



**Chapter Officers
Handbook**

2022

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CHAPTER ONE, AN AFCEA OVERVIEW

1.1 The History of AFCEA

Following the Civil War, the United States Veterans Signal Association was formed from the original Signal Corps established under Major Albert J. Myer of the U.S. Army.

This organization was active for many years, ultimately being augmented by veterans from the Spanish American War and World War I. Another World War I group, the American Signal Corps Association, merged with the U.S. Veterans Signal Association and was active until 1944.

In May 1946, Major General Harold C. Ingles, Brigadier General David Sarnoff and a number of industrial leaders joined to found the Army Signal Association, absorbing the remaining chapters of its predecessors.

With the creation of the Department of Defense, the name was changed to Armed Forces Communications Association in 1947, and then to the Armed Forces Communications and Electronics Association in 1954. With the establishment of chapters in Europe, Asia and Canada, AFCEA became international in 1979. In 2018, the formal name was changed to AFCEA International.

AFCEA has grown to over 30,000 professional members worldwide, including over 1600 corporate members and is comprised of more than 130 chapters. AFCEA serves the military, government, industry, and academia in the fields of communications, IT, intelligence, and global security.

AFCEA conducts conventions, symposia, and expositions around the world. For a complete list, refer to <https://www.afcea.org/site/Events>.

AFCEA International publishes *SIGNAL* magazine and the electronically distributed *CONNECTIONS*, the two preeminent professional journals for communications, electronics, intelligence and information systems professionals.

1.2 The AFCEA Vision, Mission, Goals and Core Values

AFCEA is a professional association chartered in Washington, D.C., as a patriotic, educationally oriented, non-profit, technical association. Its mission is (a) to promote industry-government-academia cooperation in developing effective intelligence and information management, including the development, manufacture and operation of equipment and systems, and provision of services in communications, electronics, computers, intelligence systems, command, control and technical photography; (b) to foster strong Armed Forces and national C⁴I organizations; and (c) to contribute to the professional development of those serving in C⁴I fields. Through these activities, it is the purpose of AFCEA to further the security and military preparedness of the United States, its allies and countries that abide by democratic principles.

Vision:

To be the premier information technology, communications, and electronics association for professionals in international government, industry and academia worldwide.

Mission:

AFCEA is an international organization that serves its members by providing a forum for the ethical exchange of information. AFCEA is dedicated to increasing knowledge through the exploration of issues relevant to its members in information technology, communications, and electronics for the defense, homeland security and intelligence communities.

Goals:

1. Provide the recognized ethical forum that bridges information technologies and issues among academic, industry and government leaders worldwide.
2. Provide value and benefits to members and communities of interest.
3. Actively engage governments on IT policy matters.
4. Grow and maintain our active membership within the IT community.
5. Provide professional development.
6. Preserve and foster a spirit of fellowship in all AFCEA activities.

Core Values:

Ethics: Insist on the highest ethics in everything we do.

Visionary Leadership: Apply visionary leadership in our community and encourage it from our members at every level.

Commitment: Consistently demonstrate commitment to continuous improvement of the Association and to improvement of service to our members.

Quality: Provide the highest quality in everything we do.

Education: Commit to do everything possible to further the education of our members and of the communities we serve.

Diversity: Encourage, embrace and continually enlist the support and inclusion of all members of our diverse international community.

1.3 The AFCEA Forum

AFCEA International is a professional, educational and technical association. Our central mission is to provide a forum for the ethical exchange of ideas among our members in information technology, communications, and electronics for the defense, homeland security and intelligence communities. The AFCEA forum is achieved through international events, *SIGNAL* magazine, other professional publications, professional development opportunities and most importantly chapter activities.

The continued success of the AFCEA forum depends on the maintenance of high professional standards and full compliance with accepted standards of conduct and ethics by the membership. It is essential that relationships developed through membership in the Association reflect accepted standards of conduct and ethics. These standards must be observed at all levels, including AFCEA International Headquarters and AFCEA chapters worldwide.

The AFCEA forum is comprised of the following collection of activities:

1.3.1 AFCEA International Headquarters Events

AFCEA International sponsors a number of events each year. A full list can be found on the AFCEA website: <http://www.afcea.org/events/>.

1.3.2 Professional Publications

SIGNAL Magazine is AFCEA's international journal. It is read by academic, industry, government and military professionals all over the world. *SIGNAL* keeps readers current on state-of-the-art technology, information security, international events, intelligence, cyber, homeland security and defense IT systems. Issues focus on timely topics such as technologies for the military services, electronic warfare, energy, biometrics, space, NATO and tactical communications, among many.

In the online realm, *SIGNAL* publishes *SIGNAL Online*, the magazine's official Web site that serves as a news resource featuring unique material. *SIGNAL* also publishes *CONNECTIONS*, an e-newsletter that is distributed electronically to AFCEA members worldwide. This electronic publication features up-to-date information on events, chapter news and other defense and intelligence IT news.

For many AFCEANs working in remote locations, the *SIGNAL* staff and its timely publications keep members well informed on developments in technology as well as updates on AFCEA activities, including chapter news, both in print and online.

1.3.3 Professional Growth

For more information on the *AFCEA Professional Development Center (PDC)* please visit: <https://www.afcea.org/site/Events>.

1.3.4 Educational Programs

The AFCEA Educational Foundation and chapters' educational programs, in the U.S. and internationally, disburse more than one million dollars each year in fellowships, scholarships, grants, science fair awards and military prizes. These programs recognize, reward and promote academic excellence in the technical and scientific fields particularly related to communications, intelligence and information systems. These endeavors demonstrate AFCEA's dedication to promoting education vital to the success of the professions it represents.

1.3.5 Chapter Activities

Chapter activities bring all the elements of the AFCEA forum together in localities around the world. The chapters are the key to AFCEA's continued success and growth. They perform an invaluable service to AFCEA members by providing an ethical forum where academia, government, military and industry professionals can exchange views and match military requirements with industrial capabilities. Through regularly scheduled meetings, technical symposia, conferences, and expositions chapters provide members the opportunity to interact with professional contemporaries and exchange views on important and relevant technical and business issues.

1.4 The AFCEA Organization

The AFCEA structure consists of the International Headquarters, the European area office, more than 30 regional vice presidents and over 130 chapters worldwide. AFCEA is governed by volunteer members who comprise the Board of Directors, Executive Committee and Council. The officers of AFCEA include a Chairman of the Board of Directors, Vice Chair of the Board of Directors, President/CEO, General Counsel, Secretary and Treasurer.

The Board of Directors is the governing body of AFCEA and consists of 40 – 100 members, including the elected Chairman of the Board, Vice Chair of the Board of Directors, members of the Executive Committee, Permanent Directors (all past elected Chairmen and all past Presidents), the General Counsel, Directors-at-Large, and an appointed Regional Vice President and Emerging Leader Advisory Council (ELAC) member.

The Executive Committee acts for the Board between sessions and also ensures for the Board proper management and operation of the International Headquarters. The Executive Committee consists of 10 – 40 members including the Chairman of the Board, the immediate Past Chairman, the General Counsel, the European General Manager, and one appointed representative from the Regional Vice Presidents and Emerging Leader Advisory Council (ELAC).

The AFCEA Council consists of the Officers, the ELAC, and one chapter delegate for each 100 members or fraction thereof in each Chapter. Each Chapter will have a minimum of two delegates. They elect the Directors-at-Large to serve on the Board of Directors.

1.4.1 International Headquarters

The International Headquarters is located in Fairfax, Virginia near Washington, D.C. Day-to-day operation of the Headquarters is the responsibility of the President/CEO. He is assisted by an Executive Vice President and a staff consisting of Vice Presidents, the Global Manager of AFCEA Europe, Senior Directors and Directors with supporting staff, and an Editor-in-Chief of *SIGNAL* Magazine. The President/CEO is appointed by the Executive Committee with approval of the Board of Directors and functions as the Chief Executive Officer of the Association.

International Headquarters operations include the following activities:

1. Assisting AFCEA regions and chapters in developing and conducting their activities. (Member and Chapter Services Department, mcs@afcea.org, 703-631-6242)
2. Editing and publishing the Association's official publication, *SIGNAL*, and the electronic newsletter *Connections*. (*SIGNAL* Magazine, signal@afcea.org, 703-631-6192)
3. Conducting membership campaigns, collecting dues, processing membership applications, maintaining official membership files and handling all other membership fulfillment responsibilities. (Member Service Center, service@afcea.org, 703-631-6158)
4. Recruiting, retaining and providing desired services to corporate members. (Member, Chapter and Corporate Services Department, corp-mbr@afcea.org, 703-631-6150)
5. Planning, coordinating and managing all international meetings and convention activities. (Events Department, events@afcea.org, 703-631-6130)
6. Sponsoring numerous programs and activities at the international level to focus public attention on the importance of intelligence and information systems as valuable national resources. (Events Department, events@afcea.org, 703-631-6130)
7. Providing support to the AFCEA Educational Foundation and to equivalent trusts or foundations outside the United States to encourage academic excellence in the physical sciences. (AFCEA Education Foundation, edfoundation@afcea.org, 703-631-6147)
8. Maintaining working relationships with other organizations and associations in countries that abide by the principles of democracy and whose objectives are allied with those of AFCEA. (President and CEO, president@afcea.org, 703-631-6211)
9. Preparing and executing the operating and capital expense budget and managing the investment program. (Chief Financial Officer, finance@afcea.org, 703-631-6166)

Complete contact information and websites for AFCEA International are listed at [Appendix 1-C](#).

1.4.2 AFCEA'S Geographic Orientation

1.4.2.1 Area Offices

AFCEA currently maintains one area office: AFCEA Europe located in Brussels, Belgium. In addition to the European continent, AFCEA Europe encompasses the Middle East. The European office is run by the General Manager AFCEA Global. The General Manager AFCEA Global reports directly to the President and CEO, AFCEA International and acts as an “in-place point of contact” to support the European Regional Vice Presidents and chapter leadership in their respective areas of responsibility. In addition to maintaining a close working relationship with their Regional Vice President, European chapters should work closely with the General Manager AFCEA Global in an effort to support activities of the European office. AFCEA Europe hosts a number of events each year, to include TechNet International and TechNet Europe.

1.4.2.2 Regional Vice Presidents

Regional Vice Presidents (RVPs) are appointed to serve as a link between the International headquarters and chapters. Their mission is to strengthen chapters by offering guidance, counsel and interpretation of AFCEA policies to achieve overall AFCEA goals and objectives. Their tasks are to assist chapters in conducting their activities, maintain chapter growth, recommend financial assistance necessary to help those chapter programs that increase member participation and allow chapters to be financially self-sufficient; attend chapter functions and represent chapters at International Headquarters-sponsored meetings and planning sessions; and report the status of chapters in their region to the Chairman of the Board as requested. A typical RVP has previously served as a Chapter President and can provide invaluable insight and lessons learned to local Chapters. The European RVPs serve in close cooperation with the General Manager AFCEA Global.

1.4.2.3 Chapters

The Chapter is the basic unit of AFCEA. The worldwide chapter structure forms the foundation of the association and is the key to its continued success. Members working in the chapters on local projects and programs help their community while supporting the AFCEA mission, goals and core values. A minimum of 25 members is required to establish a new chapter. (See Chapter 2 – *How to Form a New Chapter.*)

CHAPTER TWO, HOW TO FORM A CHAPTER

The procedures for starting a new AFCEA chapter are simple and straightforward. Information on starting a chapter is available upon request from Member and Chapter Services at AFCEA International Headquarters: contact mcs@afcea.org. The start-up information includes the following:

- Electronic roster of active members in the area (after approval by the Regional Vice President)
- Links to the AFCEA Chapter Officers' Handbook and International By-Laws
- Individual Membership Applications
- Corporate Membership Applications
- Promotional items to stimulate interest in AFCEA
- Back issues of *SIGNAL Magazines*

When starting a chapter, a checklist can be found in Appendix 2-A. The necessary charter application form can be found in Appendix 2-B. These forms are for your use, and local reproduction is authorized.

2.1 Procedures

The Regional Vice President is a valuable source of guidance and information for new chapters. Invite the RVP to your planning meetings. An initial step to help determine whether or not a chapter should be formed is to conduct a brief "market survey." Be reasonably sure that you have a good resource base to support individual members and corporate sponsors. Contact local prospects among government, military, academia and industry that have an interest in the broad areas of electronics, computers, command and control, communications, intelligence and information systems, etc., and ask for a representative to attend your exploratory meeting. There needs to be a sufficiently large support base to allow the chapter to grow and sustain. Ideally, to support a potential 200-member chapter would require a population of approximately 1,000 professionals from IT, communications, or electronics fields in the defense, homeland security, and intelligence communities.

At the initial meeting of prospective members, friends and associates (ask them to bring a friend and remember that it will take 25 AFCEA members to charter a chapter), the following agenda has proven effective:

- Appoint a discussion leader who is familiar with AFCEA
- Describe the benefits of being an area chapter/member and discuss commitment required for success
- Explore the feasibility and desirability of forming a chapter
- Define the area(s) to be served by chapter
- Discuss the kinds of programs that would have greatest appeal
- Discuss the duties of chapter officers
- Select a chapter name
- Discuss election of officers
- Appoint liaison officers to contact other prospects
- Plan to announce the local chapter's formation

- **Appoint a committee to arrange a second meeting for purposes of signing a charter and arranging for guest speakers**

If the response to your initial meeting is large enough and discussion is positive, your second meeting may not be necessary. Be prepared at your first meeting to accept nominations and elect officers, approve the chapter name, sign up members and fill out the Charter Application by having each member sign it and provide their mailing address. Clearly indicate amount paid and form of payment. Chapter application signers who are not members of the Association need to complete the application form for individual membership and remit the appropriate fee. In addition, develop your chapter bylaws using the guidance in Chapter Three of this Handbook and the AFCEA International By-Laws. Forward one copy of your chapter by-laws to the Director, Member and Chapter Services, for review and approval by the President and CEO of AFCEA International.

Upon receipt of a petition stating that no fewer than 25 members of AFCEA in a locality desire to form a new chapter, the President and CEO of AFCEA may, if he determines it would be in AFCEA's best interests, authorize the formation of a new chapter. In a country where no Chapter exists, the establishment of a Chapter additionally requires a recommendation of the Governance Committee and approval of the Executive Committee. After formation, each chapter may arrange its own schedule of meetings and activities keeping AFCEA International Headquarters and the Regional Vice President advised by copies of notices of such meetings and activities.

For additional assistance in forming a chapter, contact the Director, Member and Chapter Services at AFCEA International Headquarters.

2.2 Forming a Student Club/Student Chapter

AFCEA Student Chapters may be formed at academic institutions and shall be comprised of at least one faculty advisor as well as students studying in the areas of science, technology, engineering, and mathematics. The purpose of Student Chapters is to provide students the opportunity for knowledge sharing and discussion of various aspects of communications and information technology among themselves and, through affiliation with active AFCEA Chapters, with AFCEA members who are professionals in the field, both in industry and government. By so doing, the Student Chapters will support AFCEA's overall mission of providing an ethical forum for advancing professional knowledge in the fields of communications, IT, intelligence, and global security. In addition, students can gain valuable insight and be better informed regarding their eventual transition from student to working professional.

To form a Student Chapter, a minimum of 10 students and one faculty advisor (all of whom must be active members of AFCEA) must sign and submit the Application for Student Chapter Charter ([Appendix 2-C](#)). Where applicable, the Regional Vice President should be included in all correspondence. Pending review, applications will be approved by the AFCEA International President and CEO.

If requested, AFCEA International may provide up to 10 complimentary student /faculty memberships to assist in the formation of the club. Whenever possible, each Student Chapter should maintain an active affiliation with and receive primary funding from their local AFCEA Chapter.

For more information on how to form a Student Chapter at your college or university, please contact Member and Chapter Services at AFCEA International Headquarters: mcs@afcea.org.

2.3 Chapter Names and Titles

Chapter names and titles should represent the immediate city, region or activity that is predominantly being served. Specifically, the name should have meaning and not be misleading. Chapters should not be named after individuals.

Chapters desiring a name or title change should submit their request to the Director of Member and Chapter Services at AFCEA International Headquarters after consultation with the Regional Vice President.

2.4 Installation of Chapter Officers

The installation ceremony must be conducted with dignity and decorum. It recognizes commitment to the principles and values of AFCEA as well as the assumption of leadership and transfer of responsibility.

Select chapter officers with great care. The objectives of the association can only be met through an effective, highly visible chapter system. A chapter will be a positive force and will contribute to the attaining of the Association's goals if the chapter is well organized and well led. The voting members should be well versed in the requisite qualifications of chapter officer nominees. Once the election is completed, plan the installation ceremony. Usually the installation of officers is held in conjunction with a regular meeting. Some chapters prefer a formal evening affair. When feasible, request that a Regional Vice President or an AFCEA International Officer officiate. Suitable wording for use at an installation ceremony can be found at [Appendix 2-D](#).

CHAPTER THREE, CHAPTER OPERATIONS

Extreme care is required in planning, organizing and operating a successful chapter. The AFCEA chapter, through service to its members and community, is the cornerstone of AFCEA's structure and its most valuable resource. Strong, active chapters provide the Association with the volunteers and initiatives for growth.

Relationships between chapters and AFCEA International Headquarters must be strong and continuous. The chapter is charged with the responsibility, in close concert with the Regional Vice President and the area office, where present, for generating activities that extend Association benefits to members in its area.

Although AFCEA chapters enjoy considerable latitude and autonomy, experiences gained by successful chapters over the years can serve as excellent guides to other chapters. Chapters tailor their activities to meet the needs of their members, corporate sponsors, and supporting community. Some of the more widely used and time-tested approaches to chapter operations are included in this chapter.

The continued success of AFCEA depends on the maintenance of high professional standards and observance of accepted standards of conduct and ethics. The manner in which individual and corporate members participate in the professional dialogue among government, military, industry and academia reflects the ethical reputation of AFCEA. AFCEA members shall follow the standards of conduct and ethics guidance of their appropriate government authorities along with those of AFCEA (See Section 1.2.). In addition, Chapter leaders should avoid conflicts of interest, real or perceived. Related party transactions on behalf of the Chapter should also be avoided.

3.1 General Guidelines

Fiscal Year—When a chapter is organized, the fiscal year must be established. Care should be exercised because, while the fiscal year may be changed later, there may be tax consequences as a result of the change. AFCEA International Headquarters has a fiscal year that is in step with that of the US Federal Government (October 1 through September 30). A chapter may use the same fiscal year as AFCEA International Headquarters, the calendar year or its own national fiscal year dates.

Annual Meeting—An annual meeting of the chapter membership should be held to elect new officers and to report on the chapter's activities during the previous year. All officers elected at the annual meeting should take office as soon as possible after the annual meeting.

Officers—All new officers should be installed as soon as possible after the annual meeting. Chapters that choose to continue their program through the summer months may hold elections during the summer and install their new officers before beginning fall programs. Some Chapters conduct elections as one of the final activities of the program year, usually in late spring, and then install the officers either at the last meeting during the program year or the first meeting of the next program year. As referenced in the AFCEA policy document, all chapter officers must be active members of the Association during their tenure. Additionally, officers should be affiliated with the chapter where they are serving. To avoid conflicts of interest, members should serve in leadership

positions with one chapter only. There are, however, rare instances where it is in the best interest of AFCEA for members to fill officer positions in more than one chapter. In these cases, chapter leadership should discuss the issue with their Regional Vice President, who can work with AFCEA International to grant a one-time exception to this policy.

Executive Council--Officers should consist of those mandated by the Chapter Bylaws, usually a President, one or more Vice President(s), Secretary, and Treasurer. In addition to the chapter officers listed previously, Vice Presidents for Programs, Membership and Emerging Leader Affairs are essential to chapter success. If there are multiple Vice Presidents, one should be designated as First or Executive Vice President. Local custom and/or practice may drive the need for other officers as well. All officers of the chapter's executive council should have voting rights at executive council and general membership meetings. See paragraph 3.3 for a listing of recommended chapter officers and their associated duties. It is customary for the president, executive vice president, treasurer, and secretary to be elected from and by the general membership. Other chapter officers may be elected or appointed as specified in the chapter bylaws. See para 3.3.6 for additional details.

Board of Directors--Depending on state or country laws, a board of directors may be a mandatory requirement. If a Board of Directors is required, specify the requirements (makeup, responsibilities, quorum, etc.) in the chapter's bylaws. Past chapter presidents, past chapter executive council members, and even current officers are excellent choices for a board of directors. Recommend chapters only have a Board of Directors if mandated by law or if the size of the chapter is large and additional guidance/governance is necessary for efficient operations. Another option is for the chapter to have a board of directors instead of an executive council. But whatever option is exercised, stay focused on the needs of the chapter, the needs of the membership, and efficient visionary leadership and management.

Committees—The chapter can sustain the interest and enthusiasm of chapter members by involving as many members as possible in the active management of chapter operations. The chapter can accomplish this goal through encouraging participation in committee work. Maximum effectiveness results from establishing committees and selecting strong, imaginative chairpersons and committee members. The number and type of committees may vary by chapter. Suggested committees include Awards, Programs, Membership, Finance, Publicity, Nominations, Small Business, Scholarship and Emerging Leaders.

Bylaws—The chapter's constitution and bylaws should designate the mandatory chapter officers, board of directors (if required) and committees, the terms of office, the duties associated with each office, how and when elections and appointment occur, voting procedures, and definitions (e.g., What constitutes a quorum?) Paragraph 3.3 provides a list of recommend officers, board of directors and special committees. However, local customs, practices, and unique requirements may drive the need for additional officers other than those described in paragraph 3.3. (*See Chapter Bylaws and Chapter Administration*, below.) For a sample set of chapter bylaws, refer to [Appendix 3-A](#).

Chapter Income—Although chapters are financially independent, they do receive supporting funds from AFCEA International Headquarters in the form of chapter rebates and a “finder's fee” paid for obtaining new corporate sponsors.

Educational Funds—Proceeds from chapter activities or monies from AFCEA International intended for chapter education support programs need to be maintained in a separate account with separate accounting records or transferred to the chapter educational foundation (see Chapter 7).

Finder's Fee--A chapter may receive a finder's fee for recruiting new corporate members by documenting its role in getting a corporate to join the association. This must be done in writing to the Director of Corporate Member Programs (srussell@afcea.org) within 60 days of the corporate join date. The finder's fee is 50 percent of the 1-year New rate. For 1-year members, half of the finder's fee is paid to the chapter the year the new company joins. The second half of the finder's fee will be paid when the company renews its membership the following year. For 3-year members, the chapter will receive 50 percent of the 1-year new rate the year the new company joins.

Dues--All dues received for Association membership go directly to International Headquarters. Chapters may assess their members' additional charges for special chapter services that the chapter may provide. The simplest way for members, both individual and corporate, to join and renew is via AFCEA International's website and member portal.

Other Income--It is important that chapter leadership explore other areas of generating income for the chapter. Although AFCEA and its chapters are not-for-profit organizations, all projects should be planned to be self-supporting. Any surplus funds should be used to maintain an adequate financial reserve, provide for proper management expenses and support membership programs and services. When determining a chapter's budget (income and expenses) requirements to support its programs (e.g., scholarships, Emerging Leaders, luncheons, membership drives, etc.), the executive council should also factor in adequate reserves. An adequate reserve should be determined based on prior financial commitments for funds needed to begin planning for special events, such as exhibits, golf tournaments, etc., until such time that a revenue flow begins. Suggested income producing activities include dinner meetings, golf outings, raffle tickets for special prizes and seminars or symposia through the coordination, cooperation and promotion of International Headquarters. (NOTE: Before organizing a raffle, lottery or any other form of game(s) of chance, be sure to consult local laws, ordinances and/or regulations to assure compliance.) AFCEA International Headquarters will work with the chapters to assist with financial support, if necessary, and to ensure adequate coordination and publicity of the event(s).

Chapter Taxes--The operations of chapters and chapter educational foundations located in the United States or abroad on U.S. military installations fall under the United States Internal Revenue Code 501(c)(6) and 501(c)(3), respectively. These U.S. based chapters and chapter educational foundations receive a tax-exempt status automatically through the International Headquarters Group Exemption. In some instances, chapters located on U.S. military facilities outside the United States may have to comply with the laws of the United States. Other chapters located outside the United States will need to comply with the laws of the home nation.

Every U.S. chapter and chapter educational foundation must file their own information return with the IRS on Form 990. The type of Form 990 required to be filed will depend on the amount of gross revenues received in the fiscal period by the chapter and the chapter educational foundation respectively. Regardless of the type of Form 990 filed, the returns for the chapter and the chapter educational foundation are due by the 15th day of the 5th month following the end of the chapter's fiscal year. Chapters following the AFCEA International fiscal year (1 Oct-30 Sept) must file by 15 February. Those on a calendar fiscal year must file by May 15. Contact Member and Chapter Services (mcs@afcea.org) or the Chief Financial Officer (pmiorin@afcea.org) at AFCEA International Headquarters for your chapter's Employer Identification Number - EIN (tax number) if not known. Note that a chapter and chapter educational foundation will each have their own unique EIN.

In addition to federal tax requirements, some states require additional filings from nonprofits. Make sure that your chapter is in compliance with any state and local requirements as well.

Chapter Annual Report—Each chapter will submit an Annual Report to AFCEA Headquarters not later than March 1 of each year, for the previous calendar year. A screen shot of this report is provided in **Appendix 3-D**. However, please note that all chapter annual reports are submitted electronically via the AFCEA portal. Reports submitted in any other format will not be accepted. This report serves two important purposes: (1) It helps maintain and sustain the chapter’s non-profit, tax-exempt status, and (2) It serves as a reporting and analysis tool for the RVP and Chapter Support personnel as to the chapter’s membership status, programs, financial status and general “health and welfare.” Chapters that do not submit an annual report are not eligible for and will not receive a chapter rebate and will also not be eligible to receive International awards.

Chapter Records—Careful records should be maintained for all chapter activities and annual tax filings. In addition to the necessary financial records, tax returns, and minutes of board meetings, each committee chairperson should be required to provide a detailed report on his or her committee’s activities. Such information as attendance at special events, cost of activities, revenues and other information of value to subsequent committees should be included in these reports. The accumulated information greatly simplifies the planning work of each new committee chairperson and ensures a smooth transition.

Transition—It is essential that all records, tax returns, and documentation be passed on to, and centrally maintained by the new chapter administration, normally the Chapter Secretary. This helps eliminate duplication and enhances the opportunity to draw upon previous experiences. Chapter leadership should ensure that the new officers receive copies of applicable records and documentation as soon as possible after election or appointment. In cases where no existing or incoming officers are available, AFCEA International will pay to have the records shipped either to the Regional Vice President or to Headquarters.

3.2 Chapter Bylaws

All chapters must operate with a set of bylaws. It is important that this document be consistent with and aligned as closely as possible with the bylaws of AFCEA International. Local chapter bylaws shall contain at least the following:

- Name of the Chapter
- Provisions that the chapter not be organized for profit and no part of its net earnings shall accrue to the benefit of its members.
- Provision outlining that chapter’s fiscal year
- Provisions fixing the number of members or proportion of members entitled to call a meeting.
- Provisions outlining the duties and responsibilities of chapter officers and committees.
- Provisions outlining the terms of office for each chapter position. If the terms of office are the same for all chapter positions, then this requirement could be described in one to two sentences as a stand-alone requirement.

- Provisions specifying that written or electronic notice shall be given to the members of the place, day and hour of a meeting (and, in the case of a special meeting, the purpose or purposes for which the meeting is called), and specifying further the amount of advance notice that must be given of the meeting.
- Provisions as to the number or percentage of members entitled to vote, represented in person or by proxy, or the number or percentage of votes, represented in person or by proxy, which shall constitute a quorum at a meeting of members.
- Provisions on what constitutes membership. One of the most common provisions for membership is something like the following example. “Membership in the chapter, classes of membership, and fees therefore will be prescribed in the AFCEA International Constitution and By-Laws.”
- Provisions on how voting shall be conducted for both the executive council/board of directors and the general membership, and specifying further if/when electronic voting is allowed/authorized.
- Provisions for when and how to conduct meetings, both executive council and general membership.
- Provisions for how to request/make changes to a chapter’s constitution and By-Laws.
- Provisions as to whether once a quorum is obtained the members present at a duly organized meeting may continue to do business until adjournment.
- A provision for chapter dissolution.

Local chapter bylaws and all subsequent amendments thereto shall be submitted to International Headquarters for review and approval.

For a sample set of chapter bylaws, refer to [Appendix 3-A](#).

3.3 Chapter Administration

All chapters should, at a minimum, have the following three officer positions filled at all times- President, Secretary, and Treasurer. Descriptions of these three positions are included below. Additional officer positions are included as well. These are meant only to serve as a guide based on best practices shared from chapters around the world.

3.3.1 Duties of the Chapter President

The importance of the chapter president cannot be overemphasized. The President’s importance goes far beyond the influence he or she exerts over the success of the chapter. He/she is responsible for the success of all chapter activities, such as meetings, socials, golf outings, and special events. The President is the principal point of contact between the chapter and its members, the Regional Vice President, AFCEA International Headquarters and the public at large. He/she must demonstrate sound leadership and superb organizational skills.

A chapter should have a well-developed plan of goals and objectives. This plan should be ready for presentation at the first meeting of the Executive Council/Board of Directors for approval or modification. Ideally, the plan should be developed through consultation with the RVP and other chapter officers sharing responsibility for the coming year's operation. Having taken an active part in shaping the plan, other officers can be expected to provide effective support.

Chapter officers must pay careful attention to the selection of committee chairpersons who will have responsibility for implementing the plan. To maintain necessary control, the President should establish committee reporting procedures designed to keep chapter officers fully informed.

The President should establish a personal checklist of responsibilities, including among others:

- 1. Preside at all meetings (General membership, Executive Council/Board of Directors.**
- 2. Hold regular meetings of the Executive Council / Board of Directors, usually monthly.**
- 3. Hold regular general membership meetings.**
- 4. Maintain a firm schedule throughout the meeting. Remember, the members and guests are attending the meeting to gain information and to hear the guest speaker. Thus, chapter business, miscellaneous reports and other extraneous activities should not be allowed to turn the meeting into a boring, long-winded session. The most critical issue is to start and end on time. For related information, see [Chapter 4](#).**
- 5. Check on arrangements and other details of the meeting well in advance to avoid problems. This should include such details as special seating and biographical data used to introduce the guest speaker.**
- 6. Recognize new members, corporate sponsors and guests attending each meeting.**
- 7. Ensure that an accurate written account of the meeting highlights, along with photographs, are forwarded promptly to AFCEA International Headquarters for publication in the Chapter News section of *SIGNAL* magazine. For details or to submit information online, go to <http://www.afcea.org/signal/chapternews>.**
- 8. Delegate committee responsibilities and select committee representatives. Include new personnel as a source of new ideas and as potential new officers.**
- 9. Match committee responsibilities with available personnel. Avoid one-person committees.**
- 10. Ask for periodic and comprehensive reports of committee activities, and see that the information for the Chapter Annual Report is provided to AFCEA International Headquarters by the due date.**
- 11. Ask for committee reports, including statements of accomplishments, problems and recommendations.**
- 12. Provide supporting assistance in pursuing overall AFCEA objectives.**

From time to time there will be programs and activities vital to the continued progress of AFCEA's Board of Directors. The chapter presidents and RVPs may be called upon to implement these programs and activities locally.

3.3.2 Duties of the Chapter Secretary

The chapter Secretary has many duties that are important to the success of the chapter. To attain maximum efficiency, the Secretary may need to delegate some assigned duties.

In some chapters, the Secretary plays a prominent role and becomes the focal point around which all chapter activities revolve. Although this may be highly desirable, there is a danger that one-person domination might so standardize activities that the chapter loses the value and vitality of fresh, outside viewpoints.

The Secretary has the responsibility of maintaining all chapter records, reports, latest membership list downloads and minutes of chapter officers meetings. The Secretary also maintains close contact with AFCEA International Headquarters and Regional Vice President and furnishes such reports and records to those offices as are required. Specific duties of a chapter Secretary usually fall into these areas:

Chapter records—For chapter continuity, it is necessary that complete records be maintained of all activities, including regular meetings, educational activities, social programs and all other business of the chapter. In many instances, complete reports of special events are supplied by chairpersons of the responsible committees. Where possible, a special repository should be provided for the storage of permanent, continuing reports of all chapter activities and committees.

Meeting minutes—The Secretary is responsible for keeping minutes of all chapter meetings. Minutes should include items discussed, decisions reached and all other business conducted. Copies of minutes should be distributed to all chapter board members, the Regional Vice President and AFCEA International Headquarters, Director, Member, Chapter and Corporate Services. Records of guest speakers, topics and meeting attendance figures should be maintained.

Correspondence—The Secretary is the official recorder for the chapter. In addition to the normal correspondence with chapter members and International Headquarters, the Secretary handles official communications as directed by the chapter President.

Membership records—Each AFCEA member has access to their individual member profile through the AFCEA Portal; the Portal login screen is found at <https://www.afcea.org/portal/>. Members can update their profile at any time. The information that a member provides in their profile is reflected on the chapter's roster which is contained in the AFCEA Portal as part of the Chapter Officer Tools. Designated chapter board members, to include the Secretary, can be granted access to their chapter's interface through their individual record in the Portal. Chapter presidents should request access for chapter board members by emailing Member and Chapter Services at mcs@afcea.org.

Reports—Each local chapter shall submit an annual report of its activities including finances, obligations, meetings, scholarship and/or award programs and other matters consistent with the

objectives of AFCEA. The chapter Secretary normally consolidates inputs from chapter officers/committee chairpersons and prepares the annual report.

The chapter Secretary provides the names, addresses and telephone numbers of the chapter President and Secretary for publication in the Chapter Organization section of *SIGNAL* magazine. This is an **ABSOLUTE MUST** if we are to keep an active dialog among all chapters, worldwide. Names, addresses, telephone numbers and email addresses of the chapter President and Secretary should be submitted directly to Member and Chapter Services at International Headquarters, Attention: mcs@afcea.org.

3.3.3 Duties of the Chapter Treasurer

The chapter Treasurer is responsible for collecting, disbursing and managing the chapter's funds. The Treasurer should be prepared at all times to submit a complete and accurate statement showing the current financial status of the chapter. The Treasurer is responsible for filing the annual Form 990 for the chapter and the chapter educational foundation, if applicable.

It is sound policy to disburse all chapter funds by check. The Treasurer should normally sign all checks; however, at least one other board member/officer should be an authorized signer and chapters will include their RVP as an authorized account holder/signer. In addition, the Treasurer is normally custodian of chapter reserves in the form of savings or checking accounts in banks, stocks, bonds or other securities.

Sound chapter operations demand the formulation of, and adherence to, annual budgets. Each committee should be informed of the funds budgeted for its activities. Payments chargeable to specific committees should not be made without formal approval of the chairperson of the committee involved.

Chapter officials who handle chapter funds should be covered under a fidelity bond (or national equivalent) to protect the chapter from possible legal action in the event money is mishandled or misappropriated. Each chapter should purchase this coverage locally from a reputable insurance agency or through the AFCEA International broker. Recommended coverage should be discussed with the AFCEA International CFO to see if coverage is in place though International HQs that extend to chapters and chapter educational foundations.

Some chapters may wish to appoint a budget and finance committee to review each year's budget, financial reports, and tax returns and attest to their accuracy and completeness. This committee acts in an advisory capacity to the Treasurer in establishing budgets and setting financial policies. The Treasurer should be a member of this committee.

Chapters with annual receipts of US \$250,000 or more should consider having an annual external review or audit completed by an independent CPA firm.

Among the specific duties of the Treasurer are the following:

Receiving and depositing all funds—Regardless of the source, funds paid into the chapter or chapter educational foundation should be handled by the Treasurer. These funds must be segregated into separate bank accounts in the name of the chapter and the chapter educational foundation.

Disbursing funds—The Treasurer should do this as authorized by the chapter officers and in accordance with established, approved budgets.

Preparing financial reports— The Treasurer should:

- Prepare financial reports required for regular meetings of chapter officers and membership meetings
- Prepare annual financial reports for chapter permanent records
- Prepare, annually file and maintain all tax records and reports including those required of chapters operating as non-profit, tax-exempt entities
- Operate the chapter account in accordance with the guidance contained in section 3.3.5 *Financial Procedures* below and the [Chapter Financial Handbook](#)

3.3.4 Financial Procedures

A chapter's financial procedures should be thorough and effective, with safeguards to ensure proper controls over financial reporting and tax filings. The records should provide an easy analysis of the yearly operation and should provide for easy reporting to the Board of Directors and the membership.

Each United States chapter will apply for an Employer Identification Number (tax ID number) with the Internal Revenue Service and provide the number to AFCEA International Headquarters for its records. Application forms for an EIN are available from Member and Chapter Services: mcs@afcea.org.

Chapters in other nations should comply with local (national) law and practice.

Banking Practices—Chapter and chapter educational foundation operating funds should be segregated and on deposit with a local bank, preferably one that provides such services as monthly statements and printed checks and one that does not charge a service fee to a non-profit organization. Reserve funds should be invested in a savings account, government securities or other secure financial investment. Canceled checks or check registers or bank statements should be held for a minimum of three years depending on the statute of limitations in the appropriate state or country. Bank balances must be reconciled monthly.

Budgeting—Annually, with the Budget and Finance Committee, the Treasurer should prepare a budget prior to the start of each fiscal year and in consultation with the various committee chairpersons and chapter officers, for approval by the board of directors. Budgets should be prepared with the objectives of the chapter mission in mind. The budget should be realistic and one where overall income exceeds expenses.

In planning the annual budget, keep in mind that it is good practice to maintain a cash reserve adequate to maintain good credit and to provide for unexpected contingencies. The amount of the cash reserve, including savings account balances, would be determined by the chapter's needs. Many non-profit reference sources suggest building a reserve of 50% of annual budgeted expenses. Budgets should be reviewed at least quarterly against expenditures and should only be revised by board action.

Recordkeeping, General—All cash receipts should be recorded and deposited as soon as possible and all expenditures should be recorded at the time they are made. Chapter records should be balanced and reconciled at least monthly. These records will be kept on a “cash basis,” representing the immediate chapter financial condition. Chapters may find it advisable to keep records of accounts receivable and accounts payable and other assets and liabilities for their own internal controls.

Use of Treasurer’s Journal—

- Each time money is received it should be entered in the Treasurer’s journal under columns headed: Date, Identification (from whom it was received), Check Number, Received (amount) and in one of the income columns under Distribution of Receipts and Disbursement.
- Each time money is spent, it should be entered under the columns headed: Date, Identification (to whom it was given), Check Number, Disbursed (amount) and in one of the expense columns under Distribution of Receipts and Disbursements. The Distribution of Receipts and Disbursements columns are designed to show the financial activity major functions.
- The cash journal portion should provide a balance column so that a continuous record can be maintained of the amount of money in the chapter’s treasury. By entering the brought forward amount in the balance column, the information can be carried to subsequent pages of the Treasurer’s journal. This eliminates the necessity of carrying the bank balance on the check stubs since this journal, in effect, becomes the checkbook.
- A canceled check/charge column should be provided, to indicate which checks/charges have cleared the chapter’s bank for use when reconciling the bank account(s).
- A sample cash journal page can be found at Appendix 3-F.

Maintaining supporting records for the chapter’s financial transactions is imperative. The Treasurer must keep accurate and complete annual records and tax filings that can easily be transitioned. Suggestions for maintaining records include folders dated with the fiscal year and titled as follows:

Invoices—For every journal entry there should be an invoice marked paid, date paid, approved by the proper authority, budget account noted, and the chapter’s check number marked on it. The invoice should be filed in check number sequence and retained in accordance with Records Retention Guide (Appendix 3-G)

Receipts—All receipt records should note the budget account and should be filed in their sequence of dates and retained in accordance with Records Retention Guide (Appendix 3-G)

Bank Statements—After each bank statement is reconciled, it should be filed chronologically with the applicable canceled checks, when/if canceled checks are returned by the bank. Otherwise, electronic copies should be downloaded and used to reconcile the account(s) on a monthly basis.

Financial Reports—Monthly reports should be completed by the Treasurer and approved by the Board of Directors. Reports should include totals of income and expenditures on the basis of the established accounts. An annual report should be prepared and presented to the board.

3.3.5 Duties of the Chapter First (or Executive) Vice President

Most chapters have multiple vice presidents who effectively lead chapter committees in their respective areas. Examples are: VP-Membership, VP-Programs, VP-Publicity, etc. The First or Executive Vice President will serve as the principal VP who will act on behalf of the President in his/her absence and will normally be in a training mode as the designated President Elect. If a chapter elects to not have a separate First (or Executive) Vice President, then one of the program vice presidents (see para 3.3.6) should be designated as such.

The principal duty of the chapter First (or Executive) Vice President is to be prepared to act on behalf of the President when necessary.

In chapters where a succession of officers has been established, the term of the office of the First Vice President should be used as a learning period for the succeeding year.

Many chapters assign the First Vice President the additional job of chairperson of the program committee. In this role, the Vice President appears before the chapter at each of its meetings to introduce the speaker.

The First Vice President should serve as an ex-officio member of several of the important committees, such as the Membership Committee, Program Committee, etc., and make a determined effort to attend as many of their meetings as possible. In this way, he or she becomes thoroughly familiar with all phases of the chapter's operations and, thus, is better prepared for higher office.

There are several methods of utilizing the talents of the First Vice President, including the following:

- Direct the major chapter activity of the year, such as a regional or local seminar, special membership efforts or educational activities such as a high school science fair
- Be available for special assignment by the Chapter President to areas requiring detailed personal attention

3.3.6 Additional Chapter Officers

As the chapter membership and activities increase, consider appointing and/or electing additional officers. The Chapter's Bylaws should designate if the position is an appointed or elected position. Shown below are examples of some additional officers. It should be noted that officers do not need to have the specific title "Vice President" to be in charge of a particular area of focus – chapters should select titles appropriate to local customs and regulations.

- Vice President for Programs
- Vice President for Membership
- Vice President for Scholarships
- Vice President for Science
- Vice President for Emerging Leaders
- Vice President for Enlisted Affairs
- Vice President for Publicity

- Vice President for Awards
- Webmaster
- Chapter Historian

The Vice President for Programs would assume all the responsibilities for development of the chapter programs for the year to include arranging for guest speakers.

The Vice President for Membership is the Chairman of the Membership Committee, and the duties are explained in detail in the section on Membership Program (see Section 3.4).

The Vice President for Scholarships executes the chapter's scholarship program; sends a call for nominations to local schools and chapter membership; establishes scholarship selection committee.; insures that the program is run fairly and encompasses a wide set of candidates; and serves as liaison for AFCEA International's scholarship program.

The Vice President for Science is responsible for the Chapter's Science Teaching Tools, Science Teaching Tools Grants and Science Fair Programs; solicits select Science Advisors in the local Chapter area to nominate teachers to receive a cash award for the purchase of supplies, etc. in support of their science program; provides the list of selected teachers to the Treasurer for awards; determines the times and dates of local science fairs as well as the Statewide science fairs; coordinates with appropriate officials; recruits volunteer members to participate in the science fairs and to award prizes to students (and, in Statewide contests, to the students' teachers); and reports the results to AFCEA International.

A Vice President for Emerging Leaders shall be filled by a member aged 40 years or less who can advise the President on the concerns of young professionals, including appropriate chapter programs to attract more young members. This officer will also serve as a point of contact for the regional member of the Emerging Leader Advisory Council (ELAC). It is not uncommon, and in fact it is recommended, that there be two Emerging Leader representatives who would serve as co-chairs – one from the government/military and one from industry. In this way the chapter's outreach to attract young people to AFCEA can be facilitated and broadened. (See [Appendix 3-H](#) for more information on the Emerging Leader program.)

The Vice President for Enlisted Affairs should advise the President on programs and initiatives of special interest to attract and retain enlisted personnel.

The Vice President of Publicity is responsible for advertisement and promotion of the Chapter and its events and arranges for a photographer at Chapter events. This includes submissions to Signal Magazine after each chapter meeting or event and may include publicity in other publications.

The Vice President for Awards is responsible for the Chapter's Award Program to include the formation of a nominating committee when appropriate for large-scale and annual awards, accepting nominations and selecting deserving chapter awardees for monthly honors.

The Webmaster is responsible for the Chapter's Internet presence via a web page and is the administrator for all Chapter domains, email accounts, and list servers. The Webmaster is responsible for posting all information deemed public and for posting special announcements, photographs, and archival information on the web. The Webmaster works closely with all Vice Presidents and Committee Chairs to ensure the Chapter web site is reflecting their area of interest

accurately. The Webmaster shall post no information without the permission of the Chapter President.

The Chapter Historian would be the custodian of significant chapter records and photographs to document the lineage and past activities of the chapter. Whenever it is not possible to fill this position, all chapter officers would share in the responsibility to preserve significant information and provide chapter continuity.

3.3.7 Directorships

In some chapters a group of past AFCEA chapter presidents serves as Directors of the chapter. They can serve as a steering committee to assist the officers in a host of special projects depending on their individual skills and interests. They often serve as chapter delegates to the national convention, or serve as chairpersons of chapter sponsored symposia or on an advisory group for such affairs. Having Directorships is especially important as the chapters grow and become more active. Directorships can stimulate the chapter, assist in the transition of the chapter's officers and advise as the chapter sees fit.

3.4 Insurance Coverage

AFCEA International has insurance coverage in place that extend to chapters and chapter educational foundations, to include liability, errors and omissions, and bodily injury and property damage (Please refer to Appendix 3-I for a description of the current coverage.) Chapter officers and volunteers are specifically covered under various policies. AFCEA International Headquarters can assist in defining the specific coverage in place, the limits of coverage, and in arranging additional liability or symposium insurance when appropriate. Each chapter should determine if adequate insurance coverage is available through AFCEA International's policies and if not, make the necessary arrangements to obtain sufficient insurance. For more information on the specific coverage provided, see Appendix 3-I.

3.5 Membership Promotion

The membership committee is charged with the responsibility of securing new individual and corporate members and retaining current members. Many chapters establish the position of Vice President for Membership, with assistants for individual memberships and corporate memberships, or with assistants for government and industry membership. An active and energetic chairperson is absolutely vital to sustaining chapter growth and strength.

A complete membership roster, along with statistics on new, renewing, and transferring members can be found in the Chapter Officer Tools section of the AFCEA Member Portal (<http://www.afcea.org/portal>). Those officers needing access the Chapter Officer Tools should contact Member and Chapter Services at mcs@afcea.org.

Important! Chapter rosters and other membership contact information should only be used for official AFCEA chapter business and should be only used by authorized chapter officers. Rosters may be made available to an outside organization or individual, for support of AFCEA business, only if control remains contractually with an authorized AFCEA entity or individual.

Productive membership committees should consist of energetic, creative and enthusiastic people. From time to time, International Headquarters provides information on membership promotion programs that can and should be adapted to the specific needs of each chapter.

As with any function, membership activity should be conducted according to a well-conceived plan of action and should work toward realistic goals. Membership plans and goals should be established early and continue throughout the chapter year.

Overall Association objectives project a specific annual increase in AFCEA membership. It is essential that chapters help achieve this goal by offering programs that appeal to a broad spectrum of current and potential members.

***Committee Structure*—An active chairperson is important, but the size of the committee depends upon the chapter size and the potential membership pool. Additionally, every member of the chapter should consider it his or her duty to actively help the membership committee.**

The membership committee should include individuals who are relatively free to travel locally and have good contacts with government and industry people. There is no substitute for personal contact in membership recruitment and retention.

***Committee Meetings*—The committee should meet frequently, particularly prior to and early in the chapter year. The purpose of these meetings is to formulate plans and objectives, build prospect lists and allocate responsibilities. Subsequent meetings may be devoted to analyzing progress, revising plans and adjusting goals and assignments as necessary.**

***Committee Duties*—**

- **Actively seek new civilian, military, government and academia individual members as well as corporate members.**
- **Actively retain current individual members and corporate members.**
- **Create incentives such as corporate member exhibit, sponsor, and table discounts to attract potential corporate members.**
- **Notify AFCEA International Headquarters of all new corporate members recruited (within 60 days) to qualify for a “finder’s fee.” (Corporate Finder’s Fee information can be found in the Chapter Officer Tools section of the AFCEA Member Portal.)**
- **Review your Chapter Resume on a routine basis to ensure that it is complete and up to date. Information in the resume is used in the Chapter Search Directory (<http://www.afcea.org/membership/chapters/chaptersmap.jsp>) and can help attract both individual and corporate members to your chapter.**
- **Contact interested individuals at the local level who are possible candidates for membership.**
- **Greet new members at all chapter meetings and make them feel welcome.**
- **Be prepared at all times with individual and corporate membership literature and application forms.**
- **Coordinate and direct Association membership campaigns.**
- **Make monthly reports on membership objectives and the results of membership promotion activities.**
- **View the Chapter Officer Webinar, “Simple Steps, Growing Your Chapter Through Corporate Membership”**

Membership Recruiting—Chapter recruiting is led by the Vice President for Membership and should have a separate representative for military and industry members, as well as a network of key contacts within the military and industrial communities. Through the Vice President for Membership, these key contacts advertise chapter events, recruit new members from within their units and companies and furnish input to the chapter board of directors regarding program quality. Don't underestimate the value of corporate members. Corporate membership can help to grow a chapter since these members provide multiple individual members to affiliate with your chapter as well as other chapters in the AFCEA network. In addition, corporate membership fosters corporate commitment to the chapter and increases individual participation in chapter events and activities. Remember that the two most important personal contacts in AFCEA are the "welcome aboard" greeting and the reminder to renew your membership. Whenever possible, have new members join on-line at the AFCEA website for individual members (<http://www.afcea.org/membership/default.htm>) and for corporate members (<https://www.afcea.org/portal/cmemb/newcmemb.jsp>). This will minimize the paperwork for the chapter and will get the new member on the chapter mailing list very quickly. It will also speed up the date new members receive their membership cards and their first SIGNAL magazines.

Membership Retention—The retention of existing individual and corporate associate members is a vital component of an overall membership strategy. The Membership Committee must personally contact members whose membership is about to expire, assess their experience, solicit ways to serve them better, and secure their commitment to renew. It is very important that feedback from members be integrated into the planning cycle for the future. Chapter retention activity centers on the Vice President for Membership and chapter key contacts. The process begins upon download of chapter rosters from the Portal which contain dates of membership expiration. The Vice President for Membership analyzes the roster and redistributes appropriate portions of it to the chapter key contacts. Each individual on the "to expire" list is then contacted personally by one of the key contacts or the Vice President for Membership. In addition, the Vice President for Membership should activate a membership recruitment/renewal table at all AFCEA monthly chapter meetings.

Membership Promotion—An effective membership promotion campaign is a three-pronged effort: personal contacts, letters and telephone calls. Some combination of the above is the most effective and should be conducted at least every two weeks. People will soon learn that the chapter is interested in them. Do not get discouraged; remember 80 percent of all sales are made by 20 percent of all salesmen after the fifth contact.

For corporate members, consider offering exhibit, sponsorship, and table discounts to potential members. These incentives are a simple way to increase corporate membership in your chapter and the chapter will also earn a corporate member finder's fee. In addition, make sure that your chapter's resume is complete and up to date. Information in the resume is used in the [Chapter Search Directory](#) and can help to attract both individual and corporate members to your chapter. For more information, view the Chapter Officer Webinar, "Simple Steps, Growing Your Chapter Through Corporate Membership" at <https://www.afcea.org/portal/training/index.asp>.

When preparing a prospective new member list, do not forget to include those companies or individuals that have dropped their memberships. This is important because the complex government/industry market may not be aware of the benefits of AFCEA membership potential and AFCEA is aggressively developing new programs and services to benefit members; lapsed members may be unaware of such new activities.

Life members and distinguished life members have a long history of support and contributions to AFCEA. They can be a valuable sounding board for chapter ideas and provide a wealth of thoughts and recommendations, based on their extensive experience, on how to make a chapter grow and flourish.

Invite prospective members to attend upcoming events as a guest to provide them an opportunity to see firsthand what benefits Association membership provides and to meet the other chapter members. Assign someone the duty of serving as host to make introductions and answer any questions the prospective members may have. Above all, ensure guests are adequately recognized.

3.6 Senior Government Engagement

It is important for chapters to engage with senior military and government leaders in the area. Particular focus should be given to ensuring that senior civilian government leaders are included in this outreach. Because of AFCEA's history and strong engagement with military leaders, there is sometimes a perception that the association's footprint does not include civilian leadership. AFCEA's Senior Government Engagement Plan is at [Appendix 3-J](#).

Increased participation by senior government civilians presents an opportunity to increase membership in this underrepresented group, and can also lead to an increase in participation and membership by mid-level government civilians.

Some ideas to keep in mind:

- Capture and share successful activities and best practices in engaging senior civilians among Chapters and across Regions.
- Invite senior civilians to participate and/or speak at Chapter meetings/luncheons.
- Include senior civilians as nominees for Chapter awards, as appropriate.
- Recruit senior civilians as Chapter leaders, subject to the limitations of local ethics and conflict of interest guidelines.
- Ensure that senior civilians can be easily recognized as such by use of distinctive name tags or ribbons at Chapter functions.

Upon request, AFCEA International may provide up to five free memberships per year to chapters in order to recruit senior civilian government leaders. For more information, contact Member and Chapter Services at mcs@afcea.org.

To receive a supply of SES and/or Government VIP ribbons, contact Member and Chapter Services at mcs@afcea.org.

CHAPTER FOUR, MEETING ARRANGEMENTS

Holding an efficient and well-run meeting is a responsibility of the assigned committee; which may be any of the following: Programs, Membership, Entertainment, Education or other as determined by the Chapter.

Duties—The assigned committee should begin its activities as soon as the program or appropriate committee has determined the program schedule and, if applicable, as soon as the Board of Directors has determined the meeting dates and sites.

Meeting sites should be selected with consideration for the convenience of the members and to augment the program. Confirmations for meeting place and date should be made in writing as early as possible. The range of menu selection, pricing and guarantee policies should be well investigated prior to making the decision for each meeting or function. Board of Directors approval may be required prior to actual booking of events. Consideration to board approved budget for each event must be adhered to.

Preparations for the Meeting—

- Complete all arrangements for a meeting in advance. Arrange for the meeting room, food and beverage, taking into consideration religious dates, holidays, food restrictions, ease of physical access for individuals (accommodating those with disabilities) and ability to reach the venue especially if held on a military base or other secured location.
- Send out meeting notices via email to Chapter Members with a link to the meeting registration site.
- Publicize the meeting in local media ie: local city newspapers, base newspapers, business newspapers.
- Enter all meetings into the AFCEA Calendar and on your Chapter website.
- Preregistration of attendees helps determine the count and relieves day-of-meeting confusion.
- Submit the guarantees to the venue as previously agreed.
- Provide a list in advance at the main gate and/or Pass & ID for attendees if held on a military base or secured location.
- Prepare name badges for all pre-registered attendees, speakers, VIPs, etc.
- Designate one member of the committee to arrive at least one hour early to determine that all previous arrangements are in good order.

- Designate one member plus a back-up member who will be responsible for bringing a camera to the meeting and taking pictures during the meeting.
- Confirm speaker's requirements.
- Review the speaker's presentation, slides and handouts prior to the event to avoid any technical problems as well as any conflicts of interest. Advertisements should be avoided.

Outside the Meeting Room—

- Provide proper facilities for checking or handling of hats and coats.
- Set up tables, chairs and equipment such as tickets, cash boxes for the ticket sellers and receipt book.
- Set up tables for registration and badges/name tags.
- Set up table(s) for promotion of AFCEA membership and activities.
- Display directional signage and/or appropriate information.

Inside the Meeting Room—

- Determine that the speaker's equipment requirements are conveniently placed and in working order.
- Determine seating arrangements for the head table, including the placement of name cards for each person, if used.
- Provide a lectern at the speaker's table or within the room with an operating light for use with narrative notes for movies and slides.
- Hang AFCEA Podium Banner and any Chapter Banners.
- Ensure the public address system is operational and place a microphone at the lectern and/or a lavalier as required.
- Position operational screens, projector stands and laptops or projectors in the appropriate location. Secure a competent operator for projection equipment and have a backup system or equipment on hand. Be sure that a sufficient length of extension cord is available to reach from the equipment to the wall outlet and that it is properly covered to avoid accidental tripping. If utilizing a projector be sure the remote control cord is long enough to reach from the slide projector to the lectern. Predetermine where the light switches are and who is responsible for dimming the lights.

- Set the room up so that the white/blackboard, markers/chalk, eraser, easel and laser pointer are readily available.
- Provide ice water and glasses for the speaker.
- Monitor and adjust the thermostat for the right comfort level. This may require coordination with the facility's staff.
- Have all possible needs covered and arrangements made before members and their guests arrive.
- Follow a prepared agenda and stay mindful of the time.
- Report/document meetings/speaker in Chapter News in *SIGNAL* magazine (See chapter 6).

4.1 Policy for Chapter Hardware Shows, Exhibits and Seminars

AFCEA International Headquarters fully supports and encourages special educational activities that are in keeping with its stated objectives. The association compliments the initiative, drive and imagination of chapter leaders who have conducted many worthwhile, educationally oriented activities. These activities illuminate important areas for discussion and bring timely information on need and emerging technologies to Chapter members.

Unclassified Chapter Events—Each chapter planning a seminar, symposium, technical session, hardware/software exhibition, mini exhibit or similar activity must notify International Headquarters as soon as possible, but no later than 120 days prior to the event. This prior notification helps to ensure compliance with policy stated herein, to avoid conflicts of interest and scheduling with International or other chapter events and to allow adequate time for discussion of the event with Member and Chapter Programs. The notification can and should be done through the AFCEA Portal by utilizing the AFCEA Calendar within the Chapter Officer Tools Section. (see Chapter 6.10 AFCEA Calendars.) To the extent possible, priority exhibit space should be offered to AFCEA corporate members affiliated with the Chapter and other companies in the local area who may not have the opportunity to participate in major AFCEA International events.

Classified Chapter Events (for U.S. Chapters)—Any classified chapter events must be conducted in accordance with the National Industrial Security Program Operating Manual DoD 5220.22-M. Chapters holding classified events must arrange to have the event sponsored by an entity with a valid facility security clearance. Chapters planning a classified event must contact Member and Chapter Services at mcs@afcea.org, at least six months prior to the scheduled date of the classified event. Chapters outside the U.S. should ensure they are in compliance with all local regulations governing classified events.

AFCEA's mission is to encourage understanding among military, government, industry and academia and to promote efficiency in the fields of interest to AFCEA. To ensure that such functions

support AFCEA’s Mission and stated purposes; chapters shall incorporate the policies outlined herein. Planners should use the following special activity checklist to ensure that appropriate safeguards are observed.

4.1.1 Special Activity Checklist

AFCEA International maintains an on-line event related calendar. The event information is distributed in three formats; the calendar on the AFCEA Website, in SIGNAL Connections, and on a printed calendar used at events. For more information on how to submit the Chapter’s event information via the AFCEA Portal, see Chapter 6.10, AFCEA Calendars.

Notify International Headquarters, the Regional Vice President and the General Manager AFCEA Global (if applicable) 120 days in advance of proposed date (six months for classified events), of the time and place of event and approximate audience expected by entering your event in the AFCEA Calendar. The direct benefits of this process are that AFCEA Headquarters will be able to offer expanded publicity for the Chapter events through SIGNAL Connections, AFCEA Calendars, and links to chapter websites via the member portal (see Chapter Six for detailed information on publicizing a chapter event). Additionally, AFCEA Headquarters can furnish technical advice, expert assistance, and financial guidance to ensure successful chapter events. Equally important, this will permit industry exhibitors to plan more efficiently for an active presence at chapter sponsored events.

Obtain required permission from Installation Commanders if military facilities are to be used.

Notify host command or other authorities if senior military or civilian government officials, or other VIPs, are expected. Alert local representatives if senior corporate officials are to be present.

For chapters in the US, chapters located on US military installations located outside the US, or chapters hoping to draw US military/government attendees and/or speakers to their events, please refer to Appendix 4-A for a sample Widely Attended Gathering (WAG) statement which can be used to help local lawyers evaluate whether government attendance is appropriate. This statement does NOT declare that an event is a Widely Attended Gathering, but rather provides the rationale for a local lawyer to come to that conclusion.

Whenever a commercial entity purchases tables, provides hospitality or underwrites other expenses, such as “green fees” for an event, ensure that appropriate government Standards of Conduct are followed. It is important that government guests be assigned to tables, etc., by the Chapter on a random basis. Government personnel are severely restricted in what they may accept as a “gratuity” from a contractor, usually subject to dollar value limitations. Local interpretations of applicable ethics and standards of conduct regulations will define the limits on participation by Government personnel.

Inspect the premises where an event is to be held to determine that adequate fire and safety precautions are taken. Where equipment is to be displayed, ensure that proper protection against hazards is provided. Consult local directives regarding legal requirements for items such as insurance, union rules, contracts and taxes. AFCEA International has insurance coverage in place that extend to chapters and chapter educational foundations, to include liability, errors and omissions, and bodily injury and property damage (Please refer to Appendix 3-I for a description of the current coverage.) Chapter officers and volunteers are specifically covered under various

policies. AFCEA International Headquarters can assist in defining the specific coverage in place, the limits of coverage, and in arranging additional liability or symposium insurance when appropriate. Each chapter should determine if adequate insurance coverage is available through AFCEA International's policies and if not, make the necessary arrangements to obtain sufficient insurance.

All special activities should benefit the Chapter or the community. Participants should be drawn primarily from local companies, bases and units. Exhibitors should be local companies or representatives of AFCEA corporate member companies. Nothing in this paragraph should be construed to mean that high level visitors, panelists, etc. should not be invited.

Local chapters that plan for and otherwise conduct a chapter hardware exhibit involving the logistical support and transportation of such exhibits should encourage participation by exhibitors within the designated AFCEA region in which the sponsoring chapter is located.

Planners are encouraged to discuss their program with Member and Chapter Services at AFCEA International Headquarters: mcs@afcea.org, to receive specific guidance on the successful conduct of the event.

Because AFCEA is a non-profit, education oriented association, large net revenues from special activities are inappropriate when not raised for the chapter mission or to support scholarship awards or other mission focused programs. Chapters planning events to raise money for scholarship or charitable funds should clearly state that objective.

Instructions and deadline information for the submission of publicity material to Headquarters for pre and post event coverage is found in Chapter Six.

Instructions to exhibitors for mini exhibits, hardware shows, etc. must emphasize that tax rules prohibit any selling during the exposition.

4.1.2 Other Considerations

- **Begin with the end clearly in mind by establishing the Chapter's objective in holding an event. Once the objectives are clear, pick the theme, subjects and speakers.**
- **Establish the format and a revenue and expense budget that includes a fees structure.**
- **Decide if a local announcement or flyer is needed in addition to e-mail broadcasts that the Chapter sends or to promotional material that has been forwarded to Headquarters. Concentrate on getting strong local attendance.**
- **Decide if courtesy or free invitations are to be extended from the Chapter (not from industry). Make a list of those you want to extend these invitations to and assign someone to send them out, follow up and record responses. Make sure these costs are considered.**
- **Designate someone to keep accurate records of paid registrations. Ask for advanced registration from guests, but plan for on-site registration at an additional cost, if necessary.**
- **Designate someone to prepare a seating chart for each event. Special consideration should be given to VIPs, guests and sponsors.**

- **Coordinate speaker’s subjects, time allocation, audio visual requirements and advance scripts (if any). Obtain written permission from all speakers to record or reuse their presentations in print, electronic or audio format.**
- **Prepare and follow a checklist on all of the above. Check and re-check all arrangements.**
- **Assign volunteers to check in guests and VIPs and issue name badges at the door.**
- **Select a good Master of Ceremonies. His or her job will be to welcome the audience, introduce the speakers, and keep the program on schedule.**
- **Prepare a list of questions to facilitate discussion following a guest lecturer’s remarks.**
- **Prepare materials prior to event, providing for a check-in and a critique form for all attendees. Collect prior to dismissal.**
- **Determine if refreshments or meals will be provided.**
- **Determine if the meals will be free/inclusive or if there will be an additional charge.**
- **Assign a volunteer or a committee to work with the venue to arrange for refreshments or meals.**
- **Determine if alcoholic beverages will be offered. If so, strongly consider limiting complimentary drinks to no more than 2 per person to avoid any potential liability issues.**
- **Designate an individual to be responsible for meal registrations and fee collections, if required.**
- **Complete all arrangements for a meeting in advance. Arrange for the meeting room, food and beverage, taking into consideration religious dates, holidays, food restrictions, ease of physical access for individuals (accommodating those with disabilities) and ability to reach the venue especially if held on a military base or other secured location.**

4.1.3 Multiple Day Events that include Exhibitors

Determine in advance the number of days the event will run. Determine the dates for the events and then notify AFCEA International (see section 4.1.1.) Once dates are agreed upon locate a venue for the main event including exhibit hall space and book it.

The Board of Directors should designate an individual to serve as the Event Director, Officer or Chairperson per the Chapters designation (referred to herein as Event Chairperson).

The Event Chairperson should report to the Board of Directors for approval of event plans and functions as the liaison between the Chapter and AFCEA International. The Event Chairperson should be responsible for forming and directing committees to assist with all aspects of the event. Committee functions include, separately or combined, but not limited to:

- **Treasurer/Budget: This committee would work directly with the Treasurer of the Board of Directors to maintain the agreed upon budget, the acceptance of fees and donations, and any costs which may occur that require payment.**

- **Protocol:** The committee Chair is the liaison between the Chapter and Local Government Agencies including local Commands that could be asked to participate in the event. This committee is responsible for developing a current list of Government and Military VIPs to be invited to attend or speak, for updating VIPs daybooks as required, and for assisting in obtaining Bios for VIPs who will be speakers. In addition, the Committee arranges for proper escorts and protocol for VIPs during their attendance at the event.
- **Program/Speaker:** Obtains/contacts/schedules speakers/panels that support the events theme and venue.
- **Master of Ceremonies (MC):** The Committee Chair is usually responsible for obtaining the MCs for all events, obtaining Bios of each Speaker to be introduced and training/instructing the MCs on their duties.
- **Event Components:** Each component of an event should have a committee that is responsible for it. This could be one committee responsible for all components or there could be several committees, each responsible for one or more components. Event components that could require a committee are, but not limited to, receptions, dinners, sporting events/tournaments, opening ceremonies, award ceremonies, recognition/gifts/awards and panels. Each Chapter will ultimately determine the number of committees that will assist with their event.
- **Seating Committee:** This Committee ensures that all VIPs are seated appropriately. If the Chapter has sold Corporate Tables the Committee could also be responsible for ensuring proper seating arrangements and table placements are provided.
- **Venue/Facility Committee:** The Committee Chair is the liaison between the event facility and the Chapter. The Committee should be responsible for ensuring that there will be adequate space available, adequate seating, proper access (including handicapped access), parking, availability of rooms, audio visual, sound requirements, refreshments, and meals.
- **Publicity Committee:** Responsible for providing local media coverage prior to, during and after the event. Additional responsibilities could include arranging for the event to be covered by a photographer and/or videographer, and/or showcasing the educational activities supported by the Chapter. For more information, refer to Chapter Six – Publicity.
- **Sponsor Committee:** Responsible for obtaining sponsors to donate funds, services and/or prizes for the event.
- **Volunteers Committee:** Responsible for organizing and assigning duties to Chapter Members as requested by the other organizing Committees or the Event Chairperson.

Special note for U.S. chapters:

The Department of Defense (DoD) has specific rules applicable to U.S. chapters whenever DoD participation is desired.

Chapters need NOT request approval for events such as annual or monthly meetings of LOCAL chapters, commissions, or committees scheduled for locations outside the Washington D.C.,

metropolitan area when the expected DoD participation would be from local DoD agencies or offices. Events scheduled for the Washington, D.C., metropolitan area are not considered local due to the city's Seat-of-Government nature.

When a chapter wants to invite DoD personnel from outside the local area to an event, it is recommended the Chapter submit the following information on each event for DoD review: composition and purpose of the sponsoring organization; details of the event, including dates, location, planned attendance, sources of attendees, costs to attendees; focus of the event. The sponsoring organization's assurance is required that it will be solely responsible for issuing invitations and assigning seats to DoD guests.

If DoD is able to approve the event or events, it will issue a statement to that effect. DoD recommends chapters use the statement shown below on its invitations to inform DoD personnel that the event is approved for participation. Actual participation by DoD personnel is ultimately determined by the individual's command, agency, or office. For planning purposes, the DoD approval statement would be similar to the following:

“On reviewing the (specific association) proposal, the Department of Defense finds this event meets the standards for participation by DoD personnel under DoD instruction 5410.20 and DoD Standards of Conduct Directive 5500.7-R. This finding does not constitute DoD endorsement of attendance, which must be determined by each DoD component.”

If Chapter leaders have questions as to whether a Chapter event or activity requires DoD approval, assistance is available from AFCEA International by contacting Member and Chapter Services: mcs@afcea.org.

CHAPTER FIVE, INTERNATIONAL AWARDS PROGRAM

5.1 Awards Program, General

Through its annual awards program, AFCEA International recognizes the outstanding contributions of individuals in the communications, electronics, intelligence and information technology disciplines. In addition, Chapters are recognized for outstanding support to the Association. To learn more about a specific award, including eligibility criteria, submission deadlines, and past winners, please visit: <http://www.afcea.org/awards/>. A listing of awards and submission deadlines may be found at Appendix 5-A.

5.2 Awards Committee

The AFCEA International Awards Committee is constituted to review and select those persons and chapters meriting special recognition for their contributions to the goals and objectives of the Association. One Committee meets in November to select the Distinguished Young Professionals (DYP's), Emerging Leaders, and Chapter Emerging Leader Program winners; the other in March to select the International Award winners.

5.3 Awards Criteria

In general, all AFCEA International awards recognize specific contributions, developments or ideas which support the Policy and Objectives of the Association as described in Article II of the AFCEA International Bylaws.

5.4 International Awards

5.4.1 Distinguished Young Professional (DYP), Emerging Leader and Chapter Emerging Leader Program Awards

NOMINATION FORM/AWARD CRITERIA

Refer to the AFCEA website for nomination forms and criteria: <http://www.afcea.org/awards/>

Nomination information will be e-mailed to all chapters, RVPs, and the General Manager AFCEA Global in August. All nominations are submitted online.

SUBMISSION DATE

General timetable for submission of nominations is September.

SELECTION PROCESS

DYP, Emerging Leadership Award Winners and Chapter Emerging Leader Program Awards are selected by the AFCEA International Awards Committee in November, for presentation at the annual AFCEA-USNI WEST Conference in San Diego. The Committee selects the Young Professional of the Year from the DYP submissions.

5.4.2 AFCEA International Awards

Selected by the Awards Committee:

General James M. Rockwell AFCEAN of the Year Award

Admiral Jon L. Boyes Medal for Distinguished Service to AFCEA

AFCEA Leadership Award

Medal of Merit

Meritorious Service Award

Harry C. Ingles Award

Brenda M. Dougherty Diversity Program Award

Selected by the AFCEA Technical Committee:

Benjamin H. Oliver Gold Medal for Engineering

Meritorious Award for Engineering

The AFCEA Award for Excellence in Information Technology

Meritorious Award for Excellence in Information Technology

Selected by the AFCEA Intelligence Committee:

Award for Distinguished Service to the Intelligence Community

Meritorious Service to the Intelligence Community

NOMINATION FORM/AWARD CRITERIA

Refer to the AFCEA website for nomination forms and criteria: <http://www.afcea.org/awards/>.

Nomination information will be e-mailed to all chapters and RVP's in January.

SUBMISSION DATE

General timetable for submission of nominations is early February.

SELECTION PROCESS

Award winners are selected by the AFCEA International Awards Committee approximately six weeks prior to the TechNet Conference, for presentation at this conference in Baltimore in May/June.

5.4.3 Additional International Awards

AFCEA Award for Distinguished Service to Education

The AFCEA Award for Distinguished Service to Education reinforces education as the Association's #1 priority, and recognizes outstanding contributions to education through a sustained and demonstrated commitment to the goals of the AFCEA Educational Foundation.

Nominations and selection are done by the Educational Foundation Board of Directors in conjunction with the AFCEA Vice President for Education. (There are no nomination forms.) The award is presented at the TechNet Cyber conference in Baltimore every May/June.

5.5 Chapter Awards

AFCEA International sponsors an awards and recognition program designed to honor Chapters for superior achievements. To be eligible to receive an award, chapters must maintain a minimum of 25 members and must have submitted their Annual Report Form.

5.5.1 Model Chapter of the Year Program

The purpose of the Model Chapter Award is to strengthen the overall chapter structure and program of activities. The Model Chapter of the Year program measures achievement over a full calendar year. In the late fall/early winter, Chapters receive an annual reminder of the program. Chapters must first establish a set of goals for the coming calendar year which are attainable, yet require substantial effort. These goals are then submitted to AFCEA International through the Model Chapter Report form, which is available as part of the Chapter Officer Tools in the portal. All submissions must be endorsed by the Regional Vice President to be considered.

In February of the following year, all chapters enrolled in the Model Chapter Program will submit results of their efforts, again via the Model Chapter report form in the portal, for review by their Regional Vice President and AFCEA International's Member and Chapter Services. Model Chapters will be recognized at the TechNet Cyber conference in Baltimore every May/June.

5.5.2 Albert J. Myer Award

This award, named in honor of General Albert J. Myer, one of the founding fathers of AFCEA, recognizes chapters which excel in membership recruiting and retention. All chapters are automatically considered each year, with the winning results based on pure statistics; no nomination or application is necessary. To qualify, a chapter must have been chartered for at least one year prior to the evaluation period, and must have maintained the minimum number of members (25) required to retain its Chapter Charter. The period of consideration is one calendar year: January 1 – December 31.

Individual Member Recruiting awards will be presented to those chapters demonstrating the highest percentage increase in new individual members; Individual Member Retention awards recognize those chapters achieving the highest percentage of individual member retention; and Total Membership Growth awards will be presented to chapters with the highest net percentage growth in individual members. The most prestigious of the Albert J. Myer Awards is the Achievement Award, which recognizes all chapters meeting or exceeding the Association's established goals for both recruiting and retention (currently 30% and 80%, respectively).

The Myer Awards are presented each year at the TechNet Cyber conference in Baltimore every May/June.

5.5.3 AFCEAN of the Month

Each month one member of AFCEA is accorded the unique honor of being named AFCEAN of the Month. This award is open to any AFCEA member, and recognizes a strong and sustained commitment to the goals and objectives of the Association. There is no nomination form, but any member may nominate another member by delineating the nominee's qualifications, and then submitting that information to the Manager, Member and Chapter Programs, AFCEA International, who will determine the winners. All nominations must be endorsed by the Chapter President or, in the case of nominations of Chapter Presidents, by the respective Regional Vice President.

Excellent AFCEAN of the Month narrative examples can be found in *SIGNAL* Magazine, which can be used as a guide. Chapters should submit nominations (approximately 300-400 words) along with an electronic photo via e-mail to Member and Chapter Services: mcs@afcea.org.

The AFCEAN of the Month will have his or her photograph and write-up printed in *SIGNAL* Magazine.

CHAPTER SIX, PUBLICITY: A POSITIVE IMAGE

Overview

What is publicity – and what isn't it? Publicity is a third party talking or writing about your Chapter in a public forum – for free. If you have to pay for it, it is advertising. Publicity is essentially getting a third party such as a newspaper or trade e-publication to draw (positive) attention to your Chapter's events or activities. With publicity you do not control the message or the delivery – but it is invaluable because you trade on the credibility of the third party (journalist, trade publication, broadcasting station) with an implied endorsement of your event. The benefit of advertising is that you control the message and the delivery, but the public knows you bought the endorsement. Finally, there is marketing, in which you draw positive attention to yourself, such as through mailings (especially mass e-mails), or the Chapter website.

Publicity doesn't just happen – in the majority of cases, a media article or news feature is the direct result of a public relations effort. A successful public relations effort entails a great deal more than notifying a media outlet via a phone call or press release that an event will be occurring – it entails ongoing planning and execution of your Chapter's marketing and publicity goals. It also requires an understanding of what is newsworthy in general – and what is newsworthy about your Chapter events. To be considered “news” there is typically public recognition (famous people or institutions, ties to the local community, a link to something already considered to be an issue), importance (timeliness, impact) and interest (an angle, whether it be human interest, accompanying audiovisuals or photographs, strong emotional tie-ins such as to particular national holidays, etc.).

Why do we care about publicity? With time, publicity can result in goodwill for your Chapter and for AFCEA International, as well as increased interest in your events. Individual press releases issued in advance of Chapter events can increase attendance. Marketing can have the same effect on event attendance, by capitalizing on tools such as AFCEA websites, *SIGNAL* Magazine, *SIGNAL Connections* and targeted mass e-mailings.

It is imperative that the Publicity Chair for the Chapter be proactive in maintaining close and frequent contact with the Programs Chair and the various event chairs. Ideally a person will be designated with responsibility for the publicity aspects of each major Chapter event. It is important to work closely with the Chair of special events early on to define publicity goals and objectives and helping to ensure those goals and objectives are being met before, during and after the event.

In this chapter, you will learn some of the tools and techniques that will assist your Chapter in leveraging electronic and traditional media to maintain a positive Chapter image and to stimulate interest in present and future Chapter functions. The first half of the chapter focuses on publicity, discussing press releases, photographs, and media outlets. The latter half of the chapter addresses marketing activities, including mass e-mails, Chapter and AFCEA International websites and portal, *SIGNAL* Magazine, *SIGNAL Connections* and AFCEA calendars. Advertising is not addressed in this chapter with the exception of a discussion as it relates to *SIGNAL*.

6.1 What to Publicize

- Regular chapter meetings
- Conferences/Symposia/Expositions
- Chapter Special Events (golf tournaments, dances, etc.)
- Charity events
- Chapter Projects (Science Teaching Tools, mentor programs, etc.)
- Awards and Scholarships
- Election of officers
- Chapter anniversaries
- Community events (e.g. Chapter members volunteering time at a local school, Science Fairs, etc.)

Although a printed story or broadcast about a specific meeting might not affect attendance at that particular meeting, it definitely helps Chapter recognition and attendance at other meetings. The cumulative effects of publicity help the local chapter as well as the entire AFCEA organization gain recognition.

6.2 Tips on Technique

Publicity planning involves considering the promotion potential of each chapter activity well in advance. Publicity should begin as soon as an idea for a chapter activity has been conceived, dates secured, and a venue selected. You will need to (1) get a press release out, (2) concisely describe what is newsworthy and important about the events in terms that draw favorable attention, and (3) follow-up your release with a personal telephone call. Because publications seek notices with broad appeal and do not have time to determine it for themselves, you have to spell out the appeal of the event. Some tips for great Chapter publicity:

- Get to know local editors and journalists.
- Chapters that are having prominent guest speakers at their meetings may have success in arranging for them to be interviewed by the news media.
- After the event, timing is critical. News should be provided as soon after it occurs as possible. For a late evening newscast, as with a morning newspaper, a telephone call might be your best approach. For the next afternoon's edition, a faxed or e-mailed story should be at the media office early in the morning.
- Whenever possible, obtain copies of the speaker's text and distribute them to the news media. When sending information to trade publications, make sure that the release, photograph and speech text arrive prior to their closing dates, if possible, to ensure that the story will appear in the next edition.
- Keep copies of media coverage (newspaper clippings, TV coverage, etc.) – review them to see what angle the reporter used to cover your event. This will help promote future events.

6.3 Press Releases

Press releases are a key communication tool with all news media; but keep in mind that the typical media organization receives hundreds of press releases each day. Here are tips on crafting your press release. See [Appendix 6-A](#) for sample releases.

- Always obtain a speaker’s permission before including him or her in a press release.
- The words “press release” or “news release” should be apparent in the subject line or in the header of the release document.
- The name, telephone number and email address should be prominently displayed in the upper left corner of the release.
- Always include the date when the information can be published, e.g., “For Immediate Release September 9, 2011” or “For Release on September 9, 2011” or “Not To Be Released Before September 9, 2011.”
- Before writing the release, determine its objective (e.g., to increase attendance, to have media cover the event, to make the public aware).
- Use a headline but keep in mind that most media will use their own.
- The opening paragraph should provide the important details (who, what, where, when, why/how, theme). Use the “Inverted Pyramid” writing approach to a news story. Headlines / Important at top of the story with details at the bottom. A good release follows the rules of good writing: information should be complete; facts, names and background information are accurate; the story is brief without being terse.
- Include photographs with your release (see section 6.4).
- Good timing is key:
 - Pay attention to submission deadlines for each publication/media outlet to which the release is sent.
 - Local news media should have your information several days prior to the event.
 - TV Assignment Managers want releases the day before or the day of the event; coverage will depend on what is happening that day.
 - Follow up with key media (especially TV).
- Do your research before sending out the release – make sure it goes to the appropriate point of contact within each media organization.
- If faxing a press release, note at the top that photos are available.

6.3.1 U.S. Press Release Distribution

The Associated Press maintains a Daybook that is sent to the media every day to let them know what activities are taking place in their region. To submit your press release to the Daybook, go to http://www.ap.org/pages/contact/contact_pr.html and click on the drop down list of bureaus to select the bureau nearest you.

There are companies who will distribute press releases for you at a cost; AFCEA International uses PR Newswire (www.prnewswire.com). Another company that you may use is Eworldwire (www.eworldwire.com).

PR Newswire Pricing:

Option 1:

- A flat rate of \$1,250 for up to 5 releases to any state/local newswire
- A flat rate of \$2,400 for up to 10 releases to any state/local newswire
- A flat rate of \$3,375 for up to 15 releases to any state/local newswire

Option 2:

- A 20% discount off of any domestic distribution
- 5% discount off of any international distribution

PR Newswire Point of Contact:
Kristen van de Graaff
Account Manager, Public Interest and Policy Services
Phone 20- 360-6946, kristen.vandegraaff@prnewswire.com

6.4 Photographs

Photographs are a welcome addition to press releases and enhance your chance of coverage. A photograph frequently will be published in a local newspaper or industry publication when a straight story on the same subject might be ignored. The following are recommended guidelines for submitting photographs:

- **Action shots are preferable; examples include**
 - **Photos of the past conference/symposium/exposition**
 - **Key speakers making a speech or walking through the exposition**
- **If the guest speaker is a celebrity, having a photograph with that celebrity and a Chapter member will increase your chance of coverage**
- **Do not try to include too many people in the photograph (one to five subjects usually works well)**
- **Always include a caption with each photo. The caption should include full name, rank and branch of service or company affiliations – pay careful attention to spelling and proper military salutation(s). Identify figures in photographs as left or right, center, standing, etc.**
- **Do not submit photographs in which drinks are within view**
- **Black/white and color photos will work**
- **Editors prefer electronic photos (as an attachment within an e-mail), but do not attach large files (over 3mb) without asking the recipient first**
- **Electronic images should be at least 200 dots per inch (dpi) and should be in jpeg, gif, bmp, eps or tiff format**
- **Electronic image file names should directly correspond to the captions**

6.5 Publications/Media

6.5.1 Local Newspapers and Trade Publications

Local newspapers and trade publications are more likely to cover your event than national media. Trade publications (defense/government/IT-specific magazines, newsletters and blogs) benefit greatly from Association events through speaker interviews, technology previews, and information.

6.5.2 Radio and Television

Local radio and television coverage can add great legitimacy to events. To pitch a story to the local radio or TV station, find an angle that will interest them (e.g., the exposition is full of technologies currently being used in the war on terrorism; the featured speaker has a local connection.) Follow up a faxed or e-mailed press release with a phone call to the Assignment Manager/Editor at the station.

Television stations may also be interested in covering an event the night before or the morning of the opening day – this can help boost attendance. Many stations have a “man about town” morning program that travels to different community events. Contact news stations at least two months in advance to arrange this coverage.

Radio stations may be interested in interviewing event speakers. Contact local talk radio stations to discuss opportunities.

Radio and television advertising can be very expensive; in addition this advertising is proven most effective when a campaign is conducted over a long period of time. However, in the U.S., many radio stations will run public service announcements (PSAs) for non-profit organizations. Contact a station sales representative to find out if this exists in your area. Check with local cable companies to see if they have a local cable channel that will include a free event notice or a PSA.

Beware of “pay for play” news programs in which companies have to pay to be included in a television news segment, which is then offered to news stations like CNBC, MSNBC, etc. Although these are legitimate groups, they often use expositions to solicit participants and they frustrate exhibitors.

To obtain a list of local media, visit the closest Chamber of Commerce or Convention and Visitor’s Bureau website; for a list of trade publications contact AFCEA’s Public Relations team at promo@afcea.org.

6.6 Chapter Newsletters

Publishing a Chapter Newsletter provides another avenue to keep the membership informed of chapter activities and events. This is also a way to include the chapter members in featured stories. To have a successful newsletter the Executive Committee of the Chapter must commit to submitting write-ups to the publicity chair on a regular basis. Photos should be taken at chapter events to be included in the newsletter. A broadcast email is sent to the chapter members which either contains the newsletter or the link to the website which hosts the newsletter. Mailing a hard copy of the newsletter can also be effective, but experience has shown that such mailings may be subject to the whims of mail room personnel sorting out mail perceived as “junk.”

Ideas for sections of a chapter newsletter are as follows:

- **President Letter – Highlights past and upcoming chapter events**
- **VP Letter – Discusses special projects that the chapter has under development, e.g. symposiums, training courses**
- **Small Business Spotlight – Highlights a small business that is active in the chapter**
- **AFCEAN of the Month – promotes a job well done by a chapter member.**
- **Education Corner – Discusses educational activities that the chapter is supporting**
- **Events Listing - Provides information to the AFCEA members about defense meetings in the upcoming month**

6.7 Broadcast E-mails

Designated chapter officers have access to complete chapter rosters, including member contact information, via the AFCEA Portal Chapter Officers Tools. Many members have provided their e-mail address to ensure that they receive information about upcoming chapter activities. Promotional e-mail for various chapter events can be designed and broadcast to the addresses in the chapter's roster. See [Appendix 6-B](#) for criteria that a promotional e-mail broadcast must meet to stay compliant with AFCEA's privacy policy, particularly the use of "opt out" lists.

6.8 Free Chapter Website Hosting

A well-maintained website is crucial to doing business today. Use of both the local chapter website and the AFCEA International Portal provides the capability to reach a much broader target audience. Tips on website development are included in [Appendix 6-C](#).

6.8.1 AFCEA International Website

The content of the AFCEA International Home Page and Portal, at www.afcea.org, provides the most complete and up-to-date information about the Association. Contact and procedural information for the various features of the home page such as submitting calendar additions, chapter links, etc., is mentioned elsewhere in this handbook. The home page is arranged by menu entries that link to information for the Association's benefits and offerings.

6.8.2 Chapter Websites

Chapters are encouraged to create their own unique websites. AFCEA Headquarters offers free website hosting to all chapters to include the following:

Features:

- 100MB web server storage space
- ftp protocol access for page/site maintenance
- html, php, asp, mysql, and perl languages are supported
- FrontPage extensions support
- CGI Support
- Host existing domain names - e.g., <http://chaptername.org>
- Use of AFCEA sub domain - e.g., <http://chaptername.afceachapter.org>
- Support e-mail forwarding for chapter's domain or sub domain
- Data backup and protection
- 24X7 monitoring for maximum uptime

Caveats:

- No coding or page design support
- SSL support only for <https://chaptername.afceachapter.org> domain

Contact webmaster@afcea.org for additional information.

6.8.3 Other Websites (Calendars, etc.)

Many publications, including trade magazines and local newspapers, maintain on-line calendars of events. Most of these calendars accept submissions free of charge. For a list of trade magazine calendars, contact promo@afcea.org.

6.8.4 AFCEA Portal

Chapter links are provided through a member's profile in the AFCEA Portal. The chapter link from a member profile is dependent on the chapter affiliation of the member. The Portal login screen is found at <http://www.afcea.org/portal>. Login instructions are posted on the screen. The AFCEA Service Center can be contacted for login assistance at service@afcea.org, 703-631-6158, or US toll free, 1-800-336-4583, ext. 6158.

6.9 SIGNAL Magazine

SIGNAL Magazine, published monthly, reaches the military, government, academic and industrial communities in the United States and 60 other countries and serves as a vehicle for the Association to inform and promote the interests of those in the IT fields. *SIGNAL* articles reflect the experience and technical expertise of recognized leaders.

6.9.1 Chapter News

The "Chapter News" section of *SIGNAL* covers the activities and programs of chapters worldwide. The professional aspects of programs and meetings should be emphasized as much as possible. When submitting Chapter News articles, be sure to include detailed information about the program as well as clear photographs with captions identifying persons by their full name, title, position and branch of service or company. The staff will use all pertinent material that is submitted, eliminating unclear, duplicate items, or information that exceeds the 150-word limit. The deadline for Chapter News material is the 20th of the month, two months prior to the publication date; for example, 20 May for publication in July. Chapter material should be sent to the assistant editor, *SIGNAL* Magazine, International Headquarters. [Appendix 6-D](#) contains complete instructions on submitting chapter news articles to the magazine. Additional information on submitting Chapter News is available on the *SIGNAL* home page: <http://www.afcea.org/signal/chapternews/>

6.9.2 Advertising in *SIGNAL* Magazine

Chapters can advertise their activities and events in *SIGNAL* Magazine in two ways: by purchasing advertising space or by taking advantage of the free advertisement that is made available on a space available basis.

PAID ADVERTISING

Paid advertisements in *SIGNAL* Magazine contribute to the healthy financial status of the Association and keep readers informed about new products, services, technology and methodology. For information on advertising, contact *SIGNAL*'s advertising director at AFCEA International

Headquarters at (703) 631-6181, advertising@afcea.org, or one of its worldwide advertising representatives as listed on the International calendar page of each month's issue of *SIGNAL* Magazine.

Chapter luncheons or meetings are an excellent opportunity to distribute flyers or other printed event promotional material.

Chapters wishing to place advertisements beyond the free package described below may do so on a paid basis at reduced advertising rates. Contact the Director of Advertising, advertising@afcea.org, for details.

FREE ADVERTISING

Chapters hosting special events, such as conferences or symposia, can also submit copy for a free advertisement in *SIGNAL*'s Chapter News column. For information, contact *SIGNAL*'s assistant editor, chapnews@afcea.org, (703) 631-6196.

If your chapter is holding a special event (i.e., a conference or symposium), you can publish a free 1/3 page black/white advertisement up to three times per year in the Chapter News section of *SIGNAL* Magazine, on a space-available basis. Advertisements do not have to run in consecutive months' issues.

It is very important to plan ahead as the magazine is prepared two months prior to the publication date. Advertisements must be received no later than the 20th of the month two months prior to publication date. See Chapter News Schedule for specific dates for each issue.

Chapters have three options for submitting information for free advertisements for the Chapter News section:

1. **Camera Ready**
Chapters can submit a camera-ready advertisement; the measurements are 27 1/2 picas across by 30 picas down, or 4-9/16 inches across by 5 inches down.
2. **On Disk**
The second option is to submit an advertisement on a Zip or CD. Submit any text, graphics or camera-ready artwork to the Chapter News Editor, who will forward all to the Art Director for in-house design.
3. **Via E-mail**
Advertisements may also be submitted via E-mail to chapnews@afcea.org. Simply type text into the E-mail memo or cut and paste it onto the E-mail screen. The text will be forwarded to the Art Director for in-house design. Complete advertisements may be sent as E-mail attachments.

Send free advertisement copy to:

SIGNAL Magazine
Chapter News
4400 Fair Lakes Court
Fairfax, VA 22033-3899
Telephone: (703) 631-6196
Facsimile: (703) 631-6188
chapnews@afcea.org

6.9.3 SIGNAL Magazine Issues

Issues of *SIGNAL* are available from International Headquarters for promotional distribution at Chapter events. Request *SIGNAL* Magazines from Member and Chapter Services at mcs@afcea.org. In order to assure availability, the request should be submitted at least 60 days prior to the desired delivery date.

6.9.4 SIGNAL Connections – AFCEA’s Monthly E-Newsletter

SIGNAL Connections is broadcast to the entire membership (members with current e-mail addresses in their profile) on the 15th of each month. AFCEA Chapters are encouraged to use *Connections* to remind their members of meetings and events through links to their chapter web sites. Access to the links will normally appear under the AFCEA “Topic” heading. To add your chapter to the link list, send the web address to the associate publisher, *SIGNAL Connections*, SIGNAL@afcea.org.

6.10 AFCEA Calendars

AFCEA International maintains two calendars.

- 1) Website calendar – available at www.afcea.org/portal and www.afcea.org/calendar - includes AFCEA International and Chapter events, meetings, social events, golf tournaments, etc. The online calendar is searchable by keyword, location or venue. The calendar also supports download of event information directly into the Outlook vCard format.
- 2) Printed calendar – distributed at various AFCEA International events - includes AFCEA International and Chapter events only.

“Events” refers to any Chapter activity, including but not limited to conferences, seminars, luncheons, etc.

AFCEA International has created an on-line calendar where chapter representatives may input information. This calendar has a number of benefits:

- 1) Chapters may input their own events at any time.
- 2) When a website visitor goes to <http://www.afcea.org/calendar/calendar.jsp> they may search the calendar by organizer, event category, location, date, and keywords.
- 3) Any event posted to the website will be included in the website calendar, printed calendar, and *SIGNAL Magazine* calendar, if received by the *SIGNAL Magazine* calendar deadline.

How to submit an event:

The calendar submission form is available at <http://www.afcea.org/calendar/addevent.jsp>. After all information has been submitted, the information will be reviewed at AFCEA International before it is published. The review process will take one business day.

CHAPTER SEVEN, THE AFCEA EDUCATIONAL FOUNDATION

For more information, visit: <https://www.afcea.org/site/Educational-Foundation>

APPENDIX 1-C, AFCEA Contacts and Websites

AFCEA ONLINE

AFCEA Home: www.afcea.org
SIGNAL Home: www.afcea.org/signal
SIGNAL Connections: www.afcea.org/signalconnections
AFCEA Europe: www.afcea.org/europe

AFCEA TELEPHONE

AFCEA International Main Number: (703) 631-6100, Toll Free US: 800-336-4583
AFCEA Europe: + 32 (2) 705-2731
Advertising: (703) 631-6181
Chapter Support: (703) 631-6191
Customer Service Center: (703) 631-6158
Educational Foundation: (703) 631-6147
Intelligence: (703) 631-6219
Membership, Corporate: (703) 631-6150
Membership, Individual: (703) 631-6158
Plans and Development: (703) 631-6170
Professional Development Center: (703) 631-6137
Programs: (703) 631-6130
Promotion/Public Affairs: (703) 631-6189
SIGNAL Editorial: (703) 631-6192
Small Business Programs: (703) 631-6119
Subscriptions: (703) 631-6158

AFCEA E-MAIL

Advertising: advertising@afcea.org
AFCEA Europe: europe@afcea.org
Corporate Membership: corp-mbr@afcea.org
Customer Service Center: service@afcea.org
Educational Foundation: edfoundation@afcea.org
Finance: finance@afcea.org
Intelligence: intel@afcea.org
Member and Chapter Services: mcs@afcea.org
Operations: operations@afcea.org
Plans and Development: plans@afcea.org
Press Release Submissions: signalnews@afcea.org
Professional Development Center: fdc@afcea.org
Programs: events@afcea.org
Promotion/Public Affairs: promo@afcea.org
Scholarships and Awards: scholarship@afcea.org
SIGNAL: signal@afcea.org
Small Business Programs: tgoehring@afcea.org
Webmaster: webmaster@afcea.org

APPENDIX 2-A, Checklist for Starting a New AFCEA Chapter

- 1. Ask AFCEA International for a Regional Vice President (RVP) to assist you in setting up the Chapter. (Note: If a RVP hears of this interest first, the RVP should contact International AFCEA Chapter Services to let the applicable people know that can help the proposed Chapter.)**
- 2. Determine Interest: You need at least 25 people interested in starting the Chapter.**
 - a. Contact International to develop a roster of people within zip codes near your location that are already members.**
 - b. Find at least five to ten corporate affiliates in your area.**
 - c. Conduct a brief “market survey.” Contact local prospects among government, military, academia and industry that have a broad interest in the areas of electronics, computers, command and control, communications, intelligence and information systems and ask for a representative to attend a first exploratory meeting.**
- 3. Determine if this is a new Chapter of a re-energized dormant chapter?**
 - a. If dormant, are there existing documents identifying Chapter membership/officers, chapter name, and a bank account with or without money?**
- 4. Request sample documentation from the RVP—charter, goals, etc.**
- 5. Hold an initial exploratory meeting to determine if there are a minimum of 25 AFCEA members or members-to-be to charter a chapter.**
 - a. Have a discussion leader familiar with AFCEA (possibly the RVP) discuss the benefits of being an area chapter/member and the commitment required for success.**
 - b. Explore the feasibility and desirability of forming/re-energizing a chapter.**
 - c. Define the area(s) to be served by the chapter—draft up first set of Chapter goals (RVP can furnish a sample and should input the chapter’s goals into the Portal)**
 - d. Discuss the kinds of programs that would have the greatest appeal, frequency of programs (set date monthly for luncheons and executive board meetings tend to work best), and put together a potential list of the first six programs/speakers.**

- e. **Discuss the duties of chapter officers and nominate an initial slate of officers. These become the temporary officers that become permanent after the election.**
 - i. **Essential officers for a chapter are:**
 - 1. **President**
 - 2. **Vice-President**
 - 3. **Secretary**
 - 4. **Treasurer**
 - ii. **Additional recommended officers are:**
 - 1. **VP, Programs**
 - 2. **VP, Membership**
 - 3. **VP, Corporate Membership (Can be combined with membership)**
 - 4. **VP, Emerging Leaders**
 - 5. **VP, Education/Scholarships (Can subdivide depending on availability of members)**
 - iii. **Other optional officers might include:**
 - 1. **Webmaster**
 - 2. **VP, Publicity**
 - 3. **VP, Special Projects**
 - 4. **VP, Shows**
 - 5. **VP, Small Business**
- f. **Determine date, time, and place to hold executive board meetings and membership meetings (monthly meetings are recommended for both at the same time and place so members can mark their calendars.)**
- g. **If new or the bank account does not contain any money, request a stipend money (\$1,000) to open the account and assist you with initial actions.**
- h. **Establish first six month schedule of events and actions to include determining a list of speakers for your first six meetings and appoint someone to initiate contact and invites**

- i. **Appoint liaison officers to contact other prospects**
 - j. **Plan to announce the local chapter's formation**
 - k. **Appoint a committee to arrange a second meeting for the purpose of signing a charter and completing any business not completed during the first meeting. The committee will draft the charter from the sample in the AFCEA officer's handbook. (If the chapter was only dormant, may just need to update existing documents)**
 - l. **Identify quick wins, ie, STEM tools grant to local K-12 school (publicize this)—AFCEA International will furnish the initial money for one grant and a social event at a local base club or restaurant (Happy Hour).**
 - m. **Type-up minutes and send to AFCEA International along with your way ahead plan to check for any suggestions.**
6. **Request access for the four essential officers to the AFCEA portal so the Chapter can access the Officer's handbook and other tools.**
 7. **At second meeting, finish any leftover business from the first meeting**
 - a. **Review and sign the charter—each of the 25 members must sign it and provide their mailing address. (If not previously a member of AFCEA, send any membership applications and payment for those not previously members)**
 - b. **Approve a final slate of officers to put forth for election to the general membership.**
 - c. **Identify initial list of possible corporate sponsors (send note to other regional chapters for companies open to sponsoring, look in SIGNAL for companies listed as members who are in the local area.)**
 8. **Send Charter application to International**
 9. **Work with International to host at least your initial web site to post notices of meetings, etc.**
 10. **Request AFCEA FLAG/Podium Banner/Table Banner, SWAG, an AFCEA Polo for at least the four essential officers, Signal magazines, membership forms, etc.**
 11. **Request a compliment of promotional items from AFCEA International.**
 12. **First Luncheon**

- a. ID a location with audio-visual help—“schmooze” best deal. Golf club on base/post is a possibility.**
 - b. President/RVP brief AFCEA to membership/guests**
 - i. Get audience actively involved in discussion at this event**
 - ii. Recognize new and lifetime members; recognize guests**
 - iii. Push for on-the-spot volunteers for any offices unfilled**
 - iv. Hold election**
 - v. Get sign-in sheet with pen**
 - vi. HAVE FUN!!!**
 - c. Announce next luncheon and next executive board meeting**
- 13. Recognize your members—put one in as the monthly AFCEAN of the month within six months of organizing your Chapter.**
- 14. Keep RVP and AFCEA International updated on progress.**

APPENDIX 2-B, Application for Chapter Charter



AFCEA INTERNATIONAL
4114 Legato Rd. Suite 1000 · Fairfax, Virginia 22033, USA
Telephone (U.S.) 703-631-6100 · (International) 001-703-631-6100
Toll-Free Telephone (U.S. only) 800-336-4583
Facsimile (U.S.) 703-631-6124 · (International) 001-703-631-6124
E-mail: mcs@afcea.org
Home Page: <http://www.afcea.org>

APPLICATION FOR CHARTER

Date _____

We, the undersigned members of or applications for membership in AFCEA International, all being residents of or located in _____ and vicinity, desiring to form a local Chapter of said Association at _____ do hereby make application to the President/CEO of AFCEA International for the requisite authority, certifying and agreeing as follows:

ARTICLE I

The name of this Chapter shall be the AFCEA _____ Chapter.

ARTICLE II

The bylaws of this Chapter will be forwarded for the approval and acceptance of the President/CEO of the Association.

ARTICLE III

The officers (or temporary officers) selected by us and constituting the interim leaders of this Chapter are:

_____ **President**
_____ **1st Vice President**
_____ **2nd Vice President**
_____ **Secretary**
_____ **Treasurer**

The Association for Communications, Electronics, Intelligence and Information Systems Professionals, and
Publisher of SIGNAL Magazine

ARTICLE IV

We understand and agree for ourselves and for this Chapter as an association, to abide by the Bylaws of AFCEA International and all regular and lawful directions received by us from the President/CEO of the Association.

PRESIDENT NAME (PRINT) ADDRESS

SIGNATURE ZIP CODE

1ST VICE PRESIDENT NAME (PRINT) ADDRESS

SIGNATURE ZIP CODE

2ND VICE PRESIDENT NAME (PRINT) ADDRESS

SIGNATURE ZIP CODE

SECRETARY NAME (PRINT) ADDRESS

SIGNATURE ZIP CODE

TREASURER NAME (PRINT) ADDRESS

SIGNATURE ZIP CODE

NAME (PRINT) ADDRESS

SIGNATURE ZIP CODE

_____ NAME (PRINT)	_____ ADDRESS
_____ SIGNATURE	_____ ZIP CODE

_____ NAME (PRINT)	_____ ADDRESS
_____ SIGNATURE	_____ ZIP CODE

_____ NAME (PRINT)	_____ ADDRESS
_____ SIGNATURE	_____ ZIP CODE

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_____ SIGNATURE	_____ ZIP CODE

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NAME (PRINT) ADDRESS

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NAME (PRINT) ADDRESS

SIGNATURE ZIP CODE

NAME (PRINT) ADDRESS

SIGNATURE ZIP CODE

Received, approved and charter granted at Washington, DC, this _____ day of _____, _____.

AFCEA INTERNATIONAL

By _____
PRESIDENT/CEO, AFCEA INTERNATIONAL

Appendix 2-C, Application for Student Chapter Charter



AFCEA INTERNATIONAL
4114 Legato Rd. Suite 1000 · Fairfax, Virginia 22033, USA
Telephone (U.S.) 703-631-6100 · (International) 001-703-631-6100
Toll-Free Telephone (U.S. only) 800-336-4583
Facsimile (U.S.) 703-631-6160 · (International) 001-703-631-6160
E-mail: mcs@afcea.org
Home Page: <http://www.afcea.org>

APPLICATION FOR STUDENT CHAPTER CHARTER

Date _____

We, the undersigned members of or applications for membership in AFCEA International, all being residents of or located in _____ and vicinity, desiring to form a local Student Chapter of said Association at _____ do hereby make application to the President/CEO of AFCEA International for the requisite authority, certifying and agreeing as follows:

ARTICLE I

The name of this Student Chapter shall be the AFCEA _____ Student Chapter.

ARTICLE II

The bylaws of this Chapter will be forwarded for the approval and acceptance of the President/CEO of the Association.

ARTICLE III

The officers (or temporary officers) selected by us and constituting the interim leaders of this Chapter are:

_____ **President**
_____ **1st Vice President**
_____ **2nd Vice President**
_____ **Secretary**
_____ **Faculty Advisor**
_____ **Faculty Advisor**

The Association for Communications, Electronics, Intelligence and Information Systems Professionals, and
Publisher of SIGNAL Magazine

ARTICLE IV

We understand and agree for ourselves and for this Chapter as an association, to abide by the Bylaws of AFCEA International and all regular and lawful directions received by us from the President/CEO of the Association.

_____	_____
PRESIDENT NAME (PRINT)	ADDRESS
_____	_____
SIGNATURE	ZIP CODE

_____	_____
1ST VICE PRESIDENT NAME (PRINT)	ADDRESS
_____	_____
SIGNATURE	ZIP CODE

_____	_____
2ND VICE PRESIDENT NAME (PRINT)	ADDRESS
_____	_____
SIGNATURE	ZIP CODE

_____	_____
SECRETARY NAME (PRINT)	ADDRESS
_____	_____
SIGNATURE	ZIP CODE

_____	_____
FACULTY ADVISOR NAME (PRINT)	ADDRESS
_____	_____
SIGNATURE	ZIP CODE

_____	_____
FACULTY ADVISOR NAME (PRINT)	ADDRESS
_____	_____
SIGNATURE	ZIP CODE

_____ NAME (PRINT)	_____ ADDRESS
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_____ NAME (PRINT)	_____ ADDRESS
_____ SIGNATURE	_____ ZIP CODE

_____ NAME (PRINT)	_____ ADDRESS
_____ SIGNATURE	_____ ZIP CODE

Received, approved and charter granted at Washington, DC, this _____ day of _____, _____.

AFCEA INTERNATIONAL

By _____
PRESIDENT/CEO, AFCEA INTERNATIONAL

APPENDIX 2-D, Sample Script for Installation of Officers

The following format and language are suggested for the Installing Official: (Installing Officer goes to the podium and sets the tone for the installation)—

“One of the most interesting, challenging and rewarding experiences is the assumption of a leadership role in a professional association like AFCEA. It provides an effective venue for the exchange of ideas between the government, industry, academia and among individuals. AFCEA brings people involved in communications, electronics, computers, command and control, intelligence and information management together so that they may share and exchange ideas, skills and requirements and may share in technology and experience.

“To fulfill its purpose, AFCEA needs dedicated, conscientious and professional leaders. Our Association calls upon men and women of the highest ethical standards, professional skills and human understanding. Their awareness of the great opportunities their country holds for all its people is a reason for their service in this chapter. During the past year, you have been fortunate to have such leadership. I would like you to join me in honoring the outgoing officers with a round of applause (retiring officers rise).

“Will the President and his/her new officers please join me at the podium... (pause). Raise your right hand and repeat after me: I do affirm that I will support the Standards of Conduct and the objectives of AFCEA International and that I will serve the chapter to the best of my abilities.

“Thank you, Mr./Madam President—and officers—I know that you will do well—your nation and yourselves will benefit.”

APPENDIX 3A: MODEL AFCEA CHAPTER BYLAWS

**BYLAWS OF THE
XYZ CHAPTER**

AFCEA International

(AFCEA)

BYLAWS OF THE XYZ CHAPTER

AFCEA International (“AFCEA”)

ARTICLE I - NAMES AND LOCATIONS

Section 1: Name.

The name of the Chapter shall be the XYZ Chapter, AFCEA International (“AFCEA”), hereinafter referred to as "The Chapter".

Section 2: Location.

The Headquarters of the Chapter shall be in or near the cities of _____.

ARTICLE II – GUIDING PRINCIPLES

Section 1: Vision, Mission and Core Values of AFCEA International

A: Vision.

To be the premier information technology, communications, and electronics association for professionals in international government, industry and academia worldwide.

B: Mission.

AFCEA is an international organization that serves its members by providing a forum for the ethical exchange of information. AFCEA is dedicated to increasing knowledge through the exploration of issues relevant to its members in information technology, communications, and electronics for the defense, homeland security and intelligence communities, and other government entities with components supporting these missions.

C: Core Values

- 1. Ethics:** Insist on the highest ethics in everything we do.
- 2. Visionary Leadership:** Apply visionary leadership in our community and encourage it from our members at every level.
- 3. Commitment:** Consistently demonstrate commitment to continuous improvement of the Association and to improvement of service to our members.
- 4. Quality:** Provide the highest quality in everything we do.

5. **Education:** Commit to do everything possible to further the education of our members and the communities we serve.
6. **Diversity:** Encourage, embrace and continually enlist the support and inclusion of all members of our diverse international community.

Section 2: Actions and Activities.

AFCEA is organized to promote the common business interests of its members and operate for nonprofit educational, scientific, patriotic, and civic purposes. It has no political interests or alliances. It is an international association. Being incorporated in the United States, its actions and activities are intended to qualify AFCEA as an exempt organization under Section 501(c)(6) of the U.S. Internal Revenue Code of 1986, as amended, or the corresponding provision of any future U.S. Internal Revenue Law and, in any other regions as may be applicable, under the revenue/charity laws of the various countries concerned.

Section 3: Certain Activities Prohibited.

No part of the net earnings of The Chapter shall inure to the benefit of, or be distributed to, its members, Directors, Officers, or other private individuals. The Chapter shall neither lend any of its assets, nor guarantee to any person the payment of a loan, to or on behalf of any member, Director, or Officer. However, The Chapter shall be authorized and empowered to pay reasonable compensation for services rendered, and to make payments and distributions in furtherance of the objectives set forth in Article II. The Chapter will not conduct lobbying activities.

The Chapter will not participate or intervene in any political campaign on behalf of any candidate for public office. The Chapter will not conduct any activities not permitted by an organization exempt from income tax under the tax laws of the states and/or nations in which The Chapter operates.

Section 4: AFCEA Ethics and Standards of Conduct Policy

The continued success of AFCEA depends on the maintenance of high professional standards and behavior and observance of accepted standards of conduct and ethics. The manner in which individual and corporate members participate in the professional dialogue among government, industry and academia reflects the ethical reputation of AFCEA. AFCEA members shall follow the standards of conduct and ethics guidance of their appropriate government authorities.

ARTICLE III - MEMBERSHIP

Section 1: General.

Membership in the Chapter shall be open to all citizens and industrial organizations of the free world that are interested in furthering the objectives of AFCEA and the Chapter as set forth in the AFCEA Articles of Incorporation and Bylaws and the provisions of the Chapter Bylaws.

Section 2: Classes of Membership.

The classes of membership of the Chapter shall conform to those outlined in the AFCEA Bylaws Article III; i.e., Individual, Life, Distinguished Life, Student, and Corporate.

Section 3: Membership Dues.

Membership Dues shall conform to the dues as outlined in the AFCEA Bylaws. Additional funds for Chapter activities may be raised by appropriate means commensurate with AFCEA and Chapter status as a non-profit organization.

ARTICLE IV - ORGANIZATION AND STRUCTURE

Section 1: Organization.

The Chapter shall consist of members as described in Article III and be governed by a Board of Directors, Chapter Officers, and an Executive Committee.

ARTICLE V - BOARD OF DIRECTORS

Section 1: Authority and Responsibilities.

The Board of Directors will have supervision, control, and direction of the affairs of the Chapter, its committees, and publications, and is empowered to act on the part of the membership by these Bylaws. The Board shall determine Chapter policies and change thereto and shall fill casual vacancies in its membership and those of Chapter Officers.

Section 2: Composition.

The Board of Directors shall consist of the following Chapter Members: President, Treasurer, and Secretary, a maximum of ____ members elected at-large and Past Chapter Presidents so long as they maintain continuous membership.

Directors, with the exception of Past Presidents, will be elected annually. The current Chapter President serves as the Chairman of the Board of Directors. An Advisory Committee consisting of key personnel designated by the Chapter President may assist the Board of Directors. The Committee should meet with the Board of Directors/Executive Committee periodically to discuss planned programs and events, and exchange general information and suggestions regarding the Chapter activity.

Section 3: Meetings.

The full Board of Directors shall meet at the call of the President at least each year. The President, as required, may call additional meetings. Notifications of meetings shall be made to each Board member at

least one week prior to each meeting to include place, date, hour, and major agenda items that will require Board approval. While in person attendance at meetings is encouraged, meetings may be held by any electronic or telephonic means in which all persons participating are able to communicate directly with each other. Such electronic or telephonic participation shall constitute in person attendance for purposes of establishing a quorum and for voting.

Section 4: Procedures.

At any meeting of the Board of Directors, no less than one-half of the represented members of the Board shall constitute a quorum for the transaction of Chapter business. For purposes of this section, a quorum of one-half shall refer to the number of officers and members of the Board except Past Presidents, as this number may vary. Any business transacted shall be valid, providing it is passed by a majority of those represented. Should representation fall below a quorum during the conduct of a meeting, no further business shall be transacted.

ARTICLE VI - CHAPTER OFFICERS

Section 1: Chapter Officers shall consist of at least a President, Secretary and Treasurer.

Officers shall be elected for one-year terms by a majority vote of the Chapter membership. No member may hold more than one office during the Chapter year, which will run from June 1 until May 31 of the succeeding year. Officers may be appointed to fill unexpired terms by vote of the Board of Directors. No officer may hold the same office for more than two consecutive years, unless no one has been submitted as a potential candidate for election and the re-appointment is approved by a majority of the Board of Directors.

Section 2: Responsibilities of the President.

The President shall have general supervision of the affairs of the Chapter and shall perform the duties usual to the office. The President shall preside at the meetings of the Chapter and Board of Directors and shall be an ex-officio member of all committees and all sub-committees thereof.

Section 3: Responsibilities of the Secretary.

The Secretary shall prepare, publish, and maintain minutes of Chapter meetings, Board of Director meetings, and committee meetings prepared and published by those committees, maintain a role of Chapter membership to include the address and status of each member and maintain official records. The Secretary shall provide notice of any special meetings at the direction of the President. The Secretary shall distribute minutes to members of the Board of Directors with an information copy to the AFCEA Director of Chapter Affairs and to interested Chapter members.

Section 4: Responsibilities of the Treasurer.

The Treasurer shall be comptroller of the finances and accounts of the Chapter under the direction of the President and the Executive Committee, and shall prepare an annual budget and render an annual statement of accounts and such special reports as may be called for by the Board of Directors.

Section 5: National Council Delegates.

In accordance with Article V, Section 2, of the AFCEA Bylaws, each Chapter is entitled to designate delegates to the National Council (total number depends on the membership strength of the Chapter). The Board of Directors shall appoint Chapter Delegates to the National Council from Chapter members who expect to attend the Annual International AFCEA Convention.

ARTICLE VII - EXECUTIVE COMMITTEE (Optional)

Section 1: Authority and Responsibilities

The Executive Committee is empowered to act on behalf of the Board of Directors between Board meetings on all matters except those specifically reserved for the Board or membership by these Bylaws.

Section 2: Composition.

The Executive Committee shall consist of the Chapter Officers and the immediate preceding Past Chapter President residing in the area. The Chapter President shall preside at Executive Committee meetings.

Section 3: Meetings.

The Executive Committee shall meet at the call of the President and shall have the power to take actions on behalf of the Board of Directors as prescribed in these Bylaws. Notification of Executive Committee meetings shall be provided at least four days prior to the meeting. While in person attendance at meetings is encouraged, meetings may be held by any electronic or telephonic means in which all persons participating are able to communicate directly with each other. Such electronic or telephonic participation shall constitute in person attendance for purposes of establishing a quorum and for voting.

Section 4: Procedures.

At any meeting of the Executive Committee no fewer than four members must be represented to constitute a quorum for the conduct of business. Any business transacted shall be valid provided it is passed upon by a majority of those represented. Should representation fall below a quorum during the conduct of a meeting, no further business shall be transacted.

ARTICLE IX - FINANCE

Section 1: Fiscal Period.

The fiscal period of the Chapter shall be a 12-month period, from ____ to _____ .

Section 2: Financial Obligation.

No financial obligations shall be incurred on behalf of the Chapter except by the approval of the Executive Committee or as covered in these Bylaws. Expenditures of less than one hundred dollars (\$100.00) may be authorized by the President to be subsequently approved by the Board of Directors.

Section 3: Annual Budget and Statement of Accounts.

The Annual Budget and Statement of Accounts prepared by the Treasurer will be approved by the Executive Committee and reviewed by the members of the Board of Directors. Chapter members at the first Chapter meeting of each year will review this budget.

Section 4: Audit.

The accounts of the Chapter shall be audited annually by the Audit Committee consisting of two Chapter members, who are not current officers, as appointed by the Board of Directors.

ARTICLE X - CHAPTER MEETINGS

Section 1: Annual/Special Meeting.

The Chapter shall hold an Annual Meeting each year. The purpose of the Annual Meeting shall be the election of Officers and Directors of the Chapter, the submission of reports by the Officers and such other matters as decided upon by the Board of Directors or Executive Committee. Written or printed notification will be provided to all members at least thirty (30) days prior to the Annual/Special Meeting. Information provided shall include the place, date, and hour of the meeting, and in the case of a Special Meeting, the purpose(s) for which it is called.

One third of active members represented shall constitute a quorum for the conduct of business. Any business transacted shall be valid provided it is affirmatively passed upon by a majority of those present. Should representation fall below a quorum during the conduct of the meeting, no further business shall be transacted. While in person attendance at meetings is encouraged, meetings may be held by any electronic

or telephonic means in which all persons participating are able to communicate directly with each other.

Such electronic or telephonic participation shall constitute in person attendance for purposes of establishing a quorum and for voting.

Section 2: Regular Meetings.

Regular meetings of the Chapter shall be held throughout the year, the time and place to be designated by the President to be devoted to discussions of scientific, industrial, and military issues and such other subjects as approved by the Board of Directors.

ARTICLE XI - NOMINATIONS AND ELECTIONS

Section 1: The Nominating Committee.

As selected by the current President, shall present their report at the April Chapter Meeting; elections shall be held at the Annual Meeting in May; and the newly elected members of the Board of Directors shall be installed at the May Luncheon Meeting and shall assume their duties following the June Board of Directors meeting. Any group of five (5) or more active members of the Chapter may submit by written petition the name(s) of candidate(s) for office to the Nominating Committee. Such a petition shall be in the hands of the Nominating Committee prior to its report being presented to the Chapter members at the April Chapter Meeting. Petitions submitted after the April Meeting shall be provided to the Secretary prior to the opening of the Annual Meeting. Nominations may be accepted from the floor during a Chapter meeting assuming at least five (5) members will support such nomination. Any person nominated must be a member of the Chapter, in good standing.

Section 2: Elections.

One third of total Chapter members shall constitute a quorum for the election, which shall be valid provided it is affirmatively passed upon by a majority of those present.

ARTICLE XII - AMENDMENTS

Section 1: Amendment Proposals.

Amendments to these Bylaws may be proposed by a majority vote of the Board of Directors or of the Executive Committee or upon petition addressed to the President and signed by not less than five (5) percent of Chapter members.

Section 2: Amendment Approval.

Proposed amendments shall be submitted to the Chapter membership at least one month prior to being voted on at a regular Chapter meeting.

Section 3: Amendment Effective Date.

Amendments, which have been adopted by a majority of the Chapter membership voting at a regular Chapter meeting, shall become effective as specified in the amendment

ARTICLE XIII - DISSOLUTION

Section 1: Dissolution.

On dissolution of the Chapter, the Board of Directors shall pay or make provisions for the payment of all liabilities and legal obligations of the Chapter, then dispose of all remaining assets by transferring them to the International Headquarters of AFCEA.

APPENDIX 3-G, Records Retention Guide

The purpose of this retention guide is to ensure that necessary records and documents are properly maintained and to ensure that records that are no longer needed or of no value are discarded at the appropriate time. The timeframes noted below are from the IRS regulation – 26 CFR 1.6001-1 and various state CPA society guidelines.

Document	Retention Period
INSTITUTIONAL AND LEGAL RECORDS	
Articles of Incorporation and Amendments	Permanent
Charter and Amendments	Permanent
By-Laws and Amendments	Permanent
Minutes of Board of Directors Meetings	Permanent
Minutes of Committee Meetings	Permanent
Attorney Opinion Letters	While Active + 4 years
Leases	While Active + 6 years
Policy Statements and any revisions	10 years
Contracts and Agreements	While Active + 6 years
Organization Chart	Permanent
TAX RETURNS AND FORMS	
Form 990 and support documentation	Permanent
Form 990-T and supporting documentation	Permanent
OCONUS Country Specific Returns and supporting documentation	Permanent
Tax Correspondences	Permanent
State or Local Tax Returns and support documentation	Permanent
REVENUE AND RECEIVABLES RECORDS	
Accounts Receivable Aging Reports	7 years
Accounts Receivable Subsidiary Ledgers	7 years
Accounts Receivable Invoices	7 years
Revenue and Cash Receipts Journals	Permanent
Uncollected Accounts	While Active + 7 years
DISBURSEMENTS AND PAYABLES RECORDS	
Accounts Payable Ledger	7 years
Accounts Payable Subsidiary Ledgers	7 years
Processed/Paid Purchase Orders	7 years
Cash Disbursement and Check Registers Journal	Permanent

BANK RECORDS

Bank Statements	7 years
Bank Reconciliations and Support	7 years
Deposit Slips	3 years
Canceled Checks	7 years

FIXED ASSET AND PROPERTY RECORDS

Property Records	While Active + 5 years
Inventory	While Active + 5 years
Depreciation Schedules	While Active + 5 years
Mortgage, Bonds and Other Long-Term Debt Records	While Active + 5 years
Property Improvement Records	While Active + 5 years

FINANCIAL RECORDS

Accounting Policies and Revisions	While Active + 3 years
General Ledgers	Permanent
Subsidiary Ledgers	While Active + 7 years
Journal Entries	Permanent
Account Reconciliations	7 years
Chart of Accounts	Permanent
Financial Statements and Trial Balance	Permanent

BUDGET RECORDS

Budget Committee Minutes	Permanent
Annual Budget and Supporting schedules	While Active + 7 years

INSURANCE RECORDS

Property Insurance Policies	Life of the Policy + 3 years
Liability Insurance Policies	Life of the Policy + 3 years
Insurance Claim Documents	Settlement + 10 years



AFCEA Insurance Coverage for Chapters

Directors and Officers Liability Insurance

- This covers all Directors and Officers of AFCEA International worldwide.
- Limit for chapters is \$5M per year, with a \$25,000 deductible. This is a shared limit and an aggregate limit.

Crime Insurance

- Coverage provided worldwide however, the Suit must be brought within the US:
 - \$500,000 Forgery or Alteration with \$5,000 deductible
 - \$2M Computer Fraud with \$10,000 deductible
 - \$2M Funds Transfer with \$10,000 deductible
 - \$500,000 Money Orders & Counterfeit Money with \$10,000 deductible
- Non-Domestic chapters should take out their own policies to cover their full crime exposure.

General Liability

- Currently the chapters are covered for General Liability under AFCEA International's policy for their events: \$10M under commercial umbrella; \$1M primary.
- Regular chapter events (luncheons, dinners, conferences, meetings) are covered under this policy.
- Golf tournaments are not excluded.
- There is no exclusion for participants in athletic events. Spectators are covered under the General Liability policy.

Additional Insurance

- Accidental Medical insurance Coverage is available.
-

Appendix 3-J, Senior Government Civilian Engagement Plan

Following is information regarding increased engagement and outreach to senior civilian government employees. Although most chapters and Regional Vice Presidents are already reaching out to SES's (Senior Executive Service) and other civilian government employees for speakers at events, as an organization we need to reinforce this on an ongoing basis. AFCEA Int'l is preparing other references to this issue, to be included in the AFCEA Chapter Handbook. This will educate those chapters or RVP's who do not have an understanding of the civilian government structure.

There's a line that suggests RVPs have this included in their annual evaluation. If this was to be included, I would think a simple question such as "Did you stress the importance of outreach and engagement of senior civilian government folks to your chapters last year?" would suffice, with a check box for yes or no. I welcome your thoughts on how to best embrace the spirit of the attached plan in a realistic way.

- US Government civilian participation and membership in AFCEA is not as strong as it should be.

Assumptions

- Increased participation by senior US government civilians will lead to some of them joining the Association.
- Increased participation and membership by senior US government civilians will lead to increased participation and membership by mid-level US government civilians (e.g., GM 12-14)

Proposed Plan for US Government

- 3 Tiers
 - National
 - Regional
 - Local (Chapters)

National Level

- AFCEA HQ targets DOD, Homeland Security and Intelligence community focused on SES's and mid to senior level civilians.
- Continue to emphasize selection of senior civilians as speakers at events, both those run by HQ and Chapters.
- Publish a SIGNAL Magazine article explaining the current civilian career field structure.
- Encourage HQ functional committees (Membership, Intelligence, Technical, etc.) to invite participation by senior government civilians both as speakers and members.

Regional Level

- RVP's transmit the emphasis on senior civilian participation to Chapters.
- Educate existing RVP's on civilian workforce structure as needed; include this topic in training of new RVP's as well as in the RVP handbook.
- Include regional results of this campaign as part of annual RVP evaluation.
- Solicit best practices from Chapters and forward to HQ.

Chapter Level

- Capture and share successful activities and best practices in engaging senior civilians among Chapters and across Regions.
- Educate Chapter leaders on civilian workforce structure; include this topic in training of new Chapter officers as well as in the Chapter Officers Handbook.
- Invite senior civilians to participate and/or speak at Chapter meetings/luncheons. Report such participation through RVP's to HQ.
- Include senior civilians as nominees for Chapter awards, as appropriate.
- Recruit senior civilians as Chapter leaders, subject to the limitations of local ethics and conflict of interest guidelines.
- Ensure that senior civilians can be easily recognized as such by use of distinctive name tags or ribbons at Chapter functions.

Recommendation

- That AFCEA International develops a Senior Government Civilian Engagement Plan for implementation at the International, National, Regional and Chapter levels.
- That AFCEA International work with Chapters outside the United States to develop similar plans to be implemented within local custom and law.

APPENDIX 4-A

Widely Attended Gathering Statement

Note for Government employees:

It is the opinion of AFCEA International (or name of AFCEA chapter) that this event qualifies as a "widely attended gathering." However, you must receive a final determination from your own ethics official.

This opinion is based on the following:

- The number of invited attendees will exceed 75 (this is the minimum)
- Attendees will include representatives with diverse views from industry competitors
- Any seating assignments will be made by AFCEA International (or name of AFCEA chapter)

APPENDIX 6-A

SAMPLE PRESS RELEASES

COMMANDER, U.S. CYBER COMMAND CONFIRMED TO KEYNOTE AFCEA HOMELAND SECURITY CONFERENCE

Conference is the Premier Homeland Security IT Event in Washington, D.C. Area

For Immediate Release January 12, 2011

AFCEA Media Contact:
Rachel Haborak
rhaborak@afcea.org
703-631-6180

FAIRFAX, VA—AFCEA’s tenth annual Homeland Security Conference, “Working Together Today for a More Secure Tomorrow”, returns to the Ronald Reagan International Trade Center, Washington, D.C., February 22-24, 2011. Attendees include government and industry IT professionals, CIOs, and program managers involved in operations, policy and procurement.

As a new feature this year, on Tuesday, February 22, U.S. Customs and Border Protection will host an industry day at the Conference. Sessions will focus on current and proposed initiatives and industry opportunities. Additionally, the Conference will include several roundtables this year, focusing on Chief Information Officers, Procurement Executives, and Collaboration when Disaster Strikes.

GEN Keith Alexander, USA, Commander, U.S. Cyber Command and Director, National Security Agency/Central Security Service will kick off the conference on Tuesday afternoon as the keynote speaker. General Alexander will address cybersecurity priorities, including coordination among federal agencies. The intersection of federal, state and local requirements will be the focus of Wednesday’s lunch speaker, Chief Cathy Lanier, Chief of Police, District of Columbia.

Conference panel sessions will cover identity management, interagency collaboration, secure information-sharing, border security, and person-centric screening. In addition, sessions will concentrate on critical cyber and homeland security cross-over issues, including situational awareness, training and education, and privacy and security conflicts. Panelists include federal, state and local government officials as well as industry and academia experts.

The Technology Showcase, with more than 80 exhibits, highlights the latest homeland security technologies, including communications equipment, emergency response systems, network and information security, and more. Exhibitors will display products and solutions for law enforcement, federal government, military, and commercial applications.

The exhibits are open to the public (on-site registration required); there is a registration fee to attend the speakers and panel sessions. For details on the event visit www.afcea.org/events/homeland.

AFCEA International, established in 1946, is a non-profit membership association serving the military, government, industry, and academia as an ethical forum for advancing professional knowledge and relationships in the fields of communications, IT, intelligence, and global security. To learn more about AFCEA International, visit AFCEA.org.

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AFCEA Expands Teacher Education Scholarships Supporting Science, Technology, Engineering and Math (STEM) Studies

For Immediate Release February 17, 2011

AFCEA Media Contact
Rachel Haborak
(703) 631-6180
rhaborak@afcea.org

FAIRFAX, VA – Calling the nation’s declining numbers of science, technology, engineering and math students “one of the greatest challenges facing America,” AFCEA International and the AFCEA Educational Foundation are increasing the number of scholarships available to support those preparing to teach a STEM subject in an American middle or secondary school. The increase from 35 to 50 annual scholarships of \$5,000 each comes only one year after AFCEA launched the initiative.

“The latest studies show we are continuing to fall behind while other countries multiply their investments in science, math and technical education,” said Fred Rainbow, Vice President for Education, AFCEA International. “Our schools, labs, industries, military, government agencies – plus the quality of our lives – will suffer if we don’t address this as one of the greatest challenges facing America.”

Among the latest in warning signs, the recently released Science National Assessment of Educational Progress in the U.S. found that 79 percent of high school seniors fall short of science proficiency. President Barack Obama has set a goal of preparing 100,000 new teachers in STEM fields over the next 10 years, saying in his Jan. 25 State of the Union address, “Maintaining our leadership in research and technology is crucial to America’s success. But if we want to win the future – if we want innovation to produce jobs in America and not overseas – then we also have to win the race to educate our kids.”

AFCEA is a long-time supporter of STEM education, offering annual \$1,000 grants to STEM teachers to help pay for classroom supplies through its Science Teaching Tools program. Last year, with major support from Booz Allen Hamilton and AFCEA International’s own funds, the number of STEM teaching scholarships grew from two to 35. Two hundred future teachers of STEM subjects applied.

For the 2011-2012 school year – with the added support of Terremark Worldwide and five AFCEA Chapters, 50 scholarships will be available. To be eligible, students must be a U.S. citizen and a sophomore, junior, graduate or credential/licensure student attending an accredited college or university in the U.S. and be pursuing a degree for the purpose of teaching a STEM subject in a U.S. middle or secondary school. Additionally, nominees must be enrolled full time and hold a minimum grade point average of 3.0.

In addition to the \$5,000 scholarship, each graduating AFCEA STEM Scholar will receive a \$1,000 AFCEA Science Teaching Tool grant each year for three years if the recipient continues to teach a STEM subject. These grants can be used to fund hardware and software, other classroom tools, field trips, STEM-focused clubs and other activities.

Interested candidates, teachers and mentors can get more information and apply online at <http://stem.afcea.org>. The application deadline is May 1, 2011, and scholarships will be awarded in August.

About AFCEA International and the AFCEA Educational Foundation

AFCEA International, established in 1946, is a non-profit membership association serving the military, government, industry, and academia as an ethical forum for advancing professional knowledge and relationships in the fields of communications, IT, intelligence, and global security. For more information, visit www.afcea.org.

The AFCEA Educational Foundation works closely with the chapters, raises funds, and provides leadership, guidance, and rewards to help motivate more students to become scientists and engineers. The Foundation is an independent 501(c)(3) organization dedicated to providing educational incentives, opportunities, and assistance for students and teachers in the science, technology, engineering, and mathematics disciplines (broadly known as STEM). In 2009 the AFCEA Educational Foundation awarded more than \$1.5M in scholarships and grants. The AFCEA Educational Foundation has been granting scholarships and grants to college students in STEM disciplines for 30 years. Working with AFCEA local chapters, the Foundation's Science Teaching Tool program annually reaches 200+ teachers and an estimated 50,000+ students in grades kindergarten through high school.

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AFCEA ANNOUNCES THE 2011 DAVID SARNOFF AWARD WINNER

ADM James G. Stavridis, USN, to receive AFCEA's highest award

For Immediate Release April 28, 2011

AFCEA Media Contact
Tobey Jackson
(703) 631-6189
tjackson@afcea.org

FAIRFAX, VA – AFCEA International is pleased to announce that Admiral James G. Stavridis, U.S. Navy, Commander, U.S. European Command and NATO Supreme Allied Commander Europe, has been selected as the 2011 David Sarnoff Award winner.

AFCEA established the David Sarnoff Award, its highest honor, to recognize individuals who have made lasting and significant contributions to global peace. Recipients have demonstrated a sustained and personal commitment to furthering communications, electronics, and information technologies toward achieving a more secure tomorrow.

The Award's namesake, David Sarnoff, exemplifies those great individuals whose work, sacrifice, enthusiasm and patriotism form the backbone of America. An early pioneer in the radio industry, Sarnoff quickly rose to prominence in the fledgling telecommunications business. During World War II, he experienced first-hand how open dialogue and strong relationships between government and industry in times of peace can help ensure effective communications during wartime. As the Founding Father of the Armed Forces Communications and Electronics Association – AFCEA as it is known today – Sarnoff established the Association's legacy of communication, dialogue, and an open and ethical information exchange between the Public and Private Sectors. These principles remain the pillars of AFCEA International today.

ADM Stavridis has served as Commander, European Command and Supreme Allied Commander, Europe since 2009. A Surface Warfare Officer, he commanded the Destroyer USS *Barry* (DDG 52) from 1993-1995, completing UN/NATO deployments to Haiti and Bosnia, and a combat cruise to the Arabian Gulf. *Barry* won the Battenberg Cup as the top ship in the Atlantic Fleet under his command. In 1998, he commanded Destroyer Squadron 21 and deployed to the Arabian Gulf, winning the Navy League's John Paul Jones Award for Inspirational Leadership. From 2002-2004, he commanded Enterprise Carrier Strike Group, conducting combat operations in the Arabian Gulf in support of both Operation Iraqi Freedom and Operation Enduring Freedom. From 2006-2009, he commanded U.S. Southern Command in Miami, focused on Latin America and the Caribbean. Ashore, he has served as a strategic and long range planner on the staffs of the Chief of Naval Operations and the Chairman of the Joint Chiefs of Staff. He has also served as the Executive Assistant to the Secretary of the Navy and the Senior Military Assistant to the Secretary of Defense. He holds various decorations and awards, including two awards of the Defense Distinguished Service Medal, the Defense Superior Service Medal and five awards of the Legion of Merit. He is author or co-author of several books on

naval ship handling and leadership, including *Command at Sea*, *Destroyer Captain*, and *Partnership for the Americas*.

“Who better than Jim Stavridis to join the Honor Roll of former Sarnoff winners,” comments Kent Schneider, President and CEO of AFCEA. “His contributions to world peace are legendary - currently, as SACEUR, he is forging a strong and binding coalition of Allies who will help to keep this Nation and our friends around the world safer and more secure. Prior to this assignment, as Commander, Southern Command, he used his incredible leadership skills to help stymie the scourge of illicit drug trafficking, and to build partnerships with some of our most important friends to the south of our border. We are thrilled to honor him with AFCEA’s highest award.”

Previous Sarnoff recipients include Vice President Dick Cheney, General Colin Powell, Vice President Al Gore, Norm Augustine, Admiral Bobby Inman, Senator Barry Goldwater, Admiral Archie Clemens, The Honorable Duane Andrews, Dr. Ralph Shrader, General Richard Myers, Senator Daniel Inouye, Admiral Edmund Giambastiani, General Michael Hayden, General James Cartwright, Senator John Warner, and the Honorable John Grimes.

The Award will be presented on Wednesday, September 14, 2011 at the Willard InterContinental Hotel in Washington, D.C. Banquet tickets and tables are available. For more information visit www.afcea.org/events/sarnoff or contact Julie Lama at jlama@afcea.org.

AFCEA International, established in 1946, is a non-profit membership association serving the military, government, industry, and academia as an ethical forum for advancing professional knowledge and relationships in the fields of communications, IT, intelligence, and global security. To learn more about AFCEA International, visit AFCEA.org.

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APPENDIX 6-B, Broadcast E-mail Promotion and Can Spam Legislation

The following information regarding E-mail Spam legislation for US chapters should not be taken as either legal advice or a legal opinion, but rather a guideline for chapters that use promotional E-mail broadcasts. The guideline describes how AFCEA International currently handles the use of promotional E-mail broadcasts or commercial electronic mail messages to its members for event related functions. Further, it is AFCEA's understanding that Congress did not intend for communications between tax-exempt associations and charities and their respective members and donors to be affected by the new law provided that the communication is in furtherance of the organization's exempt purpose.

What is a "commercial electronic mail message?"

The term commercial electronic mail message is defined as "any electronic mail message the primary purpose of which is the commercial advertisement or promotion of a commercial product or service (including content on an Internet website operated for a commercial purpose)."

What does AFCEA International do to comply with the rules of the legislation?

The law establishes three criteria for e-mail when messages are commercial in nature:

1. "Clear and conspicuous identification that the message is an advertisement or solicitation" (not necessarily in the e-mail subject line; this requirement does not apply if the sender receives "affirmative consent" from the recipient to send the e-mail)
2. An ability to "opt-out" electronically from future emails of this nature
3. A valid postal/physical address of the sender

Also note that once someone "opts out" of receiving future commercial e-mail messages, the new law prohibits the sender of the e-mail from transferring or releasing that "opted out" e-mail address to anyone for any purpose.

It has always been AFCEA International's policy to fiercely protect personal identifiable information that its members have provided in their member profiles. AFCEA does not sell member information to anyone. Member personal information is not shared with third parties other than those acting as agents of the association.

Broadcast e-mails are proven to be one of the most effective ways to communicate with members. The following three articles offer suggestions on creating content and format for your emails.

Back to E-Mail Basics

E-mail pointers to help you get your message read.

http://www.clickz.com/experts/em_mkt/em_mkt/article.php/3503111

E-Mail Creative Checklist

Tips on file size and writing text.

http://www.clickz.com/experts/em_mkt/em_mkt/article.php/3520491

E-Mail Creative: The HTML/Text Struggle

The debate over whether to send plain text or html encoded e-mails.

http://www.clickz.com/experts/em_mkt/em_mkt/article.php/3443361

APPENDIX 6-C, Website Suggestions

Creating and maintaining a website is not easy. Here are three articles packed with helpful hints on how to make the most of your website.

The Six Rules of Web Writing

How does Web writing differ from the usual business writing you have done? Web-writing coach Merry Bruns helps you tap-tap your way to compelling Web content.

<http://www.gwsae.org/executiveupdate/2003/November/web.htm>

What Does Your Web Site Say about Your Association?

Building an Award-Winning Web Site

Associations spend significant time and effort developing and maintaining their Web sites. How can they tell if they are on the right track?

<http://www.gwsae.org/executiveupdate/2004/May/web.htm>

Look Ma', No Web!

For many associations, their Web site is the only way they digitally communicate with the public. As the Web has matured over the last five years, however, it has become more difficult to effectively use a static Web site as a promotional tool. Web users have become more sophisticated. Marketers and hackers continue to frustrate users with pop-up ads, spam, and viruses. It's time to revamp your association's digital strategy.

<http://www.gwsae.org/executiveupdate/2004/February/web.htm>

APPENDIX 6-F, SIGNAL Magazine – Chapter News Submissions

Phone: (703) 631-6196; Fax: (703) 631-6188; E-mail: chapnews@afcea.org; Web:

EDITORIAL POLICY: Chapter News must be received by the 20th of the month two months prior to publication date.

Keys to Chapter News: Accuracy, Interest, Brevity

- The 20th day of the month two months prior to publication is the cutoff date for chapter material. For example, March Chapter News is due by January 20. No exceptions. Check out the Chapter News Schedule for specific dates.
- No submission will run for an event that took place more than 60 days before the Chapter News Deadline. For example, submissions for the December issue (deadline: October 20) must be from meetings no earlier than August 20.
- The fastest and simplest way to submit a Chapter News item is to use the "Submit a Chapter Writeup Electronically" option at www.afcea.org/signal/chapternews. Otherwise, email the information to chapnews@afcea.org
- A writeup--not just captions-- must be included. The writeup should contain meeting details, including date, topic of featured speaker, award presentations, etc.
- Each chapter is allowed up to 150 words per meeting. Focus on members, awards, chapter's accomplishments and the speaker's remarks. Material will be edited to SIGNAL style for clarity and length. Three photographs per meeting are allowed. Symposia and conferences might receive fuller coverage with a maximum of 250 words and five photographs.
- Identify attendees in writeups or captions by full name, rank and branch of service or affiliation. The chapter contact will be notified about missing information by telephone or E-mail and must supply the information by that month's deadline.
- Unless sporting/social events are held to benefit a scholarship fund, they will not be included in the section. Symposia and science fairs will receive coverage.
- Always provide a contact name, address and telephone number.
- E-mail text and photographs when possible. Please label the subject line of your E-mail in all capital letters "CHAPTER NEWS" and send it to chapnews@afcea.org.

- If you submit your writeup electronically, please indicate how many pictures, and include caption material.

Photographs and Captions

- A maximum of three photographs per meeting is permitted. In addition, no chapter may feature more than five photographs in any one month--regardless of the number of meetings covered.
- Good quality photographs will be used, unless they duplicate subject matter. To avoid redundancy, group award winners into a single, quality photograph.
- Captions must include full name, rank and branch of service or company affiliations. *SIGNAL* reserves the right not to run photographs if quality is poor or if complete identification is not provided upon submission. Identify figures in photographs as left or right, center, standing, etc.
- Photographs in which drinks are within view will not be published.
- *SIGNAL* will accept electronic images of at least 200 dots per inch in JPEG, GIF, BMP or TIFF format; however, file quality and formatting problems can prevent the use of some of these images in publication.
- Electronic image file names must correspond directly to caption material. These guidelines will help ensure that photographs sent electronically can be matched accurately to the correct chapter and event and will help prevent problems with file formats and sizes.

Common Problems

- Limit one meeting writeup to each submission. Do not group multiple events together.
- Include branch of service for all military personnel. The editor cannot assume that all military attendees at an Augusta-Fort Gordon event are in the U.S. Army, for example.
- Spell out all acronyms no matter how obvious the meaning is to you.
- Submit the writeup no later than 60 days after the meeting date.
- Double check the spelling of all names. Often a name will be spelled two different ways in the same writeup.

- If submitting photographs in hard copy and identification is written on the backs of photos, please separate them with a sheet of paper. Often the writing on the back of one photo smears on the front of the next photo, ruining it for publication.
- Submit clear, sharp color or black-and-white photos. Avoid Polaroid shots. Get close to the subject.
- Photographs will not be returned.

Chapter Advertisements

Promote your chapter events in *SIGNAL*

If your chapter is holding a special event (i.e. a conference or symposium), you can publish a free advertisement up to three times in the Chapter News section of *SIGNAL* Magazine, on a space-available basis.

It is very important to plan ahead as the magazine is prepared two months prior to the publication date. Advertisements must be received no later than the 20th of the month two months prior to publication date. See Chapter News Schedule for specific dates for each issue.

Chapters have three options for submitting information for free advertisements for the Chapter News section:

Camera Ready

Chapters can submit a camera-ready advertisement; the measurements are 27 1/2 picas across by 30 picas down, or 4-9/16 inches across by 5 inches down.

On Disk

The second option is to submit an advertisement on a Zip or compact disk. Submit any text, graphics or camera-ready artwork to the Chapter News Editor, who will forward all to the Art Director for in-house design.

Via E-mail

Advertisements may also be submitted via E-mail to chapnews@afcea.org. Simply type text into the E-mail memo or cut and paste it onto the E-mail screen. The text will be forwarded to the Art Director for in-house design. Complete advertisements may be sent as E-mail attachments.

Send all advertisement copy to:

SIGNAL Magazine
Chapter News Editor
4400 Fair Lakes Court
Fairfax, VA 22033-3899
Telephone: (703) 631-6196
Facsimile: (703) 631-6188
chapnews@afcea.org

Chapter News Checklist

When covering a chapter event, it's easy to leave out some of the details. Below is a list of items that should be included in each Chapter News write-up. You might find it helpful to review this list before submitting your write-up to ensure that the Chapter News submission form includes all the necessary information.

- **A 150-word write-up about a chapter meeting or a special 250-word write-up about conferences or symposia.**
- **Up to three pictures for 150-word write-ups or up to five pictures for special 250-word write-ups.**
- **First name of everyone mentioned on the form in the write-up or in captions.**
- **Titles for those mentioned in the write-up or in captions.**
- **Branch of service for anyone listed in the write-up or in captions.**
- **Location (city and state) of every business or school mentioned.**
- **Date of the meeting.**
- **Numbers on the photographs correspond with the captions.**
- **People are identified left to right in the captions for each photograph.**
- **Point of contact, telephone and facsimile number, and e-mail address appear on the Chapter News submission form.**

Chapter News Submission Deadlines

Issue Date	Article Deadline	Meeting Dates
September	July 20	May 20
October	August 20	June 20
November	September 20	July 20
December	October 20	August 20
January	November 20	September 20
February	December 20	October 20
March	January 20	November 20
April	February 20	December 20
May	March 20	January 20
June	April 20	February 20
July	May 20	March 20
August	June 20	April 20

ISSUE DATE

The Issue Date refers to the issue in which Chapter News submissions will appear.

ARTICLE DEADLINE

The Article Deadline is the closing date for all write-ups, photographs and Chapter advertising to be submitted to SIGNAL Magazine. The deadline is the 20th of the month two months prior to publication. If the 20th falls on a weekend or holiday, the deadline becomes the next business day.

MEETING DATE

The Meeting Date is the earliest date for which a chapter event will receive coverage in a specific issue. Chapter events occurring before the Meeting Date deadline will not be accepted.