

# Eight Practical Steps to Establishing and Sustaining a Local USAEE Chapter

## BACKGROUND

The guidelines presented here are meant to assist those wishing to establish a new local USAEE chapter or to resuscitate a dormant one. Eight steps are outlined, the sum of which are meant to provide the foundation for a thriving, ongoing chapter that serves its members well while minimizing the load on its leaders. The steps are based on experiences of those who have led chapters and hence can point out what works and what doesn't. It's mostly common sense, offered to help get a new chapter off to a good start and maintain its momentum indefinitely.

## STEP 1 – SEEK CRITICAL MASS

In conducting USAEE chapter activities, there's nothing more exhilarating than having a large number of people share the experience, and nothing more deadly than having only a few show up. Attaining a critical mass of chapter membership to assure good attendance at chapter events is perhaps the single most important step in creating and sustaining a vibrant, lively chapter.

What constitutes critical mass? Experience teaches that a minimum of 20-30 members, preferably more, are needed to sustain ongoing activities. There are various reasons for this. The workload should be shared. Not all members will make it to every activity. Speakers like a large audience. And there will need to be rotation of chapter responsibilities. Therefore, organizers or sustainers of a chapter need to keep a keen eye on membership, and do what they can to start with a viable number and constantly seek to increase it over time.

## STEP 2 – IDENTIFY INITIAL LEADERS AND A GOVERNING COUNCIL

At minimum, any chapter will need a president and a secretary-treasurer. Better yet, include a vice president to help with organizing activities and to eventually ascend into the presidency. And even better, a separate secretary and treasurer to each take the duties of one of these offices. The important thing is to recognize the need for a small subset of members who will take responsibility for organizing chapter activities for some set period – usually one year. You want a core leadership group, but you want them to feel their commitment is not unlimited.

---

The officers should not try to run the chapter by themselves. There should be a governing council that includes the officers and at least 2-3 other members. This widens the numbers participating in chapter leadership and provides openings for non-officer members, particularly younger members, to grow into leadership and later assume officer duties.

### STEP 3 – OBTAIN A CHAPTER CHARTER

For a brand new chapter to be recognized by USAEE, it needs to be granted a charter by the national organization. Usually this is straightforward, involving little effort on the part of the organizers. There are minimum requirements, in particular that a new chapter has to have at least 20 members, but the paperwork will not take long to put in place. USAEE will help with this step, and information is available directly at its website, <http://www.usaee.org/startchapter.html>.

For existing chapters that are trying to resurrect themselves, no new charter is needed. USAEE has not cancelled local chapter charters even when those chapters became moribund, in hopes that one day they would be re-established. The existing charter is all you need.

### STEP 4 – FIND A CONVENIENT MEETING VENUE AND TIME

Assuming a chapter will hold regular meetings of one kind or another, it is necessary to find a venue that is reasonably attractive and convenient to members. If possible, it's best to maintain consistency – regularly scheduled meetings at the same place and time. For example, a chapter might meet once every two months on the 3<sup>rd</sup> Thursday of the month at 12 noon at a given location. That way, members have a good idea when and where the next meeting will be held, and can plan their schedules accordingly.

If chapter activities involve speakers, the venue chosen should accommodate a speaker format along with ancillary activity such as food service. This means having presentation facilities such as a screen of some sort and access to power for purposes of plugging in microphones, computers and projection devices. About the only way to assure that these features will be adequate and available is to first inspect a facility directly and then reserve it well in advance.

### STEP 5 – PLAN A PROGRAM FORMAT AND AN INITIAL SET OF PROGRAMS

Programs should be thought through in advance, though not all arrangements need to be made at once. Regularly scheduled speakers probably will work out best, but other formats may prove interesting as well, e.g., a panel to debate a controversial subject. The chapter president probably should take responsibility for establishing the overall program during the coming year, but should seek help from others – particularly his or her governing council – in generating ideas, lining up speakers, dealing with facilities and the like. By first putting a plan in place for

upcoming programs and speakers, it'll be mainly a matter of implementing the plan to achieve the desired outcomes.

### STEP 6 – PUBLICIZE YOUR ACTIVITIES

The more you publicize, the more chapter members and guests you'll get to come to your activities, and the better the experience for everyone concerned. Some possible means to do so:

- Send multiple E-mail announcements to chapter members about an upcoming activity or activities.
- E-mail the announcements to other USAEE members in the area who are not members of the local chapter.
- Ask USAEE to post the announcement on the chapter's page at the USAEE website.
- Send out a regular chapter newsletter that includes announcements of upcoming activities.
- Set up a chapter website and post upcoming activities there.
- Encourage word of mouth.
- Encourage the speaker to advertise his or her appearance.
- Trade e-mail lists with other organizations in your area whose members might have an interest in energy matters (e.g., financial analysts).

Responsibility for publicity should probably be centered in one of the leaders, perhaps the secretary or treasurer, but that person should make use of others to help in the process.

### STEP 7 – ESTABLISH FINANCIAL PARAMETERS AND PRICE ACCORDINGLY

Some money is needed to run a chapter. The cost of lunches will need to be covered. You may need to cover some speaker expenses. The chapter may wish to give out student subsidies. There should be a financial reserve. And so on.

USAEE local chapters usually don't need much money to run their affairs, though this varies by chapter. Membership dues and luncheon charges are a good way to raise whatever it takes. Experience will indicate what that is, but generally a nominal membership charge of say \$20-25 per year plus a luncheon charge that slightly more than covers costs should be sufficient.

---

One way to provide a return to chapter dues is to annually publish, for chapter members exclusively, a directory of members. Such publication can be distributed electronically to keep expenses to a minimum. All that is needed is someone to gather contact information, which should be required of each chapter member, organize it by name, and then distribute it.

### STEP 8 – ESTABLISH A LEADERSHIP SUCCESSION PROCESS

Nothing can lead to chapter demise more quickly than burnout among a small number of people who have been leading it. This can be avoided by setting a succession procedure in place from the beginning. The more that chapter members see they will only be required to take responsibility for a limited time, the more likely they are to undertake such responsibility. A one-year assignment probably will work out best, though occasionally someone may state a willingness to stay on longer in a leadership position.

What sort of succession procedure makes sense? Some kind of nominating committee, appointed by the chapter president, usually works out pretty well. Somewhere late in the chapter year the president appoints such a committee, it in turn suggests a slate of nominees for the next year's governing council, and the membership votes. For an ongoing chapter, having the previous president head up the nominating committee may work out. For a new one, the first-year president will need to ask someone else to do so, at least for the first year. But each chapter may have a different way of implementing its succession. The important thing is to be sure such a succession mechanism is visibly in place from the start!

David Williams, Executive Director of USAEE, is an excellent resource to tap for assistance and for further thoughts concerning local USAEE chapters. He can be reached at [usaee@usaee.org](mailto:usaee@usaee.org).