held one social with husbands and partners to foster membership.

Diversity, Equity, Inclusion and Belonging (DEIB)

We ask every branch to include in their website the official statement from the National AAUW site regarding our commitment to diversity, equity and inclusion:

“In principle and in practice, AAUW values and seeks an inclusive membership, workforce, leadership team and board of directors. There shall be no barriers to full participation in this organization on the basis of age, disability, ethnicity, gender, gender identity, geographical location, national origin, race, religious beliefs, sexual orientation or socioeconomic status.”

Definitions:

To better understand the goals of achieving diversity, equity, inclusion and belonging in each of our branches, a short definition of each term is provided below.

- **Diversity** represents the many traits that differentiate individuals and groups from each other. Some of these characteristics include Age, Ethnicity, Family Structures, Gender and Gender Identity, Language, National Origin, Physical Ability, Race, Religion, Sexual Orientation, Socioeconomic Status, and Veteran Status
- **Equity and Equality** are two terms that are often used interchangeably but don't mean the same thing. **Equity** refers to understanding the diverse attributes and needs of individuals and providing access to the necessary resources for success. This differs from **Equality**, which would give all individuals the same access to resources without consideration of their diverse needs.
- **Inclusion** refers to the acts of valuing, respecting, and supporting diverse individuals and perspectives, and enabling their full participation in a community. Inclusion requires us to constantly assess who is left out, and who is not represented.
- **Belonging** is the emotional feeling that an individual or group feels when their identity, diverse characteristics, and unique needs are seen and accepted

by a community or organization. When individuals or groups experience belonging in any space, like a workplace, they feel empowered to be authentically themselves.

DEI Rep Expectations:

The focus of each branch DEI representative is to collaborate with other members of branch leadership to ensure the AAUW OF VIRGINIA Policy on Diversity and Accessibility (below) is addressed to promote DEI within their branch.

AAUW OF VIRGINIA

Policy on Diversity and Accessibility:

This policy is designed to promote the diversity of our members, the equitable treatment of all persons, opportunities for inclusion of all persons in activities (including ensuring activities are accessible to all persons), and an environment that creates a sense of belonging in all persons participating in any activity of AAUW OF VIRGINIA and the Virginia districts and branches.

A -AAUW OF VIRGINIA and Branch Membership Recruitment and Development

- All state and branch websites and social media, newsletters, membership brochures, and other publications shall include the first paragraph of the current AAUW Diversity Policy Statement as follows:
 - In principle and in practice, AAUW values and seeks an inclusive membership, workforce, leadership team, and board directors. There shall be no barriers to full participation in this organization on the basis of age, disability, ethnicity, gender, gender identity, geographical location, national origin, race, religious beliefs, sexual orientation, or socioeconomic status.
- Membership campaigns shall stress the positive impact and power of a diverse and inclusive AAUW membership as set forth in the AAUW Diversity Policy and Disability Access Statements.

- Branches shall work towards creating a diverse and inclusive membership and a sense of belonging in accordance with the AAUW Diversity Policy and Disability Access Statements. Branches shall use a variety of approaches, including collaborating with other organizations, outreach to under-represented groups, and making personal connections, to attract and invite a population representing the categories in the AAUW Diversity Policy Statement, plus citizenship, color, and any other diverse backgrounds.

B -AAUW OF VIRGINIA, District, and Branch Programs

- When possible, programs shall include presentations that enhance members' knowledge of issues of diversity, equity and inclusion and shall otherwise, as appropriate, address any aspects of diversity, equity and inclusion that are related to the subject being presented.
- Collaborations shall be encouraged for programs, meetings, events and activities with organizations focused on supporting persons identified by the categories in the AAUW Diversity Policy Statement, plus citizenship, color, and any other diverse backgrounds.
- Sincere efforts shall be made that speakers, panel participants, trainers, and facilitators at programs include persons representing the categories in the AAUW Diversity Policy Statement, plus citizenship, color, and any other diverse backgrounds.

C -AAUW OF VIRGINIA, District, and Branch Activity Sites and Dates

- Programs, meetings, events and other activities shall be organized with the objective of being inclusive and welcoming to all to create a sense of belonging.
- Planning for any activity shall include making sincere efforts to:
 - identify whether there are problems related to accessibility and the suitability of the meeting method and location for persons from diverse backgrounds;

- address any identified problems by, among other things, not holding meetings in religious-connected facilities, providing closed captioning for video meeting attendees, obtaining guidance from the Vice President for Diversity, Equity and Inclusion, and, in general, endeavoring to make each person feel they are included and belong; and
- provide any necessary accessibility information in publicity about the activity.
- No activities shall be held on a date that conflicts with major religious and cultural observances, which include but are not limited to Easter, Orthodox Easter, Juneteenth, Rosh Hashanah, Yom Kippur, Passover, Christmas, Diwali and Eid al-Fitr.
- AAUW OF VIRGINIA and Branch Governance Policy and Operations
 - Diversity, equity, inclusion, accessibility, and belonging shall be promoted in all aspects of governance and policy documents and the operations of boards of directors and committees.
 - Periodic reviews shall be conducted of governance and policy documents and the activities of the board of directors and committees for compliance with diversity, equity, inclusion, accessibility, and belonging objectives and any necessary adjustments shall be made.

Resources:

The state website, <https://aauw-va.aauw.net/diversity-inclusion-equity/> provides resources for gaining better understanding of DEI issues and opportunities for branch discussions, videos and books. The national AAUW website <https://www.aauw.org/resources/member/leader-resources-tools/dei-toolkit/plugin-dei-programming/> also provides plug and play DEI programming ideas for individual branches.