QRCA Chapter Leader's Handbook

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Foreword

The organization wishes to thank all those who contributed to this project.

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QRCA HISTORY

QRCA was born from an idea Judy Langer had to gather New York City qualitative researchers together to share their stories. What followed was that a group of 26 NYC based qualitative consultants got together at Dresner's restaurant, 88th St. & 2nd Ave., early in 1983. The culmination of that get-together was the belief that the interaction and feedback they were getting was worth formalizing into an organization with a structure and a purpose. During these early days they would have periodic general meetings for the membership, chaired by a rotation of moderators, which continued even after the official Board of Directors was formed.

The organization was officially announced on October 19, 1983 at an AMA Qualitative Research panel discussion at the NYC Grand Hyatt Hotel and via press release. The first Board of Directors were elected on October 15, 1983 and was lead by Judy Langer as President, Frank Kennedy as Vice President, Elizabeth Hardwick as Secretary and Elizabeth Donovan as Treasurer. Directors were Annette Bamundo, J.R. Harris, Hy Mariampolski, Leon Schiffman and Bill Weylock. The meeting was held at Judy's Manhattan apartment on the Upper East Side and like all good qualitative researchers, food was served.

Some key dates and events for the organization's history are:

♦ The name of the organization, Qualitative Research Consultants Association was decided upon on June 24, 1983 at an organizational meeting.

- The first QRCA newsletter was edited and compiled by Hy Mariampolski and issued on September 7, 1984.
- The organization was officially granted non-profit status as reported in Board minutes of March 28, 1985.
- As of November 1984 there were 153 overall members including 39 charter members. By then 40% of the membership was outside the tri-state NY area and as is now, membership was 2/3 female, 1/3 male. According to meeting minutes the organization was already looking to expand membership internationally.
- As early as April 1984 meetings were being held in Chicago chaired by Cindy Clark and in Los Angeles.
- The first recorded "QRCA Research Workshop" was held June 15, 1984 with presentations by Dr. Shoi Dickinson, Bonnie Goebert and Lou Cohen.
- The First Annual QRCA Conference took place in 1986.
- The first chapter outside of NYC was formed in Chicago in 1988.
- The first Bylaws were adopted by the membership in April 1985. Marilyn Landis Hauser chaired the committee consisting of Kathryn Alexander, Elizabeth Donovan, Gerie Feldman, Elizabeth Hardwick, J. Robert Harris, Olivia Holmes, Frank Kennedy, Ann Scheib, and William Weylock

Basic expectations

Inspiring message

Welcome to your new role as a QRCA Chapter Leader! QRCA is very fortunate to have numerous volunteers working together to make QRCA a vibrant and impactful association for its members. In many ways chapters serve as the face for QRCA and we are grateful for the leadership taking place across the globe in bringing members together. Member engagement is extremely important to our organization, since it is involved and empassioned members who help us to collectively grow as an association and an industry.

As a chapter leader, your role is to serve the QRCA members in your region by being the local connection to their profession association. It is at the chapter level that members often make lifelong connections to colleagues, so chapter events are key for member education, satisfaction and retention.

This handbook will help you to succeed as a chapter leader. It contains the collective wisdom of chapter leaders and provides a solid foundation for you to work from as you plan your chapter activities. In addition to the resources in this handbook you will be invited to quarterly meetings of all chapter leaders for ideas and insights, and have QRCA staff at your disposal. When any questions arise or you need assistance, you have a network to turn to for inspiration that includes the QRCA Vice President, other chapter leaders, a chapter forum, colleagues in your chapter and QRCA staff. Be assured that you are not alone, that you are recognized for your important role in QRCA and that you will grow as a leader and a qualitative researcher!

Things you need to know right now

These are some of the most important things that you need to know as a chapter leader to get started.

1. You are invited to the Leaders' meeting at the Annual Conference, which occurs the Wednesday morning just prior to the start of the conference and the Leader's dinner which occurs the night before, on Tuesday. Both of these meetings are key to getting to know your fellow Chapter leaders and staff, as well as for you to play a role in setting strategic priorities for the organization.

2. There are a few key rules that exist between QRCA and its Chapters. Chapters must provide a list of Officers to the QRCA management company annually, they must have a minimum of five (5) active Members, and they must convene (in-person or by

electronic means) at least four times per year. One of those meetings may be at the Annual Conference.

3. Staff will be able to supply you with a list of your Chapter members. Chapter members who live within the geographic boundaries of a Chapter are considered Members of that Chapter whether they participate in the Chapter's activities or not.

4. Since you are local face and expert in your region, Chapters are encouraged to identify and invite prospective Members to experience QRCA. Qualified non-members may attend a maximum of four (4) regular Chapter meetings after which time they will be required to join.

5. Share responsibilities with other Chapter members. In order to keep the planning of meetings manageable and to grow future leaders, Chapters have found success in dividing up the tasks needed to host a successful meeting. Smaller tasks are easier for volunteers to take on, and shares both the responsibility and success of meetings.

6. In order to get the word out about the great work that you are doing, make sure to communicate information about Chapter activities to the QRCA organization.

7. Chapters are responsible for any direct costs associated with the Chapter meetings. To augment Chapter Treasuries, a QRCA Annual Chapter Allotment is extended for activities designed to enhance attendees' professional knowledge and skills.

8. Having great presenters at your Chapter events will boost attendance and educate your members. In some instances a presenter may require a speaker fee or some other form of compensation, and Section 7 of the *Chapter Policy Manual* has paramaters and more information on this topic.

9. Chapter Chairs meet quarterly as a group via teleconference, online or in person with the Vice President, who serves as the liaison between the Chapters and the Board. These meetings are wonderful for exchanging ideas, gaining support and meeting other leaders in QRCA.

10. Your time and commitment to QRCA are greatly appreciated by the Board, members and staff!

History, Vision, Mission and Values

Introduction

QRCA is a not-for-profit association of consultants involved in the design and implementation of qualitative research — focus groups, in-depth interviews, in-context and observational research.

As an organization we highly value our collegiality. The majority of QRCA members are sole practitioners, or in companies with fewer than five people. Members may not be part of a client side organization. Although there are excellent qualitative researchers who do not fit QRCA's membership criteria, the reason for this continued restriction on membership is to preserve the collegiality and sharing that has always characterized QRCA meetings and our annual conference.

History

To come

Vision Statement

Qualitative research provides inspiration and guidance to enhance customer knowledge for sustainable competitive advantage. The Qualitative Research Consultants Association (QRCA) provides industry-leading resources that are essential to its members and the professionals who use research.

Mission Statement

The Qualitative Research Consultants Association (QRCA) is dedicated to advancing the discipline of qualitative research worldwide.

Values Statement

- ♦ **Passion for knowledge:** By nature, we are curious, open-minded questioners who love to learn. Increasing collective knowledge and insight is what we do.
- ♦ **Respect:** Our respect for the individual drives our role as the voice of the consumer. We are gracious and caring in all our interactions.
- ♦ **Sharing:** We support and encourage one another in a collegial environment. We share our knowledge, skills and expertise with each other and the Association.
- ♦ **Creativity:** We develop imaginative, inspired, and innovative research approaches and solutions.

♦ **Ethics:** We uphold the highest standards of ethical and professional behavior in our work and in all our relationships.

As a chapter leader, you can help us preserve these important values by emphasizing them at chapter events.

Organization structure

QRCA is a not-for-profit organization (501c6) incorporated under the laws of the state of New York.

Some of the rules and regulations you will encounter in QRCA are related to the preservation of this not-for-profit status, and to ensure compliance with specific laws.

We are a volunteer led organization. Chapters are an important part of our volunteer structure, but you'll probably find it helpful to know a bit about the rest of the volunteer structure.

Board

There are nine members on the QRCA board who are elected for two-year terms. The Executive Committee consists of the President, Vice-President, Secretary and Treasurer, and there are five directors at large. Per the Bylaws, a Nomination Committee is formed every year to find candidates for upcoming vacancies on the Board of Directors.

The QRCA board is a policy-governing board. This means that the Board strategically works to set direction for the organization and focus on vision, mission and goals for the future, separate from the volunteer's own role as service volunteers. This change occurred relatively recently in QRCA's history, and has been significant in helping the organization develop.

You will find on the website a variety of policies that have been developed to instituionalize best practices and Board decisions; all policies are created by the Board of Directors. The Board also creates and approves an annual organizational budget, sets strategic direction for the organization, hires and supervises our administrative staff, approves the mandate of all committees, and approves all public statements made by QRCA.

By tradition and per the *Board Policy Manual*, the Vice-President takes responsibility as liaison with Chapter leadership. If you have questions, concerns, problems or ideas, the Vice President is a key resource to get the help you need.

Committees, Task Forces and SIGs

QRCA has a variety of standing committees, advisory groups and task forces that work on behalf of all members.

Per the QRCA Bylaws: *The Board of Directors, by a majority vote, will establish Standing and ad hoc Committees as it deems appropriate in order to fulfill the goals of the Association, and may from time to time modify the structure, purposes, and/or objectives*

of the Committees. Committees and Advisory Groups annually submit to the Board a form detailing their leadership, members and plans for the following year. This information can be found on the Committee page of the QRCA website at http://www.qrca.org/displaycommon.cfm?an=1&subarticlenbr=23. Committee leaders also post any positions they are seeking assistance for on the Get Involved/Volunteer page, which is under My QRCA at http://www.qrca.org/login.cfm?an=1&subarticlenbr=12.

Task forces are created by the Board of Directors to accomplish specific, time-limited tasks that do not fall within the boundaries of current committees. The Board appoints leaders of Task Forces, who then recruit members to help them accomplish the task they have been assigned. These groups can also be found on the Committee page of the QRCA website.

Special Interest Groups (SIGs) are members who have banded together around a topic of interest of characteristic. Similarily to Chapters, SIGs meet quarterly to educate members, discuss important topics and enjoy the fellowship of colleagues who have shared interests.

In the organizational structure of QRCA, the Chapters are listed along with all of the other Committees and Special Interest Groups under the Leadership area of the website under About Us.

Staff Support

QRCA has a contract with an association management company to provide management and administrative services to our organization. This is currently with Ewald Consulting, headquartered in St. Paul, Minnesota.

We have an Executive Director, who is an Ewald employee, Shannon Pfarr Thompson. Several other people at Ewald also provide staff services to QRCA, however the key contact point for chapter business is Darrin Hubbard, who is the Assistant Executive Director.

As a chapter chair, you can contact Darrin Hubbard for assistance with chapter mailing lists, questions about the Chapter area of the Forum, or other questions that arise.

To obtain the reimbursement of chapter expenses, contact Shannon Pfarr Thompson at exdir@ewald.com or fax the information to 651-290-2266.

Throughout this guide, we have avoided references to specific individuals, and refer more generally to "staff", or "management company" or "Ewald"

Governing documents

Chapter Policy Manual

A *Chapter Policy Manual* was approved by the Board in 2009, and is available on QRCA's website under About Us, Bylaws and Policy Manuals.

Two of the more important provisions are below:

Meeting Attendees:

Chapter meetings are open to all QRCA members. Qualified non-members may attend a maximum of four regular Chapter meetings after which they will be required to join. Non-renewed members (those who were previously members but have since cancelled their membership) may attend a maximum of two regular Chapter meetings, after which time they will be required to rejoin.

Fiduciary Matters:

Chapters are responsible for any direct costs associated with Chapter meetings. To augment Chapter treasuries, QRCA provides an annual Chapter allotment. Currently it's $1,000. The expenditure of these funds should be associated with Chapter activities designed to enhance attendees' professional knowledge and skills. To obtain funds, Chapters must submit a timely statement with receipts. Unused allotments cannot be carried over for use during the next calendar year.

Running the chapter

Planning meetings

Meeting formats

Chapters use various formats and meet at different times, and this is usually based on what best meets the needs of the chapter. For example, many chapters have Friday lunch meetings, though one meets on Monday; and one often has a half-day and/or all-day Saturday "conference."

Chapters generally meet at local facilities; in the larger metro areas where there are many facilities, they meet at different facilities to provide variety and lessen the "burden" for facilities. Where there are many facilities, the facilities more often than not host the lunches; while some chapters split the cost with the facilities, some chapters fund the lunches (facilities provide beverages) in cities where there are not many facilities.

Sometimes chapters might occasionally use other venues such as conference rooms at members' companies/employers, or a venue in connection with a special event or program.

Please bear in mind when planning Chapter events that QRCA does not have insurance that covers risks of serving liquor at chapter events, regardless of whether the liquor is served at a cost or is served for free. Events where alcohol is served should be held at a licensed facility, and each member should purchase their own."

Introducing the speaker

Consider having the person who arranged for the speaker introduce him/her. This is a good way to get others involved. It's wise to get biographical information from the speaker in advance to make sure the introduction is accurate and appropriate, much as you might do for the program announcement.

An adage professional speakers use is this: the introduction should be as long as needed and no longer. A lengthy recitation of accomplishments doesn't set an energetic tone for your speaker. Instead, focus on one or two key accomplishments and personalize them to the group if possible. A nice way to end any introduction is to say, "please welcome... [name]"

You can, of course, include the full biography in your meeting invitation, and you might include this in a handout at the session.

Finding speakers

There are many sources for speakers. Consider the following:

♦ Your own chapter members who have special techniques/skills they are willing to share
♦ Read "Connections" articles about other chapter meetings
♦ Get on the email list for other chapters' announcements
♦ Annual QRCA conference
♦ Other organizations' local meetings – AMA, MRA, or non-research events
♦ Local university faculty members
♦ Local business press
♦ Poll chapter members
♦ The lists of chapter speakers and recent QRCA chapter meetings

Speaker compensation

Chapters are entitled to an annual allotment (currently set at $1,000) for programming expenses. These funds are to be requested from QRCA management and receipts are required; unused allotment does not carry over to the next year. This may be used for speaker fees, speaker travel and other programming expenses (e.g. program materials, projector, etc). Of course, the chapter may also use funds from its treasury for such expenses.

The following is from the *Chapter Policy Manual* regarding speaker fees in particular:

1.   In some instances a presenter may require a speaker fee or some other form of compensation. This is allowable for QRCA non-members, however, prudent judgment should be exercised as to whether a speaker should receive such compensation and how much.

2.   QRCA Members can be presenters at Chapter events, and their expenses can be covered. Under certain circumstances, QRCA members can receive a speaker fee, up to $300, at the discretion of the Chapter. However, prudent judgment should be exercised as to whether a speaker should receive such compensation.

In unique circumstances, Chapters can compensate a member presenter for more than the $300 maximum by using fees collected by the Chapter for that presentation.

Tokens of appreciation of nominal value such as a gift card, gift basket, etc. are allowed for Members or non-members (although if a non-member speaker is receiving a speaker fee then such a gift generally is not necessary).

Popular topics

A list of past chapter presentations is available on the chapter area of the website.

How to Run a Virtual Chapter Meeting

Some chapters have virtual meetings, including, of course, the Virtual Chapter. The Virtual Chapter is primarily focused on serving members that live outside the geographic area served by other chapters, especially outside North America.

The Virtual Chapter has created an invitation to potential speakers that outlines their approach very effectively, and it is reproduced below.

Virtual Chapter invitation to speakers

It seems so long ago now since the October QRCA Conference doesn't it? What wonderful memories we were able to take away from the experience!

As you may recall, I spoke with you very briefly about your presentation at the conference, and about what great feedback we have had about it. As Co-Chair of the Virtual Chapter with Corette Haf, we would very much like to be able to pass this experience onto other US and international members of QRCA who weren't able to make it to the Vancouver conference in person, through one of our 2008 Virtual Chapter meetings.

As you may (or may not) already be aware, the Virtual Chapter of QRCA is comprised of members from all around the world, plus of course US members who aren't able to make it along to their local Chapter meetings because of distance or other challenges. Our members are located in many different countries and time zones, which poses particular challenges in terms of how and when our Chapter meets, but we have found the most effective way for us to connect with each other is by way of an online Bulletin Board meeting.

We aim to have four or five meetings each year, with our meetings usually being held over 3-4 days, quite often from Wednesday to Friday during the week. The Bulletin Board format is a very useful way for us to explore new technology platforms together, to improve our understanding and share our experiences and learnings, to develop professional networks with fellow QRCs around the world, and of course to get to know the other members of our Virtual Chapter better.

If you are not familiar with how a Bulletin Board meeting operates, here's a quick overview, to put you in the picture:

♦ The BB platform allows us to set up a "whiteboard" area where we can load PowerPoint slides or jpg graphics (eg photos) into a series of pages or sections.
♦ The whiteboard slides or graphics are usually accompanied by additional text notes, which provide an explanation of the content and allow for inclusion of additional commentary from the presenter.
♦ The participants read through the presentation and ask questions or discuss the ideas – sharing their personal perspectives and own experiences with other participants, and hopefully learning something new along the way.

♦ Each day of the meeting we add some additional, new sections of content, which encourages participants to come back and revisit the meeting and helps stimulate interest levels.

If it would be of help to see an example of the content and interaction at a typical meeting, I can send you a transcript from one of our previous meetings to get an idea of how the discussion and meeting evolves.

So what exactly are we looking for from our presenters? Here's the rundown on that:

1. You send us the slides/photos (in PowerPoint or jpg format) that you want to show in your presentation, along with the accompanying explanatory text and any additional comments you'd like to have included (as a Word document), with a couple of interesting or thought provoking questions to help start the discussion going. Ideally we would like to have this information to hand at least 2 weeks ahead of the meeting, to allow sufficient time for setup and testing.

2. We load the content onto the Bulletin Board and check that it all works as it should.

3. Once the meeting starts, you need to visit the Bulletin Board once a day and read and respond to the participants' comments and questions. We envisage you spending no longer than an hour each day on this, but of course you are able to spend more time there if you wish. You are able to log in and out of the meeting as often as you like, at whatever time, and from whatever location, that suits you.

4. You can then type in your answers and responses … and that's about it!

In terms of how much time is involved, for the content of the presentation you would need to invest probably at least a couple of hours depending on how detailed your notes and slides from the conference presentation are, and how easily your content would translate from a live in- person presentation to the Bulletin Board format. The good news is that you can do everything from home, at your convenience, from your own computer, so it will all be familiar territory for you. We will take care of doing all the work required to upload and setup everything on the Bulletin Board. And of course once the meeting goes "live" you can access it from wherever you are – we have had presenters travelling on business while the meeting was running, and they've been able to log in from their hotel, and that worked perfectly fine. Most of the work can be done well ahead of time – so that once the meeting begins, the fun stuff starts.

We are very much hoping you will be willing to present at one of our 2008 Virtual Chapter meetings. This is a wonderful opportunity to reach an international audience, and we know that your presentation will be eagerly anticipated and much appreciated.

If you have not had a great deal of previous experience with Bulletin Boards, this is an excellent opportunity to gain additional experience, expertise and confidence in a non-threatening and very supportive environment. Some of our previous presenters have admitted to being a little nervous and apprehensive ahead of time – but afterwards they

say they really enjoyed the experience and some have since become strong advocates for us! Let us know if you'd like to speak to any of our previous presenters to get their tips and insights – we know they will be happy to provide a reference for the experience!

Please let us know if you would like to support the Virtual Chapter by presenting at one of our 2008 Chapter meetings. We are currently putting together our schedule of meetings and topics for next year, so if there is a particular timeframe that is best for you in terms of scheduling, just let us know and we'll sort that out. Of course if you have any questions or queries, please don't hesitate to ask us. We are sure this can be a very rewarding experience for all of us, and Corette and I thank you in advance for your time and support.

Webcasting Meetings

QRCA is currently investigating options for webcasting of chapter meetings to help us reach more of our members across a larger geography.

A few chapters have done this on their own, with the help of research facilities.

Highly interactive presentations are not suitable for webcasting, as the people in remote locations can't easily participate.

A good practice is to send out a copy of any slides in advance, so the camera can be on the speaker, instead of the slides.

You will also want to devise a method for having the remote participants ask questions or communicate -- this could be by texting a volunteer, for example.

Facilities

Several suppliers of research platforms have kindly offered the use of their platform for virtual chapter meetings.

Be sure to acknowledge their contribution in an appropriate way.

Publicizing your meetings

QRCA has an online calendar for events (http://www.qrca.org/calendar.cfm) where all Chapter events should be listed in order to draw both regional members and those who may be travelling. Meeting information can be sent to webmaster@qrca.org or you can submit the event information on this page following the prompts, and staff will update the calendar http://www.qrca.org/displayemailforms.cfm?emailformnbr=68055.

Connections is a great way to share meeting information for upcoming meetings, as well as learnings after events.

Use the chapter list servs that are set up through QRCA to communicate with members in your area, as well as potential members.

Other

How else you can publicize your meetings, being cautious in regard to non-qualified attendees.

 Should you have "client" or outsider events occasionally, and how that might be done?

Chapter sponsored or co-sponsored conferences.

Getting organized

Top 10 Tips for Managing Volunteers Effectively

Like any volunteer organization, QRCA faces the challenge of finding and keeping good people on our teams. Teams need to get things done, people need to feel valued, and all of this needs to happen in our "spare time." Not so easy, huh? Here are a few tips to get the most out of your Chapter team, based on the experiences of some QRCA leaders.

1. **Be a leader. Don't be afraid**

Some people love the idea of stepping up and being considered a "leader." Some of us, though, are more apprehensive, for fear that we'll never get out from under the weight of leadership. But being a good leader doesn't mean assuming the weighty mantle of "commander in chief." So don't be afraid. Embrace the fact that people trust you and know you can do well. Be a leader on your terms. And remember that being a Chapter Chair is not a lifetime commitment.

2. **Ask for help**

Being a leader does not mean doing everything! It involves a good team, with clear goals, and proactive management. A good leader does not have to handle every detail of the team or project. If someone else knows more than you, ask them to lead a piece of the puzzle. If someone else has faced a situation you're struggling with, reach out to them for advice. And, when all else fails, get in touch with a QRCA colleague for moral support. Sometimes all you need is a pep talk. And QRCA members have plenty of inspiration and energy to boost us up.

3. **Find "good fit" teammates**

There is no "I" in "team." A team requires many people to be effective. Each team's needs will be different – in terms of skill sets, time commitment, personality, etc. For Chapters, you have a bevy of possible teammates – every member of your Chapter. To get the most from them, and from the Chapter:

Ask people to help. A phone call or meeting is hard to resist. But we don't always have that luxury. Email your Chapter members; tell that about what's going on and how they can help.

Don't assume that all who raise their hands is a good fit, though. Talk to them about what's required. Feel out your ability to work well together. Politely decline, if you suspect it won't work well.

4. **Get personal**

It's easy to dismiss a request or blow off an assignment when you have no vested interest in it. Conversely, it's hard to say no to someone you know and care about. When you have a relationship with someone, you want to be successful -- for them as much as for yourself. So make a point of getting to know the people in your Chapter and on your Chapter team. Find out what makes them special. Tap into their unique beauty.

5. Define your roles and tasks

There are few things more frustrating than working on something undefined. To say "I need help with the Chapter" is practically begging people to ignore you, because they fear the unknown. Instead, give people very specific ideas about what you need. Ask for "a food lover to get donations for the next meeting" or "someone who can find a venue for the next meeting" or "an idea for someone to present on the topic of social networking." Then people feel their commitment is manageable and they can succeed.

6. Set specific goals, agendas and timetables

In order to feel like their participation matters, people need to know what success looks like. SMART goals are a great way to make sure we all can do well and feel good about it – and provide a roadmap for how to get there. SMART means Specific, Measurable, Actionable, Relevant, and Timely. So instead of saying "Our goal is to make our Chapter more successful this year," try "We will increase quarterly meeting attendance by 15% and bring-a-friend participation by 10% in 2010." Goals will benefit from some structure to make them happen. Map out how long things will take and when individual steps need to happen. Tell people in advance what will be covered in a meeting. Set expectations!

7. Make people accountable

In a volunteer organization, we may be afraid to ask people to commit to assignments because we don't want to risk losing or frustrating them. But, as a result, everything can become a mish-mosh. And, guess what? People actually like having specific deliverables. So when people offer to step up, make sure they know what they're getting into, reduce the scope if needed, give them deadlines, and follow up if things don't get done on time. And, if someone doesn't pull their weight, it's ok to cut them loose – gently, of course.

8. Communicate – a lot

You have stepped up to be a Chapter Chair. And so you now have an uncommonly strong involvement in what's going on with your Chapter. But other people don't. Even with the best intentions, your teammates have jobs, and lives, and all kinds of distractions. So if you want them to get the job done, you need to tell them, and tell them again. Send out meeting reminders. Post agendas on the Forum. E-mail

to-do lists with specific assignments and due dates. Call when a black hole seems to emerge.

9. **Say thank you – a lot**

You may feel like you're in the hot seat, doing a lot with little glory. You may get frustrated when people don't deliver. Don't despair. The best way to keep the optimism alive is to show your gratitude. Say thank you every time people do what they say they will. Say thank you when someone unexpectedly steps in to save the day. Scream thank you out to then team when a special person makes a difference. You'll be surprised at how many gratifying thank-yous come your way, too.

10. **Celebrate successes – a lot**

In the end, we want to feel like our QRCA efforts are worth it. We want to feel like we made a difference. So celebrate when things go well. Was that last Chapter meeting a roaring success? Remind everyone afterward – and make sure they know it was only possible with their participation. Get together for coffee or a drink with the team who planned the session. Promote the good things that happen – for example, when your Chapter meets its SMART goals for the year!

Virtual chapter guidelines

The virtual chapter created guidelines for themselves which may be useful to others, so they are reproduced below.

Meetings

The Virtual Chapter's objective is to have the following meetings each year:

- ◆ Three or four online BB meetings
- ◆ One in-person face to face meeting at the QRCA Annual conference

Speakers and Topics

At least once each year, input will be sought from Chapter members regarding the speaker programme and topics to be covered at future meetings. It is anticipated that the majority of speakers will be current QRCA members who have given the most popular presentations at the QRCA Annual Conferences.

Attendance

Attendance at Virtual Chapter meetings is open to any current, qualified QRCA member. From time to time non-member guests may be invited to attend a meeting, and this is at the sole discretion of the Virtual Chapter Chairs.

Transcript

Provided the permission of the presenter has been obtained prior to distribution, and that meeting participants have been given the opportunity to object but have not done so, a transcript of the meeting will be circulated to those Virtual Chapter members who request it. It is to be made clear to Virtual Chapter members that these transcripts are for their own personal use and should not be circulated more widely, in particular not to colleagues who are not QRCA members.

Speaker Gifts

Each presenter to a Virtual Chapter meeting (excluding a member of the QRCA Board or the Chapter Chairs) is sent a "thank you" note and a Barnes & Noble gift voucher to the value of US$100 per person. After each meeting has concluded, QRCA's Association Management company, Ewald, is contacted by the Chapter Chairs with a request to send a gift, and provided with the details of the speaker or speakers. The cost of the voucher, plus any postage incurred, is charged to the account of the Virtual Chapter.

Where considered appropriate, a token of appreciation to the sum of US$100 or any lesser amount as agreed by the Chapter Chairs, may be awarded to a sponsor of the bulletin board platform for Virtual Chapter meetings, in consideration of the level of support they have provided to the Chapter.

Reporting

At the conclusion of each meeting, a summary report of the presentation is prepared for the next issue of Connections by the Communications Chair.

New Members

Welcome emails are sent by the Chapter Chairs to all non-US resident new members of QRCA, when the Chapter becomes aware of their joining. This may be when the latest edition of Connections is published, or after circulation of new member lists and contact details by staff. The names of new Virtual Chapter members are then added to the Chapter's circulation list for future Virtual Chapter meetings.

Database Integrity

After the closing date and grace period for membership renewal has passed, staff circulate current Chapter master mailing lists to each Chapter. Any individual Virtual Chapter mailing lists should be checked against the master list and any errors, omissions or duplications investigated. If required, a mailout to members may be undertaken by the Virtual Chapter Chairs to establish if members wish to continue to receive future communications from the Virtual Chapter. Should they decline to do so, their names will be removed from the circulation list.

Communication

In addition to the regular communication to Virtual Chapter members regarding Chapter business and upcoming meetings, from time to time the Chapter Chairs may be asked to assist with circulating information of particular interest and importance by other QRCA

Committees or Chapters. For example, the Conference Committee's request to promote pre-conference early bird conference registration savings, or membership renewal. Where practicable, the Virtual Chapter will assist with promotion when required, provided this does not result in an excessive number of emails to Chapter members. Although every attempt will be made to support and promote other QRCA initiatives, the number and content of communications sent to Virtual Chapter members is at the discretion of the Chapter Chairs.

Money Matters

Chapter budgets

Each chapter's financial management and budget will vary, based on how the chapter's finances were set up and how it operates its programs. Each chapter is responsible for its own activities and remaining fiscally solvent. As previously mentioned, there is an annual allotment that is available from the national office, that must be used before December 31 or it is lost for that year.

Per the *Chapter Policy Manual*: Chapters shall provide a Chapter Financial Report once per year or at any time requested by the Board of Directors. Properly maintained Chapter books and records shall be available to the Board upon request.

Going electronic

 Some chapters have set up ways to collect chapter event registration fees online to streamline the meeting registration process, and Paypal and EventBrite are two systems that have been used. Megann Willson set an account up for Canada Chapter, and shared the following information.

Canada Chapter

Why can't we pay with a credit card? Why do we have to hand-write all these receipts for every meeting, or create a document and email it? Isn't there an easier way?

All these questions and more are being asked by Chapter Committees. When Canada Chapter wanted to figure it out, our first stops were the QRCA Forum, and LinkedIn. We explained what we needed: "We're a not-for-profit professional association, looking for a way to let our Members register and pay for events online. We'd like to make less work for our Committee Members."

Chapters across the USA, as well as a number of individuals from LinkedIn, responded. We looked at several ticketing options, but the least expensive yet most secure was EventBrite which you can find at www.eventbrite.com.

Before setting up with EventBrite, your Chapter will need to set up a PayPal account that will link to your Chapter's bank account at www.paypal.com, or in Canada, at www.paypal.ca. At some point, PayPal will ask you to prove that you are not-for-profit, and the folks at the National Organization and Ewald helped us out with a letter. This will prevent unnecessary tax consequences for your Chapter, and you will receive a preferential rate.

The system works like this:

You create a custom invitation through EventBrite. This includes things such as what information you'd like to gather from Members (at minimum, an email address and phone number in case of a problem are helpful). Of course, the logistics of your event (where, when, times) are necessary. When entered, EventBrite will create a map that invitees can download, and can keep track of registrations, create a check-in list, allow attendees to pay in advance by check (or in Canada, by cheque!), or major credit card. You can see how fast tickets are selling, and you receive an email when someone registers (making it easy to let them know right away, how much you appreciate their support). For those folks who are worried about online payment, you can give them the option to pay at the door.

EventBrite lets you create a custom address where registrants can to go buy their ticket to the event. You can hyperlink this with in an email that you send to them. Although there is an option to email from EventBrite directly, in respect of our Members' privacy and to avoid spam filter issues, we email from one of our Chapter Committee Members' personal emails. This way, no one but a QRCA Member has access to the email accounts.

When a Member registers and pays, they are immediately sent a confirmation email and receipt – no more work for the Chapter Treasurer. Their payment goes directly to the PayPal account, which your Committee can then transfer to the regular Chapter bank account, from the convenience of your laptop, wherever you're working that day.

EventBrite lets you decide when to start and cut off ticket sales, and you can issue refunds for cancellations as well, if you wish. There's always a fall-back link to the Chapter Committee if anyone has trouble. Multiple ticket types/prices are possible – Member, Non-Member, Student, Guest…it's your choice. Best of all, once you've set up one event, you can copy it and simply amend the parts that are changing, such as the date, location, or price.

All in all, electronic ticketing and payment have been a real boon to us. Members rarely no-show, and the paperwork and logistics of holding an event are minimal. That way, we can spend our time on learning, networking, and enjoying our friends' and colleagues' company.

Questions? Call or email Megann Willson, at megann@panoptika.ca

Others chapters use E-vite to get out meeting information. If you want to use PayPal, you need to get the non-profit status information from the national office in order to get the best rate from PayPal.

Bank accounts

Steps for setting up chapter checking accounts:

1. Identify the bank/branch you want to use.

2. Get information from the bank about various free "Small Business Account" "options and select one that meets your needs.

3. Complete the paperwork using the following:

QRCA – Chapter Name, Name of Chapter Member that will monitor account, Address for statements, Contact Telephone number. Tax ID Number 13-3189168

4. Get bank signature card/form signed by each person authorized to sign checks (at least two are recommended).

5. The bank may request a copy of the IRS Non-Profit letter or Articles of Incorporation, which are available from the national office.

It is recommended that you annually report your financial status to chapter members and the national office.

What to charge

This information was collected in April of 2008 and addresses what chapters have been charging attendees, as well as other interesting information.

CHAPTER	FEES	WHERE/WHO FUNDS	DAY/TIME	REFRESHMENTS	# ATTENDEES
1. Canada	$25 M/$30 NM	At facilities; facilities provide beverages & mtg. fee covers food	Friday, noon – 2:30 pm	Healthy lunch: salads, wraps/sandwiches, fruit, light dessert	20 – 25 attendees ¾ M, ¼ NM
2. Chicago	$20 M/$40 NM, $30 M/$45	Moves around to various facilities & facilities fund.	Friday, noon – 3 pm	Decided by facility, usually something like Corner Bakery	About 25 attendees

	NM, depending on prog. content/length				
3. Minnesota	$25 M/$30 NM (Just increased from $20/$35)	At facilities; facilities provide beverages & mtg. fee covers food	Monday, 10:30 – 1:00 pm	Lunch	15-20 attendees; has been up to 24. including 1-3 NM
4. Missouri	$20 M/ ??NM	At facilities; chapter usually pays/sometimes facilities pay	Friday, 12:00 – 2 or 3:00	Lunch – box lunch unless facility pays and then it's catered	5-10 members, plus 2-3 SIU students
5. New England	$35 M/$45 NM	At facilities; facilities fund	Friday, 10 am – noon	Lunch	5–25 attendees Covers 5 states and meets in Boston
6. Ohio/Kent/Ind	$15 M/$20 NM	At facilities; Chapter pays for food	Friday, 10:00 – 11, 12 or 1:00	Lunch – soup, sandwiches, salad, etc.	Usually 8-1 attendees but has been up to 25
7. Pacific NW	$100 M/$150 NM	Facilities fund	Friday, 9:30 am – 4:30 pm b/c many travel at least 3 hrs to	Continental breakfast and lunch for all-day meeting.	

			meeting.		
8. Philadelphia	$20 M/$30 NM	Rotates facilities among downtown & suburban. Facilities funds.	Friday, noon – 3 pm	Decided by facility; deli thru elaborate lunches w/ flowers and gifts	20-30 attendees
9. San Francisco Bay Area	$25 M/ $40 NM	At facilities; chapter splits cost with facility	Friday, 10 am – 2 pm	Lunch: Sandwiches & salads	10 attendees
10. So. California	Half-day mtg: $20 M/$40 NM Full-day mtg: $55 M/$95 NM	Facilities often fund mtgs; if not, mtg fee covers food.	Two Friday mtgs/two Saturday mtgs. per year. Friday, 2:00 – 6:00 pm; Saturday, 9:00 am – 5:00 pm, & 9:30 am – 1:00 pm	Friday: snacks Saturday: Cont. breakfast and lunch	15–25 attendees
11. Virtual	No charge b/c of currency complications; sponsored by FocusForums	On-line BB format	Run over 2-3 days, Wed – Friday & left up for the weekend	None	20–60 attendees. Email invite to 240, a mix of VC members & others

					who are interested.
12. Washington DC	$20 M/$30 NM	At facilities; chapter usually pays	Friday, 12-3:00 pm or 3-6:00 pm	Light refreshments	12-12 attendees

Other money rules

Chapters must obtain prior written approval of the Board with respect to the following:

- Public statements of any kind, oral or written, that purport to officially represent the Association;

- Entering into contracts exceeding $2,000 or that exceed one year in duration;

- The purchase, sale, lease or other disposition of any assets or improvements with a value greater than $500;

Publications and Outreach

Breakthroughs

Breakthroughs is an audio series created by the QRCA that bring to life some of the exciting qualitative research being done in the field by our association members. http://qrcabreakthroughs.com. The series highlights the skill and creativity QRCA members use to harness the power of qualitative research in a variety of indusries.

QRCA is constantly seeking case studies and chapter members are encouraged to submit their case studies by going to the home page and clicking on the Submit Your QRCA Success Story button. In addition to the Breakthroughs volunteers, by sharing your success story in this way, volunteers from the Public Relations, Qcast and Branding committees will have the opportunity to approach members in order to share their story in other venues.

Qcasts

QCasts are QRCA-sponsored monthly webcasts on qualitative research topics. QCasts provide professional education opportunities to market researchers and marketers. Each presentation is made by a QRCA member or guest speaker, lasting about one hour and offering rich opportunities for interaction.

There is more information about submitting an idea for a Qcast or sharing the information about upcoming Qcasts with member's clients at http://www.qrca.org/displaycommon.cfm?an=8.

Help chapter members to gain profile by encouraging them to sumit their case studies via the QRCA website!

Connections

Connections is an electronic newsletter for QRCA members that is published 10 times annually (no issue in January or July). Articles may be edited by the Connections editorial team for clarity or appropriateness. The deadline for each issue is the last business day of the month.

Chapters are encouraged to send in brief write-ups of chapter meetings.

Guidelines for a great write-up were created by former Connections publisher Hank Goldwasser, which are reproduced below. The current publisher of Connections is member Jeff Walkowski.

Share the learning – Get the credit

There's a lot of work that goes into planning and producing a really great presentation at your chapter meeting. Why limit the presentations' learnings to those who were able to attend the meeting? Connections, the on-line newsletter of QRCA, welcomes articles relating the highlights of your chapter's meetings. An article in Connections has the potential to reach members from Indianapolis to Istanbul, thus widening the scope of your meeting program until it spans the globe.

Writing for Connections is almost the same as writing for one's clients, yet very few writers do it! Most chapter meeting reports play back what the presenter said, and do that in great detail. That's like writing about the stimuli that were shown to the respondents in your groups; it's interesting material, but not at all what we're paid to report. We'd like Connections to reflect what the meeting attendees got from the presentation – that's what makes your meeting unique.

Like the idea but not certain where to begin?

First, designate a willing chapter member as your meeting "reporter." Then arm the reporter with these basic journalistic tools, the "Five W's," plus extras, to use as prompts to organize the article.

> **Which** chapter hosted the meeting?

> **When** was the meeting held?

> **Who** was the speaker? (Add speaker credentials as relevant)

> **What** were the speaker's title and topic?

> **Why** did the speaker speak? That is, what was the speaker telling the audience?

> **What** were the main points presented? And we stress main points, rather than details

> **How** were the attendees affected?

Try to capture all aspects of the talk within the article, even going beyond the straightforward reporting approach described above.

Increase relevance and interest

Many of our speakers give the same presentation to more than one Chapter. What will make the article relate to your Chapter is the reaction/response by those who attended. (This is the "How" mentioned above.)

Think about how some of these Letter "I" thought-starters might apply to your article:

1. **Insight:** What were the "ahas!" within the talk?

2. **Innovation**: Any new tools or techniques that others could use?

3. **Intrigue:** Any surprising revelations? Anything controversial or thought- provoking?

4. **Ingenuity:** Any old techniques or approaches presented or used in a new way?

5. **Illustrations:** Any good examples or demonstrations used to demonstrate key points? Describe them and tie them to the speaker's relevant point(s).

6. **Imagination**: Any totally surprising or unique information or ideas presented?

7. **Impact:** In what ways would the information or ideas change the status quo, either for the chapter members or even for the entire industry?

8. **Incendiary:** Anything in the presentation really heat the members up? Cause them to react, either positively or negatively? Did it create momentum? Did it challenge the members? How did they react?

9. **Individuality:** How were the speaker's comments or viewpoint different those the members have heard before, or those that are commonly held? What impact does that difference have on the members?

10. **Infectious:** In what ways did the speaker cause the members to consider changing their own methods in order to adopt the speaker's new and better ideas or approaches?

You or your reporter could hand out index cards before the meeting starts, and ask those who are attending to submit notes on these "I" words. (Pass them out beforehand, and there will be less running around afterward!)

Submitting the article

While there is no maximum length for articles in *Connections*, readers appreciate concise, insightful writing. The writer should be sure to include his/her name and email address at the top of the article, as these will be included in the article's byline when it is published. The writer may also be contacted via email if questions arise during the editing process.

We would love to get photographs. Pictures of the presenter or presenters, pictures of the attendees, a picture of the author; anything to make a reader more interested in reading the article. We can process nearly any type of digital image, and we can scan photographs if they're sent in sufficient time before the deadline.

Getting in touch with members

Chapter member lists and e-mails

Chapter chairs and co-chairs have the ability to send e-mail to everyone in their chapter using a centrally maintained e-mail list (called a List Serve).

In order to use the List Serve you *must* be a Chapter Chair. Only those who are listed on the website as Chapter Chairs/co-chairs have the "right" to send an email to their chapter members/mailing list/prospects using the List Serve found on the QRCA website under "My QRCA" in the left hand column.

Messages sent to these lists from others will not be distributed.

There are three different types of email lists available to Chapter Chairs:

a. Chapter Members - these are members who have designated your chapter as their 'home' chapter on their profile

b. Mailing List - QRCA members interested in receiving chapter event notifications. These are members who have indicated they want chapter mailings from your chapter on their profile. There is no limit to how many chapter mailing lists a member may subscribe to

c. Prospects List - Non- members who contacted QRCA about joining but have not done so yet and former QRCA members. This list is maintain by the management company. To add or remove someone from this list, you need to contact the management company directly.

You can obtain an Excel version of any of these lists by contacting staff. Staff will be updating the names contained in each Email List Serve on a monthly basis. They will also add any updates as they receive them.

Please let staff know if the Chapter Chairs change so they can update the access to the Email List Serve. Also, they would be happy to add another Chapter Leader to the list of those who have mailing privileges. Just let staff know (for contact names and information, please refer to the Resource Locator section.)

Finally, you should be aware that this email system will not allow the recipients to reply to all.

You will also be advised from time to time of new members in your chapter.

Member Profile

If you hear complaints from members that they are not receiving invitations or update from the chapter, this is very likely caused by one of two reasons:

- The member has not kept their profile current, and their e-mail address is out of date

- The member has not subscribed to mailings from your chapter

Although members are invited to update your profile at least annually, there seems to be some confusion on this topic.

This section is found on the homepage under my QRCA (see image below).
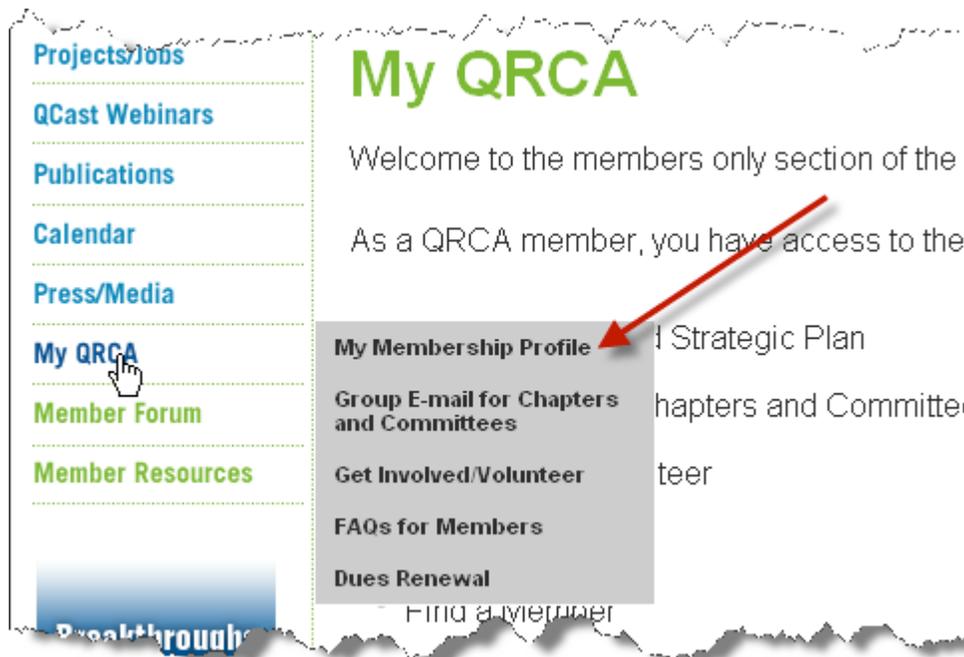
Once in the profile, a member **must** select your chapter in order to automatically receive the mailings for your chapter.

Members can request to be on the mailing list for any number of chapters. Now that you are chapter leader, you may wish to monitor more of the communications of other chapters to help you stay in touch and get new ideas about what other chapters are doing.

Welcoming new members

A personal welcome to new members is greatly appreciated, and helps them to quickly get connected to the organization and start to access the many excellent resources of QRCA.

Some chapters call new members or prospects, while others send an e-mail.

Currently, a welcome email is sent to all new members and the other "welcoming materials" are being reviewed by the Membership Committee.

Some chapters have a standard e-mail that they send. Here are two examples, one from the Virtual Chapter for new members, and one from the SoCal chapter for potential members.

Virtual Chapter welcome message

Welcome to QRCA! Corette Haf from South Africa and I (from New Zealand) are the Co-Chairs of the Virtual Chapter and we are delighted to hear that you're interested in our Chapter. Here's a little information for you about our Chapter.

Members of QRCA's Virtual Chapter are located all over the world, in many different countries and time zones, and we have found the most effective way for us to connect with each other is by online Bulletin Board. We usually aim to have four meetings each year, with our meetings usually being held over 3-4 days. It is a useful way for us to explore new technology platforms together, and to get to know the other members of our Virtual Chapter. We will be in touch with you again soon, with information about our next meeting.

Corette and I hope to be able to meet you during 2007 - perhaps even in person at the QRCA Annual Conference in Vancouver in October. Information about this year's conference is available via the Home page of QRCA's website at www.qrca.org

We also encourage you to log into QRCA's member Forum which is a very useful resource in terms of communication with fellow QRCA members. It provides a wealth of information and advice on a wide range of topics. You can log into the Forum through the "Member Forum" link which is also located on QRCA's website Home page.

We want to help make your membership both long-term and helpful to you personally and professionally, so please feel free to contact either of us with any questions or comments.

With our warmest regards,

Manuela Fletcher and Corette Haf, Virtual Chapter Co-Chairs

SoCal Chapter welcome message

I am co-chair of the QRCA Southern California chapter, along with Holly O'Neill and Carol Gailey. I got your name from the QRCA main office as someone who might be interested in joining our association. When you join the QRCA (which is an organization that includes members from the U.S., Canada, and quite a few other countries), you automatically become a member of our chapter since you live in Southern California.

I strongly recommend joining the QRCA. You can become a member if your primary professional role consists of designing, conducting and analyzing qualitative research, you are a principal or associate in an independent marketing or social research company, and you do not work for an advertising agency, manufacturer, or service firm outside the research industry.

Membership dues are $280 per year, and I think you'll find that the value provided is well worth the cost. I really think the QRCA has a lot to offer:

Education: I'm continually amazed at how freely the members give of their expertise - how they truly help fellow members on our online forum, at the annual conference and at chapter meetings.

"Virtual water cooler": Membership in the QRCA gives you access to hundreds of other colleagues for camaraderie and advice – whether it's on the online forum or at the meetings.

How our profession is perceived: I think the QRCA raises the level of professionalism and the perceptions of moderators nationwide.

New business: Last but not least, membership in the association (and inclusion in the website's "find a consultant" database) has actually helped me get new clients.

If you'd like to become a member, go to http://www.qrca.org/displaycommon.cfm?an=1&subarticlenbr =5 and click on "Information

Request Form" or contact our membership director, Darrin Hubbard, by e-mail at membership@qrca.org or by phone – 651- 290-7491 or toll-free – 888.ORG.QRCA (888.674.7722).

And of course, feel free to call me at (818) 752-7210.

Staying connected

LinkedIn

QRCA Qualitative Research Discussion

What it is:

QRCA Qualitative Research Discussion is one of the external connections we created so that members might share their expertise with non-members in a public forum. As a chapter leader, you may get questions on the basis for the LinkedIn discussion, why it exists and how to get the most out of it.

What it tells the visitor:

This qualitative research discussion venue is sponsored by the Qualitative Research Consultants Association. It is open to anyone interested in discussing issues pertaining to qualitative market research.

Why it exists:

QRCA desires to gain positioning as a resource organization for qualitative research. We wanted to reach beyond our membership to non-members and share some of our expertise. This positions QRCA as a go-to resource, a center of knowledge for all things qualitative, and a leader in the qualitative world.

Size and composition of group:

1. Almost 1,400 members, having begun in September 2009 (high growth rate)

2. Members and non-members of QRCA can join this group

How to get the most out of the LinkedIn group:

     a. Join the group – while on LinkedIn, search for "QRCA Qualitative Research Discussion" and make a request to join.

     b. Introduce yourself under Ricardo's "Welcome" thread.

     c. Read through recent discussions. When you find one on which you have something to add or consider, post your comment!

     d. Visit often, at least weekly.

     e. On occasion, start a discussion.

     f. When you see questions that you can add to (much like our private QRCA Forum), respond accordingly.

g. Consider what you post carefully as QRCA wants to maintain a reputation for fostering high-level discussions about the industry.

h. Avoid discussing pricing specifics.

i. When you find publications, stories and/or press about the industry that deepens group members' knowledge, post under "News."

j. Refrain from posting sales and promotional comments – you'll note that there are rarely any views of these, meaning they hold no interest. Group moderators will remove inappropriate postings.

Member Forum

The QRCA forum is one of the key resources we offer members. As a chapter leader, you may get questions on the forum, or on forum rules and etiquette.

QRCA has forum etiquette guidelines which are available in the Forum area under the first "Welcome" thread. These guidelines are distributed annually with the membership renewal-you may recall signing off on this the last time you renewed your membership. Some key aspects include:

♦ Agreeing to deal with other members with courtesy and respect
♦ Agreeing not to have discussions related to the pricing of services
♦ Agreeing not to promote or sell one's own services

Please note that price-related discussions create potential legal risks for QRCA; this type of comment is removed as soon as it appears on the forum.

Tips on Using the Forum

Members may not be aware that they can receive updates to the forum via their e-mail or in a "feed reader" by using the RSS feed option.

How to receive updates and RSS feeds directly to your inbox or reader of choice

1) To access the Member Forum – visit http://www.qrca.org

On the left hand side click "Member Forum"

2) Once you are re-directed to the Member Forum, you must log-in to the forum with your UserID and Password.

Forum Digest

Once you are logged in, you can scroll all the way down to the bottom and click the "Subscribe to the Forum Digest" button. Enter your e-mail and click "subscribe", to stay up-to-date with new posts/entries on the forum. This comes in the form of a daily e-mail that is easily deleted if you are not interested that day, but can provide valuable info and keep you up to date!! (It can be a source of getting work!!)

How to subscribe to threads in a specific area, such as your chapter or SIG section of the Forum

1) Once you are logged into the Member Forum scroll down and find the section of interest under "Sigs, Chapters and Committees"

2) Click on a thread mentioned and you will enter the discussion contained within that particular thread.

3) Once you have entered the thread, Click "Subscribe to this topic" located in the group of links on the top left:

4) Once you subscribe to a topic, you should receive notifications when someone posts new information to the thread. It is an efficient way of staying up-to-date with important info related to a SIG or chpater.

5) If you would like to post information or a reply, click the "post reply" button at the bottom right of the last message in the thread:

When you post a new message, you will have a few options at the bottom of your post.

6) When you check the box labeled "Post Notification", you will know whenever someone posts a reply to the thread or your question. This will come in the form of an instant e-mail, rather than in the comprehensive daily digest:

You may also want to visit your **Account Settings** menu located within the control panel:

There, you can upload your picture (Avatar) and adjust any account settings according to your preferences.

*One setting that is recommended is turning "on" Private Messages and Private Message notifications. This will let you know when someone sends you a PM so it is easily seen (otherwise it is easy to overlook a specific request).

Insider Tips and Tricks

The Forum has its own help section -- it's the very first section in the forum!

Inside this section you will find a downloadable tutorial. This is a great resource to recommend to any member who seems to be struggling.

Did you know? You can...

11. Subscribe to a daily RSS feed for all posts in the forum that will be delivered to your e-mail inbox?

12. Search for topics inside the form defined past discussions on practically anything?

13. Rate topics using a 1 - 5 star system? this is a new feature added to the bottom left of every thread.

14. Generate a printable PDF version of any thread in the forum? This is a new feature added to the bottom right of every thread.

15. Change your screen name to something people would recognize -- like your actual name?
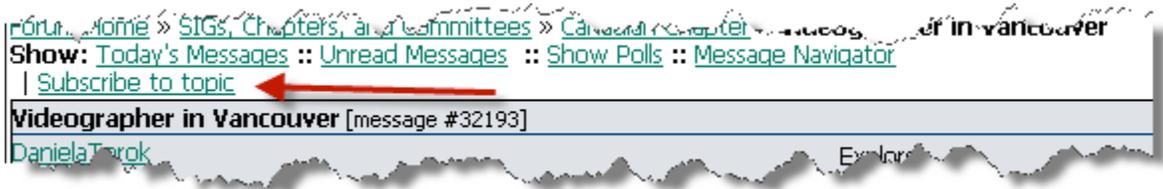
Chapter Sections

Any chapter can have a section in the forum. If your chapter doesn't currently have its own section, to get one, simply contact Darrin at the QRCA office.

To get people using your chapter section, you may need to do some encouragement. One thing that could be helpful is to encourage your chapter members to "subscribe" to this section of the forum so that they automatically receive an e-mail whenever there is a new post.

There are two ways to do this.

16. Subscribe to specific thread -- this is found in the top left-hand corner (see image below).

17. Syndicate a section of the forum such as a chapters own section. This is found in the bottom right corner (see image below)

Chapter leadership sections

You have access to two sections of the forum that are exclusively for leaders of chapters and special interest groups.

These sections are found in the SIGS, Chapters and Committees section of the forum.

This is a good place to post a question or topic you think will be of general relevance or concern to other chapter leaders.

Conferences

Annual Conference Leadership events

All chapter chairs and co-chairs are invited to the Leadership Meetings at the Annual Conference (along with Committee and SIG leaders and Board Members). There are two events for QRCA's volunteer leaders during the conference.

The first is an appreciation dinner on the Tuesday evening prior to the opening of the conference on Wednesday afternoon. This dinner provides an opportunity for leaders to relax, share a meal and be recognized by the QRCA President for their contributions througout the year.

The following morning (Wednesday) is the Leadership Planning meeting which includes breakfast and lunch. This meeting provides an important opportunity for leaders to interact, brainstorm ways to improve the association, and to provide ideas and insights to the Board.

All Chapter leaders are asked to plan on attending both meetings, and making the necessary travel arrangements.

Chapter meeting

It is assumed that chapters will have a meeting at the conference. Typically, this occurs over breakfast either Thursday or Friday during the conference – a timeslot is chosen by the planning committee and promoted to the leaders and attendees in the conference brochure. Signs at tables indicate where each chapter is meeting, and the meetings are a great way for colleagues to re-connect or meet new people from their chapter.

Joint QRCA/AQR Conferences

This biennial event is co-sponsored by the world's leading professional associations for qualitative research – the Association for Qualitative Research (aqr.org.uk) and the Qualitative Research Consultants Association (qrca.org). The Worldwide Conference on Qualitative Research brings together the best thinking and practice of more than forty qualitative market researchers from around the world. This conference is all about how and why qualitative research can go beyond information and insights to inspire decisions and actions that make a difference.

The latest conference was held in Prague in May of 2010 and had approximately 180 attendees from 40 different countries. Look for more information about this event on the QRCA website under the Calendar.

Symposium

QRCA held its first Spring Symposium in May of 2009. The objective of the event was to provide an opportunity to illustrate the value of qualitative research to the general audience of research users and buyers, while at the same time highlighting the professional excellence, client/researcher partnership, and creativity of QRCA members. Unlike the Annual Conference, which is for members and qualified non-members only, this new event afforded an opportunity both for potential members and clients to attend a QRCA event and get more involved with the organization and its members.

The next Symposium will be held in May of 2011 in Chicago. Look for more information coming soon about the opportunity to submit a speaking proposal. This event showcases success stories between QRCA members and clients demonstrating the power of qualitative research. It provides an exciting opportunity for members to share their ideas and successes and all members are encouraged to consider submitting a proposal.

Resource locator

Where to find what you need on QRCA's web site

Throughout the manual we have directed the reader to different places – what else should be listed here?

Probably need some screen shots with brief text to accompany, maybe some live links for key resources.

e.g.

18. where the mailing lists are

19. where to find who is the committee chairs, other chapter chairs

20. where to find the policy documents

Staff contact list

Senior Advisor, David Ewald, CAE, 651-290-6276, davide@ewald.com

David focuses on client vision and big picture goals. He ensures client satisfaction by working with the Board and staff to keep all organizational goals and operations on track.

Executive Director, Shannon Pfarr Thompson, CAE, 651-290-6277, shannonp@ewald.com

Shannon is responsible for overseeing all QRCA actitivities including working with the Board and Committees in events, accounting, membership, information technology, and communications. Shannon will coordinate all staff activities and act as the liaison between staff and the QRCA Board on a day-to-day basis.

Committee liaison: Industry Awards Task Force, NomCom, Professionalism

Assistant Executive Director, Darrin Hubbard, 651-290-7463, darrinh@ewald.com

Darrin assists Shannon in all oversight of all of QRCA's activties and works as Membership Director to screen and approve new members to QRCA.

Committee liaison: Field, International, Membership, QCasts, TechCom

Communications, Laurie Pumper, CAE, 651-290-6273, lauriep@ewald.com

Laurie directs the Communications Department, which designs all printed and electronic communications including event and membership brochures, websites, member directories, annual reports and special projects.

Committee liaison: QRCA Connections, QRCA Views, PRag and BRag.

Communications, Nicki Brunner, 651-290-7494, nickib@ewald.com

Nicki works in the Communications Department, designing printed and electronic communications including event and membership brochures, websites, member directories, annual reports and special projects. She is also talented in technological areas such as website strategy and design, podcasts and online communications.

Committee liaison: QRCA Connections

Event Management, Julie Cygan, 651-290-7475, juliec@ewald.com

Julie is in the Meetings and Events Department and her skills include coordinating tradeshows, sponsorship development, planning conventions with multiple tracks, receptions, seminars, training and development.

Committee liaison: Conference, Symposium, AQR/QRCA Conference

Member Services, Chris Swanson, 651-290-7464, chriss@ewald.com

Chris is the Director of Member Services; she directs staff regarding membership activities such as responding to member questions via phone and email, invoicing for dues and events and processing membership applications.

Finance/Accounting, Amanda Ewald, 651-290-7464, amandae@ewald.com

Amanda works on all financial aspects for QRCA from monthly statements to payables and receivables to tax preparation assistance.

Operations, Kathie Pugaczewski, CAE, 651-265-7859, kathiep@ewald.com

Kathie oversees the Member Services, Events and Communications departments and is an expert in organizational processes and project management execution.