

IAAND Board of Directors/Leadership Team Orientation

IAAND Portal: Finding & saving your work

<https://iaand.webauthor.com>
(NOTE: No www in URL)



1

This presentation answers!

What documents should I save on Portal and where?

What should be included in Leadership vs other Portal Communities?

What should be included only in BOD Community?



2

Library is for storage of documents

Leadership Team Community Library

- Meeting Agendas and Minutes
- Leadership Team Folders (by office)
- Program of Work
- Orientation Documents
- Governing Documents (Policies- Procedures-Best Practices, Bylaws, Position Descriptions)
- Sponsorship
- Newsletters and Passport files
- Academy Documents
- Administrative Document Templates (forms)
- Marketing Materials for IAAND



3

Topics in Library Expand to Sub-folders (+)

The screenshot displays the IAAND Leadership Team Community Library interface. The main navigation bar includes Home, LIBRARY, Leadership Team Wikis (Pos Descrs), Discussions, Polls, Calendar, Members, Tasks, Blog, and Options. The LIBRARY section is active, showing a list of topics:

- Meeting Agendas and Minutes
- Leadership Team Folders (by office) (Files: 1)
- Program of Work
- Orientation Documents (Files: 4)

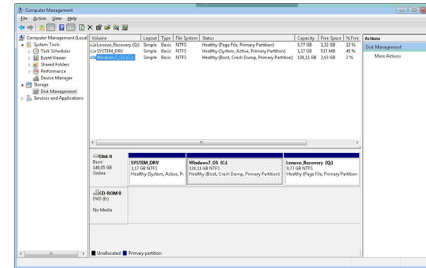
A detailed view of the 'Meeting Agendas and Minutes' topic is shown in a pop-up window, listing sub-folders:

- + 2017-2018
- + 2018-2019
 - Annual COI, P&P review & Acceptance of Volunteer Position Documents
 - April 2019
 - August 2018
 - December 2018
 - February 2019
 - June 2018
 - October 2018
 - Annual Calendar

4

What to Save?

- Information that will be useful for the next person who has your position
- Information that others may need to access
- Information that you may want to access when you are not at your own computer
- Anything that would be required by records retentions policy/procedure for your area



5

What goes in different communities

Board of Directors Community

Polls for BOD votes on official motions

Confidential information for BOD members only

Leadership Team Community

Polls for input from LT members

Discussion on most motions

General communication that all LT members may be interested in

Meeting agenda, minutes, request for reports

Specific Communities

(International, Strategic Comm, Website, Professional Dev, Nomination/Awards)

Working documents
Discussion of options not yet ready for BOD discussion and vote

Draft documents before BOD input or revisions prior to being sent back to BOD for final approval

6

Content can appear in more than one location

7

Accounts Receivable Ledgers and Schedules	At least 7 years
Annual Reports	Permanently
Articles of Incorporation	Permanently
Audit Reports	Permanently
Bank Statements/Reconciliations	At least 7 years
Bylaws	Permanently
Budgets	At least 7 years
Capital Stock and Bond Records	Permanently
Cash Books	Permanently
Charts of Accounts	Permanently
Checks, Cancelled	At least 7 years
CPEU records	No less than 7 years (per CDR guidelines)

Records Retention Policy/Procedure

0-8 Record Retention and Destruction

To Be Reviewed By:	Executive Director/Secretary
Effective Date:	June 1, 2019
Review Date:	June 1, 2021
Revision Date:	April 17, 2019

POLICY: Records will be retained and destroyed according to the recommendations of AND, the US Accreditation Council for Education in Nutrition and Dietetics (ACEND) and other governing bodies, such as the Internal Revenue Service and the State of Illinois.

PURPOSE: Balances the need, and legal requirements in some cases, to maintain accurate and appropriate files with the challenges of limited physical and electronic space for archives; ensures assets are protected from litigation or government fines

RESPONSIBILITY: Executive Director

PROCEDURES:

8

Working
Communities,
Leadership
Community and
Personal emails

- IAAND Documents can be attached to discussion threads
 - Working documents can be shared within a smaller community during development (e.g. SCC or Pro Dev Community)
 - In some instances if you are not ready to share with all members in the smaller Community then IAAND emails or personal emails can be used to transmit documents
 - When ready to share with Leadership Team for broader input then use Leadership Community Discussion Threads to share documents
- Personal emails are used however the communication will be lost when officers change



9

Only BOD members vote on motions

Motions are posted with Polls only in BOD Community to approve motions.

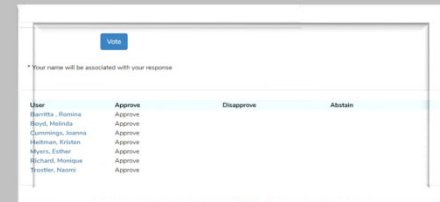
Access the active poll **to** **vote** from the home page in BOD Community



10

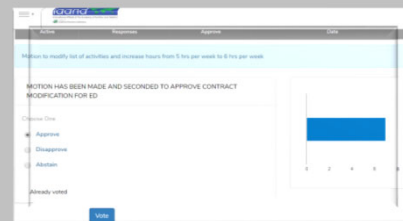
Only BOD members see results of votes on motions

- After you vote, you can scroll to the bottom to see the other votes



Your name will be associated with your response

User	Approve	Disapprove	Abstain
Barrett, Romina	Approve		
Boyd, Melissa	Approve		
Cummings, Joanne	Approve		
Holliman, Kristine	Approve		
Hyers, Esther	Approve		
Richard, Monique	Approve		
Spaulding, Isaac	Approve		



11

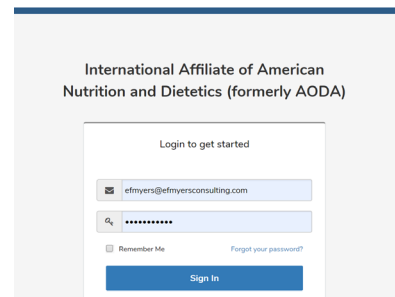
This presentation answered!

What documents should I save on Portal and where?

What should be included in Leadership vs other Portal Communities?

What should be included only in BOD Community?

12



IAAND Board of Directors/Leadership Team Orientation

IAAND Portal: Finding & saving your work

<https://iaand.webauthor.com>
(NOTE: No www in URL)

