

AIChE Local Section Officers' Resource Guide, 2006

The Local Section Officers' Resource Guide is designed to provide local section officers with the information, answers, and support they need to lead and manage a successful local section.

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AIChE Contacts

(Telephone numbers are area code 212, except where noted.)

Customer Service

AIChExpress Customer Service Center (Outside US and Canada)	800-AIChemE 591-8100
AIChExpress Fax	591-8888
AIChExpress E-mail	xpress@aiiche.org

General Information

Fax	591-8897
Web URL	http://www.aiiche.org

Executive Office

Executive Director, John A. Sofranko	591-7330
Manager, Executive Office, Fiona Brennan	591-7333

Finance & Strategic Programs

Director, Rick Cain	591-7751
Controller, Stetson Wilson	591-7085

Operations

Director, Bette Lawler	591-7207
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Information Technology Services

Senior Manager, Infrastructure & Data Management Steve Youn	591-7633
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Volunteer & Membership Activities

Director, Felicia Guglielmi	591-7329
Member Benefits, Camille Belcuore	591-7113
Divisions, Forums, & Local Sections, Anette Ngijol	591-7478
Students & Awards, Gordon Ellis	591-7107

Marketing

Marketing Manager, Tim McCreight	591-7224
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Meeting Logistics & Programming

Logistics Director, Jeff Wood	591-7450
Programming Director, Joseph Cramer	591-7950

Technical Activities & Publications

Director, Stephen Smith	591-7335
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CEP

Editor & Publisher, Kristine Chin	591-7662
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**Center for Chemical Process Safety,
Design Institute for Physical Properties, and
Design Institute for Emergency Relief Systems User's Group**

Director, Scott Berger 591-7237
Sponsor Support Engineer, Karen Person 591-7319

Institute for Sustainability

Director, Darlene Schuster 410-458-5870

Society for Biological Engineering

Executive Director, June Wispelwey 591-7616

Corporate Sales

Account Executive, Denise DeLuca Mallon 591-7170

AIChE Human Resources and Foundation

Director, Cathy Diana 591-7230

Most AIChE staff can also be reached via email as follows: the first four letters of the person's first name, and the first letter of the last name, followed by @aiche.org (Example: To reach Stephen Smith, the address would be steps@aiche.org.)

2. AIChE Overview & Governance

AIChE, founded in 1908, is a professional association of more than 40,000 chemical engineers worldwide. AIChE fosters and disseminates chemical engineering knowledge, supports the professional and personal growth of its members, and applies the expertise of its members to address societal needs and improve the quality of life. For more information about AIChE, including membership, structure, governance, etc., please visit <http://www.aiche.org/about>

2.1 AIChE Vision

AIChE provides value as:

- the global leader of the chemical engineering profession;
- the lifetime center for professional and personal growth and security of chemical engineers; and
- the foremost catalyst in applying chemical engineering expertise in meeting societal needs.

2.2 AIChE Mission

AIChE will:

- promote excellence in chemical engineering education and global practice
- advance the development and exchange of relevant knowledge
- uphold and advance the profession's standards, ethics and diversity
- enhance the lifelong career development and financial security of chemical engineers through products, services, networking, and advocacy
- stimulate collaborative efforts among industry, universities, government, and professional societies
- encourage other engineering and scientific professionals to participate in AIChE activities;
- advocate public policy that embraces sound technical and economic information and that represents the interest of chemical engineers
- facilitate public understanding of technical issues;
- and achieve excellence in operations of the Institute.

2.3 AIChE Leadership:

<http://www.aiche.org/About/WhoWeAre/Leadership/index.aspx>

2.3(a) The AIChE Board of Directors is charged with maintaining AIChE's vitality. Elected by the members, from our membership, these dedicated professionals have backgrounds as varied as our industry. To ensure the organization meets all of our needs, the Board regularly meets with local sections, divisions and forums, and sister societies. If you'd like to contact any one of the Board Members, contact localsections@aiiche.org or call (212) 591-7478 for more information.

2.4 AIChE Structure:

<http://www.aiche.org/About/WhoWeAre/Structure/index.aspx>

The Operating Councils work with the various entities that make up AIChE—local sections, divisions, forums, committees, student chapters, etc.—to assure that they are aligned with the needs of the members and with each other.

1.4 (a) 1.3(b) AIChE’s three **Operating Councils** are leading the Institute’s efforts to realize the three elements of AIChE’s Vision. The **Career and Education Operating Council (CEOC)** is focused on the “lifetime center” and areas of membership, professional development, and financial services. The CEOC is also responsible for addressing the needs and providing enhanced services to local sections. The **Chemical Engineering Technology Operating Council (CTOC)** is responsible for two major areas: the frontiers of chemical engineering and the dissemination of that knowledge. The **Societal Impact Operating Council (SIOC)** is leading efforts for how chemical engineers can effectively address societal needs.

1.4 (b) Local Sections: <http://www.aiche.org/LocalSections>

There are 110 local sections throughout the United States and Puerto Rico, plus the Netherlands and Belgium, Saudi Arabia, Singapore and Canada. Local sections sponsor activities of interest to members in their particular area. They are the “grassroots” of AIChE and play a key role in helping AIChE fulfill its vision and mission for the 21st century.

1.4 (c) Divisions and Forums: <http://www.aiche.org/DivisionsForums>

There are 18 divisions and forums focusing on the technical areas in which chemical engineers work, including fuels and petrochemicals, advanced materials, and biotechnology.

1.4 (d) National Committees:

<http://www.aiche.org/About/WhoWeAre/Structure/Committees/index.aspx>

There are 23 national committees that work to further the objectives of the Institute, both internally and through outreach efforts.

1.4 (d) (a) The Local Sections Committee (LSC)

The mission of the LSC is to strengthen AIChE's Local Sections through resource development, networking, and opportunities for sharing information, with particular focus on Local Section officers. All current and past Local Section chairs are invited and encouraged to become members of the Local Sections Committee. Officers of the Committee include Chair, Vice-Chair, Secretary, and Operating Council Representatives. LSC goals/products include:

- ✓ Improved relationships and linkages of Local Sections with AIChE staff and the Career and Education Operating Council;
- ✓ Effective tools for information sharing;
- ✓ Practical Local Section resource materials; and
- ✓ Local Section best practices

LSC guiding principles:

- ✓ Local Sections benefit from interacting with each other and the Institute; and Local Sections have unique needs and have officers who are capable and willing to provide leadership to meet those needs economically and practically.

1.4 (e) Student Chapters: <http://www.aiche.org/Students/Chapters/index.aspx>

There are 164 Student Chapters on campuses in the United States, Puerto Rico, Mexico, Canada, Nigeria, and Hong Kong, offering undergraduates a chance to learn more about their chosen profession.

1.4 (f) Technical Societies allow industry, academia and government representatives to collaborate and leverage resources for research, technology transfer and other activities. Currently more than 200 companies participate in three Industry Technology Alliances: Center for Chemical Process Safety ([CCPS](#)), including Safety and Chemical Engineering Education ([SACHE](#)); Emergency Relief Systems ([DIERS](#)); Thermophysical Property Data, Evaluation of Measurement ([DIPPR](#)), the [Society for Biological Engineering \(SBE\)](#) and the [Institute for Sustainability \(IfS\)](#)

3. Volunteer and Membership Activities: Support for Local Sections

Local section officers can look to AIChE's Volunteer and Membership Activities Department for support, resources and training. Our goal is to make your role as a volunteer leader as rewarding and simple as possible. The following resources can help offer valuable opportunities to your members:

3.1 Membership Lists

Membership lists for your local section are now available to download on the AIChE website anytime at <https://www.aiche.org/apps/mag/sections/memberlist/login.asp> . Only local section chairs and other designated officers have access to this list. If you have any questions, please contact localsections@aiiche.org or call (212) 591-7478.

3.2 Local Sections Committee Resources

AIChE's Local Sections Committee (LSC) is charged with developing the relationships between AIChE's local sections and AIChE Staff and the Career and Education Operating Council. Through monthly networking calls, meetings, and using other available means of collaboration, the LSC aims to highlight local section best practices and develop practical resource materials that will help AIChE's local section leaders serve their constituents. Please visit <http://www.aiche.org/LocalSections/Resources/Committee.aspx> for more information about how the LSC can help you serve your local section members.

3.3 ProjectConnect Grants

The John J. McKetta ProjectConnect Grants for Local Sections were inaugurated in 2001 to assist local sections with their efforts to reach out to students, recent chemical engineering graduates, and new engineers. Local Sections are encouraged to request funds to help support innovative programs designed to increase participation of young graduates transitioning from student to professional. For more information and to apply, please visit <http://www.aiche.org/LocalSections/Resources/PCGrant.aspx>

3.4. Best Practices

A diverse collection of local section best practices, including the Career and Education Operating Council's volunteerism best practices, is provided on the AIChE Web site at <http://www.aiche.org/LocalSections/Resources/BestPractices.aspx>

3.5 Volunteer Recognition requests

AIChE President John Chen would like to thank you for your efforts as a volunteer leader, by writing a letter of recognition to your boss or others in your company, university, or government agency. If you would like to request a Volunteer Recognition Letter for yourself or others, please visit <http://www.aiche.org/uploadedFiles/LocalSections/DepartmentUpload/Volunteer%20Leader%20Recognition%20Request%20Form.doc>

3.6 Local Section Newsletter

AIChE publishes a monthly electronic newsletter to all local section officers. The newsletter contains important updates and deadlines for AIChE related activities as well as other activities of interest to local sections. <http://www.aiche.org/LocalSections/Resources/Newsletter.aspx>

4. Administration

4.1 Officer Elections

The rules of election of local section officers are stated in each local section's bylaws, and are based on election guidelines established by headquarters.

Some AIChE local sections conduct elections in the Spring, with new officers taking their positions in September. Most others elect officers in December for installation at the local section's first meeting in January. A few important notes on local section elections:

All officers of a local section **must be national AIChE members**. The membership status of candidates should be verified prior to approval of a slate.

All officers of the local section shall be elected by ballot at the local section's annual meeting or by mail ballot prescribed by the local section's Executive Committee and shall take office at the first meeting of the following fiscal year. It is recommended that the retiring chair remain on the Executive Committee for one year.

Should a vacancy occur in any office, the Executive Committee shall appoint a member of the local section to fulfill the term.

Immediately after officer elections, the Secretary must forward the names and contact information of newly elected officers to the Volunteer & Membership Activities department at AIChE headquarters. If you find that your local section bylaws do not thoroughly articulate the steps involved in officer elections and need further assistance, please contact localsections@aiche.org or call (212) 591-7478.

4.2 Responsibilities of the Local Section Executive Committee

The chair, chair-elect or vice chair, secretary and treasurer normally comprise the local section's Executive Committee. The Executive Committee is charged with:

- Leading and managing the affairs of the local section;
- Functioning as a clearinghouse for new business by reviewing proposals or local section issues prior to be presented at a full meeting;
- Setting clear-cut policies in such areas as authorizing expenditures, programming, membership, any other matters relating to general local section business.

The exact job responsibilities for the local section's officers may vary from local section to local section depending on the culture and climate of each local section, including specifications in membership size and demographics, bylaws, professional composition, location, etc. However, some responsibilities for each position are common enough to all groups. Please find below "standard" or "traditional" officer descriptions and responsibilities for Chair, Chair-Elect, Secretary, and Treasurer.

4.2(a) Chair

The local section chair is responsible for the overall direction of the local section's activities. The chair should provide leadership for the local section officers and committee chairs and delegate responsibilities and authority as much as possible to committees such as Membership, Young Professionals, Communications, Awards, etc. Specific duties of the chair include calling and conducting local section meetings, maintaining good communications between the local section and AIChE, staying on top of local section changes and updates, submitting an annual report to local section members and to AIChE, receiving and reviewing the quarterly membership updates from

staff, planning and implementing local section programs and services, and recognizing new members and rewarding local section volunteers.

4.2(b) Chair-Elect or Vice Chair

The chair-elect should be an extension of the chair office. The person who fills this position often serves as the program chair (if one is not otherwise assigned) and has the responsibility for planning local section meetings and activities. The chair-elect should assist the chair in key leadership duties, lead meetings, host speakers, and fill in for the chair as needed.

4.2(c) Secretary

The local section secretary's duties are essentially those of record keeper and correspondent. The secretary's responsibilities usually include keeping meeting minutes, following up on action items from meetings, maintenance of membership lists and local section files, working with other local section officers to prepare meeting agendas, correspondence with AIChE on local section business, including information changes, as they occur, and at the term's end, training the new secretary and turning over all records and local section materials. In smaller local sections, the secretary may also be responsible for mailing meeting notices, preparing and distributing local section news, and compiling the local section's annual report.

4.2 (d) Treasurer

The treasurer handles the local section finances and accounting for all local section money received and spent, including membership dues, reimbursements from AIChE, and program revenues and expenses. This involves keeping accurate records, and reporting the local section's financial status according to the manner and schedule prescribed in the bylaws. The local section officers should clearly establish guidelines and procedures for authorizing expenditures, paying bills, signing checks, and any other financial related actions, with the treasurer responsible for keeping copies and records of all transactions. The treasurer reports on all requests to the Executive Committee or other officers, including status of bank balances, dues collections, expenses relating to specific projects, and any abnormal account activity. The treasurer is also responsible for preparing an annual budget in the beginning of the term, and should prepare an annual report on the local section's fiscal condition at the years-end, and submit to AIChE with the annual report.

4.2 (e) Local section Committees and Committee Chairs

Some local sections have a substructure of committees to help organize and sustain local activities and fulfill local section goals. The type, size, function and structure of local section committees will vary from local section to local section based on different needs and goals. Here are a few examples of typical local section committees and their general duties. For more information about organizing a local section subcommittee, please contact localsections@aiche.org or call (212) 591-7478.

Awards- administers all award activities, such as nominations for local, national and special local section awards.

Education/Student Relations- plans and implements activities and resources to assist local teachers, college professors, deans, students, and student chapters, including student awards/scholarships, k-12 outreach tools, science fairs, teacher/student nights, E-Week activities, etc.

Employment/Careers/Professional Development- plans and implements activities to provide members with professional development opportunities and employment (job seeking) assistance, networking and relationship building opportunities between employers/industry and employees,

information on local employment data, trends and statistics, general career guidance services. This person/committee may also be responsible for planning E-Week activities and outreach.

Government Relations-plans and implements local section programs that focus on local and national concerns regarding regulation issues, and invites regulators and government officials to speak at local section meetings.

Membership- plans activities to increase member participation and retention, and recruits new members.

Mentoring- develops programs and activities that include and encourage the participation of young people, women, and underrepresented minorities in local section activities.

Minority Affairs- develops programs and activities that encourage and support the participation of underrepresented minorities in the local section's activities.

Newsletter/Communications/Webmaster- administers and manages the operations behind the local sections newsletter/publication/website, etc.

Nominations/Volunteer Recruitment/Volunteer Recognition-identifies and recruits candidates for local section leadership and develops recognition programs for incoming and outgoing local section leaders. This person/committee may also be responsible for conducting or overseeing the local section's elections.

Programming- manages the local section's meeting planning, such as the execution and organization of local section meetings, meeting content, speaker recommendations/selections, etc.

Public Relations- develops programs that focus on areas of public policy in the chemical engineering community, both locally and nationally, such as energy, education, research, etc.

Women Professionals- develops and advocates a strong network of women in the local section, and oversees that the local section is effective and accommodating in serving its members; encourages and supports the participation of underrepresented minorities in the local section's activities.

Young Professionals- identifies the needs and concerns of young professionals, and develops programs and resources to respond to those needs. This person/committee may also be responsible for creating professional and social networking opportunities for younger members/potential members.

4.3 AIChE Staff and Local Section Officer Administration Calendar:

January	<ul style="list-style-type: none"> • Send officer updates to AIChE • Receive monthly newsletter from AIChE • Write monthly local section newsletter
February	<ul style="list-style-type: none"> • National Engineers Week • Quarterly dues reimbursements sent by AIChE
March	<ul style="list-style-type: none"> • AIChE Spring Meeting/Local Sections Committee Meeting/Volunteer Leadership Recognition Reception • Deadline for ProjectConnect Grant application- March 31 • Student Regional Conferences- schedule and locations TBD • Treasurer's Report due March 31
April	<ul style="list-style-type: none"> • National Volunteer Week • AIChE Spring Meeting (see above) • Student Regional Conferences- schedule and locations TBD • Designate representative to attend the Leadership Development Conference • IRS filings- April 15
May	<ul style="list-style-type: none"> • Quarterly dues reimbursements sent by AIChE • Report local section dues amount (changes) to AIChE • Hold local section elections • Submit AIChE Annual Report online • Send AIChE local section treasurer's report
June	<ul style="list-style-type: none"> • Leadership Development Conference • Deadline for ProjectConnect Grant application- June 30
July	<ul style="list-style-type: none"> • Send officer updates to AIChE • Plan fall and spring meeting schedule and distribute programming plans to local section members and AIChE
August	
September	<ul style="list-style-type: none"> • Quarterly dues reimbursements • AIChE reports to IRS on local section tax-exemption • Deadline for ProjectConnect Grant application-September 30
October	
November	<ul style="list-style-type: none"> • Hold local section elections • AIChE Annual Meeting
December	<ul style="list-style-type: none"> • Start planning activities for National Engineers Week • Deadline for ProjectConnect Grant application- December 31
Ongoing	<ul style="list-style-type: none"> • Periodically download membership lists online and contact AIChE with any updates and/or corrections • Keep AIChE's VMA updated on local section activities and highlight any special event • Recognize the time and talent of your volunteers

4.4 Local section Responsibilities to AIChE

4.4 (a) ANNUAL REPORTS

Each local section must submit an annual report to AIChE each year by the Spring deadline. The annual reporting process has been simplified over the years and can now be filled out and submitted online at:

<http://www.aiche-xtranet.org/aichereport/default.asp?CatID=3>

The online annual reporting system also has the ability to archive past local section reports which serves as a great resource in aiding new local section officers submit the report as well as review and better understand their local section's history.

Annual reports are a great tool for information sharing between local sections officers and AIChE staff. They are an effective vehicle for local section officers to share best practices, programming ideas, speaker recommendations, and local section challenges and concerns. Submitting an annual report helps staff have a better understanding of each local section's characteristics and situation, and be more responsive to each local section's needs. Further, taking the time to complete an annual report helps the local section reflect back on its programming year and identify the year's successes, shortcomings, etc.

For information on Annual Reports, contact localsections@aiiche.org

4.4 (b) OFFICER UPDATES

Good record-keeping and updates to AIChE staff regarding changes in local section leadership and contact information are essential in allowing us to keep up-to-date membership lists and maintain healthy communications with local section leaders. To make this process as simple for you as possible, there is an Officer Update Form located at

http://www.aiche.org/LocalSections/Resources/FAQs.aspx#Officer_updates or you can always email changes directly to localsections@aiiche.org or call (212) 591-7478.

4.4 (c) BYLAWS REVISIONS

Periodically, local section leaders should review their bylaws, amending the bylaws to reflect current practices, and submit any proposed changes to the Volunteer and Membership Activities department for review. Upon favorable review, the Volunteer and Membership Activities department submits the proposed bylaw amendments to AIChE's Career and Education Operating Council for review and approval.

For a copy of AIChE's model local section bylaws, please see the appendix.

4.4 (d) LOCAL SECTION ARCHIVES

Local section's should set up a central and permanent location for all important materials, including documents of a legal or tax nature, to be stored and made accessible to local section officers. During the transition of leadership, this information should be reviewed with the incoming officers so as to help them become familiar with the local section's history, business and level of activity.

A local section's permanent file should include (but is not limited to):

- Local section charter and bylaws;
- Meeting minutes;

- Financial statements and accounting records;
- Annual reports and historical documentation;
- Past officers and leadership history;
- Local section newsletters, meeting flyers, event announcements, etc.;
- Speaker recommendations;
- Tax-exempt, legal, and incorporation documents; and
- Communications, correspondence, and any other pertinent information.

4.5 Membership Lists

Membership lists for your local section area are now available to download on the AIChE website anytime at <https://www.aiche.org/apps/mag/sections/memberlist/login.asp> . Only local section chairs and other designated officers have access to this list. If you have any questions, please contact localsections@aiiche.org or call (212) 591-7478.

4.6 Additional Administrative Advice

Effective leadership and efficient administration of a local section is dependent upon clearly defined objectives and officer responsibilities. Two good ways to ensure there is a collective understanding amongst your local section's leadership, of what needs to be done, by whom, and when, is to have frequent leadership meetings and a leadership handbook. Both resources will help guide local section officers in the right direction regarding their respective administrative tasks and responsibilities.

5. Programming

Local section programs are a crucial AIChE member benefit. Local section activities provide excellent forums for engineers to make professional contacts and socialize with like-minded engineers in their area. Aside from regular monthly meetings, which vary in subject, style and format from local section to local section depending on local interests and demographics, most local sections participate in:

- Career development workshops for local professionals or students;
- Community and education outreach activities, like National Engineers Week;
- Participation in public forums, classroom visits, and science fairs;
- Plant and brewery tours, various field trips and social outings, i.e. sporting event, family picnic, holiday party, etc.
- Joint meetings with other professional societies and/or neighboring AIChE local sections;
- One or two-day technical seminars;
- Continuing education programs;
- Government interaction programs;
- Student programs, awards nights, and student chapter interaction; and
- Programs to attract young professionals; and
- Web seminars

5.1 Program Planning Tips

Determining the type of programs you want to establish in your local section is one aspect of programming. However, there are also preliminary steps to take in planning a successful program:

- Poll your membership, formally or informally, to find out what types of programs and activities they'd like to attend or participate in;
- Obtain financial backing from local companies;
- Ensure you have enough volunteer support and commitment to carry out the program;
- Set up effective and timely meeting promotion, in writing, online and by word of mouth, at least two weeks in advance;
- Plan in advance and plan diverse programs; and
- Vary meeting times and locations so as to reach a larger audience.

With increasing demands on our energy and time, it may be beneficial to programmers to “think out of the box”, and put greater emphasis on creative ways to attract new people and connect more broadly with the local community. This may mean doing more than scheduling monthly dinner meetings by investing more time in your local section’s communications, such as your newsletter and Web site. For example, more substantial newsletter and web content- such as interviews with employers, career development news/resources, job search strategies, company profiles, web seminars, family and financial planning news, etc.- can increase local interest and provide immense value to local section members across the board.

5.2 Meeting Logistics

The following is a “checklist” of meeting logistics, compiled from suggestions from local section programmers over the years.

- ✓ **Pre-Registration & On-site Registration** (have enough volunteers to work the registration process- collect payments, greet attendees, answer questions, distribute badges/information packets, etc.)
- ✓ **Name Badges** (emphasize special groups, i.e. students, VIP, speaker, new member, etc.)
- ✓ **Meeting Facility** (ensure that it is accessible and comfortable for attendees; find out about parking restrictions, transportation options, etc.)
- ✓ **Membership Display** (ensure that there is visual and informative information about AIChE and local section membership.)
- ✓ **Meeting Agenda** (ensure there is a meeting agenda/program guide for programmers to follow.)
- ✓ **Welcoming Attendees** (introduce new attendees/members.)
- ✓ **Promotion** (promote membership and promote upcoming meetings and local section activities.)
- ✓ **Pre-Meeting Social Activities** (facilitate networking, set-up a “meet-and-greet” if necessary, situate bar/refreshments centrally to draw attendees into the meeting environment, etc.)
- ✓ **Room Layout** (arrive early to check room set-up, including food and beverage, AV equipment, signage, etc.)
- ✓ **Meeting Attendance and Experience** (have a sign-up sheet to keep track of who attended and even consider having an exit survey to gauge what the experience was like for attendees.)
- ✓ **Timing (adjourn at a reasonable hour)**

5.3 Post Meeting “To-Do’s”:

- ✓ Thank everyone who played a role, especially volunteers and speaker;
- ✓ Announce next meeting and/or other special events;
- ✓ Ask people what they thought;
- ✓ Send thank you notes to speakers, sponsors, and anyone else who played a role in the meetings;
- ✓ Send photos and information about the meeting to AIChE’s Volunteer and Membership Activities department and post on your website and/or in your next local section newsletter; and
- ✓ Write a brief summary of meeting-attendance, cost, receipts, what worked and what didn’t, and bring to the next business or executive committee meeting.

5.4 Programming Resources

The following are some examples of committees and resources that are available and specific to the needs of local sections and to enhance and diversify their programming:

5.4 (a) The John J. McKetta ProjectConnect Grants for Local Sections

The Project Connect Grants were inaugurated in 2001 to assist local sections with their efforts to reach out to students, recent chemical engineering graduates, and new engineers. Local sections are encouraged to request funds to help support innovative programs designed to increase participation of young graduates transitioning from student to professional. For more information, please visit <http://www.aiche.org/LocalSections/Resources/PCGrant.aspx>

5.4 (b) Local Sections Committee (LSC)

The mission of the LSC is to strengthen AIChE's Local Sections through resource development, networking, and opportunities for sharing information, with particular focus on Local Section officers. Contact localsections@aiche.org for more information about how the LSC can enhance your local section activities.

5.4 (c) Minority Affairs Committee (MAC)

The mission of MAC is to promote activities that will encourage the education and training of underrepresented minorities in engineering and related disciplines. Please visit <http://www.aichemac.org> for more information about how MAC can enhance and diversify your local section activities.

5.4 (d) Student Chapters Committee (SCC)

The SCC provides assistance to student chapters; and organizes programming for Annual National Student Conference. Many local sections communicate and interact frequently with student chapters in the area. For more information, please contact studentchapters@aiche.org or call (212) 591-7107.

5.4 (e) Young Professionals Advisory Board (YPAB)

The YPAB is dedicated to gaining and maintaining the participation of young professional members. The YPAB will foster relationships with young members, employers, and local sections to promote increased participation. Contact ypab@aiche.org for more information about how the YPAB can enhance your local section activities.

5.4 (f) Women's Initiatives Committee (WIC)

WIC is dedicated to promoting the entry, development, and full participation of women in the Institute and the profession. Please visit <http://www.aichewic.org/pages/index.cfm?siteid=546> for more information about how WIC can enhance and diversify your local section activities.

5.4 (g) Speakers College

AIChE is in the process of creating a "Speakers College", which will be operated and maintained by a Speakers Committee. More information to follow, however, in the meantime, please feel free to contact felig@aiche.org or call (212) 591-7329.

5.4 (h) Additional Resources

Please visit the following Web sites to find out more about how you can work with other local/technical societies on joint programs.

American Chemical Society (ACS)

<http://www.chemistry.org/portal/a/c/s/1/home.html>

American Society of Civil Engineers (ASCE)

<http://www.asce.org/asce.cfm>

American Society of Mechanical Engineers (ASME)

<http://www.asme.org>

American Society for Engineering Education (ASEE)

www.asee.org

Institute of Electrical and Electronics Engineers (IEEE)

<http://www.ieee.org/portal/site/iptables>

Society of Women Engineers (SWE)

http://www.swe.org/stellent/idcplg?IdcService=SS_GET_PAGE&nodeId=5

Society of Petroleum Engineers (SPE)

<http://www.spe.org>

Society of Plastics Engineers (SPE)

<http://www.4spe.org>

National Academy of Engineering (NAE)

<http://www.nae.edu>

National Society of Professional Engineers (NSPE)

<http://www.nspe.org>

A diverse collection of local section best practices, including the Career and Education Operating Council's volunteerism best practices, is provided on the AIChE Web site at

<http://www.aiche.org/LocalSections/Resources/BestPractices.aspx>

6. Membership Recruitment and Retention (compiled by local section officers and VMA staff, 2005.)

- **Surveys and Data:** Local section officers should periodically survey their membership to identify member interests, demographic trends/changes, member needs, etc. This allows the local section to plan and provide more relevant programming and often helps increase participation. See the appendix for a member survey template and contact the Volunteer and Membership Activities Department at (212) 591-7478 or localsections@aiiche.org for guidance on the preparation of member survey questionnaires.
- **New Members:** Always make new comers and prospective members feel welcome and comfortable at meetings and local section events. This should be a personal responsibility of all local section officers. A quick phone call, a welcome letter, an announcement in your local section newsletter and at your local section meeting will encourage new members to feel comfortable and most likely encourage him/her to come again. Remember: first impressions last.
- **Communications:** Be able to articulate what it is, exactly, that your local section provides to its membership and why it is vital for your membership to stay involved. If you cannot communicate the benefits of local section membership involvement succinctly, clearly and enthusiastically, than you cannot expect your members (and potential members) to understand it intuitively. This should also be a personal responsibility of all local section officers. Furthermore, be open about local section dues. Make public what, specifically, local section dues' are used for. This keeps your local section members informed and involved and satisfied knowing how their dues payments are benefiting them *directly*. If the local section dues go to the publication of a newsletter, building/maintaining a website, employment/career services, contribution to local causes/organizations that represent chemical engineers, scholarships and awards, meeting planning, speaker fees, local section administration—let your members know.
- **Member Benefits:** Local section leaders sometimes have difficulty articulating the value of AIChE membership and answering the question “what’s in it for me?”. Next time you’re faced with this question, use the following member benefits list to help you answer:
 - ✓ Networking opportunities, such as local section involvement, division/forum participation, attendance at national conferences and meetings, to help you build and maintain professional relationships;
 - ✓ Access to cutting edge information;
 - ✓ Members-only database;
 - ✓ Affiliation with peers from allied industries, both locally and around the world;
 - ✓ Career advancement and support;
 - ✓ Leadership development opportunities and professional recognition;
 - ✓ Discounts to publications, books and conferences;
 - ✓ Subscription to CEP magazine;
 - ✓ Free access to Knovel Life Science and Chemical Selections; and
 - ✓ Members-only insurance plans and a range of financial products, discounts and services.

Furthermore, hold at least a handful of member discounted (or, if possible, free) events (i.e. training courses, dinner meetings, social events, etc.) per programming year to further advertise to non-members or prospective members the benefit of local section membership.

For additional guidance on membership recruitment and retention tools and techniques, contact localsections@aiiche.org or call (212) 591-7478.

6.1 Member Recognition: Contact AIChE's Volunteer and Membership Activities department at vma@aiiche.org or (212) 591-7478 for a range of information regarding member recognition ideas and AIChE awards/certificates that can be used to thank members for their outstanding service to the local section. Always consider the following volunteer opportunities:

- ✓ Present a certificate of recognition and a gift to the outgoing local section chair;
- ✓ Present a certificate or personalized gift to task force or committee members, and to volunteers who help organize local section events;
- ✓ Thank your guest speakers with a thank you letter and a personalized local section gift;
- ✓ Recognize area high school students at science fairs and competitions, and for excellence in math and science;
- ✓ Present scholarships to qualified student members;
- ✓ Honor local college students for academic achievement or outstanding entries in one of AIChE's national student competitions; and
- ✓ Honor members for their outstanding technical accomplishments
- ✓ host meetings where a local section member's attendance can be credited towards Professional Engineer Requirements.

6.1 (a) Fellow Nominations

Here's a perfect opportunity for your local section to provide dedicated AIChE members with the recognition they deserve. Nominate a qualified member to the grade of "Fellow of AIChE."

This is a special category of membership that identifies and honors members who have made a meaningful impact on the profession, in addition to their demonstrated commitment to AIChE. Prerequisites for consideration of the nominee are: 25 years' chemical engineering practice; ten years as a full member of AIChE; and, of crucial importance, a history of service to AIChE.

As sponsor of a Fellow nominee, your local section will assist the National Admissions Committee in evaluating the qualifications of your nominee. Contact AIChE's Customer Service department at xpress@aiiche.org or call 800-AIChemE for more information and to request a fellow nomination packet.

6.1 (b) Fifty-year AIChE Members

When AIChE members reach the fifty-year membership milestone, the Institute honors them with a special citation, presented at a select AIChE event- either a national level event, or, if the member prefers, at a local section event. Each April, headquarters notifies local section chairs about any fifty-year member in the local section. Should the member request to receive his or her honor at the local section, AIChE will work with the local section to arrange for the presentation, including provision of the formal certificate.

6.2 Member Relations Opportunities

6.3

The Company Liaison

A company liaison is a local section member designated to promote AIChE local section activities and participation to members and non-member in his or her place of work. Through its network of company liaisons, local sections maintain a connection with potential members and give the local section a personal face in each company.

Among your officers and active local section members, you will probably find representatives from the area's major companies. Liaisons can be recruited at local section meetings and events, or through the local section newsletter.

When there is no active member from a local company, it will be necessary to recruit a liaison from the general membership. Use member rosters or contact personnel departments at companies to identify members and potential volunteers. Contact these members and ask if they are interested in becoming a company liaison.

The potential volunteer is informed that the time and effort involved will be minimal and will not interfere with their work. Among the volunteer's duties will be: 1) circulate and post copies of local section news and meeting notices; 2) discuss with colleagues the advantages of participating in local section activities, and encourage attendance at for the next meeting; 3) discuss AIChE member benefits and provide membership literature and applications to interested parties; 4) answer questions about the local section.

Some company liaisons organize "lunchtime learning" opportunities at which potential members are briefed on local section activities and are personally invited to attend the next meeting.

When a member has accepted a role as company liaison, the local section leadership sends them a letter of appreciation and "information" including: a list of current local section officers and their contact information, AIChE membership literature and applications, copies of local section newsletters, bylaws, and the latest local section board meeting minutes, and finally, a list of members currently employed at the company. The liaison continues to receive communication, recognition, follow up, and support from local section officers.

6.3 The Professional Network- the greatest member benefit

Local section leaders and members alike tell us that the greatest benefit of AIChE membership is the opportunity to meet and affiliate with a diverse population of engineers.

No dollar value can be placed on the network of professional, educational, and personal affiliations that form through local section activities and interactions. The opportunities for mutual career support, shared expertise, business contact, collaboration, and friendships established in each local AIChE community genuinely qualify local sections as the "foundation" of the Institute.

As the perfect forum for building a professional chemical engineering network, local sections truly define themselves as lifetime centers for engineers- as intended in AIChE's vision and strategic objectives.

6.4 Young Member Outreach Strategies

Young engineers- motivated to establish a professional network and to invest in their professional development- bring fresh energy and ideas to local sections. Every local section needs a strategy to include, nurture, and encourage the involvement of recent graduates and young engineers. Please contact the Young Professionals Advisory Board at

<http://www.aiche.org/About/WhoWeAre/Structure/Committees/ViewAll/YPAB.aspx> for more information and guidelines for organizing your own successful young member outreach program.

6.4 (a) The John J. McKetta ProjectConnect Program- AIChE Tracking Program

Through the John J. McKetta ProjectConnect Program, AIChE's young member tracking program, AIChE introduces local sections to recent graduates moving into the area. Local sections can then complete the connection by personally inviting them to get active on the local and national level. Each spring, headquarters will contact student chapters and request forwarding addresses for graduating student members. When AIChE receives the name of a student relocating to your area, your local section will be notified. Your local section can then take the initiative to personally welcome the new member to the area, and help him/her establish roots in the chemical engineering community by inviting him/her to participate in local meetings and activities. Contact the Volunteer and Membership Activities department at localsections@aiiche.org or (212) 591-7478 for more information about the ProjectConnect program and funding for local sections.

7. Finances

For most local sections, the major source of income is local member dues. Described below is the AIChE process for dues collection and remittance. Member dues alone, however, are usually not enough to fund all the projects and activities that a local section would like to arrange for its members. Local sections will find it beneficial to conduct an occasional fundraising event. The following are some common fundraising strategies and best practices.

7.1 Dues Accounting- Collection and Remittance

AIChE sends out dues checks to all local sections on a quarterly basis. Dues are calculated on actual payments received. Dues collected January – March are sent out in April/May; dues collected April – June are sent out in July/August; dues collected for July – September are sent in October; dues collected during the last quarter of the year, October – December, are mailed in January/February of the following year. For more information about the Dues Accounting, please contact localsections@aiiche.org or call (212) 591-7478.

7.2 Corporate Sponsorship and Support

Local companies often make financial contributions to local sections- either in the form of a donation or as sponsors of a project or event. The best course of action may be to request company sponsorship for a specific activity or event- such as an annual student scholarship or seminar. Contact the contributions coordinator at local companies to find out what support may be available. Company support can also take the form of low-cost, on-site meeting venues, access to speaker and tour facilities, and, of course, endorsement of employee participation in AIChE activities. Here are some opportunities for local sections and local companies to cooperate:

- Continuing education- Make sure to tie in your continuing education efforts to local companies. Find out what courses companies want for their employees, and what they're willing to pay for.
- Scholarships- Corporations are often willing to fully sponsor an annual student scholarship program, with good publicity and a tax-deduction as incentives.
- Vendors- Invite a company vendor to your meeting and provide a display booth for the vendor's wares. Offer the vendor an audience with local engineers in exchange for a subsidy to help pay for the meeting, meals, or the pre-meeting reception.
- Company of the Month- Select a "company of the month" and make it the focus organization at your next meeting. Invite company leaders and vendors. The company may be willing to sponsor the reception, cover the cost of student dinners, or offer another kind of subsidy.
- Volunteer recognition- find out if local companies have a "volunteer recognition" program set up which acknowledges the volunteer efforts of company employees who donate their time and talents to improving the quality of life in the community. Some companies may provide funding to the organization which the employee volunteers.

7.3 Local Symposia and Conferences

Many local sections organize mini-meetings, web seminars, symposia, or short courses and charge registration fees to sufficiently increase revenue.

7.4 Appeals to Individual Members and Local Section Alumni

In any fundraising endeavor, personal giving results from one of the following factors:

- The organization is one with which the donor shares values, experiences, or philosophy;
- The organization exists to address a need relevant to the donor;
- The organization is uniquely positioned to respond to that need;
- They were asked.

For these reasons, local section alumni and members of the local engineer's community can be successfully targeted to support activities, especially programs that hold a special interest to the member. This may include community relations, educational outreach, k-12 and/or college student scholarships, career development programs, or government relations initiatives. Because AIChE and its local sections are tax-exempt organizations, such contributions are considered charitable and may qualify for tax deductions.

Develop a database of local "VIP's"—company leaders, founding members, past local section officers, and eminent local engineers—and use it to identify potential donors. And as always, financial contributors should receive recognition at local section meetings/events, in the newsletter and on the local section Web site.

7.5 Collaborative Alliances with Community Groups

If your local section has already established a community presence or has established alliances with community organizations, your fundraising appeals can extend outside the engineering community. By joining forces with business people, opinion leaders, teachers, or community organizers who share some of your objectives, you establish groups to pool contributions to support your mutual good works.

7.6 A Successful Fundraising Strategy – Best Practices: Northern California's Direct Approach (transcribed from the Local Sections Discussion Group on Topica.)

Most of Northern California's fundraising success comes from direct approach of senior executives or by having officers who work in highly desirable fields (such as biotech) contact vendors who serve that industry. Networking with local section members during dinner and approaching them as the first point of contact to get sponsorship may also generate results. The best strategy is to establish contact by phone, sell the concept of sponsorship, and follow up with a detailed email. Several more phone calls may be required. In summary, start at the top of the ladder and increase the chance of success. The Northern California local section has been very successful in raising funds directly and via technical symposia.

7.7 Cost Cutting Strategies

There are many small things that local section leaders can do to cut expenses, without decreasing local section visibility or program quality. Some suggestions from AIChE local section leaders include:

- Prepare a careful budget;
- Find alternatives to full postage and reduce the number of mailings to local section members. Use postcards for meeting announcements instead of letters. Bulk mail permits are cost effective for some local sections; Or announce the meetings via email.

- Maximize and develop your local section's electronic communications. Post your news each week or month on the local section's Web site- inviting all members to bookmark the site and visit more regularly;
- Subsidize the cost of newsletter printing and distribution by accepting newsletter advertising;
- When organizing an event with food/beverage, tell the restaurant or caterer your maximum budget. Most will work with you to give good value for the price. Try smaller restaurants and organize more lunch meetings (to avoid higher dinner costs.) Many local sections have pizza nights- which are inexpensive and always successful;
- Have a cash bar instead of a host bar;
- Own or borrow your own AV equipment, instead of renting;
- Select low cost meeting sites, such as engineering/faculty clubs, schools, community centers, company facilities; and
- Use company contacts to see what support they might offer for mailings, meeting sponsorship, speaker travel expenses, etc.

8. Volunteer and Leadership Development

In addition to their prescribed duties, local section leaders must also ensure the local section's future by nurturing and developing new leaders. A qualified officer candidate will be one who has established a strong personal connection with the local section through meaningful activity and participation. But how do local section officers move local members from passive recipients of local section services to active volunteers and potential leaders of the organization? Here are some ideas:

8.1 The Benefits of Volunteer Leadership and Participation

Your role as a local section leader provides work experience and enhances skills that are transferable to your career. In fact, leadership development is considered a top issue facing companies today.

AIChE local section officers are given multiple leadership development opportunities in such diverse areas as strategic planning, budgeting, public speaking, communications, project management, membership marketing, event planning, and corporate sponsorship and fundraising.

8.2 Recruiting Volunteers: Helping Volunteers Conquer the Fear of Trying

Every local section faces the challenge of inspiring members to volunteer time to help make the local section successful.

With members' personal workloads and time constraints, it can be daunting for a potential volunteer to consider taking on an assignment, let alone accept a nomination to chair a local section, however, there are ways to make the local section's workload appealing to volunteers.

Start by rewriting your local section's "job descriptions" and make them more function specific. No more than a half dozen bullet points should cover each officer's duties. State the time required for each duty. Members who know up front exactly what's involved in each assignment, and how much (or little) time it will take, are usually more willing to volunteer.

Asking a member to run for local section secretary can sound intimidating. Instead, why not tell potential volunteers that the local section needs someone to spend one hour per month taking notes at the local section board meeting, and 30 minutes a month typing up the notes and emailing them to the board. The more specific, the better and clearer the expectations are and the more likely the potential volunteer is to say yes.

Instead of searching for a Vice Chair or Program Co-Chair, find a member to act as Fall meeting room coordinator and someone else for the Spring—responsible for locating three or four meeting sites.

8.3 The Process of Delegation*- the key to a successful leadership team

8.3 (a) Make delegation part of each volunteer assignment:

Delegation in local volunteer structures is key to a successful leadership team. You need to rely on others to help you produce successful results. Further, delegation significantly eases each volunteer's personal workload, making assignments even more manageable. Perhaps, most importantly, new volunteers can be mentored into local section leadership without being overwhelmed with a broad responsibility. When you re-write your officer or position descriptions to state specific task and time requirements, always include delegation as a part of the volunteer's responsibility.

8.3 (b) Find the right person:

After determining what assignments are sensible to delegate, the next step is finding the right person to delegate to. Andrew Carnegie once said: "The secret of success is not in doing your own work but in recognizing the right man to do it." The key to finding the right person to delegate to is to match skills and personality to the task at hand. Also, asking the person where and how they want to expand their skills is another great way to find the right person for the right job.

8.3 (c) Communicate what you want done

Another crucial part of the process of delegation is communicating what you want done. Rather than rush to give "do this, do that" orders, effective delegation consists of explaining the WHAT and the WHY. What do you want the volunteer to do and why did you choose them to do it? Before delegating your next local section project or assignment, try composing a WHAT-WHY statement. These statements will be great guidelines, as well, for new local section officers to follow.

When you've polished your WHAT-WHY statement, you're almost ready to delegate. But first, prepare answers to these three questions:

- ✓ Who should the volunteer work with on this assignment? Who's available to offer help?
- ✓ What resources or tools are available?
- ✓ What's the deadline?

The final step in communicating what you want done is to gauge the volunteer's willingness to comply. End by asking, "Are you excited about doing this?" or "Do you feel comfortable tackling this?"

You might also ask for input on how the individual intends to get started. Example: "How do you plan to approach this?"

8.3 (d) Follow Up

Establish checkpoints to monitor progress. This discussion should be a collaborative process where you reach mutual agreement on how you intend to follow up with the volunteer.

(*Full article titled "*How to Delegate Effectively*", located at http://www.lawsoncg.com/lcgi-article_delegate.htm.)

8.4 Volunteerism: Reviewing the basics

Get to know people who attend meetings- learn their interests, talents, and motivation for participating. Design assignments suitable to their interests and talents.

Let members know what jobs are available- use available channels of communication to announce the goal and activities of the local section. Match the right person to the right task or ask which areas/assignments are of interest to the person.

Give volunteers options- on an invitation to serve, include an option allowing members to say: "I'm interested, but maybe next time." This creates a pool of potential committee members for future projects.

Write a job description- make it clear what functions must be performed and what the time commitment is. Remember to write a WHAT-WHY statement for specific tasks.

Effectively convey the intangible benefits of getting involved- a member may have the opportunity to practice public speaking skills, network with significant new contacts, or may be able to obtain leadership development opportunities.

Hold reasonable expectations- put yourself in your volunteers' shoes. How would you perform under the given circumstances?

Follow up and follow through- when a member offers to help and receives no response or insufficient support and instruction, the resulting disillusionment can be destructive to their relationship with the local section.

ASK! - the biggest reason why people don't volunteer is because no one asked them to. In the culture of your local section, find out what constitutes "asking." Sometimes, members don't consider themselves "asked" to serve unless someone has visited with them personally. Others prefer the invitation to volunteer to be in writing or specifically to come from the Chair. Find out what the preferences of your membership are and ASK!

Create small jobs- Try to create assignments that are easy for volunteers to accommodate and that can be completed in a relatively short time period.

Use task forces as an alternative to committees- Using short-term task forces also allows for the same volunteers to be "recycled" for more than one short-term assignment during the year.

Listen to your members- use technology, focus groups, surveys, email, face-to-face dialogue, etc., to reach beyond the local section's board to the general membership, which may have a very different point of view.

Reinforce with thanks and support- always let volunteers know their efforts are important, recognized, and appreciated. Having an ongoing system of recognition and rewards for volunteers ensures greater participation and involvement in local section activities.

8.5 Leadership Development Conference

The Leadership Development Conference (LDC), formerly known as the Officers' Conference, is one of the most important programs AIChE offers to support, recognize and reward the efforts of our volunteer leaders. AIChE local section, division/forum and committee leaders from across the country and around the world are invited to join the AIChE Board of Directors, Operating Council members and AIChE staff, for an exciting weekend of networking, learning and fun. The conference program, workshops and theme vary in focus each year, however, every LDC offers a wide array of formal and informal opportunities to discuss critical issues facing volunteers such as leadership, programming, membership, outreach and communications. Please send a representative from your local section to the next LDC. To find out more information, please contact leadershipconf@aiche.org or call (212) 591-7478.

8.6 AIChE National Meetings and Conferences

AIChE National Meetings and Conferences are specifically designed to help AIChE members network with one another and stay current on the latest advances in the engineering profession. Encourage your local section members to take full advantage of AIChE membership and attend the

next AIChE National Meeting. For more information about AIChE Meetings and Conferences, please visit <http://www.aiche.org/Conferences>.

8.7 AIChE Volunteer Recognition

Volunteer recognition, whether through awards, gifts, or words, is an essential part of any and every volunteer driven organization. Not only do volunteer recognition efforts make volunteers feel appreciated, they also increase public awareness and visibility in the community. The Points of Light Foundation, <http://pointsoflight.org>, is an excellent resource for anyone involved in volunteer activities and community involvement. The Foundation put out an interesting report in 2005 on: “Recognition Programs and Volunteering: Determining the Impact of Recognition Programs”, please visit <http://www.pointsoflight.org/downloads/pdf/resources/research/Frontline4.pdf>

8.7 (a) National Volunteer Week

Sponsored by the Points of Light Foundation, National Volunteer Week is about thanking one of America's most valuable assets – our volunteers – and calling the public's attention to all that they do to improve our communities. Participating in National Volunteer Week is a great way to publically recognize your local section volunteers. For more information about how to get involved, please visit <http://www.pointsoflight.org/programs/seasons/nvw>

8.7(b) Media Outreach

Send a press release about your local section activities and the volunteers that make it happen to your local government, media and/or community groups to further recognize your volunteers in a public forum. For more information about media outreach and for tips on writing a press release, please contact vma@aiiche.org or call (212) 591-7478.

8.7 (c) Awards and Certificates

Presenting your volunteers with awards and certificates is a great way to acknowledge their many efforts and promote volunteerism within the local section itself, as well as within the community at large. For more information about awards programs and/or to request a “Certificate of Appreciation”, please contact vma@aiiche.org or call (212) 591-7478.

8.7 (d) Corporate Involvement

As you know, AIChE has a “Volunteer Recognition Request” form at <http://www.aiche.org/uploadedFiles/LocalSections/DepartmentUpload/Volunteer%20Leader%20Recognition%20Request%20Form.doc>, available to all volunteers to request a letter of recognition from AIChE President to be sent to your boss or others in your company, university, or government agency. In addition, many companies have established their own volunteer recognition programs, which acknowledge the volunteer efforts and community involvement of their employees. Find out if the local companies in your area have recognition programs and learn how to get your local section and your volunteers involved.

For more information and ideas about volunteer recognition, please contact vma@aiiche.org or call (212) 591-7329.

Appendix

- I. Jurisdictional Review
- II. Business Operations
- III. Guidelines for Organizing a Local Section
- IV. Model Local Section Bylaws
- V. Model Local Section Charter
- VI. Model Member Survey Template
- VII. Model New Member Welcome Letter
- VIII. Model Certificate of Recognition
- IX. 2006 Activities Directory

Jurisdictional Review

Boundary Changes

Sometimes, local sections opt to change their boundaries. Valid motivations for such include:

- Creation of more “logical” or uniform boundaries. A local section may relinquish or exchange territory (usually entire counties within a state) with a neighboring local section to provide a more accessible “home” for region members
- Response to population or industry location shifts
- Inclusion of territories not presently represented by any local section

The creation of new boundaries often involves the exchange of territory between local sections. The proposed boundary change is then submitted to the Volunteer and Membership Activities department for review and subsequently endorsed by AIChE’s Career and Education Operating Council. This endorsement involves approval of revised bylaws for each affected local section.

A copy of revised bylaws, stating the boundary change, along with supporting documentation, must be submitted.

Business Operations

Bulk Mail Permits

Local sections work directly with the postmaster to obtain a bulk mail permit. To begin the transaction, local sections must first acquire a copy of the Institute’s tax-exempt documentation, with a letter stating the local section’s tax eligibility.

Tax-Exempt Income Information

Local sections share in the 501(c)(3) non-profit status of the national organization because they share in the national organization’s exempt purpose of educating the public on topics relating to chemical engineering, and because they are non-profit.

Because local sections devote almost all of their activities and spending to education, and abstain from lobbying, and in no way influence the election or defeat of a candidate for public office, the IRS exempts from taxation many sources of revenue needed to fund local section activities. This non-profit, educational organization status also allows contributions to the local section to be a deduction on the tax returns of the contributors. Additionally, the U.S. Postal Service gives reduced postage rates for certain types of mailings.

The IRS’s definition of education is broad, stating that it relates to: the instruction or training of the individual for the purpose of improving or developing his/her capabilities; or the instruction of the public on subjects useful to the individual and beneficial to the community.

What forms of income are tax-exempt?

Many sources of revenue are exempt from taxation by the IRS, but not all. Contributions and members’ dues are tax-exempt, as are most received revenues, such as fees for seminars and symposia. Below are several criteria to determine whether or not a particular source of revenue is tax exempt or is “unrelated to the local section’s exempt purpose” and produces “unrelated business taxable income” (UBTI):

1. Was the revenue raised through a “trade or business” organized with the “dominant hope and intent of realizing a profit,” whether or not a profit was achieved? Since the “dominant hope” of publishing a newsletter or running a seminar or symposium is to educate, raising revenue sufficient to show a surplus does not create a UBTI.
2. Will exempting the trade or business from taxation rely on an “unfair” competitive advantage? The IRS has determined that using the platform of a tax-exempt newsletter or magazine to publish ads constitutes an unfair competitive advantage.
3. Was the means of raising revenue passive and therefore not a trade or business? For example, investment income is generally considered passive and not UBTI.
4. Was the trade or business regularly carried on with frequency and continuity? Ad revenue realized from a monthly newsletter would be considered UBTI, whereas ad revenue realized from an annual publication would not be frequent or continuous and therefore not UBTI.
5. Was the revenue raised through work and/or sale of merchandise donated to the organization?

Even if your activity does raise revenue from an unrelated activity, it may not have any practical impact on your local section. The IRS defines UBTI as revenue from the unrelated business activity less expenses directly connected with the raising of the revenue. If the UBTI is more than \$1,000, an IRS Form 990T must be filed, but even then, it is possible that no tax obligation will result, as there may be other deductions that will offset the UBTI. If this net amount is less than \$1,000, you don’t need to file a 990T.

Tax-Exempt Documentation

Once your local section has been included under the group tax exemption, the Volunteer and Membership Activities department can provide copies of the Institute’s tax exemption letter, and a letter stating your local section’s Employer Identification Number – confirming that your local section is included in AIChE’s group exemption. These documents are necessary when applying for bulk mail permits, when opening bank accounts, or when applying for local or state tax exemption. To request a copy of the Institute’s tax-exempt documentation, and a letter confirming the local section’s tax-exempt eligibility, use the Resource Order Form, located on AIChE’s web site.

Federal Tax Returns

As long as your local section’s gross receipts do not “normally exceed” IRS minimum guidelines, your local section does not need to file an IRS “information return” unless you are required to file IRS Form 990T. The guideline for “normally exceed” varies depending on how new your local section is.

State Sales Tax-Exemption

Tax-exempt laws and eligibility vary widely from state to state and between localities. Local sections should contact their local IRS to inquire into local tax-exemption. The Volunteer and Membership Activities department can provide further assistance, as needed.

Newsletter Advertising & the IRS: What Local Sections Should Know

By publishing paid newsletter advertisements, local sections can defray the cost of printing and distributing the newsletter, while freeing up the dues income for other local section activities. The IRS has determined that using a tax-exempt newsletter, as a platform to publish ads may be an

unfair competitive advantage, therefore, advertising revenue is potentially considered Unrelated Business Taxable Income (UBTI). Two further criteria that determine UBTI are:

1. The frequency with which paid ads are published in the newsletter
2. The degree to which volunteer labor is used to publish the newsletter.

Frequency of Ad Publication and Use of Volunteers

The appearance of paid ads in up to three issues per year is not considered frequent or continuous trade or business; therefore, that revenue is not considered UBTI. If paid ads were published more often, the advertising revenue for that year would probably be considered UBTI.

Most, if not all, local sections use volunteers to sell ads for their newsletters; however, if your local section pays for a printer to lay out and print the newsletter, you don't have a volunteer-produced newsletter, and your advertising revenue is UBTI. If volunteers handle your entire publication process, then your ad revenue is not considered UBTI.

If ads are published frequently in your "non-volunteer" newsletter, and they generate more than \$1,000 of revenue, the local section must file a Form 990T to report this unrelated business income (Important note – this will also necessitate filing a Form 990EZ). Filing a Form 990T does not mean you will pay taxes. First, you may have a loss from your advertising business; even if you make money from your advertising, you probably have a loss from the editorial part of your newsletter, which will offset all or some portion of your advertising gains. Let's go into this in more detail.

Two Parts of the Newsletter: Advertising and Editorial

The IRS splits a publication into two parts; advertising and editorial, each with its own revenues and costs.

Advertising revenue includes the sales of both commercial and classified ads. Advertising expenses include solicitation and selling expenses, preparation of ad copy, printing, a portion of publication distribution expenses, and a share of general and administrative costs. Proportion of costs between editorial and advertising is appropriate (e.g., printing costs are commonly apportioned based on lineage)

If advertising produces a loss, this loss can be applied against other UBTI you may have in the current year or any time in the subsequent fifteen years. If it produces a gain, all or a portion can be offset by losses from the editorial part of the newsletter.

Deducting readership expenses from circulation revenue derives the gain or loss from the editorial part of your newsletter.

Readership expenses are the total expenses for your newsletter (including an appropriate share of general and administrative costs) less advertising expenses. Circulation revenue consists of paid subscriptions and sales of back issues (seldom a concern for local section newsletters), plus a percentage of your local section's due income. This percentage is calculated by dividing total newsletter expenses by the sum of the newsletter expenses plus all other exempt expenses for your local section. (In most cases, the denominator is the local section's total expense.)

If deducting readership expenses from circulation revenue results in a loss, it can only be used in the current year to offset the current year's advertising gains.

Liability Insurance

As entities of the Institute, local section activities are covered, to an extent, by the Institute's insurance. However, should the local section sponsor an event with unusual logistics (i.e. a large scale meeting, sporting event fund raiser, public open house, family outings, etc.), it is advisable to request additional liability coverage. AIChE headquarters will file a request for special coverage on your local section's behalf, and a Certificate of Insurance will be issued to the local section.

To receive a Certificate of Insurance, local sections should describe their plans in writing and forward a request for insurance coverage to AIChE's Volunteer and Membership Activities department at least one month prior to the event. The request must provide the following information:

1. A description of the event and location, with comments on special circumstances (such as serving of alcohol)
2. The full legal name of the venue or meeting site (i.e. the business desiring coverage), including the name and telephone number of a contact at the business.
3. The types and amount of coverage requested by the owner of the venue. Talk to the meeting site representatives and ask what they require.

The financial staff member in the New York office will work with AIChE's member insurance agent to obtain a Certificate of Insurance for your local section event.

Alcoholic Beverages and Liability at AIChE Meetings

Local sections should consider applying for additional liability insurance coverage if they plan to host an alcoholic drink reception as part of a local section event.

AIChE's New York office possesses "Host Liquor" insurance coverage. This allows AIChE headquarters or local sections to act as hosts at an event where alcohol is available, without the necessity of acquiring a liquor license.

"Host Liquor" insurance covers those situations where the group (AIChE or the local section) is not viewed as selling or dispensing alcohol; i.e., when guests at an AIChE event purchase alcohol at an on-site bar and bring drinks into the event, or where guests bring alcoholic beverages to an AIChE picnic.

If the state or local authorities view the group to be engaged in selling or dispensing alcohol, this falls outside AIChE's "Host Liquor" coverage. Your state or locality may then require either a liquor license, or that a special rider be added to the existing liability coverage or Certificate of Insurance.

Contact your local or state attorney general's office to determine what sort of coverage might be desirable for your event. AIChE's financial staff will work with you to provide any additional assistance. If there are questions, contact the Volunteer and Membership Activities department at localsections@aiiche.org or call (212) 591-7478.