

# Chapter 3: Your Chapter Organization and Administration

This section provides guidelines and suggestions for Chapter Presidents and others with leadership responsibility and who help provide coordination with the international level on behalf of chapters.

## Organizing Your Chapter

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The slate of chapter officers should be established by your chapter's constitution and bylaws. Typically, chapters elect officers to the same positions recognized on the international level. Variations may be adopted for the number of Vice-Presidents, division of Secretary and Treasurer offices, and the number of members representing geographic districts, subchapters, zones, etc., on the Board of Directors or committee. These differences are reflected by the chapter's size and geographic area.

Officer election criteria are usually spelled out in chapter constitutions and bylaws. Many chapters have nominations committees to canvas members to determine who is qualified, willing and available to serve in the office, if elected. This method has proven quite successful in chapter experiences. Any nomination should be made 30 to 60 days prior to the election. The manner in which the election is conducted is the choice of the chapter and should be articulated in its Constitution and Bylaws. Chapter-meeting elections should allow for nominations from the floor; however, any candidate(s) nominated must meet the chapter's established criteria for office.

The following are suggested criteria and duties chapters may adopt or customize to establish rules governing elections and duties of chapter officers.

### Chapter President

Although it would be impractical to establish strict, standardized duties and activities applicable to every Chapter President or individualized procedures for each Chapter President, IAWP through its close relationship and experience with Chapter Presidents, offers the following as a suggested framework that may adapt to chapter operations:

#### Qualifications

1. Provides written approval, if applicable, from the appropriate supervisor.
2. Served at least one year as a chapter Vice-President or a subchapter or district president.
3. Served on at least two chapter committees as presiding member.
4. Participated actively in the chapter for at least three years.
5. Demonstrated organizational and management capabilities during the period of employment.
6. Attended at least three chapter conferences.

Note: One year's service on the International Board of Directors may substitute for any or all of the above, except # 1.

#### Duties

- Provide direction and responsible leadership for an association offering significant professional and educational value to your members;
- Communicate frequently with Board of Directors members;
- Presides at all chapter meetings and Board of Directors/council meetings;
- Appoint officers other than those elected to office with the approval of the chapter Board of Directors/council;
- Appoint committees and chairs with the approval of the chapter Board of Directors/council;
- Delegate committee assignments to chapter members;
- Appoint special committees not specified in the chapter constitution & bylaws as may be required to accomplish specific functions;
- Serve as an ex officio member of all committees;
- Present a report on projects, programs, accomplishments and status of ongoing and current activities and plans at the annual chapter convention;
- Perform other duties as directed by the chapter Board of Directors/council and/or the membership;
- Serve as liaison between the chapter and the agency executive administrator or employer;
- Maintain lines of communication with the International Board of Directors;
- Has a self-directed goal: "This will be the most outstanding chapter in the entire association."

#### **Chapter President-Elect/Vice-President**

##### Qualifications

1. Provides written approval, if applicable, from the supervisor or administrator.
2. Served as subchapter or district president.
3. Served on at least two chapter committees as presiding member.
4. Participated actively in the chapter for at least two years.
5. Demonstrated organizational and management capabilities during the period of employment.
6. Attended at least two chapter conventions.

##### Duties

Presidents-Elect or Vice-Presidents may be asked to assume responsibility for many different areas of the chapter's operation. Unless constitutionally specified, these assignments may depend on geographical location and the opportunity for travel. Some typical assignments for these officers include:

- Chairing or serving on a finance committee (in cooperation with budget and audit committees direct chapter financing);

- Editorial board (in cooperation with publicity chair or publication editor oversee all chapter publicity and media releases);
- Membership (in cooperation with membership chair direct membership drives);
- Program committee (in cooperation with program chair, produce programs on chapter, subchapter and district basis);
- Assume duties of the Chapter President during any presidential absence;
- Assume the duties of the Chapter President for remainder of the term of office, if the office of Chapter President becomes vacant for any reason;
- Serve as presiding member of one or more standing committees as may be prescribed by the chapter constitution and bylaws.

### **Chapter Secretary and Treasurer**

The offices of secretary and treasurer may have separate functions or be combined under one title. The responsibility for correspondence, reports, convention proceedings and executive meetings usually is vested in the office of the secretary.

#### Qualifications for Treasurer

1. Served as treasurer of a subchapter or district, if such is constitutionally specified.
2. Has considerable knowledge of accounting and bookkeeping procedures.
3. Participated actively in the chapter for at least two years.
4. Served as a member of the audit and finance committee for a least one year.

The treasurer's functions should be outlined in chapter bylaws. Many chapters follow the IAWP model, specifying that the treasurer conducts an audit of all accounts. Most chapters provide for the bonding of this officer, and in many chapters, the person serves multiple terms.

- Keeps an accurate account of all receipts and disbursements of funds;
- Accounts for all chapter funds;
- Transmits membership names and dues to the IAWP Administrative Office;
- Works closely with the membership committee;
- Distributes membership cards;
- Receives dues from membership committee members;
- Prepares the annual chapter budget and treasurer's financial report;
- Audits subchapter/district books, if requested by the subchapter/district treasurer or directed by the chapter President or Board of Directors/council;
- Audits chapter convention/institute books if such records are established separate from treasurer's accounts;
- Insures compliance with all government regulations pertaining to educational nonprofit association status (IRS code 501(c)(6) for US Chapters).

### **Other Officers**

Chapter constitutions and bylaws may provide for officers other than those mentioned here. Criteria for and duties of those officers are usually defined in the bylaws. Criteria should be

commensurate with the office and model duties described here. All criteria should emphasize willingness and ability to serve.

### **Chapter Board of Directors**

Composition of the chapter Board of Directors (or Executive Committee) traditionally and historically is determined by the constitution, but most often is composed of officers, immediate past-president(s), and a representative from each subchapter, zone or other subdivision. Board meetings usually are held in conjunction with the chapter conference and at two or three other times during the year. Committee chairs typically are invited to participate in board meetings, although, in most instances, they have no voting strength.

Some chapters name the last three Chapter Presidents as a “Board of Governors,” with all serving on the Board of Directors. This group may have responsibility for budget and finance or may serve as a consultant entity on policy and program.

In some chapters Board of Directors members are given individual responsibility for specific phases of the chapter program, while in others, committee chairs handle such duties. The representatives on the Board of Directors are commonly assigned responsibility for the chapter’s total program within each one’s jurisdiction.

### **Chapter Committees**

Committee appointments should be considered on the basis of ability, interest and objective. Chapter two of this handbook contains overviews of the international committee structure which can be adopted or customized to suite your chapter’s activity and structural needs.

### **Suggestions for Chapter Committees**

Standing and special committees conduct most chapter business. A chapter’s overall success depends largely on the activities of these groups. As in the case of chapter officers, the number and type of committees appointed will vary considerably from one chapter to the next. Many chapter constitutions and bylaws stipulate the size, composition and method of selection/election for all committees. This section is intended to be a model for establishing chapter level committees and assigning their functions. Again, each chapter should establish those committees and other bodies which best address its needs and potential.

The summaries here are intended to help the Chapter President establish selection criteria and methods for committee members, and offer ideas to committee members to assist in discharging their duties.

Committee appointments should be based on IAWP’s primary objectives as they relate to the Chapter Achievement Award program. This will insure chapter participation in all major activities and be an asset in your chapter’s bid for this award and other recognitions. Major chapter committees/activities typically are:

- |  |  |
|--|--|
| <input type="checkbox"/> Membership                    | <input type="checkbox"/> Chapter Institutes/Conference (Program) |
| <input type="checkbox"/> Education                     | <input type="checkbox"/> Chapter Achievement/Awards              |
| <input type="checkbox"/> Communication                 | <input type="checkbox"/> Professional Practices                  |
| <input type="checkbox"/> Legislative                   | <input type="checkbox"/> Retirees                                |
| <input type="checkbox"/> Services to Veterans          | <input type="checkbox"/> Award of Merit                          |
| <input type="checkbox"/> Services to Special Customers | <input type="checkbox"/> Citation Award                          |

This list by no means limits chapter structure to these program categories but is offered as a starting point for consideration.

### **Special Committee Functions**

The following suggested committees and their descriptions align with the International Board of Directors subcommittees. This operational structure may work well in your chapter. However, the functions and responsibilities may be separated or combined according to chapter needs or guidelines provided in the chapter's constitution and bylaws.

### **Audit and Finance Committee**

1. Prepares an operations budget for presentation to the Board of Directors.
2. Audits the books of the treasurer, or secretary-treasurer where the position is combined, and provides for the audit's publication.
3. Presents a report on committee findings and financial status to the chapter's annual convention/conference.

This committee should be composed of at least three members. Staggered terms ranging up to three years is recommended to provide continuity, with the most tenured member recommended as chair.

### **Convention/Conference Site Committee**

Most chapters select their convention/conference sites one year in advance, although space availability may force some to consider planning farther ahead. This committee receives invitations from prospective host cities for the annual convention's location. They then recommend first, second and third choice locations and provide details on each site.

### **Nominations Committee**

1. Obtains and recommends to the membership a list of candidates for each office. In accordance with the constitution and bylaws, nominations also may be (or may not be) made from the floor at the annual convention.
2. Conducts a committee meeting prior to submitting its report to discuss the candidates' qualifications.
3. Reports committee recommendations to the chapter Board of Directors prior to the nominations being called for on the convention floor.

Note: It is recommended that this committee's membership be chapter-wide so candidates may be representative of the entire membership. It is also recommended that the Immediate Past

President chair this committee because he/she would have the most up-to-date knowledge of the duties of the various positions.

### **Bylaws and Resolutions Committee**

1. Provides a mechanism by which members of the association may present resolutions for consideration/action in annual convention.
2. Determines resolutions to be presented to the convention for vote.
3. Makes appropriate disposition of all resolutions received, both approved and disapproved.
4. Coordinates activities with those of the constitution committee.
5. Assists the President and Board of Directors in assuring all chapter policies, programs and procedures are developed and performed in conformity with the IAWP Bylaws.
6. Acts in an advisory capacity to the President and Board of Directors, chapter committees and members on constitutional matters.
7. Maintains records of all association constitutional decisions and interpretations.
8. Suggests revisions to the chapter bylaws, as deemed necessary or advisable.

### **Planning Successful Chapter Meetings**

Consider these suggestions before establishing the chapter's annual calendar of events. They apply to any meeting, but should be reviewed when planning Board of Directors sessions.

- Good meetings rarely “just happen.” Regularly scheduled meetings help assure the success of the chapter. It is imperative to plan significant and stimulating meetings.
- Try new ideas or unprecedented programs.
- Analyze the “competition” to avoid scheduling meetings when other activities or opportunities are offered which may create a conflict for members.
- Make the event worthwhile.
- It is the presiding officer's primary function, regardless of how much assistance is given, to see that every meeting detail is planned carefully in advance.

Not only is it essential to plan a meeting in advance, but it also is wise to plan the annual series of meetings in advance to assure compliance with chapter governing documents requirements and a proper balance between professional, business, social and other types of chapter interests. Most chapters appoint a program committee to prepare a detailed annual meeting schedule. Some chapters delegate broad powers to their Board of Directors, eliminating the need to hold more than one general membership meeting a year. Some chapters' constitutions and bylaws stipulate the frequency of meetings.

A chapter may hold as many meetings as wanted. Numerous chapters, particularly smaller ones, are successful in holding interesting, worthwhile and well-attended meetings each month. Large chapters often schedule regular meetings for districts, subchapters and local or area clubs, in addition to the regular chapter-wide meetings. A great deal depends on local requirements, ease of getting together and officer initiative. In any event, a rule to follow is that a few good, small-scale meetings are better than a large number of mediocre ones.

Site requirements vary considerably from chapter to chapter and will depend on the type of meeting planned. Chapters whose membership covers a wide geographic area should periodically arrange meetings in different locations for the membership's convenience. It is best to plan meeting locations when the annual schedule is set and to know in advance what facilities will be available.

The importance of advertising meetings cannot be over-emphasized. This is essential to stimulate good attendance and to assure all members understand the focus and topic for each meeting.

### **Conducting Business Meetings**

The following suggestions are designed to assist presiding officers in efforts to improve chapter meetings. These suggestions also apply to Board of Directors meetings.

- A detailed agenda should be prepared before each meeting outlining exactly what is to take place and how business is to proceed.
- Ensure that a host or hostess is on hand to greet members as they arrive - particularly first-time participants and new members. Good hospitality isn't just courteous, it also helps leave people with a positive impression and people who feel they have been treated well are more inclined to attend future meetings.
- Begin the meeting with a brief rundown of the agenda, highlighting topics of particular importance or interest. Unless unforeseen circumstances intervene, stick to the published agenda.
- Make sure seating is arranged to encourage the group to assemble in a rather confined area - don't crowd folks together, but don't allow too much room to separate members from each other and from the business at hand.
- Be sure the action takes place on a raised or otherwise visually distinct spot in the meeting space and ensure all in the room can hear.
- Begin and adjourn on time.
- Limit business meetings to 1-2 hours. If combined with planning sessions or retreats, break the group often enough to maintain productivity.
- Always include a reading of minutes of the previous meeting in your agenda. This helps refresh and bring members up to speed on the chapter's activities. Ask the secretary to summarize minutes from long meetings. Save time and retain interest by covering only the salient points.
- Introduce all guests and guest speakers. Keep introductions brief, but include name, title and a brief background profile, especially when introducing a guest speaker.
- Keep committee reports brief and concise. Check with prospective report givers before the meeting to ascertain whether a report is prepared. When committee chairs have failed to prepare their reports, simply announce there is no report from the committee "at this time."
- If a committee recommends action, request that a voting board member put it in the form of a motion for prompt action.

- Use chapter newsletters and other publications to keep members informed of all that occurs at chapter meetings. Summarize the material and report only pertinent information.
- Refer most “new business” issues to a committee. Too often, prolonged discussion can delay a meeting’s progress and defeat a proposal’s objective when no one is prepared to discuss it.
- Don’t be impatient for immediate results. They eventually will show by the reputation created.

### **Parliamentary Procedure**

To transact business efficiently, the presiding officer must adhere to parliamentary procedure. Otherwise, confusion results, little is accomplished and the timing is destroyed. Although the following is not a complete study of parliamentary order, it provides a brief outline sufficient for practically all chapter needs. As a part of its administrative or organizational reference file, each chapter should keep a book on parliamentary procedure (e.g., *Robert’s Rules of Order Newly Revised*).

Before studying the various motions, remember the following points:

- All new business must be presented to the chapter as main motion.
- All motions must be seconded.
- A motion not seconded is lost.
- A member who seconds need not rise to do so.
- Not all motions may be debated.
- Debate or discussion must come after the seconding.
- A motion, after seconding, must be disposed of in some way.

Motions do not have equal ranking. Some may be made while others are before the chapter. However, there may be only one main motion at a time. In other words, there cannot be two different matters before the chapter at the same time. The Chapter President must rule the second out of order until disposing of the first.

The President should be familiar with the following most frequently made motions. They are listed in order of their status:

- Main Motion: The business motion on a specific topic.
- To Amend: A motion to modify the main motion.
- Refer to a Committee: A motion to let a committee look into the matter.
- Postpone To a Certain Time: A motion to postpone consideration of the main motion until a later, set time.
- Lay on the Table: A motion to set aside the main motion with no provision to revive it at any specified time.
- Adjourn: Close the meeting.

- **Rescind or Repeal:** Used to reverse a previously passed motion. Motion may only be made by someone who voted on the prevailing side of the question. Cannot be made if action stipulated in previous motion already has been initiated.
- **Reconsider:** Used to extend discussion on a motion previously passed or defeated. Rules must be made at same meeting and must be made by a member who voted on the prevailing side.
- **Division of the House:** Used when a member is not satisfied with the President's ruling on a vote. The President must ask members to vote by a show of hands.
- **Appeal the Decision of the Chair:** Used when a member believes the President made the wrong ruling on a parliamentary point. The President asks for a vote to sustain the ruling.
- **Withdrawal Motion:** Used when it is evident that a motion does not express the organization's will. A motion made and seconded may be withdrawn with consent of the maker, if there is no objection, or by a motion to withdraw.
- **Previous Question or Motion to Stop Debate:** Used when for some reason it is necessary to pass.
- **Motion to Adjourn:** If the motion is lost, it may be renewed again after there has been some progress in the debate. But, if made and lost again too frequently, the President may declare it out of order on the grounds that it is being offered to hamper business. This motion also is used to close a meeting. The motion to adjourn is not debatable.

### Summary of the Rules

	Main Motion	Amendment	Refer to Committee	Postpone to set time	Lay on table	Adjourn
Must be recognized by chair	Yes	Yes	Yes	Yes	Yes	Yes
Must be seconded	Yes	Yes	Yes	Yes	Yes	Yes
Must be amended	Yes	Yes**	Yes	Yes***	No	No
Must be debated	Yes	Yes	Yes	Yes	No	No
Must be made when another has the floor	No	No	No	No	No	No
Vote required to carry	Majority	Majority	Majority	Majority	Majority	Majority

\* All main motions may be referred to a committee, postponed to a certain time, or laid on the table.

\*\* But not as an amendment to an amendment. \*\*\*As to time only.

**Notes**

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## Membership

Membership is the lifeblood of IAWP and provides about 85 percent of IAWP's annual income. The portion of a member's dues transmitted to the Administrative Office insures that:

- ❑ Programs for chapter development, education, and legislative awareness continue;
- ❑ Officers and District Directors can fulfill their elected responsibilities;
- ❑ Supplies and materials can be available for chapter use;
- ❑ IAWP can meet its financial obligations.

### Membership Plan and Campaign

Each chapter should develop a membership plan. Copies should be sent to the IAWP Membership Coordinator and the Administrative Office, postmarked by **October 1**.

A plan should include strategies for retiree recruitment, retention of past and current members, recruitment of new members, and employer and partner recruitment.

### Sample Membership Plan

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**Chapter:** Yours

**Chair:** You

**Membership Goal:** XXX

**Last Year's Membership:** XXX

#### Accomplishments to Date

- Appointed chair; selected committee.
- Set goal; selected, ordered and designed membership materials.
- Developed plan, which includes special membership drives in each subchapter and cash/prize incentives.
- Met with administrator to discuss goals and obtain letter of support. Obtained updated employee list from Personnel.
- Clarified responsibility for transmitting new members to Administrative Office promptly so *Workforce Professional* service can begin immediately.

#### July/August

Launch chapter-wide membership campaign with first promotional mailing. Determine what program areas and local offices aren't responding and decide how to address. Develop special membership drives, assign responsibility and insure efforts include outreach to workforce partners. Make in-person contact with every new employee, and provide IAWP application and information package. Send special notices to retirees.

**September/October**

Announce membership contests. Contact members who did not renew last year and ask them to rejoin. If they decline, give them questionnaires asking for suggested improvements. Begin publicizing new members. Compare membership with goals and discuss strategies at board meeting. Transmit all new members to date. Mail renewal notices. Submit Membership Plan to the IAWP Administrative Office to be received or postmarked no later than **October 1**.

**November**

Send formal invitation to administrator for “Meet IAWP” reception and request department head help/cooperation in allowing staff to attend. Post and publicize reception announcement and encourage new members to attend. Send follow-up to retirees and associates. Compare membership with goals. Develop promotional materials for December Jumpstart! and distribute to subchapters. Transmit renewals

**December**

Launch subchapters’ special drives. Hold central office reception to kickoff December Jumpstart!; send administrator’s letter and update on chapter goals/accomplishments, announce first-new member prize; recognize retirees and associates. Push membership incentives and contests. Compare membership with goals; assess questionnaires. Determine whether more renewal notices are needed. Assess reception results. Contact subchapters on progress.

**January**

Transmit more members, new and renewal; showcase subchapter drives and new members to date. Compare membership with goals. Review progress of special membership drives.

**February/March**

Compare membership with goals and adjust strategies. Gear up for chapter convention push. Send flyers on contests to all employees. Transmit more members.

**April**

Contact subchapters on progress and expected convention attendance. Compare membership with goals and target last big push. Follow up on non-renewals.

**May**

Announce membership contest winners. Give campaign the last best shot. Send final transmittal by cutoff.

**June**

Proudly accept IAWP membership awards at conference!

*Note: List any plans developed for special membership drives.*



### Membership Campaign Checklist

- Appoint a chair. Form a membership committee with chair's advice.
- Attempt to have statewide involvement. Meet with last year's membership committee chair to obtain training and advice.
- Set a goal above last year's total, but be realistic.
- Review association membership materials available from the Administrative Office to determine how items can help your membership drive or whether you will develop your own.
- Determine the areas where membership is weak.
- Determine how your administrator can play a role in your membership campaign.
- Develop membership drives for:
  - Renewals
  - New members
  - Retirees
  - Other Partners in workforce development fields
  - Partners
  - Weak areas
- Mail Renewal Notices Early. Remember, the Administrative Office will handle dues-billings for a nominal fee plus postage.
- Mail letters to members who did not renew last year.
- Determine how your membership campaign fits into all major chapter events or programs (e.g., public relations, institutes/conventions, newsletter, education, legislative, etc.).
- Establish a method to welcome new members and transmit them monthly to the Administrative Office so *Workforce Professional* service and other benefits can begin immediately.
- Prepare a list of potential members both in and out of the agency.
- Decide whether you will hold membership contests.
- Determine how membership materials will be distributed to all locations, and how a chapter-wide membership drive will be conducted.
- Use the public relations chair to assist in membership drive's promotion.
- Involve the retiree chair in your membership campaign.
- Send chapter membership plan to the IAWP Membership Coordinator and the Administrative Office.

## Membership Basics

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Chapter Presidents should provide the information in this section to the individual(s) responsible for preparing membership transmittals and submitting dues to the Administrative Office. This material also can be helpful to the chapter membership chair(s), committee members and key recruiters who can benefit from a complete understanding of the process and all available membership services.

Membership monies passed through IAWP have a direct return to individual members through services and benefits. Timely and regular transmittals from the chapters stabilize the cash flow needed to provide these services. **There are no restrictions on how large or small a transmittal can be, so chapters need not postpone membership processing to once or twice a year. The association urges chapters to process transmittals on a monthly basis.** Begin transmitting dues early and continue a steady flow throughout the year to protect these valuable member benefits.

Membership processing procedures vary from one chapter to the next, and may include steps that are not covered in this section. This material presents the basic concepts, definitions, steps and forms required for IAWP purposes. It does not cover supplemental procedures chapters may need for payroll-deduction programs or automated membership processing. However, instructions for computer-processed transmittals are covered later in this chapter.

**All individuals involved with chapter membership campaigns and processing need to understand that membership transmittals are tied directly to a member's receipt of *Workforce Professional* subscription service. This is especially critical to new members, who cannot begin receiving their newsletter until their names and mailing information reach the Administrative Office.**

The association urges chapters to transmit new members on a priority basis, remembering that newsletter service is the one constant communication link each member has. Because *Workforce Professional* also is one of the best marketing tools a membership recruiter can use, the immediate onset of subscription service only reinforces a positive view for the new member. Many complaints and misunderstandings can be avoided if new members are transmitted quickly. When members report not receiving their newsletter, chapter leaders can help by checking first with whomever is responsible for processing chapter membership transmittals before referring the individual to the Administrative Office. If the Administrative Office has not received the transmittal and must refer the person back to the chapter, it reflects negatively on the association and also on the chapter leadership.

When training chapter Board of Directors members and membership recruiters, please remember this important correlation and its impact on internal public relations, member perception and membership retention.

### Timeline

- **Official Membership Year:** IAWP membership is reported on the calendar-year basis (Jan.-Dec. 31).
- **Association Year:** The association year runs from July 1-June 30, which coincides closely with the installation of the IAWP international officers at the annual convention's business meeting.
- **Membership Campaign Kickoff:** Most chapters begin their annual membership campaign on or about July 1 for the upcoming calendar year. The Administrative Office will accept transmittals with members for the new membership year (i.e., after July 1, 2009, you may send 2010 transmittals).
- **December Jumpstart:** This contest is won by the chapters that: 1) attain the highest percentage of their previous year's membership by the contest deadline (December 10); 2) attain the most new members; and 3) attain the highest percentage of renewals. Membership must be transmitted, *with full payment*, to the Administrative Office by December 10 (postmark date).
- **Voting-Credential Cutoff:** Chapter voting strength for the international convention is determined on membership totals received in the Administrative Office 30 days prior to the international convention. All chapters that are recognized, approved and affiliated with the association have two at-large votes, plus an additional vote for every 100 (or major portion thereof) full members.

#### **Membership Status**

- **New Member:** Anyone who was not a member in the previous membership year.
- **Renewal Member:** Any member who was in a paid-up status the previous membership year. If former members let their membership lapse for one or more years, process them as new members when they rejoin.

#### **Membership Classes**

- **Full Member:** Any person interested in the workforce development arena who has paid the full amount of membership dues. If someone retires and changes from full to retiree but continues membership, transmit them as renewal retiree not new retiree.
- **Retiree Member:** Any person who is retired from full-member status. Transmit one-half of the amount submitted for full members.
- **Life Member:** Any member who has been awarded a paid-up life membership by the international board, including all past International Presidents. Report these members, but don't transmit dues for them.

## The Membership Transmittal Process

### Forms

The materials and forms that follow are required to process IAWP dues and membership transmittals, or to pay dues via credit cards and electronic transfer. All are available from the Administrative Office.

- **Transmittal Cover Sheet:** Use this required cover form to summarize a transmittal's content.
- **IAWP Membership and Dues Transmittal Form:** Use this form to list members' names, membership status and name/address changes. Submit it with a transmittal cover sheet.
- **Dues via Credit Card Transmittal Form:** Use this form to process memberships paid by VISA or MasterCard.
- **Authorization for Electronic Dues Payment:** Use this form to authorize IAWP to deduct membership dues from an individual's personal bank account. This service is only available to chapters who have members currently using this payment method.

***Important! All membership renewals must be transmitted and paid to the IAWP Administrative Office by January 1 of each year. Membership is based on the calendar year. Membership records will be purged by March 31 of each year. Unpaid members will not receive benefits once purged.***

### Membership Card

Individual membership cards are sent to members by the Administrative Office. These 2 1/4" x 2 3/4" durable cards do not reflect the membership year, fit easily into a standard billfold, and are a continuing verification of membership..

### Processing Memberships

The transmittal form serves several purposes:

- It lists all members (new AND renewed).
- It acts as an address change form for renewal members.
- It acts as a name change form for any member.
- It provides a hard copy record shared by the chapter and the Administrative Office.
- It provides a current email address for each member.

When preparing transmittals, use as many forms as necessary, and remember the following tips:

- **Coordinate, coordinate, coordinate!** If you aren't the Membership Committee chair, stay in touch with this individual. Include, as part of the membership plan, an application-collection procedure to promote timely processing, immediate deposit of monies and good feedback on membership status to the frontline recruiters.

- **Group members by membership class.** Separate member listings by using appropriate headings for each class (full, retired and life), then list names alphabetically within that group.
- **List members alphabetically, last name first.** Non-alphabetized listings increase processing time at the Administrative Office, which translates into possible delays in activating subscription service for *Workforce Professional*. If questions regarding membership arise at either the chapter or the international level, it's easier to track names when they're alphabetized.
- **Address changes are critical.** Please be accurate and consistent with address changes so mail service will not be interrupted. Undeliverable mail also costs IAWP money.
- **Email addresses are needed.**
- **Report name changes.** Refer to the chapter records and prior-year transmittals. Was William M. Martin transmitted as Bill Martin previously? Try to transmit all members by their most complete names, including middle initials.
- **Report deaths.** When members die, it may be painful to their families if mail continues. Please be sensitive to this possibility and report deaths to the Administrative Office so names can be dropped from the membership database and mailing list.
- **Prepare your successor.** The sometimes-annual transition of membership-transmittal processing is a problem for new office holders. It appears more difficult than it is, but usually is not viewed as the most desirable chapter duty. The perception worsens when a predecessor managed chapter records haphazardly or failed to train the successor. Chapters may consider placing these duties with an officer or appointee willing to perform the task over a period of several leadership terms.

### How to Prepare the Transmittal

Important! Group all information in this order:

Full — New Members	Retired — New Members
Full — Renewal Members	Retired — Renewal Members
Life Members	

- **Separate** groups above by triple spacing and **alphabetize** by last names within each group.
- Handwritten transmittals are not acceptable.

- Send **separate transmittals for credit card** dues payments.
  1. Enter member's email address.
  2. Enter member name, (last name first, first name second, then middle initial). Please provide middle initial whenever possible.
  3. New Members — address required
  4. Renewals — only change of address required.
  5. Name Change — enter former name, whenever applicable.
  6. Enter member's gender. "F" for female, "M" for male on New members only.
  7. Enter year of birth for New members only.
  8. Check this space for Full New members only.
  9. Check this space for Full Renewal members only.
  10. Check this space for Retired New members only.
  11. Check this space for Retired Renewal members only.
  12. Check this space for IAWP Life members only.

### **Preparing the Cover Sheet**

Once you've completed the transmittal listings, prepare a Transmittal Cover Sheet. This sheet provides membership totals from the transmittal and captures a running total from previous transmittals. Specific instructions for preparing the cover sheet appear below. Most are self-explanatory or described on the actual form. If you have questions, call the Administrative Office for assistance.

1. Enter chapter name.
2. Enter the date you prepare the transmittal. This is important for membership contests and voting credentials. Remember, membership is on a calendar-year basis.
3. Enter the transmittal's number, beginning with 1 for the first transmittal of the new membership year, starting after July 1. A break in numerical series will indicate a loss of transmittal.
4. Enter total number of full members listed on Membership and Dues Transmittal Form and total dollars for members in that category.
5. Enter total number of full members in retired status and total dollars for members in that category.
6. Enter number of IAWP life members. Do not send money for these members.
7. Enter the total number of members listed on the Membership and Dues Transmittal form and total dollars. Also enter the total number of new members listed on the transmittal.
8. Enter the total number of members listed on your last transmittal in the current membership year. (See Item 9 of your last transmittal for the previous year-to-date total.)
9. Enter total of items 7 and 8. This gives you the total members year-to-date as of the current transmittal.
10. Enter the name, address, and telephone number of the individual to whom IAWP should mail the receipt.
11. Enter the name, address, and telephone number of the individual who prepared the transmittal.

If your transmittal includes dues that are paid by VISA or MasterCard, you must prepare a *separate credit card dues transmittal* form for each member who uses this method but no a separate transmittal. Please be sure to provide the complete credit card number and expiration date. The charge must be made for the total dues amount, both chapter and IAWP portions. Please indicate that amount on both the top and bottom portions of the form.

*See pages 63-64 for sample transmittal sheets.*

### **Electronic Dues Transfers**

The electronic dues-transfer method is available to all of U.S. chapters. Instructions are provided in this handbook to insure that user chapters have adequate procedures.

This method of dues payment grants the Administrative Office authorization to electronically deduct a predetermined dues amount from a member's personal account in three installments. Chapters using the service to should continue to coordinate with Mary Riddell at the Administrative Office. Since this is both a legal authorization and a dues-transfer method, there are both required steps and optional steps chapters must consider. The service provides the features below:

- **Transmittal Preparation:** On receipt of an eligible electronic dues-transfer, staff completes a Transmittal Cover Sheet and a Membership and Dues Transmittal Form, then returns the forms to the chapter with a check for its membership dues portion.
- **Service Continuation:** Dues deductions occur automatically unless the member notifies IAWP to stop withdrawals. Staff notifies each participating member when the dues withdrawal will begin (specific dates vary by chapter). This allows members adequate time to notify the Administrative Office if cancellation is desired.
- **Three-installment Deduction Plan:** Deduction will be no more than a three-payment procedure. Dues can be deducted in one, two or three consecutive monthly payments as determined by the chapter, as are the actual transaction dates. Deductions are made on the selected dates or on the first banking date after a weekend or holiday. For example:

#### **Full Members**

1 payment: Oct. (\$50)  
 2 payments: Nov. (\$42) and Dec. (\$8)  
 3 payments: Dec. (\$21), Jan. (\$21), Feb. (\$8)

#### **Retired Members**

Oct. (\$25)  
 Nov. (\$ 21) and Dec. (\$4.50)  
 Dec. (\$11), Jan.(\$10) and Feb. (\$4)

**Note:** Neither chapters nor members are entitled to refunds if a participant starts electronic transfer, then terminates employment and IAWP membership before the payment procedure is completed. Neither chapters nor participating members are charged a service fee. However, if a participant's account is insufficient, the bank may charge a service fee just as it would for a check written against the account.

The organization retains electronic transfer forms for membership tracking and financial audit purposes. Authorizations must reach the IAWP Administrative Office at least 60 days before the dues-transfer process begins.

Chapters with automated membership-processing capability may submit member-listing printouts instead of the IAWP Membership and Dues Transmittal Form. However, this type of transmittal must be accompanied by a Transmittal Cover Sheet just as any other transmittal would. When designing an automated transmittal layout for membership, be sure to capture the same data elements and dimensions on the Membership and Dues Transmittal Form. Contact the Administrative Office for assistance on designing automated systems.

### **Transmitting Members Who Join Multiple Chapters**

It is not uncommon for IAWP members to join more than one chapter during an association year or for more than one chapter to transmit them to IAWP. While this is an acceptable and legitimate practice, it also must meet the requirement below:

Each chapter must transmit the correct IAWP dues portion for these individuals according to the membership types and dues structure defined in the IAWP bylaws. For membership transmittal purposes, this stipulation takes precedent over all chapter constitutions, bylaws, procedures, membership definitions or dues assessments.

Confusion over this matter occurs frequently in the transmittal process because some chapters do not define membership types according to the IAWP definitions. Most membership definition combinations are permissible, as long as the above requirement is applied.

### **Life Memberships**

Chapters may nominate individuals for life memberships according to IAWP's Bylaws, Article I, Section 2 (membership class) and Article II, Section 3 (membership fees). The fee is calculated by membership class (full or retiree) for a 15-year period at the current dues rate on the date of the member's nomination. Submit nominations for life memberships to the Board of Director via the Administrative Office. Provide a letter of nomination, including a brief statement of or summary about the nominee's IAWP participation, as well as the monies to cover the life membership fee. Chapter Presidents should provide a copy of all life membership nominations to their current District Director, not only as a courtesy, but also so the District Representative may make the motion for the Board of Directors approval.

<b>Membership Year:</b> _____		<b>IAWP MEMBERSHIP and DUES</b>				<b>Chapter:</b> _____					
Prepared by: _____		<b>Transmittal Form</b>				Subchapter: _____					
Phone: _____						Transmittal #: _____					
Send original transmittal form with payment and cover sheet to the IAWP Administrative Office, 1801 Louisville Rd., Frankfort, KY 40601 Keep a copy for chapter records. If questions, please call 502.223.4459.											
1. Enter Social Security Number on all members			3. New Members – Address required			4. Enter gender for all new members only					
2. Alphabetize by group, then by last name, first name and middle initial.			Renewals – only change of address required			5. Enter date of birth for all new members only					
			Name Change – include former name			6-12. Mark X by category, new or renewed.					
E-mail Address.	Name			Address (or address/name change for renewals)	Male or Female	Year of Birth	Full		Retired		Life
	Last	First	Middle				New	Renew	New	Renew	
1.	2.			3.	4.	5.	6.	7.	8.	9.	10.

## IAWP TRANSMITTAL COVER SHEET

Send original cover sheet with payment and original of each Membership Transmittal and Dues form to IAWP Administrative Office, 1801 Louisville Road, Frankfort, KY 40601. Keep copy for chapter records.  
Make checks payable to IAWP.

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1. Chapter Name: \_\_\_\_\_
2. Transmittal Dates: \_\_\_\_\_
3. Transmittal Numbers: \_\_\_\_\_
4. No. of full members: \_\_\_\_\_ @ \$42 each = \$ \_\_\_\_\_
5. No. of full members in retired Status: \_\_\_\_\_ @ \$21 each = \$ \_\_\_\_\_
6. No. of IAWP life members: \_\_\_\_\_
7. Total members listed: \_\_\_\_\_ Total dues = \$ \_\_\_\_\_  
(Total new members \_\_\_\_\_) .(Total items 4-6)
8. Total members as of last transmittal: \_\_\_\_\_
9. Total members to date: \_\_\_\_\_  
(Total Items 7& 8)
10. Name/ Address to whom receipt should be mailed:  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
E-mail: \_\_\_\_\_  
Phone: \_\_\_\_\_
11. Name / Address of transmittal preparer:  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
E-mail: \_\_\_\_\_  
Phone: \_\_\_\_\_

**Do not write in  
this block**

## International Development



IAWP is an international association with chapters and individual members in numerous nations beyond the United States. To extend the organization's outreach and address the global expansion of workforce development programs, the association encourages both chapters and members to sponsor memberships from non-USA nations at \$1 per member. This amount does not entitle the member to receive *Workforce Professional*. A subscription to *Workforce Professional* requires the full \$42 membership dues.

If you are planning to travel abroad and may have opportunities to meet individuals who work in workforce development areas or could benefit from receiving *Workforce Professional*, contact the International Development chair.

- ❑ It is important to coordinate efforts for specific countries.
- ❑ There are certain protocols and materials that should be used.
- ❑ The International Development Committee provides visitation guidelines (available from the Administrative Office) and requests that they be followed by any member soliciting or sponsoring membership in another country.

The International Development Committee also can assist those wishing to sponsor non-USA members. Contact the International Development chair for more information (including names) on current outreach initiatives. To activate sponsorship submit:

- ❑ Full name(s);
- ❑ Complete mailing address(s);
- ❑ Job title(s) of the individuals you wish to sponsor;
- ❑ Check or money order for the appropriate dues total;
- ❑ A cover letter to the Administrative Office.

Your receipt will be acknowledged, the chair will be notified, and *Workforce Professional* service will begin for the sponsorship period you request and in keeping with the amount of dues transmitted.

### **Program Objectives**

1. Establish ways to encourage and increase more members in nations other than the US.
2. Host overseas members, related agency guest and potential members.
3. Conduct tours to related agencies in countries other than the US so members can better understand the workings and procedures of these agencies.
4. Establish a "sister" program with agencies or chapters in other countries, similar to the Sister City programs found in many US and Canadian communities.
5. Establish a pen-pal program between fellow members or workers in other counties.
6. Develop a program for the chapter conference that promotes an exchange of ideas and information on a direct basis with guests or delegates from other countries.



## Chapter Achievement

To provide recognition throughout and beyond the association, IAWP established the *Chapter Achievement Award* contest. In most chapters, nominations begin at the subchapter, club, zone or office level, with winners moving on to the chapter-level contests. Chapters then submit their winners to the international contests where entries can receive chapter achievement points in each category entered. Winners in some international contests earn bonus points for their chapters. The chapter credited with the most overall points wins the annual *Chapter Achievement Award*.

Whether your award program is large or small, set goals early and stick with them. Document your chapter's activities and publicize award contests and criteria in your chapter newsletter. Scout for potential award nominees, and work closely with your employers to insure that outstanding performers are recognized in all areas.

### Suggested Chapter Committee and Contest Structure

A chapter Award committee might be given the following duty assignments:

1. Find or scout members who have rendered outstanding performance per the criteria of the
2. Select an individual and a group to receive special recognition.
3. Reward those selected.
4. Prepare nomination/award report for international contest according to the guidelines in Chapter 6.

Chapters may develop their own criteria, but are urged to adopt the same basic guidelines as the international contest since all nominations will be judged using IAWP's criteria.

## Use Your Precious Resources

Track pending retirements and assure retirees IAWP still values their membership and contributions. Don't forget to ask retirees to join, even if they weren't members during their careers. Perhaps some feel they now have more time, and the chapter has an opportunity to demonstrate what they were missing all those years! Never limit recruitment to previously active members.

### Keep Retirees Informed

- Send all retirees local and chapter newsletters, and notices about local activities they can attend.
- Start a retiree column in chapter/subchapter newsletters. Be sure to feature news about retirees' post-career activities in their communities, abroad or with their families.
- Initiate telephone contact in advance of meetings to invite retirees to participate. Advise them on any interesting functions/workshops.

### Give Retirees an Active Role!

- Ask retirees to serve as speakers, panelists, chairs or workers in both chapter and subchapter activities.
- Sponsor retiree meetings, dinners or get-togethers that encourage discussion of association business as well as social interaction.

- Ask retirees to conduct special projects working members may not have time to accomplish. In many cases, they may be more qualified than anyone to spearhead a project.

## **Obtaining Chapter Development Funds**

Chapter Development Funds are released at the International President's discretion based on justified financial need and appropriate plans of action from either chapter Presidents or District Representatives. IAWP established this program for three major purposes:

- To assist chapters in conducting viable meetings when they are financially unable to initiate and sponsor such activities;
- To fund in-district travel and related expenses for District Directors to attend critical chapter meetings when chapters and districts are financially unable to cover these costs; and
- To fund special chapter-development initiatives that build, rejuvenate or enhance chapters that are financially unable to initiate or pursue full participation in association activities.

The program is neither a grant nor an entitlement, but instead, a flexible assistance program that allows IAWP to target resources where they are needed most. The program's philosophy holds that as a collective entity, IAWP must ensure that

- ❑ Financial assistance is available;
- ❑ Spending is justified;
- ❑ Accountability is shared among leadership at all levels.

To obtain Chapter Development Funds, Chapter Presidents or District Directors must complete the appropriate portion(s) of the request form and include a written plan of action to the International President. Action plans should include:

- ❑ A thorough description of the activity to be funded;
- ❑ The amount needed;
- ❑ Financial justification for the request;
- ❑ A general timetable or agenda;
- ❑ The anticipated results leadership expects from the initiative.

There are no formal criteria for the funding-selection process. The International President will consider all requests, granting approval to those viewed as most deserving and most likely to fulfill the stated purposes. Once approval is granted, the International President will instruct the Administrative Office to issue funds to the appropriate recipient, either a chapter or a District Director. Although proposals may be submitted throughout the association year, leadership is advised to assess funding needs, develop initiatives and request funds early. Since the International President must work within a budgeted amount adopted by the Board of Directors, chapter development funds could be exhausted before late proposals can be considered.

Submit all requests to the International President, who will approve or deny the plan, then forward the form, with payment instructions, to the Administrative Office for processing and/or payment.

## Chapter Follow-up Checklist

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After reading the handbook so far, here are some suggested follow-up items you may wish to consider before your next chapter board meeting.

- Be sure to order your two additional free handbooks from the IAWP Administrative Office, plus any additional copies your leadership team needs! Remember also that you can download the *Handbook* from the IAWP Web site.
- As part of your board meeting, consider discussing all of Chapter 1 to ensure that everyone on your board is completely familiar with IAWP's resources.
- If you haven't completed your IAWP Committee Assignments and Association Directory Listings request form, please do so immediately and return it to the Administrative Office.
- If you're planning to revise your chapter's constitution or bylaws, be sure your chapter chair has a copy of the IAWP Bylaws to use as guidelines. Available at [www.iawponline.org](http://www.iawponline.org).
- If you think your chapter needs financial assistance with a worthwhile initiative, begin early to develop your request and action for Chapter Development funds. Refer to the appropriate sections of the handbook for further information.
- Is there someone in your chapter who deserves an IAWP Life Membership?
- Is someone new going to prepare membership transmittals this year? Please provide a copy of the instructions for this task contained in this handbook.
- Don't forget to tell your members to visit the IAWP Web site at [www.iawponline.org](http://www.iawponline.org).
- Does your chapter have special areas of interest in IAWP? Helping IAWP develop chapters in non-USA nations? Supporting legislative awareness efforts? Assisting with resources so members can conduct special projects at the IAWP Administrative Office?

### Chapter Development Funding Request

TO: \_\_\_\_\_ International President

FROM: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone ( ) \_\_\_\_\_

Project Title: \_\_\_\_\_ Date: \_\_\_\_\_

1. District Director Request Amount Requested: \$ \_\_\_\_\_

Objective(s): \_\_\_\_\_

\_\_\_\_\_

Chapter(s) Assisted: \_\_\_\_\_

Summary of Need: \_\_\_\_\_

\_\_\_\_\_

2. Chapter President Request Amount Requested: \$ \_\_\_\_\_

Objective(s): \_\_\_\_\_

\_\_\_\_\_

Chapter(s) Assisted: \_\_\_\_\_

Summary of Need: \_\_\_\_\_

\_\_\_\_\_

3. Special Initiative Request Amount Requested: \$ \_\_\_\_\_

Objective(s): \_\_\_\_\_

\_\_\_\_\_

Chapter(s) Assisted: \_\_\_\_\_

Summary of Need: \_\_\_\_\_

\_\_\_\_\_

**For International President/Administrative Office Use Only**

Approved by: \_\_\_\_\_ Approved Amount: \$ \_\_\_\_\_

Payment Instruction: \_\_\_\_\_

Advance Paid Date: \_\_\_\_\_ Amount:\$ \_\_\_\_\_ Check #: \_\_\_\_\_

Final Paid Date: \_\_\_\_\_ Amount:\$ \_\_\_\_\_ Check #: \_\_\_\_\_

## Contributing to Special Initiatives

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IAWP works hard to build and maintain the programs its members value. A long-standing commitment toward growth and outreach has strengthened IAWP's ability to respond to changing needs for services, products and information. So members and chapters may contribute to these enhancements in specific ways, the association sponsors several dedicated funds that offer a choice in support priorities.

### **International Reserve**

Assisting the development and involvement of non-USA members and chapters is a hallmark of any international organization. In this growing global economy, the need for international outreach and informational exchange in the employment and training arena must be a priority in balancing worldwide labor markets, worker competitiveness and the sharing of best practices. Your donations insure that IAWP can help emerging chapters reach their potential by providing materials, services and exchange strategies that bring everyone closer together.

### **Legislative Reserve**

Reserving funds to support special legislative-awareness initiatives, including informational outreach to state and national policy makers, is critical to IAWP's success in demonstrating the system's effectiveness. Your donations insure that IAWP can respond rapidly and proactively when the system needs support. This fund covers extraordinary expenses by the Legislative Steering Committee when projects, mailings or travel cannot be offset by normal budgeting.

### **Kari Smith Volunteer Spirit Fellowship**

This newly founded fellowship is a dedicated, educational fund to defray transportation and housing costs for members to work in the IAWP Administrative Office for up to one month. Fellowship recipients must arrange for their absence from work, possibly taking personal leave, and be assigned to a Board of Directors approved project that requires access to research or automation facilities at the Administrative Office. Your donations insure that research, design and improvement of member services continue.

### **Bequests**

Members may also contribute to the goals of IAWP through a bequest in their will. These funds can be earmarked for a specific initiative or use, or may be considered a general contribution/donation. This is an excellent way to insure that your memory will live on through the work of your professional association.