



Guidelines For Organizing A Local Section

Introduction

This guide will assist members who wish to organize a Local Section of the American Institute of Chemical Engineers. It provides a foundation for organization efforts and outlines the formal requirements for establishment of a Local AIChE club, with eventual approval as a Local Section.

The AIChE Member Services Department assists Section organizers by providing guidance and information resources. Among these resources are lists of potential members and the Local Section Officers Manual, which details obligations to AIChE, duties of Local Section officers, services available from the Institute, and other information that will help both new and established AIChE clubs and Local Sections.

Local Sections are one of the main assets of AIChE and an important member benefit. An active and dynamic Section serves its segment of the membership more personally and directly than the Institute's office can by itself. AIChE appreciates your taking the initiative to help bring better service to our members. Thank you for taking on this responsibility. We are counting on your success.

Your Contact at AIChE:

Local Sections: (646) 495- 1330

CONTENTS

Why Form a Section?

Getting Organized

- Form an Establishment Committee
- Determining Boundaries
- Solicit Membership
- Company Support/Sponsorship

Organizing a Chemical Engineering Club

- The Organizational Meeting - Things to do
- What the First Meeting Should Produce
 - The Second Meeting
 - Petition for Approval
 - Interim Operation
 - Application for a Local Section Charter
 - Installation of the New Section

Incorporating One Section Into Another

Forming a Sub-Section

Disbanding a Section

Revocation of Section Charter

Local Section Charter & Bylaws

Model Section Bylaws & Charter

WHY FORM A SECTION?

Local Sections help to meet many members' needs, which range from professional to social. The Institute is concerned that each of its Sections become and remain a vital, active part of the national organization, and offers a wide choice of activities and programs aimed at helping Local chemical engineers get the maximum benefit from their society membership, both personally and professionally.

GETTING ORGANIZED

The Local Section Establishment Committee

Members interested in forming a new Local Section should first make certain that an existing Local Section does not already serve the area. AIChE can help you determine existing Section boundaries.

It will then be important to organize a core group of interested members in your area to help establish the vision, plans, and share the communication and organization work of establishing the new group. Find as many members as possible to share the work (a minimum of 8-10 is suggested). One or two people should not try to handle it alone. Indeed, if only a few people can be found to share the workload, this may be evidence that there is not enough interest in your area to support a new Section.

Once you have a core group of willing and interested volunteers, you are ready for **step two...**

DETERMINING BOUNDARIES

It is the responsibility of the organizing group to determine the potential size of the proposed Section and to define its probable boundaries. This is most efficiently done by identifying the counties the new Section would like to include.

Boundaries within a fifty-mile radius are suggested. However, since it is preferable to define those boundaries by complete counties, some flexibility in distance is acceptable.

Overlapping Boundaries

It may happen that, based on geographic logic or common-interest circumstances, a proposed new Section may consider it feasible to include a county or counties which belong to an existing Section. In such cases, it is necessary to approach that Section's executive committee to discuss the possibility of realigning Section boundaries. Since AIChE Board of Directors must approve the development and formation of new Local Sections, any decisions arrived at will be presented at upcoming Board meetings. In addition, the existing Section will be required to canvass its members who reside in the counties being considered for annexation to determine whether

such action should be acceptable. These procedures will take time, and it is advisable to resolve these questions before formal petition is made to the Institute to form a Section.

Membership

Contact the Institutes' **Member Services Department** for a list of the names and addresses of AICHE members residing within the defined boundaries. Requests should be made for complete counties for which specific zip code or postal district information is included.

There's no specific requirement as to the number of members a Local Section must have. However, it is desirable and practical to make sure there are enough people interested to make a working Section viable. If potential membership seems adequate for this, efforts to organize can proceed.

It is possible that the potential membership of the Section may be greater than that indicated by AICHE membership in the area. For this reason, all local industry firms and scholastic institutions in the area should be contacted in order to reach possible candidates.

AICHE non-members may become members of a Local Section for not longer than two years, unless they are members in good standing of one of the other Founder Societies (AIME, ASCE, ASME, IEEE) in which case an exception can be made. After this period, non-members must either become members of the Institute, or be dropped from the Section's membership rolls. Non-members are not permitted to hold office or serve as representatives on national committees.

Company Support/Sponsorship

Do not overlook the possibility of obtaining financial support or help with publicity from the area industries. Many companies are not only eager to see AICHE Sections started, but might also be willing to encourage them with practical help. Furthermore, alerting companies to the new Section may result in the participation of high-level professionals who may greatly add to the stature of the Section. Do not be reluctant to seek the support of company presidents, vice presidents, super-intendents, and others in similar capacities. Managers can help immeasurably in the initial organizational efforts.

Now you are ready to take your first major step toward receiving your Charter by organizing a club.

ORGANIZING A CHEMICAL ENGINEERING CLUB

The first step to attaining full Local Section status is to form an **AIChE Club**. Invitations to attend an organizational meeting should be sent to the potential membership list (which was requested from the Member Services Department). A system for recording responses should be implemented so that the organizing group will know how many people might attend. Should some "VIPs" be among the attendees, this fact should be well publicized. They can act as a "draw".

The individual who calls for the organization of the chemical engineering club is usually the organizing chair. This does not mean that person must necessarily be locked into the position. Once the group becomes established, this person may elect to turn over the actual leadership to others. However, in the beginning, it is up to the organizer to call the meeting, and act as the spokesperson for the group.

Before the organizing meeting takes place, it might be helpful to consult *Robert's Rules of Order*, available from a bookstore or public library, which spells out the procedures which govern the conduct of a meeting.

The Organizational Meeting - Things to Do

Attendance List

Make sure there is an attendance list on which attendees may record their names, addresses, phone numbers, company affiliations, AIChE membership status, and any other pertinent information the organizing group may consider helpful. This list will be your resource for the potential "actives" in your Section.

Definition of Purpose

Formally defining the purposes for which the new club should constitute the first order of business, and can be a group activity. Feedback from the attending members should be sought regarding individual professional needs, interests, and concerns. It might also be practical to devote some discussion to the consideration of meeting times, location, and frequency, ability or willingness on the part of members to travel, amount of time they will have available to participate in Section activities, and similar issues.

Meeting National Requirements

Before a club can begin formal operation as a local section, it is necessary for it to formulate an approved set of bylaws and charter. For guidance in this, AIChE has drawn up models of each which have been approved by The Board of Directors. For your reference, this guidebook contains a model Local Section Charter and Bylaws.

At this meeting it is advisable to set up a task force to work on the preparation of these documents.

Setting Objectives

The group must begin thinking about formulating a program of activity that can be developed over the next year or two. It is important to initiate this activity as soon as possible, since settling on an appropriate and viable set of dynamic objectives will take some time. Members at this meeting may be encouraged to form an ad hoc task force to consider priorities in professional needs, and possible avenues of approach in meeting them. The *Local Section Officers Manual* contains information on Local Section program planning. This will offer a guide as to what types of activity are generally carried out in established Sections. Further ideas can be gained from experienced colleagues.

Officers

This group may or may not elect to designate a full slate of officers at this meeting. However, to provide some operational basis it is advisable to at least appoint a secretary whose job it will be to keep track of attendance and membership lists, send out notices of the next meeting, record minutes, and keep AIChE up-to-date on the club's progress. A Nominating Committee should be formed and charged with presenting a slate of officers for election at the next meeting.

Setting the Next Meeting Date

Depending upon the amount of work the members have agreed to accomplish by the second meeting, the date may be set one or two months from the initial one. It is advisable not to allow too much time to elapse between the organizational meeting and the second follow-up, since enthusiasm may wane. Capitalize on the energy and commitment demonstrated by the volunteers.

What the First Meeting Should Produce:

- 1) Formal definition of purpose.
- 2) Formation of an ad hoc group to draw up bylaws and charter.
- 3) Formation of a task force or ad hoc committee to set up dynamic objectives for the club.
- 4) Appointment of Secretary and/or interim officers.
- 5) Appointment of a Nominating Committee to come up with a slate of officers.
- 6) Setting of next meeting date.

The Second Meeting - Things to Do

Approval of Bylaws and Charter

The group should be prepared to accept a charter and bylaws, and to elect officers from among the candidates submitted by the nominating committee, according to the stipulation in the new bylaws. It bears repeating that only AIChE members may serve as officers.

Committee Appointments

As stated in the *Local Section Officer Manual*, Local Sections are required to designate representatives to five important national committees: Membership, Career Guidance, Public Relations, Professional Development, and Government Interaction. Appointments to these committees are generally made by the chair immediately, so that the mechanism for Local Section operation can be set in place and begin functioning as quickly as possible.

Activity Program

The task force or ad hoc committee charged with suggesting possible activities and programs that the new club can consider implementing, should make a progress report. It is important to obtain group feedback on all proposals so that the program that is decided upon will truly reflect the members needs and concerns. Group goal setting is a vital factor in ensuring that the activities undertaken will be appropriate to the resources and desires of the Section.

Petition for Approval as a Club

At this point in the club's career, a written petition to AIChE for formal approval should be sent. This should include:

- 1) Definition of purpose
- 2) Bylaws and Charter, approved by two-thirds of the AIChE members in the group
- 3) Organizational Structure (officers, committees, representatives)
- 4) Description of Proposed Activity Program, and Timetable for Implementation
- 5) Prepared Budget

The petition will be reviewed by the AIChE Member Services Department and presented to The Board of Directors. Upon approval, the club is authorized to function as a legitimate unit of AIChE.

Interim Operation

A chemical engineering club must operate for a minimum of one year, but not more than two. This period allows the club to demonstrate whether it has sufficient organizational stability and interest among its members to warrant its being considered as a Local Section of AIChE. During this time, its activities and programs should be steadily increased, developed, and improved so that its operation in all respects becomes similar to that of a full Local Section. During this period, the *Local Section Officers Manual* and its accompanying materials, plus contact with the MemServices Department, will serve as information and assistance resources for the officers and members. If the group plans to retain its club status for more than one year, an annual report will be required at the end of the first year, as it is from all established Sections. This form will be sent automatically from the Institute.

Applying for a Local Section Charter

Formal application for Local Section status should be made not less than one, but no more than two year from the date of the club's establishment.

The following documents and reports should be submitted to the Member Services Department:

- **Bylaws and Charter** - Revised and/or updated to final form, they now describe the club as an AIChE Local Section.
- **Annual Report** - This will essentially describe and evaluate the success of the activity program of the Section and present its future plans. The report will require a complete financial statement and a chair's report, as well as reports from the representatives to the national committees.

The Petition for Authorization will be brought before the AIChE Board of Directors by the Member Services Department. Authorization is by Board charter, designating the club as a full AIChE Local Section. The Member Services Department will inform your club of the change in status.

Installation of the New Section

The American Institute of Chemical Engineers issues to the new Section a plaque that is usually presented at a meeting shortly following formal Board of Directors recognition. The Section may choose by appropriate means it desires to highlight the presentation.

Incorporating One Section into Another

It may sometimes be advantageous to combine Sections. Should two (or more) neighboring Sections decide that affiliation would be in both their interest, much of the preliminary groundwork can be laid by the chair, in close cooperation with the Institute's Member Services Department. Approval must be given by the Board of Directors to a new definition of boundaries, and must also be sought from the Section members.

Forming a Sub-Section

If a Section becomes overly large, or a significant number of its members believe that forming a sub-Section under the parent Section would be both convenient and feasible, action can be initiated to obtain approval to form a sub-Section.

In most cases, formation of the sub-Section follows basically the same procedure as the organization of an engineering club. The group must demonstrate over a period of at least one year that it can function as a viable, dynamic unit. During this time it would not be called a "club", but a sub-Section of (Parent Section). It will be expected to develop its own programs and activities, prepare and file the required documents, and submit a budget and annual report. At the end of the probationary period, a petition can be filed with the Board of Directors for permanent authorization. Upon receiving Board approval, a certificate will be issued to the sub-Section.

Disbanding a Local Section

When a Local Section no longer believes that its existence is mandated by the needs of the area, it may elect to disband.

The decision to dissolve should be a majority vote of the still-active members. AIChE should be notified as the Section proceeds through this process. The Member Services Department will offer guidance and help the Section explore options before preparing a formal request to disband.

Since dissolution of a Section is by Board decree, the proposal is presented to the Board of Directors. AIChE will direct the reassignment of members to neighboring Sections, if appropriate, and will notify the Sections and the members of these transfers.

The membership representative will then contact the newly-assigned members, and add their names to the Section's mailing list. The changes will also be recorded at Institute.

Revocation of a Section Charter

A Local Section may elect to voluntarily disband for various and valid reasons. However, in certain circumstances the AIChE Board of Directors may determine that a Local Section should be disbanded, and its charter revoked.

This may happen in the following cases:

- 1) A Local Section no longer has enough active membership to justify its existence
- 2) A Local Section has not submitted an annual report to the Institute for 3 consecutive years.
- 3) A Local Section does not actively affiliate itself with the dynamic objectives of the Institute by conducting programs, providing services, and, in general, carrying out activities which cater to the professional needs of AIChE members on an ongoing basis

Authority for charter revocation is given in the AIChE Bylaws, Section VIII, Article 2g: "Board of Directors may revoke the charter of any Local Section if, after the Local Section has been duly afforded an opportunity to be heard, and the Board judges it to be in the best interest of the Institute to do so.

LOCAL SECTION CHARTER AND BYLAWS

The American Institute of Chemical Engineers Board of Directors has approved a uniform format for these important Local Section documents. Its purpose was not to restrict Local Sections, but rather to provide helpful guidelines based on the experience of many Sections in developing an effective and successful organization, as well as to ensure that they conform to the standards dictated by legal and tax requirements.

Wording of documents can be crucial. The Board of Directors thus requires that each Section prepare both a charter and a set of bylaws which conform to the models. Both documents should be periodically reviewed, revised if necessary, and the most updated version filed with the national office.

Changes in bylaws and/or charters must be approved by the Board of Directors. Proposals to do so should be channeled through the Institute's Member Services Department.

These models are meant to serve as a guideline and framework only. Each Section can decide on the length and detail it desires. For example, the duties of the officers can be specifically spelled out, if the Section chooses to do so. It is necessary only that each Section of the model document have a counterpart in the Local Section's version.