



Society for Technical Communication

Community Handbook

Revised Edition, 2019

Copyright 2019 Society for Technical Communication

Chapter 1: Contents

Chapter 1: Contents	i
Chapter 2: The Society for Technical Communication and its Communities.....	1
Community Definitions	1
Communities.....	1
Chapters.....	1
Special Interest Groups.....	1
Community Success Plan.....	1
Bylaws.....	3
Writing Bylaws that Avoid Conflict with Society Bylaws	3
Bylaws for Communities Outside the United States.....	4
How to Develop Bylaws	4
Review and Approval of Bylaws.....	4
Mission Statement.....	4
Goals.....	4
Strategic Plan	5
Budgets.....	6
Where to Look for Help.....	6
STC Office Staff	6
Community Affairs Committee	6
CAC Outreach Team.....	6
Leadership Resources Web Page	7
Board of Directors.....	7
Available Email Lists.....	7
Leadership Transition and/or Leadership Retreat	7
SIG Business Meetings	8
Conducting a Successful SIG Business Meeting	8
Community Elections	8
Summit Communities Reception	9
Chapter 3: Community Leadership Teams and Committees.....	10
Community Leadership Team.....	10
Responsibilities of Community Leaders	11
Chapter President/SIG Manager or Co-managers	11
Vice President/SIG Assistant Manager	12
Secretary.....	12
Treasurer	12
Immediate Past President or Immediate Past Manager.....	13
Possible Committees and Responsibilities	13
Competitions	13
Employment	13

Hospitality.....	14
Membership	14
Newsletter	14
Nominations	16
Programs.....	16
Publicity/Public Relations	16
Social Media.....	16
Surveys.....	16
Website.....	16
Workshops or Conferences	17
Leadership Day at the Summit	17
Chapter 4: Programs.....	18
Identifying Program Topics	18
Choosing Presenters	19
Finding Meeting Venues	19
Meeting Formats	20
Webinars.....	20
Workshops and Conferences.....	21
Setting Prices for Programs	22
Chapter 5: Communication	23
Communication Plan.....	24
Blogs and Newsletters	24
Why Have a Blog or Newsletter?	24
What do I Need for a Community Blog or Newsletter?.....	24
Advertising.....	25
Email Lists	25
Websites	25
Chapters and SIGs.....	26
Society Website	26
STC's Notebook.....	26
Member Blogs.....	26
Social Media.....	26
LinkedIn	27
Twitter	27
Facebook.....	27
Pinterest	28
Other Tools	28
SurveyMonkey	28
Eventbrite	28
PayPal	29
File Sharing and Groups	29
Chapter 6: Membership	30

Increasing Membership	30
Identifying Prospective New Members	30
Winning New Members	31
Welcoming New and Potential Members.....	32
Keeping Members	33
Get Members Involved	33
Communicate with Members	33
Recognize Members	33
Surveying Members	34
Membership Reports	34
Chapter 7: Volunteers	35
Benefits of Volunteering	35
Recruiting Volunteers	35
Where to Find Volunteers	36
Opportunities for Volunteer Recruitment	36
Leading Volunteers	36
Retaining Volunteers	37
Recognizing Volunteers.....	37
Chapter 8: Employment	39
Society-Level Employment Services.....	39
Professional Certification	39
Community-Level Employment Services	39
Employment Networking at Meetings and Events	39
Résumé Review.....	40
Job Boards	40
Mentoring	40
Employment Information.....	41
Community Newsletters and Websites	41
Technical Communication Body of Knowledge	41
Chapter 9: Students	42
Student Involvement	42
Student Chapters	42
Other Student Organizations on Campus	42
Professional Communities	42
Engaging Students in Programs	43
Mentoring Programs.....	43
TCBOK-Specific Virtual Mentoring with SMEs	44
Honor Societies	44
Employment Services in Student Chapters.....	44
Chapter 10: Awards and Recognition	46

Community Honors.....	46
Active Member Recognition	46
Volunteer Recognition.....	46
Member of the Year Award	46
Other Awards.....	46
Society Honors	46
Associate Fellow	46
Fellow	47
Society Awards.....	47
DCSA/DSSA/DSAS	47
Community Achievement Award.....	48
Pacesetter Award	48
Community of the Year and Most-Improved Community	48
President's Award.....	48
Frank R. Smith Award	48
Jay R. Gould Award for Excellence in Teaching	49
Ken Rainey Award for Excellence in Research	49
Sigma Tau Chi and Alpha Sigma Honor Societies.....	49
Chapter 11: <i>Diversifying Your Community's Revenues</i>	50
Setting Operational and Financial Goals	50
Developing Alternative Sources of Revenue	50
Donations and Charitable Contributions	51
Incentives for Sponsorships and Advertising	51
Corporate Matching Gifts	51
Corporate Volunteer Grants	51
Keep It Local.....	51
Chapter 12: <i>Samples and Templates</i>	52
Meeting Announcement	52
Meeting Evaluation	53
Message to Presenter	54
Community Profile.....	55
Membership Survey.....	56
Chapter 13: <i>Glossary</i>.....	58
Terms and Usage	58
Chapter 14: <i>STC Contact Information</i>	59
Office Staff	59
Board of Directors	59
Community Affairs Committee	59
Chapter 15: <i>New Leader Checklist</i>	60
The Basics of Running a Community	60

Available Resources	60
Questions?	60
Chapter 16: Strategic Plan	65
Overview of Goals	65
Goal 1:	66
How 1:.....	66
How 2:.....	66
How 3:.....	66
Goal 2:	66
How 1:.....	66
How 2:.....	66
How 3:.....	67
Goal 3:	67
How 1:.....	67
How 2:.....	67
How 3:.....	67
Chapter 17: Community Success Plan	69
Chapter 18: Volunteer Code of Conduct.....	70
General Conduct.....	70
Conduct Related to Assignments	71
Chapter 19: Succession Planning	72
What is Succession Planning?.....	72
Habits of Strong Leaders	72
Succession Planning Tips.....	72
Discussion Questions	72
Chapter 20: Membership Recruitment.....	74
New Member Recruitment Guide.....	74
Review and update your community's information.	74
Identify potential members.	74
Contact potential members.	74
Build a contact list of potential members.....	75
Focus on the benefits of STC membership and the value of your community.....	75
Chapter 21: Membership Committee Resource Guide	76
Purpose of This Guide	76
Your Community's Membership Goals	76
Your Community's Membership Tasks.....	76
Chapter 22: Document Retention Policy Sample Template.....	83
General Guidelines	83
Purpose.....	83

Governing Laws	83
Definitions	83
Administration of the Policy	83
Duties of the	84
Schedule for Retention and Destruction of Records	84
In the Event of Litigation, Audit, or Investigation	84
Retention Periods Generally	84
Policy Review and Approval	84
Document Retention Schedule	85
Accounting Records	85
Chapter 23: Whistleblower Policy Sample Template	86
Society for Technical Communication, _____ Chapter/Community	86
WHISTLEBLOWER POLICY AND PROHIBITION AGAINST RETALIATION	86
Definitions	86
Rights and Responsibilities	86
Reporting	86
Directors and Officers	87
Whistleblower Protection	87
Contacts	88
Effective Date and Publication	88
Chapter 24: Conflict of Interest Sample Template	89
Purpose and General Rule	89
Definitions	89
Procedures	90
Confidentiality.	90
Review of Statement.	90
Chapter 25: Sample Contract for Conference Sponsorship	92
Chapter 26: Revision History	94

Chapter 2: The Society for Technical Communication and its Communities

Community Definitions

According to the *Society Articles of Incorporation and Bylaws*, Article IX, Section 1:

“A Society community is a group of members, organized geographically, virtually, or in some other fashion, that is recognized by the Board of Directors and which engages in activities and initiatives consistent with the charitable, scientific, and educational mission of the Society of advancing the arts and sciences of technical communication. Society communities shall be included in the group tax exemption of the Society; shall be able to use the Society name, logo, trademarks, and other Society intellectual property, as set forth in the policies and procedures of the Society; shall be eligible for funding by the Board of Directors; and may receive guidance, mentoring, training, and other assistance from the Leadership Community Resource [Community Affairs Committee].”

The Society charges dues to belong to communities, which may focus on a geographic area (chapters) or on a topical interest (SIGs). Members hold meetings at which business is conducted and educational programs are presented. These may take place face-to-face or online. Communities may also publish websites, host email lists, and hold special events. Networking and volunteering within a community builds friendships, skills, and knowledge. Communities are a significant way that the Society provides value to its members.

The *Articles of Incorporation and Bylaws*, Article IX, Section 2 state that the types of communities are **chapters** and **special interest groups (SIGs)**.

Communities

The [Communities](#) page lists the communities (professional chapters, special interest groups, and student chapters) currently chartered by the Society.

Chapters

There are two types of chapters: professional chapters and student chapters. Professional chapters are located around the globe for those who enjoy the benefits of local programming and networking with a diverse focus. Student chapters are located at colleges and universities, primarily in North America.

Special Interest Groups

Special Interest Groups (SIGs) are composed of Society members with common experiences and interests who share their knowledge with each other and with other Society members.

Community Success Plan

This section provides a list of activities that communities should complete each year. You can use this Top Ten List to help you plan your program year.

1. Elect or create leadership team.

The leadership team should have at least two officers: a president and a treasurer. Elect a leadership team annually by a vote of the membership at your business meeting or online. Ensure that the president or manager holds that one office only.

Note: An unopposed election is allowed.

2. Adopt and submit a budget.

Ensure that your community adopts a budget each year and keeps true and accurate accounts. Submit the budget annually to the Society's budget review committee.

3. **Conduct an annual business meeting.**

Conduct at least one business meeting each year. Use this meeting for reports from the leadership team and committees. You can also announce the election results at this meeting. Hold elections during this meeting if you have not previously held them.

4. **Attend Leadership Day at the Society for Technical Communication Summit (if possible).**

Send your incoming president, manager, or other leader to the Summit to attend Leadership Day (usually the Sunday at the beginning of the Summit).

5. **Maintain at least one communication tool.**

Maintain a communication device for your members to discuss technical communication. This could be a website, newsletter, blog, listserv, LinkedIn page, Facebook page, or something similar. Post an article or link to resources at least four times a year.

6. **Communicate regularly.**

Communicate with your members several times throughout the year. Write a newsletter article; send an e-mail; tweet.

Contact all of your members at least four times per year with invitations to local community activities and Society events.

Provide announcements about your community leaders.

Solicit feedback if possible.

Provide your members with a list of your community's activities.

7. **Welcome new members.**

Send welcome letters or emails; publish new members' names in the newsletter or blog; invite new members to your meetings and other events.

Review your membership roster at least once per month to identify new members. Provide them with a list of your community's activities, links to resources, a list of your officers, an invitation to volunteer for open roles, and an invitation to join your email list or social media group.

8. **Define volunteer roles.**

Maintain a list of volunteer roles and describe them, including time commitments.

If possible, provide team opportunities (in which more than one person organizes events, for example), especially for new members – they can use mentors. Specify the time required if you know it, location (whether virtual, in-person, or both), qualifications, and length of commitment. List benefits (what's in it for me?) such as portfolio additions, added skills (event organization or website development), and being a part of something important – promoting the profession. Make this list prominent on your website, link to it on your social media page, and link to it through your welcome messages.

9. **Provide educational events.**

Hold program meetings or webinars; recruit a speaker at a networking event.

Provide educational opportunities for your members at least twice a year. Education is the primary function of a non-profit organization like the Society.

At a minimum, hold an online chat to discuss topics of interest in your geographical or specialized area. For geographic chapters, consider hosting one or more of the Society's Live Web Seminars at a location where a group can attend. Consider organizing a webinar for your members with a presentation by a topic expert either in your community or in the Society. Per the Community Baseline, be sure to have at least one event per quarter for your members.

10. **Invite non-members to join.**

Have members invite non-members; encourage non-members at meetings to join.

Consider having a member-bring-a-guest event that offers guests an opportunity to attend a meeting at little or no cost.

Publicize your events in newspapers, social media channels, or anywhere potential non-members might look.

Bylaws

Chapters can develop a set of bylaws or follow the *Articles of Incorporation and Bylaws*. Community bylaws supersede, but may not violate, the *Articles of Incorporation and Bylaws*. SIGs operate under the *Articles of Incorporation and Bylaws*. International chapters should have an Affiliation Agreement. See the Samples and Templates section of the [Leadership Resources](#) page for templates for bylaws and affiliation agreements.

If your community has unique needs and can support the effort of writing and maintaining bylaws, follow the suggestions in this section to develop them and obtain approval from the STC Board initially, and later from the chapter. An advantage of having bylaws is specifying the duties of the officers and committee managers to meet the needs of the community. This promotes continuity in operations.

If you have bylaws, form a bylaws committee each year to review the bylaws and ensure compliance. The immediate past president or manager is a good candidate to lead this committee.

Make sure that all community volunteers are familiar with the bylaws. Optimally, a member of the bylaws committee should serve on the leadership team and be present at membership meetings to ensure compliance. Make sure that the secretary keeps the bylaws with the records and can distribute the bylaws to members.

Review the bylaws on a regular basis (at least once every two years) to ensure that they correspond to your current situation and needs. Propose any needed amendments, and hold a vote on the changes as required.

When bylaws or revisions are ready for approval, send the bylaws to the STC office for approval.

Writing Bylaws that Avoid Conflict with Society Bylaws

Here are some tips to help the bylaws committee avoid conflict with the [Articles of Incorporation and Bylaws](#):

- Do not refer to the parent organization as “a national organization.” The Society operates throughout the world. Refer to it as “the Society” when making a distinction between Society-level and chapter or SIG activities. The headquarters of the Society are located in Fairfax, Virginia, USA, and should be referred to as the “STC office.”
- Consult the current version of the *Articles of Incorporation and Bylaws* to ensure that you do not make provisions for depositing community funds in inappropriate financial institutions.
- Do not give your community authority that it does not legitimately possess. For example, a Society community may not dissolve itself and may not determine its own geographic boundaries or topical focus without approval from the Society Board of Directors.
- Do not identify community services as being “for members only.” Because the Society is a nonprofit educational and charitable organization, it must make its services available to members and non-members alike. (The Society can charge non-members administrative fees related to those services. However, this type of information should not be included in community bylaws.)
- Consider including some sort of caveat that your bylaws may be superseded by the *Articles of Incorporation and Bylaws*. A sample statement follows:
“Should situations not addressed in these bylaws arise, the Articles of Incorporation and Bylaws of the Society for Technical Communication are in force. Should the Society bylaws be changed such that they conflict with these community bylaws, the Society bylaws take precedence. Community bylaws must then be amended as soon as possible to bring them into agreement with Society bylaws.”

Bylaws for Communities Outside the United States

Communities outside the United States should strive to constitute themselves as legal entities in the country in which they are situated. The exact nature of this legal status varies from country to country.

In some countries, the nature of this legal status requires that certain provisions be included in the community's bylaws. These local requirements must be incorporated in the bylaws.

Wherever possible, communities outside the United States should follow the guidelines in the International Affiliation Agreement for non-US communities. If there appears to be a conflict between local legal requirements and the terms of the affiliation agreement, community leaders should consult the Board.

How to Develop Bylaws

The bylaws committee should begin its work by reviewing the community's charter and the *Articles of Incorporation and Bylaws*.

Use the bylaws templates provided on the [Leadership Resources](#) page.

Review and Approval of Bylaws

The community bylaws committee should follow this review procedure:

1. Have the leadership team review the draft bylaws, and incorporate the team's comments into a second draft.
2. Have the second draft reviewed by the Executive Director of the Society. They verify that your community's bylaws do not conflict with those of the Society.
3. Incorporate comments from the Executive Director of the Society and develop a final draft.
4. Submit the next draft for review by the Executive Director of the Society if required. Otherwise, proceed with a review in your own community as follows:
 - a. Provide your bylaws to your community members at least 30 days before they are to be voted on.
 - b. Conduct a vote on the bylaws, following the amendment process specified in your bylaws.

Mission Statement

If possible, write and periodically update a community mission statement. A mission statement tells briefly who the group members are, what the group does, for whom, and why.

If you don't have a mission statement, consider developing one during a leadership team meeting. If you have a mission statement, review it at the first leadership team meeting each year. When you adopt a new mission statement, notify the STC office, Director of Community Relations, and your CAC Outreach representative.

Goals

Develop a concise statement of your community's goals for the year with measurable criteria for completion and due dates.

Base your goals on the needs of your community's members. Surveying members periodically is recommended. Provide for conducting monthly activities. Select specific activities from those suggested or devise your own.

Apply the following guidelines when setting goals:

- **Meet Society expectations.** Offer activities of practical and professional value to members, reflecting the highest professional standards in both design and execution.
- **Focus on the community's stated area of interest and mission.** Collaborate with other groups and related professional organizations on activities in overlapping areas.

- **Complete activities within a reasonable timeframe.** State goals so that they can be achieved within the program year. The next phase of a goal can be a goal for the next year.
- **Stay within the community's budget.** Estimate needs carefully, discuss them with the STC office, and act within the budget. Weigh the value in benefit to members against the cost for any activity. You can request supplemental funding from the Society if an unforeseen project will provide value to community members.
- **Know your participants and limitations.** Make sure that community goals can be accomplished by the number of people available to do the work. If no one volunteers for an activity, do not provide that service.

Strategic Plan

If possible, develop a strategic plan that covers a specific number of years. A three-year period is typical. A community with a three-year strategic plan should update the plan once per year as follows:

- Note the goals accomplished for the past year.
- Update the goals for the next two years.
- Develop the plan for the third year.

To make creating a strategic plan easier, establish a strategic plan committee. Divide the areas (such as communication, member services, and public relations) and ask a few members to draft goals in each area. Then, have the whole leadership team or planning committee prioritize the goals and determine the tactics for completion.

Many communities hold a dedicated strategic planning meeting once per year for members of the leadership team. Holding a special meeting for this purpose allows members of the leadership team to consider strategic goals without the pressure of needing to make decisions on regular community business.

Some communities have found it beneficial to have the strategic planning meeting facilitated by a senior member who is not a regular member of the leadership team. This could be a former president or SIG manager, a senior member from another community, or a volunteer mentor recommended by the CAC. If you would like a volunteer mentor to facilitate your strategic planning meeting, email the CAC at cac@stc.org.

Ask the following questions when developing your strategic plan:

- What has been the average annual cost of operating your community over the last three years?
- Who are the members you hope to attract to your community? What are their concerns, professional needs, and interests? What other professional organizations compete with your group for members' time and interest?
- How will your community provide value to the larger community and further the overall goals of the Society?
- What is your community's mission statement?
- What are the goals? List at least three, but no more than seven, goals for your community for the next one to two years, and describe how you will achieve each of these goals.

The benefits of strategic planning are many, helping leaders and members to

- Stay focused on the mission and the audience.
- Find out if the decisions your leaders have made are still valid.
- Ensure that members are getting what they need from the community.
- Make decisions about the future.

Budgets

A community's budget supports the community's goals for the program year. The budget should not define what the goals can or cannot be.

To develop a budget, use the following community finance tools, located on the Leadership Resources page:

- Treasurers' Manual
- Filing the 990-N
- Treasurer Quick Guide
- Budget Form
- Financial Report and Bank Reconciliation Report (editable Excel worksheet)
- SIG and SIG Member Reimbursement Form
- LR Web Seminar Community Funding and Budget Sample Plan

Where to Look for Help

Society leaders and staff can help you, as can the STC website. Search the documents and links on the [Leadership Resources](#) page of the STC website and reach out to the following groups.

STC Office Staff

The Society has staff whose responsibilities include the following areas:

- Publications & Content Strategy
- Community Relations
- Media
- Web & Systems
- Meetings
- Membership
- Business Development
- Accounting
- Education

Go to the [staff directory](#) (**stc.org > About STC > Staff Directory**) to see a list of the office staff and their contact information.

Community Affairs Committee

The Community Affairs Committee (CAC) establishes two-way communication and cooperation between community leaders and the Board and STC office. The CAC has a defined set of initiatives around which it is organized.

Go to the Community Affairs Committee section of the [Leadership Resources](#) page (**stc.org > Member Center > Leadership Resources > Community Affairs Committee**) to read more about the CAC's initiatives and members.

CAC Outreach Team

The CAC Outreach Team is responsible for proactively working with chapters and SIGs to identify pain points and help solve these problems.

See the [Outreach Team Community Assignments](#) in the Community Affairs Committee section of the Leadership Resources page (**stc.org > Member Center > Leadership Resources > Community Affairs Committee**).

Leadership Resources Web Page

The CAC maintains a web page with useful information for community leaders including templates for a strategic plan, the *Articles of Incorporation and Bylaws*, sections for chapter leaders and SIG leaders, and archived leadership webinars.

Go to the [Leadership Resources](#) page (**stc.org > Member Center > Leadership Resources**) to access these resources. Login is required.

Board of Directors

The Society is governed by an elected Board of Directors (the Board). The Board includes the president, vice president, immediate past president, treasurer, secretary, and four directors at large. You can contact any member of the Board at any time for help by emailing board@stc.org.

Go to the [Board of Directors](#) page (**stc.org > About > Leadership > Board of Directors**) to see the current members of the Board.

Available Email Lists

You can use email lists and discussion lists to get help with questions and problems and to share successes with your peers.

Most communities maintain an email list to share information with technical communicators who subscribe. For professional chapters, the list might be open to anyone who subscribes, and you can usually find information about subscribing on the chapter's website. The SIGs also maintain email lists, and members of the SIG can subscribe to the list, which might require approval to join. If you are not a member of the SIG, you can submit a request to subscribe to the email list. According to the SIG Policy, SIGs may only include paid members of their SIG in member mailing lists unless explicitly allowed to do otherwise by STC. SIGs may have one mailing list that includes non-STC members to be used only for purposes of advertising SIG events or promoting STC and SIG membership.

Some communities use LinkedIn, Facebook, or other social networks to communicate in place of an email list. Check your community's website or ask the community leaders for details.

Leadership Transition and/or Leadership Retreat

At the conclusion of your community's program year, hold an event known as a leadership transition meeting or leadership retreat. At this event, the outgoing leadership team members hand off pertinent materials and information that will be helpful to the incoming leadership team. You can also use this time to review your community's initiatives and plan for the upcoming program year. In addition to the leadership team, you can invite committee managers and other volunteers so that they are involved in the community's planning.

The leadership transition meeting or leadership retreat is also a good place to hold a leadership workshop, where you can help the incoming leadership team and volunteers develop their leadership skills.

SIG Business Meetings

SIG business meetings occur during the annual Summit and are scheduled so that they do not conflict with education sessions.

To schedule a SIG business meeting, SIG managers should complete the following steps:

1. Contact the STC office after receiving the Summit Preliminary Program, and complete the form to request a room for the business meeting.
 - Once the STC office receives and processes the form, they assign a time and location for the business meeting. The SIG manager then receives an email confirmation.
 - The business meeting is announced in the final program and on the Society website.
2. After the meeting date and time are set, publicize the meeting as widely as possible, such as through the SIG newsletter, email list, and website.
3. At least two weeks prior to Summit, consider sending an email bulletin to SIG members with meeting time/location, any SIG-specific social events, and a list of Summit sessions in your SIG's interest area.

Conducting a Successful SIG Business Meeting

- Prepare an agenda for the business meeting. Here are some suggested topics:
 - Introduce the leadership team, including the incoming manager if there is one.
 - Have committee managers deliver brief presentations about SIG activities.
 - Have a SIG member present about a topic that has generated interest in the SIG. (This approach has been well received and has increased attendance.)
 - Have the SIG member summarize the SIG's activities during the past year.
 - Have the SIG treasurer present a financial summary of the past year.
- The SIG business meeting can include an open discussion. If you hold an open discussion, ask someone other than the moderator to take notes.
- Use the business meeting to learn what members want; then establish goals for the coming year. Encourage the exchange of ideas; talk about plans for future activities, and ask for volunteers to help make these activities happen.
- Circulate a sign-in sheet.
- Post the meeting notes on the SIG website. In the weeks and months after the meeting, these meeting records will be helpful in following up on what the group decided to do.
- Take advantage of the business meeting to recruit SIG volunteers.
 - Before the business meeting, make a list of open positions and include a brief description of the responsibilities.
 - Circulate the list and discuss the positions during the meeting.
 - Encourage members to volunteer by dividing larger tasks into smaller tasks. For example, divide the task of producing a SIG newsletter into smaller tasks such as soliciting articles, writing articles on particular topics, and proofreading.

During the two weeks (suggested) following the Summit, contact everyone who attended the meeting and those who volunteered. The Summit typically evokes a spirit of enthusiasm and momentum, and the manager's contact with new volunteers and the leadership team members following the Summit can be an important contribution to the SIG's success during the year.

Community Elections

Communities should hold annual elections per the community's bylaws (if applicable), even if the election is uncontested. When the election is complete, a community representative, such as the secretary, must

notify the STC office of the officers for the year, even if there is no change. For these elections, a nominating committee is responsible for recruiting qualified candidates for elected office and running the election.

The nominating committee consists of members who are well acquainted with the other members in the community. The immediate past president or manager is an excellent candidate to chair the nominating committee. To avoid conflicts of interest, candidates for office should not serve on the nominating committee or receive and report the ballot count.

The nominating committee performs the following tasks:

- Conducts a planning session to assign responsibilities, establish deadlines, and review the names of potential candidates.
- Invites members—through the newsletter, website, and announcements on the email list and during meetings—to run for office or to suggest possible candidates.
- Evaluates the qualifications of potential candidates.
- Approaches qualified potential candidates to run for office.
- Advises the leadership team of potential candidates who are willing to run.
- Announces the slate in the newsletter, on the web site, via the email list, and at a meeting prior to the election.
- Prepares the ballot, holds the election before the final meeting of the program year, and counts the votes.
- Reports election results.
- Publishes the election results in the newsletter before the leadership transition meeting or retreat.
- Gives the treasurer the names of the elected officers for inclusion in the community's financial report to the Society.
- Reminds the president or manager to notify the STC office of the new officers.

Summit Communities Reception

During the Communities Reception at the Summit, tables are available for SIGs to meet new and current members, and hand out community information. Brochures, newsletters, and volunteer sign-up sheets can be displayed and buttons or other souvenirs can be handed out.

- If your SIG wants to participate in the Communities Reception, request a table through the STC office. (Use the same form used to request a business meeting room.)
- The SIG Outreach team members also help organize the Community Reception. Contact the Outreach team for details.

Chapter 3: Community Leadership Teams and Committees

Community Leadership Team

A community's leadership team is composed of the officers, councilors, or executives who are tasked with fulfilling the mission of the organization by demonstrating its value and developing plans to reach its goals. Chapters might call their leadership team the administrative council or admin council. The usual complement is four or five people in the positions of president/manager, vice president/assistant manager, secretary, treasurer, and past president, with director-at-large positions appointed or elected as required. In some communities, the positions of secretary and treasurer are combined.

Depending on the size of the community and availability of volunteers, officers may work on or lead any of the committees. Committees exist to fulfill the goals of a community and not all communities have the same goals and volunteer base. When a committee of multiple people is not feasible for a community, an individual may take on a role alone. The community president sits ex-officio on all committees.

Committees may include, but are not limited to, the following roles:

- Archivist/Historian
- Competitions*
- Information Interviews/Mentors
- Innovation
- Employment/Job Board/Job Bank*
- Membership/Member Care*
- Newsletter*
- Outreach (might be divided into Employers/Students/Members)
- Workshops/Conferences/Professional Development*
- Programs/Webinars*
- Public Relations/Publicity*
- Scholarship
- Hospitality/Social Committee/Welcoming Committee*
- Social Media*
- Surveys*
- Ways and Means/Sponsorship
- Website*

*Most commonly a standing committee

Standing committees are those that are filled every year. They are established because their functions are critical to the community's success.

In a student chapter, faculty advisors provide support and serve as the primary contact for the Society.

The leadership team should meet once per year at a minimum, face-to-face or by conference call. While the chapter president or SIG manager calls leadership team meetings, any two members of the leadership team may also request a meeting for a specified purpose or to vote on a proposed resolution. A majority of the officers constitutes a quorum. A simple majority rules on questions brought before the leadership team.

At the time the community was formed, the initial leadership team decided if the community should have their own bylaws, and if so, likely established a bylaws committee. These bylaws should be legal in the

jurisdiction in which the community operates and not contradict any of the Society bylaws. The leadership team follows the community and Society bylaws and Society policies.

The leadership team ensures that the nominating committee develops a slate of officers and that elections are held.

At the annual planning meeting, led by the president, the leadership team states the community's goals and identifies activities to achieve them. The results of this meeting can form the basis of the strategic plan. In concert with the nominating committee or a volunteer team lead, the president appoints responsible individuals as committee team leads. Both officers and committee leaders should attend leadership team meetings to ensure that the community operates in the best interest of its members.

Responsibilities of Community Leaders

All elected officers, committee leaders, and committee members must follow the community's bylaws, the *Articles of Incorporation and Bylaws*, and Society policies and procedures in fulfilling their responsibilities. Not all positions and tasks are required.

Community leaders should be enthusiastic, energetic, responsive, and good at solving problems and resolving disputes, as well as gracious and good listeners. It helps to be open to new ideas and accepting of input and feedback.

Make sure that job descriptions are created and kept updated for elected and appointed positions. The following sections provide ideas for what to include in these job descriptions.

Chapter President/SIG Manager or Co-managers

The chapter president or SIG manager heads the leadership team and is responsible for all operations of the community.

Student chapters have a faculty advisor and a chapter president who are responsible for operations.

The chapter president or SIG manager performs the following tasks:

- Attend Leadership Day at the STC Summit.
- Join the presidents' email list (Stc_presidents-discuss), SIG leaders' email list (Stc_sigleaders-discuss), or student leaders' list (Stc_studentleaders-discuss).
- Conduct regular meetings of the leadership team.
- Assign duties not specified otherwise by the community bylaws to other officers.
- Appoint leaders for all committees and special committees in concert with the nominating committee or volunteer coordinator.
- Explore meeting topics with the program committee lead and other officers.
- (chapters) Together with the treasurer, sign all checks and maintain financial controls.
- (SIGs) Together with the treasurer, approve expenses and payment requests.
- Write a regular column for the newsletter, blog entry, or president's message.
- Lead goal setting.
- Become familiar with the criteria for the Community Achievement Award and apply them where possible to community goals and activities.
- With the treasurer and secretary, make sure that required forms are filed on time with regulatory bodies and the local Registrar of Companies.
- Prepare and distribute the community's strategic plan for the year.
- Obtain regular status reports from committee leaders.
- Take advantage of resources including this handbook and email lists (those mentioned earlier in this list as well as the treasurers' email list).

- Stay in touch with the Community Affairs Committee (CAC) Community Outreach team member for the community.
- Advise the Society of all changes in chapter or SIG leadership, address, or status. (This task may be delegated to the secretary.)
- If a position on the leadership team becomes vacant during the program year, seek out a new volunteer for the position and present the nominee to the leadership team for approval.

Vice President/SIG Assistant Manager

The vice president or SIG assistant manager performs the following tasks:

- Attend Leadership Day at the Summit.
- Assume the duties of chapter president or SIG manager if that person is not available.
- Get to know fellow chapter members, networking with them and becoming aware of resources who can support the community and become a positive force for its members.
- Prepare to succeed the current president or manager by:
 - Maintaining special awareness of all activities.
 - Conferring frequently with the president or manager.
 - As assigned, managing special projects or key committee functions.
 - Assisting with goal setting.
 - Monitoring finances.
 - Supporting and promoting the goals of the chapter or SIG and its members.

Secretary

The secretary ensures that the business of the chapter or SIG is recorded accurately and completely. This ensures that the community meets legal requirements and provides a history for the leadership team to reference that presents how and when community policies, procedures, and activities were discussed and decided upon.

The secretary performs the following tasks:

- Take minutes at leadership team and other community meetings (or arranging for a substitute).
- Prepare and distribute copies of meeting minutes to officers, posting them to the chapter or SIG website or wiki.
- Send correspondence on behalf of the community.
- Maintain community records and documents (soft and hard copy).

Treasurer

The treasurer performs the following tasks:

- Manage community funds and financial operations.
- Join the treasurer's email list.
- Safeguard the community's assets.
- File the required 990-N postcard with the IRS annually (not required for SIGs).
- Make sure that the community's budget supports the community's goals (the budget does not define what the goals can or cannot be).
- Complete and submit financial reports to the leadership team and to the STC office by established deadlines.
- Complete the transition of duties from the previous treasurer.
- Complete the required year-end financial report with assistance from the immediate past treasurer

- Prepare the community budget.
- Keep accurate financial records.
- (*chapters*) Establish and maintain banking arrangements, including arrangements for two signatures on each check (treasurer and president or vice president).
- (*chapters*) Deposit funds and pay invoices promptly.
- (*chapters*) When authorized by the leadership team, transfer funds from the operating account to the savings account when appropriate, and vice versa.
- Prepare a monthly report of income and expenditures for the leadership team.
- Work with the committee leaders to prepare reports of income and expenditures for projects.
- Compare the budget every sixty days for current projects and at the close of each project.
- Develop a detailed year-end report of all financial transactions (income and expenditures by activity), as of December 31 each year.
- Complete and sign a year-end financial report for the Society treasurer and Chief Financial Officer (CFO) using the Excel format provided by the STC office, and send it to the appropriate party no later than the due date.
- Seek advice and guidance from the Society treasurer or CFO as needed.

The *Treasurers' Manual* explains more about the typical responsibilities and provides useful information, including best practices, links to the necessary forms, and other Society resources.

Immediate Past President or Immediate Past Manager

The immediate past president or manager is not elected and does not vote.

Typically, the immediate past president or immediate past manager serves on the leadership team as an advisor. The current president or manager might assign tasks to the immediate past president or manager. Often the immediate past president or manager leads the nominating or bylaws committee.

Possible Committees and Responsibilities

All committee team leads should be encouraged to maintain careful records of their policies, procedures, decisions, activities, and job descriptions for reference by incoming volunteers and leaders.

The following sections describe the most common committees, in alphabetical order by their most familiar names.

Competitions

The Society sponsors competitions for the recognition of individual work. There are local and regional or cooperative competitions that submit entries to the Society's competitions. The competitions are described on the STC website.

Employment

Prospective employers and people looking for jobs can register with the employment committee, which distributes job opportunities to those who have requested to be on the mailing list. The employment committee also posts job opportunities on an electronic job board on the chapter or SIG website. When this committee builds relationships with employers, it performs an outreach function that enhances the image of the Society and technical communication professionals.

In student chapters, the employment committee might work with the school's placement service to help identify prospective employers of technical communication professionals.

An employment committee provides a valuable service to members, the Society, and the larger community. The work can be demanding, so it is important to make it as easy as possible and to recognize its value.

The employment committee lead serves as a contact with employers for notices about positions and with job seekers for inquiries about employment.

Over time, the employment committee is in a strong position to monitor the job market and to be aware of career counseling services and job boards in the geographic or interest area. The committee can be instrumental in building good relations with potential employers, who might sponsor Society or chapter events, or even encourage employees to join the Society.

The employment committee should work with the other leaders of STC community to ensure that employment services are always included in publicity and in information provided to prospective members. Try to keep in touch with the employment committee leads of other communities and share successes and challenges.

Hospitality

Meetings and programs provide educational opportunities to members as well as networking opportunities. The hospitality committee secures the locations and refreshments for the meetings and programs.

Membership

The membership committee is responsible for highlighting the benefits of membership, recruiting and retaining members, and responding to inquiries or concerns. See the “Membership” section on page 30 for information about attracting and keeping members.

The membership committee performs the following tasks:

- Download a list of members or new members from the Society website. (The chapter president or SIG manager may download this list also.)
- Make sure that information about the community is readily available to new members.
- Welcome new members and introduce the community, its objectives, services, and benefits. (This information could be part of a new member welcome package.)
- Make sure that new members receive an orientation to get to know fellow members and the workings of the community. (You might want to set up a ‘buddy’ system to mentor new members.)
- Remind members to make any needed changes in their personal information by logging in to the Society website.
- Distribute Society brochures.
- Encourage prospective members to join, especially from October through December, when membership for the balance of the year is free.
- Remind members to renew no later than January 1 to remain in good standing, or February 28 to be eligible to vote in the Society election.
- Make sure that announcements from related organizations are distributed to members by email.
- Encourage members to submit profiles and news of honors they have received to the newsletter, webmaster, or another communications volunteer.
- Together with employment committee, lead development and administration of the annual membership and/or regional salary survey.

Newsletter

A community can reach its members by publishing a regular newsletter and ensuring that all members receive it or are notified that it has been published. The newsletter can tell members what is going to happen and what has been accomplished. When meetings are held, the newsletter can promote the meetings. By publishing feature articles, the chapter or SIG participates in developing knowledge in the field of technical communication.

The newsletter can be kept online and can also be a blog.

See the “Communication Plan” section on page 24 for information about the role of the newsletter editor and team and publishing a newsletter.

Nominations

Communities should hold annual elections, even if the election is uncontested. The nominating committee performs the following tasks:

- Conduct a planning session to assign responsibilities, establish deadlines, and review the names of potential candidates.
- Invite members (through the newsletter, website, announcements on the email list, and during meetings) to run for office or to suggest possible candidates.
- Evaluate the qualifications of potential candidates.
- Approach qualified potential candidates to determine their willingness to stand for election.
- Advise the leadership team of potential candidates who are willing to run and announces the slate in the newsletter, on the website, through the email list, and at a meeting if one is held at election time.
- Prepare the ballot, holds the election before the final meeting of the year, and counts the votes if they are not counted by an election service.
- Report the results to the leadership team and the candidates as soon as they are known.
- Give the results to the newsletter editor and webmaster for publication.
- Give the secretary the names of the elected officers for inclusion in the community’s report to the Society.
- Remind the president to notify the STC office of the new officers.

Programs

Meetings and programs provide educational and networking opportunities to members. The programs committee plans and executes in-person and virtual meetings, including lining up speakers and other activities. Refer to the “Programs” section on page 18 for information about the work of the program committee.

Publicity/Public Relations

The publicity committee promotes the community and its activities to the public, members of the community, and the Society. Refer to the “Publicity” section on page for information about different publicity methods.

Social Media

The social media committee promotes the community and its activities on the different social media platforms. If your community forms a committee to handle social media, you can delegate a different platform to each member. That way, you can promote your community to its fullest advantage.

Communities should create community-specific accounts on the social media platforms and encourage members to follow these accounts to keep informed about community events and topics of interest in the area or field of interest of the community.

Surveys

A survey committee can create surveys and compile their results on behalf of the community. To avoid survey burnout, run no more than two surveys per year.

Website

The website committee can report news and publish information. The website promotes the community to prospective members and sponsors, and provides a place for members to register for events, take surveys, and follow local events in technical communication.

Refer to the “Communication” section on page 24 for information about the role of the website.

Workshops or Conferences

Holding workshops or an annual conference are excellent means of providing educational opportunities to members and prospective members, as well as a means of earning revenue. A workshop or conference committee can plan and execute this type of programming separately from the programs committee because these events usually require additional resources and time. See the “Programs” section on page 18 for information about holding workshops or conferences.

Leadership Day at the Summit

Each year at the Summit, Leadership Day presents topics of interest to SIGs and chapters. Communities are encouraged to send multiple representatives.

This workshop is organized by the Community Affairs Committee (CAC). Speakers cover topics such as budgeting, finances, sponsorships, legal, programs, volunteers, and more.

Chapter 4: Programs

The frequency of program meetings varies depending on the needs and plan of your community. Monthly meetings, except during holiday periods, are common, as are bi-monthly and quarterly schedules.

Try to address the diverse needs of your community throughout the year. Choose topics and plan networking opportunities to suit the different industries in your area, the different types of information products that are produced, and new technologies and trends in the industry.

Continually look for program ideas. Sources include:

- Programs of the most recent Summit and local, multi-chapter or chapter, and SIG conferences
- Recent meetings of other professional and business organizations
- Presentations by members of the Society Board of Directors (the Board) who are in your area or can participate online

Note: Board members can give an update on the Society and speak about their particular expertise on the Board. Email board@stc.org to find out if someone is available to speak to your community.

- Topics presented to other communities

Opening a meeting with a tip that is related to the meeting topic can also attract interest and participation. Any member can present the tip, and a variety of topics can be presented in this way.

Identifying Program Topics

To provide value to their membership and attract new members, communities need to provide programs that enhance their members' knowledge and skills in technical communication. Members also need to know business basics to excel in their careers.

Deliver programs about technologies that members use, such as computer technology, telecommunication, pharmaceuticals, defense technologies, and environmental engineering.

Consider programs that address which authoring tools to use, when to use them, and how they work. Provide examples of completed communication products.

Offer programs that expand knowledge and skills in writing and editing, such as marketing communication, proposal or grant writing, and environmental communication.

Programs can be designed to pose challenges in communication to attendees and to invite them to offer solutions.

Offer topics related to expanding members' business skills; for example:

- Business 101 for non-business majors
- How to demonstrate the value of technical information products
- How to sell the value of technical information products
- Copyright law
- Editing

To demonstrate the standards of the profession, obtain the traveling exhibit of winners of the Society Competitions to show at a meeting. Your community pays the cost of shipping. Contact the STC office to make arrangements for this.

Meetings do not need to be confined to technical communication subjects. Programs on management topics benefit a significant segment of members who are managers (and other members as well) since expanded knowledge of management strategies and processes helps people succeed as employees and contractors. Managers generally want to learn new and improved ways to

- Manage projects, including formulas for estimating the schedule and budget of a project.
- Hire and retain qualified staff.

- Define and control quality.
- Handle personnel matters and counsel poor performers.
- Conduct performance reviews.

Choosing Presenters

After you have chosen topics (and formats), find presenters who have the knowledge to speak on the topics, and the presentation skills to maintain the interest of participants. Try to find presenters with sufficient expertise to not only present well-researched information, but to answer questions about practical application of that information.

You can find presentations by

- Looking through the STC Summit program or taking recommendations from members.
- Visiting the TechCommSpeakersBureau.org website. Sponsored by the STC Carolina and STC Santa Barbara chapters, this website features a database through which communities can look for speakers and technical communication experts can seek speaking engagements.
- Asking for recommendations on the presidents', SIG managers', and newsletter editors' email lists.
- Finding instructors from your local colleges and universities who have expertise in pertinent subjects.
- Sending out a call for proposals using your community's email list and to your community's social media platforms to identify presenters. Send out the call at the end of the current year to find presenters for the upcoming year. The programs committee reviews the proposals and chooses the presenters.
- Checking the STC *Buyers' Guide for Products and Services* under the "speaker/trainer" category.
- Checking previously recorded Society webinars for speakers who provide educational content on topics of interest.

If your members have not heard the presenter before, you might want to request and check references.

If you are considering bringing in an out-of-town presenter, consider these items, which will increase the cost of your meeting:

- Honorarium
- Transportation
- Hotel

Presenters from within the Society often will not ask for an honorarium, but your community should cover the presenter's transportation and hotel costs. You might be able to allow the presenter to promote their product in exchange for a lower or waived fee.

Finding Meeting Venues

The hospitality committee or programs committee finds the venue for the program meetings. The venue should be centrally located when possible, or you can take turns on the side of town where you have the meeting. Meeting locations can include hotels (food or rental charges will apply), local employers, libraries, and community organizations. Organizations like the United Way, American Red Cross, homeowners' associations, and utility districts sometimes offer meeting facilities that you can use free of charge.

Next, decide what food, if any, to serve at the meeting and where you will obtain it. Try to offer food that accommodates special dietary needs if you know about them. When you choose food for the meeting, your decision should still allow the meeting to be affordable for attendees and profitable for the community. Sometimes, the meeting venue will provide the food, further controlling the cost of the meeting.

Meeting Formats

You can choose from numerous meeting formats to help your community's programs be successful. Using different meeting formats helps you introduce a greater variety of topics and allows you to include more topics during the meetings.

Program meetings can be in-person meetings or virtual meetings (webinars). Meeting formats include joint meetings, networking meetings, and progressions.

In-person meetings encourage networking and can also facilitate open discussions and hands-on activities during the meeting.

- **Social events** can work well for face-to-face meetings, especially during holidays or at the end of the program year.
- A **joint meeting with another organization or a cooperative meeting with another chapter or SIG** can expand the audience and increase attendance. Consider meeting with the Association for Talent Development (ATD, formerly ASTD), the Association for Computing Machinery (ACM), the International Society for Performance Improvement (ISPI), and other professional organizations. Meeting with a chamber of commerce or local networking organization can build awareness of technical communication in the local area.
- **Focusing a meeting on a single group**, such as newcomers or experienced technical communication professionals, can increase interest.
- A meeting **focused on networking** is an effective face-to-face program. For variety, a presenter may demonstrate networking skills, followed by practice in networking.
- **Progressions** are a popular format that can increase interest. Progressions follow a roundtable format. (A room has several tables, each with its own speaker and topic. Each speaker presents a summary of a subject in 5 to 10 minutes, and guides an open discussion for the next 10 to 15 minutes. At the end of the round, participants move to another table to learn about another subject. The speakers stay at their tables and address a new group.) A progression meeting can accommodate three rounds. Progressions can be built around several topics or can be focused on a single theme. Popular topics have included technology trends, different kinds of jobs in technical communication, and management issues.

Webinars

A **webinar** is a program meeting presented over the Internet and conference call. Attendees listen to the speaker and can see a presentation on their computer monitor. Then attendees can participate in a question-and-answer session. Communities can purchase tools like GoToWebinar or Adobe Connect, or they can pay a small fee to the STC office to use the licenses purchased by the Society. For more information about using Adobe Connect, email cac@stc.org.

- The STC office coordinates webinars that your community members can participate in during a program meeting. Attendees listen to the speaker and participate in the question-and-answer sessions. The number of participants is limited only by the size of the facility.
- Communities have facilitated recorded webinars in one or more locations (typically conference rooms made available by members' employers). These webinars have been used as the regular program or to supplement regular programs.

For information about webinars being offered, go to the [Live Webinars](#) page (**stc.org > Education > Online Education > Live Webinars**). The Society also offers over 150 on-demand, archived Summit sessions at no additional cost to members, and you can find these on the [Free Education on Demand](#) page (**stc.org > Education > Online Education > Free Education On Demand**).

If your community plans to hold webinars, as many SIGs do, the programs committee can carry out this important job. First, the leadership team provides guidance to the programs committee as to the number of webinars to hold.

The programs committee performs the following tasks:

- Brainstorms topics and speakers.
- Evaluates webinar software and recommends the tool to use.
- Reaches out to potential speakers and make a verbal agreement (this works well when committee members who know the potential speaker contact that speaker).
- Sends a [letter of agreement](#) to the speaker and files a copy of the signed letter in the community archives.
- Sets up and runs webinars.
 - Sets up the webinar using webinar software and payment platforms.
 - Publicizes the webinar.
 - Rehearses with the webinar presenter.
 - Accepts registrations.
 - Runs the webinar.
 - Collects feedback.

Workshops and Conferences

If your community plans to hold a workshop or conference, face-to-face or online, form a separate committee to plan and execute it. Make sure that you have adequate volunteers and financial resources before undertaking a program of this magnitude.

Holding a workshop or conference includes these tasks:

- Develop a budget.
- Schedule a date and a venue (for an in-person event), or conference call and webcasting services (for an online event).
- Convene a committee to help plan and run the conference.
- Select a conference theme.
- Determine sponsorship needs, and contact vendors to serve as sponsors and exhibitors.
- Determine registration categories, and the fees for each category.
- Plan the program, obtain speakers, and coordinate arrangements with the speakers.
- Oversee the registration area, meeting rooms, audiovisual equipment, meals, and coffee breaks for face-to-face events.
- Distribute conference information in advance, including how to register and pay.
- Work with the public relations committee to publicize the conference in the community newsletter, website, social media, local news outlets, area businesses, colleges and universities, and members of related organizations.
- Receive registrations and payments directly or through a web service.
- Notify registrants that their registrations have been received (if the web service does not do this). Welcome attendees.
- Orient speakers to the facility, have the equipment that they need, introduce speakers, and present each speaker with an appropriate gift.
- Carefully track expenditures, provide regular reports to the leadership team, and submit all receipts and other financial information.
- Distribute evaluation forms and make sure that they are collected and analyzed.

- Turn over evaluation results and all records to next year's committee.

Setting Prices for Programs

As an STC leader, remember that you are responsible for running your community as a business. As you consider what to charge for programs, remember that your prices should cover not only the cost of the meal or refreshments that attendees may consume, but also the overhead expenses associated with putting on the program. These may include fees for virtual and/or physical meeting facilities, AV support, telephone charges, publicity, online event-management and registration applications, PayPal and credit-card processing fees, speaker transportation/travel, printing, supplies, etc. Some expenses may be offset by sponsorships or donations (see Chapter 12), but all other expenses should be factored into your program pricing.

A few general guidelines:

- Do not use community funding to just pay for food while giving programs away for free. The mission of the Society is to advance the practice and theory of technical communication and to promote the value of technical communicators – not simply to feed them!
- The price of a program reflects its value. People will think they are getting more of an education from a \$25 or \$35 meeting than a \$10 meeting. In addition, people are more likely to show up for an event they had to pay more for. You will likely get more no-shows for a lower-cost event.
- Require payment in advance, or set a cancellation policy that requires people to pay for the event regardless of whether they attend, unless they cancel their reservation 72 hours in advance (for example).

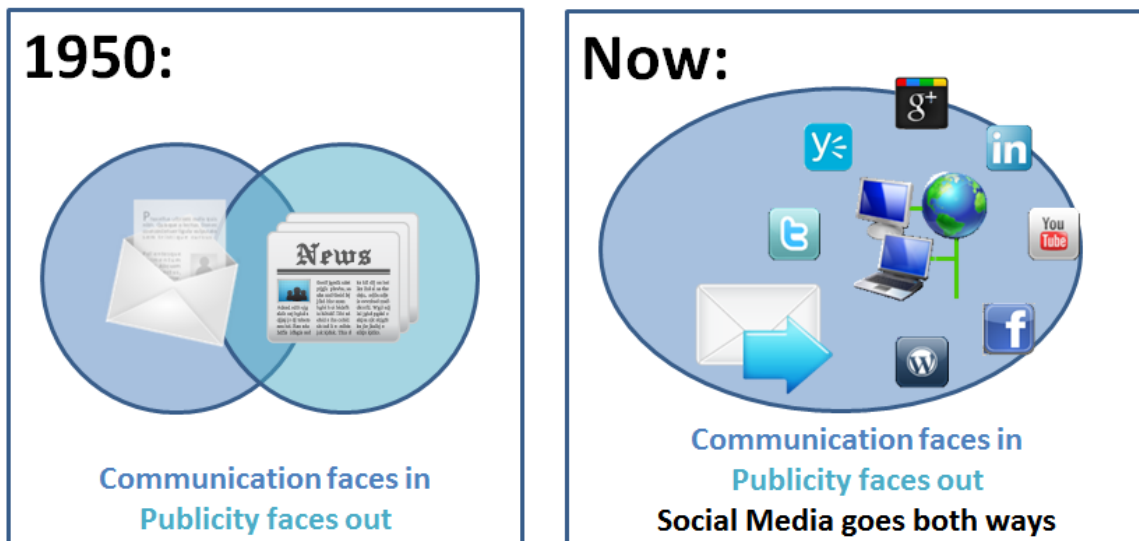
What about preferential pricing? This is an acceptable practice. In fact, it can reinforce the value of membership in STC and/or your community. Feel free to set prices lower for members, while keeping non-member prices at a premium. Just be sure that you still can cover all program costs.

Ultimately, your goal should be to work toward self-funded programs, and eventually toward programs that generate revenue to help fund other community activities. Occasionally, you may choose to subsidize the cost for members, volunteers and guests by offering coupons, discounts or special rates. However, subsidies should be the exception, rather than the rule, to help reinforce the value that attendees are receiving from your programs.

Chapter 5: Communication

This section addresses the forms of communication that your community can use to publicize what it does and to tell the Society's story. In the past, communication and publicity were different ideas. Today, they are almost the same, as this figure illustrates:

Communication and Publicity 2.0



As you look at the ideas in this section, think about how you can use them facing in and facing out. With good volunteers, you can make your communication tools publicize your events.

Communication Plan

Develop a communication plan for your community. Your plan can include one or more forms of communication, how you will use each to communicate with your members, deadlines or timeframe targets, and who will be responsible for each form.

How much or how little you plan to communicate depends on how many volunteers you have, their communication skills and preferences, and the preferences of your members. Keep in mind that any communication is better than none, that your community members understand that we are staffed by volunteers, and that we have successful communities across the spectrum.

Your communication plan can include any of the following items:

- Newsletter
- Email List
- Websites and Blogs
- Social Media
- Other Tools

Blogs and Newsletters

Why Have a Blog or Newsletter?

A blog is a great way to provide value to members, letting them know what's going on within your community, within the Society, and within our profession. When published regularly, a blog gives members a reliable way to stay informed and respond back to leadership within the community. In a survey of the communication preferences of Society members, the emailed newsletter was the number one preferred means of communication within the group. Blogs and emailed newsletters accomplish the same goal because people can subscribe to them and receive new posts by email.

Do not hesitate to repeat news from other sources, such as the Society website, *STC's Notebook* blog, or *Intercom*, as people might miss items if they are published in only one place.

What do I Need for a Community Blog or Newsletter?

A community blog or newsletter can be simple or complex, depending on the community and the amount of resources (time, money, graphic design, and content) available within your group.

A blog post or newsletter usually includes the following information:

- Email format
 - Should come from the community president or editor, with contact information for the author or a way to submit comments
 - If sent through email, the message should go to all members (as blind copy or through a mailing list to protect their privacy). Download your membership roster (login required) from the [Society website](#).
- A warm greeting from the president or editor
- Announcements and registration information for coming events
- News about events, recognition, and other activities within the community since the last blog post or newsletter
- Employment news
- Society deadlines
- Reprints of news and announcements published elsewhere, such as from the Society website, *Intercom*, or blogs

- The Society's mission statement: *"The Society for Technical Communication advances technical communication as the discipline of transforming complex information into usable content for products, processes, and services. STC serves its members by identifying and promoting best practices in the field and by demonstrating the economic value delivered by technical communicators. By providing lifelong learning opportunities, we help our members develop their skills and competencies so that they may advance in a variety of career paths."*
- If a newsletter, include the Society mailing address, telephone number, and website address
- A warm closing from the president or editor

Consider adding other elements to your blog posts or newsletter whenever possible:

- **Society logo:** [Download](#) the Society logo and become familiar with [guidelines](#) for its use.
- **At least two senior officers' names** with their email addresses and (optionally) telephone numbers
- **Publication frequency:** How often each blog post or the newsletter is published
- **Publication policies:** Deadlines for and how to submit information for publication
- **Copyright statement (for example):** *"This blog/newsletter invites writers to submit articles that they wish to be considered for publication. Note: By submitting an article, you implicitly grant a license to this newsletter to run the article and for other Society publications to reprint it without permission. Copyright is held by the writer. In your cover letter, please let the editor know if this article has run elsewhere, and if it has been submitted for consideration to other publications."*
- **Reprint policies:** Statement that other Society publications may reprint items with attribution and requesting notification (if you wish)

The editorial content of all Society community blogs or newsletters must be informational and not commercial. Material that promotes an individual, firm, or organization is inappropriate. Biographical sketches of up to 50 words following articles are acceptable. Logos of companies or other organizations should not be included. Contact the STC office for guidance if you have questions.

Advertising

Newsletters may contain paid display and classified advertising related to professional technical communication and germane to the geographic area covered by the chapter or the interest area of the SIG. Solicitation and acceptance of advertising is at the discretion of the newsletter editor. Consider checking with other communities to find out their advertising rates before proposing rates to your leadership team for approval.

Email Lists

Communities can use email lists to enable members (and non-members, depending on community policy), to communicate with each other. The email list is an easy way for the email-list members to ask questions, make announcements, and advertise employment (but not necessarily seek employment).

You can use Yahoo, Google, and other groups to set up an email list, and there are other ways you can set up email lists, such as letting the Society administer your email list.

Email management software is also available, such as Constant Contact and MailChimp. Some options are free, while others are \$10-\$15 per month. With email management software, your community can maintain an email list while sending out professional, well-designed emails.

Websites

Websites are one of the most powerful tools available for communicating with your members and other interested parties. Every community should have some kind of web presence. Most have a website, typically with a domain name representing the specific community, and hosted by an Internet Service Provider.

Chapters and SIGs

Use a website to announce events and distribute information. Be sure you have a webmaster who will keep the information on the site current and will work with the hosting service if technical problems arise. Each site should include the following information:

- Society logo and contact information for the Society (at least the address of the [Society website](#))
- Mission statement of the community
- Announcements of upcoming meetings and events, with links to register or buy tickets
- Contact information for the chapter president or SIG manager and webmaster, and other leaders if desired, updated promptly after elections

Websites may also include the following information:

- Links to corporate sponsors of the community
- Links to technical communication-related academic programs
- Links to related Society sites and sites of related organizations
- Forms for online registration for events
- Links to surveys and ballots
- Community news
- Educational articles
- Media kits and news releases
- Membership information, including online packets for new members
- A job board or links to pertinent technical communication jobs in your area (or area of expertise)

Society Website

The [Society website](#) can be a one-stop shop for members to get information about the Society and maintain their accounts.

You can access the *STC's Notebook* blog, membership reports, leadership resources, STC Summit news, and Society documents on the website.

STC's Notebook

[STC's Notebook](#) is the official blog for Society members and is also open to the public. *STC's Notebook* provides formal and informal announcements, information about important subjects, spotlights on communities and members, and links of interest.

New stories and articles are added multiple times per week, sometimes daily, and the blog will grow and change to meet the Society's needs. Both members and non-members are invited to comment on posts and participate in this social media platform.

Member Blogs

If members of your community keep blogs, you can link to their blogs on your community's website. You might also consider creating a publishing schedule for your community's blog. If you don't, the content could go dormant.

Social Media

Communities can use social media to communicate with their members and other interested parties outside of their community. Some communities will exploit many different social media platforms, and other communities will choose one or two. If your community wants to use only one or two platforms, consider a survey of your membership to select the one most members use.

If you have enough volunteers, allow one of your members to be the Social Media Manager and sit on the leadership team. It's an easy job and can be used to encourage a young or new member of your community to join the team.

LinkedIn

Several Society and community groups are available on LinkedIn, including a Society for Technical Communication group, along with individual groups set up by chapters and SIGs. When you set up a group, you can specify whether membership must be approved or if the group is open.

If you decide that membership in your group must be approved, you must specify at least one administrator for the group. (Two or more administrators are recommended so that someone will always be available to manage the group.)

Members of your group can start discussions and post announcements.

<https://www.linkedin.com/groups?gid=2926>

Twitter

Society members, technical communicators not in the Society, and communities have a strong presence on Twitter. Consider creating a Twitter handle for your community to post announcements, retweet Society news, and post questions. A Twitter handle allows those interested in your community to follow you and keep up with the latest news.

The CAC's Twitter feed is at <https://twitter.com/stccac>.

The Society uses several hashtags within Twitter to communicate with members.

Use #stcorg to tag posts about the Society in general. To see the feed with that hashtag, go to <https://twitter.com/#stcorg>.

Use #stcyy to tag posts about the STC Summit for year yy. For example, use #stc19 for posts about the 2017 STC Summit in National Harbor, Maryland. To see the feed with that hashtag, go to <https://twitter.com/#stc17>.

Facebook

Facebook has two options for large group communication. Many of our communities have a Facebook page, many have a Facebook group, and some have both.

STC's Facebook page is at <https://www.facebook.com/STC.org>.

Facebook Pages

Facebook pages are good for one-to-many communication with people who are not your specific friends. Anyone can like a page to become connected and get News Feed updates. There is no limit to how many people can like a page.

Set up a page for your community and select several admins (administrators) for the page.

Best practices for Facebook pages change from time to time as the form and function of Facebook are continually modified.

Facebook Groups

Facebook groups are good for sharing information, documents, and interests and for many-to-many communication. Group members must be approved or added by other members. When a group reaches a certain size, some features are limited. In groups, members receive notifications by default when any member posts in the group. Group members can participate in chats, upload photos to shared albums, collaborate on group docs, and invite members who are friends to group events.

As with pages, be sure to select several admins for the group. Best practices change from time to time as the form and function of Facebook are continually modified.

Pinterest

Pinterest is a pinboard-style photo sharing website that allows users to create and manage theme-based image collections such as events, interests, and more. If you set up a Pinterest account for your community, you can invite members to pin. Only a few communities have Pinterest accounts.

The home page for Pinterest is <https://pinterest.com/>.

Other Tools

Here are some additional tools that can be helpful in community management.

SurveyMonkey

Use SurveyMonkey to survey members of your community to gather demographic, salary, and interest information. SurveyMonkey has four levels of accounts: Basic, Select, Gold, and Platinum.

Basic (Free) Membership: With a Basic (free) membership, you can send out surveys of ten questions or less and can receive 100 responses per survey.

Select Membership: With a Select membership, you can ask unlimited questions and receive unlimited responses. Furthermore, you can design a custom survey, have enhanced security, use advanced features, and receive an Excel report and a PDF of your results.

Eventbrite

With Eventbrite, you can plan, set up ticket sales, promote, and publicize events. It also enables attendees to find events online and purchase tickets. Eventbrite works with PayPal and credit cards for online payment.

PayPal

You can use PayPal to collect money for your programs. Chapters can also use a PayPal account to pay vendors. When you sign up with PayPal, specify that your community is a non-profit organization so that you will be eligible to pay reduced fees.

One pitfall with PayPal is that changing the name of your community's officers is difficult. Make sure that the person listed as the contact name completes the name transfer, and that the name transfer is confirmed. Otherwise, you might end up closing the account and starting a new one.

File Sharing and Groups

Many communities use file-sharing and cloud-sharing resources for planning, brainstorming, and record keeping purposes.

File Sharing: File-sharing tools available include Yahoo Groups, Google groups, Google Drive, Dropbox, OneDrive, and Box.net.

Cloud Storage Best Practices: STC Toronto has provided a toolkit and presentation that offers these best practices for storage of community material in the cloud:

- All internal and external communication and documentation should be fully accessible to all council members from any computer.
- Tools and processes must be clear and simple; otherwise, they won't be used.
- Reuse content to continually improve it.

Chapter 6: Membership

Community membership is at the heart of the Society experience. Each community needs to work throughout the year to increase membership, keep the members they have, and recognize their members.

When people join the Society, they have the option to be a member at the Society level only (unaffiliated), as well as include one or more communities in their STC membership.

Increasing Membership

The Society offers several levels of membership to meet member needs and interests. These levels include

- Gold
- Classic
- TC Professional
- Student
- Retired

Each level offers a specific dues structure and set of benefits. When joining the Society, a member can choose one of these levels. When a member renews, they can keep their selected level or choose a new one they are qualified for.

Members can also add individual chapters and SIGs to their membership throughout the year.

For more information about membership levels, go to the [Membership Levels and Benefits](#) page ([stc.org](#) > **Join or Renew** > **Membership Types and Rates**).

Identifying Prospective New Members

You can identify potential members through the following activities.

- Build a communication program to spread the word about the Society and your community. Publish stories in the local newspaper, trade publications, and on local or trade websites. Include information about your community and its programs.
- Use social media to communicate your community's news and events.
 - Set up a Twitter account for your community and tweet regularly about your community's events.
 - Create a LinkedIn group for your community and invite both members and non-members of your community to join the group. Post messages about your community during membership renewal time, inviting non-members to join and current members to renew.
- Hold community membership drives in conjunction with the Society's annual membership renewal campaign. Give a small prize (such as a free registration to a meeting or program) to the top recruiter in your community.
- Hold a meeting in which members can bring guests at little to no cost. At the meeting, hold an orientation for new and potential members, covering the benefits of membership, as well as personal testimonials from members.
- Expand your community's mailings:
 - Find out which companies employ technical communication professionals in your geographic area or interest area.
 - Contact colleges in your geographic area or with programs in your interest area to determine if courses in technical communication are offered and who teaches them.

- Read local publications and websites to see if companies that employ technical communication professionals are moving to your area or expanding.
- Monitor job postings to learn which companies are adding technical communication professionals.
- Post your meeting notices through LinkedIn, Facebook, Twitter, and other social media outlets.
- Send your community brochure, Society [promotional brochures](#), and other promotional material or links to your mailing list. (You can download many of these materials from the [Society website](#) > Leadership Materials)
- Encourage members to bring co-workers and friends who are interested in technical communication to a meeting.
- Participate in career events at colleges and high schools.
- Establish local special interest groups within chapters and encourage networking in geographic areas within Society-level SIGs.
- Identify faculty members who teach technical communication and send them information about the Society. Find out how your community can work with the faculty and students at area colleges and universities.
- Work with faculty to engage students in activities and encourage students to join the Society as student members.
- Encourage guest presenters who are not members to join.
- Invite members of related professional organizations to your community events, and discuss the benefits of STC membership.
- Invite colleagues in your company who are not members to participate and to join.
- Send calls for competition entries and judges to non-members as well as to members. Each non-member entrant or judge is a potential member.
- Encourage non-member competition winners to participate in community events and join the Society. They might be willing to make presentations or serve as judges in the next competition.
- Participate in community service activities and other events in your community's geographic or special interest area. Talk about the Society and invite people to participate and join.

Winning New Members

When you identify potential members, share information about the benefits of joining the Society:

- **Networking opportunities** through community events.
- **Publications:**
 - *Intercom* magazine -- Published ten times a year, *Intercom* keeps members informed about the latest trends, professional news, and Society activities.
 - *Technical Communication* journal -- Published quarterly, the journal provides thought-provoking articles on subjects of interest to all technical communication professionals.
 - *STC's Notebook Blog* -- Provides formal and informal announcements, information about important topics for technical communicators, spotlights on communities and members, and links of interest.
 - *TechComm Today* e-newsletter -- Provides industry-related news plus Society information to members.
- The **Technical Communication Summit**, an international conference that brings technical communication professionals together from around the world for educational programs, seminars, and workshops conducted by experts in the field.
- **Society, local, and interest group workshops**, educational programs, web seminars, and conferences

- **Community member mailings**, which provide reminders about events and membership benefits, as well as opportunities for members to exchange information about technical communication as well as interest areas specific to SIGs.
- **Society and community websites**, as well as community blogs, forums, wikis, newsletters, and social media platforms that provide news, information, informative articles, and opportunities to exchange information and ideas.
- **Employment information**, including the [Job Bank](#), which provides members with *first look* access to the newest job openings.
- **Scientific, literary, and educational grants** (for members) and scholarships for full-time graduate and undergraduate students.
- The Society's [Corporate Value Program](#), a way for employers to support STC memberships at group discounts.

For more information, see the [Membership Committee Resource Guide](#).

Welcoming New and Potential Members

The initial contact with each potential or new member is vital. It's your most critical step in forming a positive relationship with a new or potential member, and creating a positive impression of STC and your community.

- Welcome new people who are attending your meetings. Follow up with an email or telephone call.
 - Review your community report each month and identify new members to contact and greet. Send a welcome email to each new member of your community as soon as possible after they join. Your new members need to know that they, and their membership, are welcomed and valued. An individualized, sincere welcome will have a lasting effect on their relationship with your community. Members who are welcomed will be far more likely to become active in your community.
 - In your email, include links to information such as a contact list of community leaders, the most recent newsletter, and a volunteer form that members can complete and submit.
- Develop a membership packet that informs new members about your community and its activities. The packet might include an introductory brochure, Society brochures, and a recent newsletter or link to the recent newsletter. Distribute the packet at your new-member event or by mail.
- Hold a new-member event and make sure that the leadership team can attend. Hand out new-member packets, network, and answer questions.

Keeping Members

You can take positive steps to increase membership retention by getting members involved in your community's activities, communicating regularly with members, soliciting and incorporating your members' feedback, and recognizing members. Members who are involved and regularly receive highly relevant information are more likely to remain members.

Get Members Involved

- Welcome new and prospective members to meetings and discussion forums. A warm greeting and a feeling of being included encourages prospective members to join and existing members to stay.
- Send welcome messages to new members and to contact long-term members who seem less interested in activities.
- Offer new members opportunities to work on committees and lead activities where members want to gain experience.

Communicate with Members

- Update your members regularly about your community's activities. Post program announcements and other community news on your website, newsletter, and social media.
- Distribute an annual summary of your community's achievements, emphasizing the contributions made to members' professional growth.
- Contact members who have not renewed and try to learn why. Provide a supportive and safe environment in which members can express their concerns.
- Periodically survey the members to stay informed of their interests and concerns. Know why members joined and plan activities that meet their needs. Surveys help you stay aware of the changing needs of members over time as technology and trends change.

Recognize Members

- Develop service awards and present them annually at a special event or by special announcement in the newsletter.
- Nominate a member for the Distinguished Chapter Service Award (DCSA), Distinguished SIG Service Award (DSSA), or Distinguished Service Award for Students (DSAS) to recognize exemplary dedication and service to the community. You can find details on the [STC Awards](#) page (**stc.org > Member Center > Recognition > Awards**).
- Nominate a member to become an Associate Fellow. Those who have been members for 10 years, have been active in the profession for 15 years, and have made substantial contributions to the profession and the Society are eligible. You can find details on the [Honors](#) page (**stc.org > Member Center > Recognition > Honors**).
- Encourage Associate Fellows in your community to apply to be a Fellow.
- Conduct an active-member program that awards points to members and later recognizes members for participating. For information about such programs, contact the leaders of the Rocky Mountain or New York Metro chapters.
- If your budget allows it, order pins for your new senior members. For information about ordering pins, go to the [STC Membership Pins](#) page (**stc.org > Member Center > Media > Membership Pins**).

Surveying Members

Survey your members every year or two to solicit their input and find out what they need from your community and what they are willing to do. Through the survey, you can learn your membership demographics such as job titles, experience and education. You can also learn about job-related and professional development needs, the best time and venue for meetings, and what topics members would like covered in the newsletter. For more information about surveys, go to the Communication section.

Membership Reports

The membership manager and the chapter president or SIG manager can run membership reports on the Society website by going to [Community Reports](#) (**stc.org > Member Center > Resources > Community Reports**). Check your membership reports at least once a month to find out who has joined and left your community and who needs to update their personal information in the Society's database.

You can create a membership directory from your report, but make sure that you do not publish information for members who want to remain unlisted.

Chapter 7: Volunteers

All communities are led by volunteers and all the work of communities is done by volunteers. The Society would not exist if volunteers did not contribute time and talent.

Volunteering results in contact with speakers, potential authors of articles, members of other professional and community groups, and many Society members. These contacts expand the personal and professional network of each volunteer.

Benefits of Volunteering

Volunteers build skills that they can use on the job.

- **Planning, coordinating, and implementing skills** apply to project management tasks.
- **Negotiation and teamwork skills** apply to working with developers, marketing staff, and other members of your team.
- **Survey and evaluation skills** apply to planning and coordinating projects.
- **Meeting planning skills** apply to planning meetings at work, such as department meetings, and to positions in training and event planning.
- **Supervisory skills** apply in a management position.
- **Leadership skills** apply to many different positions within a company.
- **Technical skills** apply to a technical communicator's deliverables.

Before you begin recruiting and working with volunteers, review your community's volunteer environment:

- **Have clear, up-to-date descriptions for each volunteer position.** Doing so provides several advantages:
 - Make transition easier for new volunteers.
 - Provide a resource for training and mentoring.
 - Give both new and current volunteers clarity about their roles.
 - Help prevent misunderstandings.
 - Help balance workloads.
- **Look at your community's goals.**
 - Do your volunteer roles accurately reflect those goals?
 - What roles might need to be added or changed?
- **Look at your community's bylaws.**
 - Are all elected and appointed role descriptions current?
 - Is the distinction clear between elected and appointed roles?
- **Reflect on volunteer successes and challenges.**
 - Do some roles need additional volunteers?
 - Are there some activities that need a defined volunteer role?
 - Are there some roles that are always hard to fill? If so, why?

Recruiting Volunteers

Recruiting volunteers is ongoing and a major responsibility of community leaders. Whenever possible, the chapter president or SIG manager should avoid taking on specific assignments and, instead, invest time in finding and recruiting volunteers, ensuring that volunteers become established in their roles, and ensuring that volunteers receive recognition.

Leaders must continually emphasize the advantages of volunteering.

Where to Find Volunteers

Possible volunteer pools include:

- Student members
- Newer members who might want to learn more about the community
- Members who would like to develop a skill (such as event planning, running a website, or speaking)
- Members who were active previously, but took some time out and want to get back into the game
- Retired members
- Long-distance members who can volunteer virtually
- Members of companies who have supported the Society for a long time; often, long-time members are managers of other technical communicators and will encourage and support newer members' volunteer efforts

Email and face-to-face requests are equally effective. While many people will volunteer when they are asked directly to do so, many do not respond to mass appeals. Those who do respond become great contributors. Listing the work your community needs attracts volunteers for that work. Once a year, your community's nominating committee and new president or manager should make a special effort to recruit volunteers. Success in recruiting determines the focus of community activities in the coming year.

Opportunities for Volunteer Recruitment

Use every opportunity to recruit volunteers:

- When you know of someone who is interested in the type of work your community needs, invite them to participate.
- Invite people who have expressed interest to you or to someone else on your leadership team.
- Think about the people you know who are members and consider the contribution they might make and how volunteering can benefit them.
- The nominating committee should make notes about members who did not run for office. Contact those people after elections and ask them to volunteer.
- Announce volunteer opportunities through your communication channels and at meetings
- Seek opportunities to chat one-on-one with new members.
- Encourage current volunteers to spread the word about volunteer opportunities and share their success stories.
- Emphasize volunteering in your welcome letter to new members.

When recruiting volunteers, clearly communicate what your community needs done and when. Estimate the time required based on your own experience. Nearly every person you invite to volunteer will ask for a deadline or due date, so be prepared to state a definite one.

Keep in mind that, typically, only a small percentage of the members of a chapter or SIG volunteer at any one time. The active volunteers change slowly over time, as people arrive and depart. Leaders emerge as newer volunteers gain experience and develop the ability and desire to lead. This is normal in a healthy organization.

The [Leadership Resources page](#) ([stc.org > Member Center > Leadership Resources](#)) has online training on working with volunteers. Watch the [Recruiting New Volunteers](#) webinar ([stc.org > Member Center > Leadership Resources > Leadership Webinars > Recruiting New Volunteers](#)).

Leading Volunteers

Leading volunteers, managing volunteer activities, and working with other volunteers are all tasks that differ from working with others in the paid workforce. Volunteer teams must back each other up fully, helping the team see the value of teamwork and how it can help develop support and respect. Volunteers can apply those values in their jobs. When the time comes to conclude a project, volunteers release what

is complete. Leaders might need to rework or supplement the work of the volunteers, but this allows your community to be a learning laboratory where volunteers can make mistakes yet still know that someone will be there to back them up. All this is true in the paid workforce to some extent, but even more so in volunteer work.

People volunteer for different reasons: a desire to serve others, enjoyment of working with others on projects everyone feels are important, the desire to develop new skills and knowledge, and the desire to build a reputation locally or worldwide. When you are leading volunteers, it's critical to know what each person wants to gain or achieve. Volunteers will not only do a better job if their work is well matched to their interests, but they will have more motivation to volunteer for other tasks and maybe step up to leadership. You should be able to customize the tasks and the focus to help volunteers achieve their goals.

Retaining Volunteers

You need to keep a constant focus on retaining your volunteers. Here are some ideas:

- Communicate regularly with your volunteers.
- Make sure the volunteers have the tools and resources they need to get the job done.
- Don't micro-manage your volunteers. Micro-management is something that a volunteer might have encountered at work and wouldn't want to deal with as a volunteer. Also, micro-management implies mistrust and limitations. Volunteers who are trusted and whose ideas are encouraged will be more likely to continue volunteering.
- Let your volunteers make most of the decisions, but important decisions (those involving spending or making money or a change in service providers) should go before the community leadership for a vote, with the volunteer making recommendations.
- Give your volunteers finite tasks that have a clear beginning and end. Make sure there is a goal that the volunteer can see being accomplished.

For existing volunteers, it is important to communicate with them to determine if they want to continue in their current role, volunteer in a different role, or step down. Some things to keep in mind:

- If a volunteer is in a role they enjoy and are good at it, ask them if they want to stay in that role or do something different. If they prefer their current role, let them stay in it.
- If you think they would be an excellent candidate for an elected office, invite them to run and tell them why you would like them to run. If they do not want to do so, accept their decision.
- On the other hand, if a volunteer wants to step down, respect their decision but leave the door open for volunteering again in the future! Or, if a volunteer wants to serve in a different role, support them in that decision.
- When a volunteer steps down, thank them profusely for their service.

Recognizing Volunteers

Volunteer recognition should be something our communities do automatically. Here are some ideas:

- Thank early and thank often!
- Publish volunteer names in your newsletter.
- Use social media to let everyone know about a specific job a volunteer has done for your community.
- Hold a volunteer recognition event, such as a picnic or special meeting; list your volunteers on a slide show that you display during the meeting.
- Give your volunteers a certificate or letter of appreciation.
- Tell the volunteers' bosses what a great job they have done for your community.

Recognizing your volunteers for a job well done lets them know that you appreciate them. In turn, they are happy to volunteer again. Volunteer recognition also shows other members of your community that they, too, will be appreciated if they volunteer.

Recognition says something about the community itself -- that it is a place where volunteers are welcomed and honored.

Chapter 8: Employment

Society-Level Employment Services

The Society provides a [job bank](https://www.stc.org/job-bank) (**stc.org > Job Bank**), where the most recent job listings are available to members only. (They are available to non-members after two weeks.) Employers pay to post jobs in the Job Bank. Non-member and guest recruiters can purchase accounts where they may post jobs, search résumés, and more from inside their recruiting account. The fees offset the cost of the service and are not a revenue-producing activity for STC.

Technical Communication and *Intercom* publish articles about professional matters. The Society's ePubs, *TechComm Today*, and STC's *Notebook* blog also provide industry-related news and career tips.

- *Intercom Magazine* -- <https://www.stc.org/intercom/>
- STC's Notebook Blog -- <https://www.stc.org/srcs-notebook-official-blog/>
- *TechComm Today* eNewsletter -- <https://www.stc.org/publications/techcomm-today/>
- *Technical Communication Journal* -- <https://www.stc.org/techcomm/>

All members receive a free copy of the Salary Database. The database can be used to conduct more powerful job searches, make a strong case for a raise, or prepare department payroll budgets. The data in the Salary Database are drawn from the United States Bureau of Labor Statistics' (BLS) Occupational Employment Statistics (OES). Non-members, employers, and recruiters can buy the Salary Database as a single report in PDF format, as a series of Excel workbooks, or both.

Professional Certification

The Society also offers the Certified Professional Technical Communicator program, a three-tiered program where technical communicators can further develop and demonstrate their skills. For certification program details, visit <https://www.stc.org/certification>.

Community-Level Employment Services

Networking in a community is an excellent way to find employment opportunities, so communities are encouraged to develop employment services and provide employment information to supplement Society-level services. Communities provide employment services that can be specialized to the geographic area (chapters) or area of interest (SIGs) of their members.

Employment Networking at Meetings and Events

Attending community meetings is an excellent way to make contacts that lead to employment, both for job seekers and for members who continually nurture their networks. Encourage attendees to bring their business cards to hand out during networking activities.

Allowing time in a face-to-face or online meeting for announcements of employment opportunities and for job seekers to introduce themselves briefly is a strategy for attracting an ever-changing group of members to meetings and providing a valuable service.

If your community holds an annual conference, consider having an employment booth. This can showcase your employment services for members, prospective members, and employers and be a central place where employers and job seekers can connect. If the conference is online, allowing for job announcements and introductions by job seekers can serve the function of an employment booth, as can a temporary interactive web page for registrants only.

A Career Day workshop is another way to help job seekers and attract student members and recruiters. The workshop can be a panel of speakers or a progression of round-table discussions about careers in technical communication. Invite experienced practitioners to speak on the panel or host tables. Topics

can include a résumé review session, interview skills, creating a portfolio of your experience, building and adding to your skills list, and more.

Résumé Review

Some communities offer résumé review services. If your community provides this service, publicize it frequently to your members.

- Offer résumé reviews at career-day workshops or as a service of the employment committee if the volunteer expertise is available. Ask career-day participants bring their résumés to the workshop to leave on the résumé review table. Recruiters can review résumés and speak with attendees for possible job opportunities.
- Professional résumé writers, recruiters, and technical communication managers can also conduct reviews on an as-requested basis. These volunteers can critique résumés and provide suggestions for improvement.
- Post articles on your website or job board with tips about good résumés.

Job Boards

A community can post a job bank that lists employment opportunities in the geographic area or area of interest, and links to employment services. Communities can also send notices of opportunities by email to members who ask to be on the distribution list.

Community announcement or email lists can also be used by members and agencies to announce opportunities. Some list managers ask that these announcements include “JOB” in the subject line.

If a community posts or emails notices of job opportunities, the community must clearly state that it is not offering employment referral services. Communities do not recommend people for jobs, recruit applicants, or evaluate qualifications of job candidates. The job seeker and the employer are responsible for verifying information and judging qualifications.

Running a job board can involve a lot of time on the part of the volunteer job board manager if job postings and correspondence involve manual activation. Fortunately, plugins are available for WordPress sites that provide automated services. Job announcements can also be posted to a community’s LinkedIn group. For an example of a robust job board, see the Washington, DC – Baltimore chapter’s group at <http://www.linkedin.com/groups?gid=156478> and the chapter’s job board at <https://jobs.stcwdc.org/>.

If you decide to charge employers for using the job board, it can supply income for maintaining your site; or your community can subsidize it as a service to the community.

Mentoring

The STC Mentor Board is where professionals connect to establish mentor/mentee relationships that foster personal and professional growth and development. Serving as a mentor or becoming a mentee can help you direct your future, expand your professional network, gain knowledge and perspective on the workplace, and deliver tremendous personal satisfaction.

To create a mentor or mentee account, access the [STC Mentor Board](#) (**stc.org > About STC > The Profession > Mentor Board**). You can make your account “inactive” until you complete your profile and are ready to participate.

From the STC Mentor Board, professionals can connect to establish mentor/mentee relationships that foster personal and professional growth and development. Serving as a mentor or becoming a mentee can help you direct your future, expand your professional network, gain knowledge and perspective on the workplace, and deliver tremendous personal satisfaction.

To create a mentor or mentee account, access the STC Mentor Board.

For an example of a robust mentoring program, visit the Florida chapter’s [website](#).

Employment Information

Community Newsletters and Websites

The employment committee can be the main source of employment information for your community newsletter and website. The committee can provide any of the following types of information:

- Tips on job hunting, résumé writing, and skill building
- Information on job search techniques
- Member success stories
- Ideas for dealing with layoffs
- Tips on consulting and contracting
- Listings of helpful resources, such as career counseling centers in your area and online job boards
- A webpage on which to post community members' résumés

The employment committee can also create brochures, networking guides, salary surveys, employment handbooks, and directories of contractors and consultants, typically for publication online. Obtain permission before publishing the names and contact information for individuals or private businesses.

Technical Communication Body of Knowledge

The Technical Communication Body of Knowledge (TCBOK) is an ongoing project that attempts to organize our dispersed professional knowledge and experience in books, academic programs, and collected experience. The goal is to make this information accessible for training and professional practice. The TCBOK is contained in a web-based portal at <http://www.tcbok.org/>.

All community members are encouraged to contribute to the TCBOK, especially SIGs. According to the [SIG Policy and Charter](#), each SIG must have a Content Curator, who is responsible for monitoring and guiding discussions, and transforming discussion material into usable content to be shared on the TCBOK.

Chapter 9: Students

Student Involvement

Increased student involvement in the Society and retention of student members upon graduation are critical to the future of the Society. By involving students, we encourage them to begin a lifelong relationship with their professional organization and to form professional and personal relationships with other members that can help them excel.

There are several models for establishing affiliations between geographical communities, SIGs, student chapters, and university-sponsored clubs for technical communication students. Some form of affiliation with a university is important, because it can give the students (and possibly members of your chapter) access to valuable resources, including funding for conferences and speakers, meeting space, promotional media, and so on.

Student Chapters

Currently, student chapters are located at colleges and universities primarily in North America.

If a student chapter is in your geographic area or area of interest, form a relationship between your professional community and the student chapter.

Encourage students to attend your program meetings, ask the student chapter to be involved with your community's activities, and offer to provide SME speakers for student chapter meetings and workshops.

Other Student Organizations on Campus

Colleges and universities might house other organizations not affiliated with the Society that are appropriate for technical communication students or English majors. The student government-sponsored Future Technical Communicators (FTC) club at the University of Central Florida is an example of such an organization. Sigma Tau Delta, the international English honor society for undergraduate and graduate students, has chapters on most major campuses (see Sigma Tau Delta Alliance, below). Search the websites of colleges and universities to see if their campuses offer an organization for technical communication students or English majors. Such organizations can be a fertile recruiting ground for new student members for your community.

Professional Communities

In geographic areas with a nearby student chapter, you can encourage members of the student chapter to exercise their free membership in a geographic community by joining your chapter as a student member. In geographic areas without student chapters, you can get students involved by encouraging them to work with the professional chapter, preferably by joining your chapter as student members.

On campuses with a student chapter (or a student-government-sponsored organization for technical communication students, such as FTC) identify a chapter member to act as the student liaison. (A recent graduate is a good candidate for this role.) Put that member in touch with the faculty advisor and the president of the student chapter. In cases where there is no student chapter or organization for technical-communication students, have the student liaison get in touch with the chair of the technical communication program.

You can get students involved in the chapter with activities like these:

- Networking events held at the college or university
- Mentoring programs
- Joint projects, such as writing newsletter articles or writing and editing the chapter's processes and procedures
- Competitions
- Attendance of professionals at university job fairs

- Professionals as speakers in face-to-face classes or participants in online classes

For SIGs, identify the student members in your SIG and reach out to them virtually (or, if you have SIG members who live near universities with a student chapter, face-to-face as well). Student members of your SIG can help with these activities:

- Programs
- Newsletter content

NOTE: Student memberships automatically include membership in the Academic SIG and an additional SIG.

Engaging Students in Programs

Students from trade schools, colleges, and universities are an important audience. Some schools have student chapters, which work with the local professional chapter and can work with SIGs. The following ideas might help your community engage students:

- Ask a student to work with the program committee.
- Arrange tours, demonstrations, and job-shadowing initiatives, and solicit student participation.
- Work with students to prepare and present an exhibit of outstanding information products in the areas of informational, instructional, promotional, and user support materials.
- Organize a group of students to submit proposals for the STC Summit and to attend. Of interest is the student poster competition, where the two finalists attend the STC Summit and compete for first place.
- Ask students to attend or assist in holding conferences.
- Ask students to present a program at a chapter meeting or an informal webinar on a SIG-related topic.
- Sponsor a local high school tech writing competition, encourage high performers to consider technical communication as a major in college, and suggest they consider a student membership when they are in college (whether or not they major in technical communication).
- Encourage chapter members to contact technical communication faculty who teach courses in their areas of expertise and offer to do a classroom presentation, a workshop, or an informal Q&A session.
- Find out which member of the technical communication faculty typically teaches the portfolio course for seniors and encourage chapter members to volunteer to conduct portfolio and resume reviews, mock interviews, etc.

Notes:

¹ If your chapter has an Active Member initiative, make educational outreach of this nature a point-earning activity.

² With the move to online portfolios in lieu of or in addition to traditional portfolios, this outreach activity becomes appropriate for SIGs as well as geographic communities (particularly the Academic SIG).

Mentoring Programs

The objective of a mentoring program is to pair interested students (mentees) and subject matter experts in the field (mentors). Mentees consult with their mentors on technical communication projects of various sizes or scope, based on the pair's agreed-upon time commitment to the project.

Forming a student mentoring program is a true win-win situation, both personally and organizationally. Student mentees get the benefit of real-world coaching and subject matter expertise from practicing professionals, and often a good start on job search and placement. Professional mentors get the gratification of helping the technical communicators of tomorrow launch their careers, and often even some reverse mentoring on the latest research and technologies of our profession.

From an organizational standpoint, student mentoring programs benefit student chapters by helping them recruit new student members (we recommend making a student STC membership a requirement to be eligible for a mentoring program) and giving them access to a network of professionals from which to find volunteer speakers for student chapter meetings or workshops.

Student mentoring programs are a tremendous boon to a community. The mentor pool typically includes several of your community leaders, and many of the activities in which community leaders are typically involved (newsletter editing, website administration, public relations) are ideally suited for mentor-mentee projects. The mentor gets talented volunteer assistance on an important project or responsibility; the mentee gets an extremely valuable portfolio item (sometimes even meeting an academic requirement for one of their classes).

The Academic SIG has an initiative to pair student members with professional practitioners in the SIG for virtual mentoring relationships that span two academic terms. The virtual mentors would typically be faculty members, but generally *not* on the faculty of the university where the student member and chapter reside. (This is because a confidential mentoring relationship should not pair a mentee with a supervisor or professor who has authority over the mentee, whether it be in the form of a performance appraisal on the job or the grade book in a college course).

The pairing of student members with Academic SIG members (as well as with members of other SIGs or remote geographic chapters) will be coordinated by the Academic SIG and administered centrally by the STC office using an online application process called STC Mentor Board. When the virtual mentor and mentee are paired based on mutual interests and areas of expertise, they can participate in many of the same activities as face-to-face mentor/mentee pairs; the face-to-face element can even be introduced using Skype, smartphones, and the like.

TCBOK-Specific Virtual Mentoring with SMEs

The Technical Communication Body of Knowledge (TCBOK) is a wiki-based information resource portal with articles on a range of topics on the profession contributed by technical communicators. The goal of the TCBOK is to organize, make accessible, and connect the information necessary to train for and practice within the profession of technical and scientific communication. The TCBOK serves as both an information resource and an opportunity to contribute new content.

Registered users can author new content, add to or edit existing content, and comment on pages. The TCBOK has a five-year history and, as an evolving collection of information resources, it is continually updated with new information on the profession. To access the TCBOK, go to <http://tcbok.org>.

Honor Societies

The Society sponsors two honorary societies for students. Sigma Tau Chi (STX) recognizes students in baccalaureate or graduate programs, while Alpha Sigma (AS) recognizes those in two-year or certificate programs. Both societies recognize students who have a cumulative grade point average of 3.5 or above, are active members, and demonstrate a potential for significant contribution to the profession.

For more information about these societies, go to the [Sigma Tau Chi and Alpha Sigma Honor Societies](#) page (**stc.org > Member Center > Recognition > Sigma Tau Chi and Alpha Sigma Honor Societies**).

Employment Services in Student Chapters

To help student members prepare for the job market as technical communication professionals, a student chapter employment committee can do any of the following activities:

- Help student members make contacts in a nearby chapter or in a SIG, where students can make valuable contacts by participating.
- Tap into the job listings by becoming student members of the nearest geographic chapter.
- Develop a student-specific job bank that lists entry-level job and internship opportunities.
- Arrange on-site visits that allow students to spend a day with technical communication professionals at work.
- Co-sponsor a high school technical writing competition with a geographic chapter or the Technical Editing SIG.
- Assign a member to publish a list of positions available and get other members to contribute to the list.

- Help research or update community employment reference tools, such as networking guides, job search tools, and listings of agencies and job boards.
- Cultivate relationships with employers who sponsor internships.
- Invite speakers who can provide employment-related presentations or contacts for members.
- Publicize success stories and highlight successful candidates' techniques for finding work.
- Help members arrange to conduct informational interviews with working technical communication professionals.
- Suggest that members contribute newsletter articles on topics that interest them and use those articles as portfolio pieces.

Consistent with the policies of the sponsoring college or university, student chapters might want to keep a record of their student members and the professional jobs they move on to (perhaps even build an informal alumni organization). Doing so builds a network of contacts who can mentor students and speak about employment.

Chapter 10: Awards and Recognition

Community Honors

Communities have many ways of honoring members and volunteers. This section contains some suggestions for ways you can honor your members.

Active Member Recognition

Some communities have active-member recognition programs. These programs strive to acknowledge the participation of members.

An active-member program can track participation through:

- Meeting attendance
- Volunteer hours

You can also recognize members through:

- Special shirts that identify members as active members
- Prizes to the top participants in your community

Volunteer Recognition

Recognize your community's volunteers! Get ideas for doing so in the "Recognizing Volunteers" section on page 37.

Member of the Year Award

Community presidents and managers can choose a Member of the Year (or similar award), usually at the close of the program year. Consider those members who have helped you most during the year but who might not currently be eligible for other awards. The winner of this award can be a member of your leadership team, or someone outside of the leadership team who went above and beyond the call of duty. Present the winner with a certificate or plaque.

Other Awards

Your community can create its own awards, based on special criteria. Some examples of other awards include Committee of the Year, Rookie Volunteer of the Year, John_Smith Award (where John Smith is the name of a member who made significant contributions to your community), or President's Achievement Award. Use your imagination!

Society Honors

The Society awards two honors for significant contributions to the Society and to the technical communication profession. For more information about Society honors, go to the [Honors page](#) (**stc.org > Member Center > Recognition > Honors**).

Associate Fellow

An Associate Fellow is a Senior Member who has been formally recognized by the Society for having attained distinction in the field of technical communication.

Associate Fellows have accomplished the following:

- Been responsible for important work in the field of technical communication.
- Done notable original work that has contributed to the advancement of technical communication.
- Made significant contributions to the Society and helped to tell the Society's powerful story.

Applications for Associate Fellow are typically submitted to the STC office in late October of each year, and candidates are notified early the following year. The Associate Fellow application can take some time to complete, so make sure to allow enough time to complete the application before the deadline.

This honor is awarded at the Honors Reception at the Summit.

Fellow

The rank of Fellow is the highest honor a member can receive and may be awarded only to Associate Fellows who have continued to excel in the field of technical communication. Fellows contribute to the profession and the Society at the highest level, as indicated by their publications, presentations, awards, mentoring, leadership, and community service.

Fellows apply for this award themselves (they are contacted by the Fellows committee). Applications for Fellow are typically submitted to the STC office in late October each year, and candidates are notified early the following year.

This honor is awarded at the Honors Reception at the Summit.

Society Awards

For more information about Society awards, go to the [STC Awards](#) page (**stc.org > Member Center > Recognition > STC Awards**).

DCSA/DSSA/DSAS

The Distinguished Community Service Awards recognize the hard work and commitment of community leaders. The three awards—the Distinguished Chapter Service Award, Distinguished SIG Service Award, and Distinguished Service Award for Students—recognize an individual's exemplary effort, energy, and dedication to their community and its activities.

The Distinguished Community Service Award is the highest level of recognition that a member can receive for service to their community. Honorees are nominated by leaders of their community.

Applications are typically submitted to the STC office in October of each year. Make sure to begin thinking about nominees from your community early enough to meet the submission deadline.

The Society provides awardees a certificate that can be framed or made into a plaque and presented at a chapter event or mailed to the recipient.

Winners are also recognized at the Summit in various ways and in Society publications.

Community Achievement Award

The Community Achievement Award (CAA) recognizes a community's outstanding accomplishments in achieving the Society's goals through a wide range of programs and activities.

The CAA provides four award levels: Bronze, Silver, Gold, and Platinum, with Platinum being the highest level. All CAA award winners are recognized at Leadership Program at the Summit. In addition, the Community of the Year will be announced at the Honors Reception at the Summit.

The CAA application is typically submitted to the STC office in late January for the prior year's achievements. Applications are evaluated by the CAA Committee. The application can take some time to complete, so make sure to begin collecting information about your community's achievements well ahead of the submission deadline.

Pacesetter Award

The Community Pacesetter Award recognizes innovative and successful community initiatives.

Unlike the Society's Community Achievement Award, which recognizes communities for consistent strength in many varied activities, the Pacesetter Award recognizes the successful implementation of a single beneficial innovation that could be implemented by other communities.

Applications for the Pacesetter Award are typically submitted to the STC office in March, for an innovative activity completed the prior year.

The Community Pacesetter Award is recognized at Leadership Program at the Summit. Pacesetter Award winners are also invited to present and discuss their projects during the Leadership Program at the Summit.

Community of the Year and Most-Improved Community

Winners of these awards are selected by the CAA Evaluation Committee. The winners are chosen from the CAA award applications using a set of specific criteria. Winners of these awards are announced at the Honors Reception at the Summit, while the CAA and Pacesetter awards are publicized in advance.

President's Award

The President's Award honors those who have made distinguished contributions to the profession of technical communication or the Society. The President's Award is awarded solely at the discretion of the Society President.

The STC President announces the names of the recipients during the opening session of the Summit.

Frank R. Smith Award

The Frank R. Smith outstanding journal article award recognizes the authors of exceptional articles that appeared in *Technical Communication* during a calendar year. Since 1966, the Society has paid tribute to the authors whose contributions have made *Technical Communication* one of the most highly respected journals devoted to the arts and sciences of technical communication.

Jay R. Gould Award for Excellence in Teaching

The Jay R. Gould Award for Excellence in Teaching honors true academic mentorship; a record of successful students, defined as those who are involved in the Society, and actively working in the profession; involvement in student activities outside of the classroom; innovation and creativity in teaching, and involvement in research that leads to changes in the way technical communication is taught.

Ken Rainey Award for Excellence in Research

The Ken Rainey Award honors research that has made positive, significant contributions to technical communication practice and teaching. It rewards a lifetime of quality research in the field, a single high-quality empirical study, or a set of related high-quality studies.

Sigma Tau Chi and Alpha Sigma Honor Societies

The student honorary societies Sigma Tau Chi (STX) and Alpha Sigma (AS) recognize student members of the Society who have distinguished themselves as students and have demonstrated promise of future contributions to the Society and the profession.

Membership in STX is an honor given to students enrolled in a program in technical communication, who have a cumulative grade point average of 3.5 or above, are exemplary in participation in STC, and demonstrate a potential for significant contribution to the profession.

Membership in AS is an honor given to students enrolled in a program in technical communication who have a cumulative grade point average of 3.5 or above, demonstrate active participation in STC, and have the potential to contribute to the profession.

Membership is awarded only once and honorees retain the membership only as long as they are members in good standing of the Society.

For more information, see [Sigma Tau Chi and Alpha Sigma Honor Societies](#).

Chapter 11: Diversifying Your Community's Revenues

Setting Operational and Financial Goals

Your community should strive to

- Drive value for members through programs and services
- Cover general operating expenses, program and meeting expenses, and contingency expenses
- Build and/or maintain reserves (no more than two years' worth)
- Become financially self-sustaining

Most communities have overhead or operational expenses that do not generate revenue. These might include

- Website
- Employment database
- Newsletter
- Software
- Supplies
- Scholarships
- Recognition
- Leadership support for the Summit

Revenue-generating programs might or might not fully pay for themselves *plus* cover overhead expenses.

Traditional revenue-generating programs may include:

- Programs
- Meetings
- Workshops
- Competitions
- Local conferences

In addition, community funding from the Society can help to cover expenses.

It is OK to run an occasional deficit for an event, but your overall reserves should be equal to two year's expenses at the end of your fiscal year. Ideally, your community's revenues should outweigh expenses, leaving you with a surplus. This ensures that you are able to fully cover all programs and overhead expenses, as well as build and maintain adequate reserves.

But what if your traditional sources of revenue are falling short? This section gives you some ideas for increasing your community's revenues.

Developing Alternative Sources of Revenue

Alternative sources of revenue include:

- Donations and charitable contributions
- Sponsorships
- Advertising
- Grants
- Corporate matching gifts
- Corporate volunteer grants

- Click-through partnerships that provide income to your community through affiliate links on your website such as [Amazon Associates](#) or [Cafe Press](#).

Some Considerations for Alternative Revenue Sources include:

Donations and Charitable Contributions

- Contributions are an excellent way for members to support both their community and the Society.
- Donors may be able to enjoy tax benefits based on the value of their gifts.
- Gifts may consist of cash or in-kind goods and services.
- Gifts may be used for specific or general purposes.
- You may collect an unlimited number of donations.
- There is no dollar limit on individual donations and contributions.

If you receive individual donations of \$75 or more, contact the Chief Executive Officer (CEO) of the Society for assistance. The CEO will help you determine whether any reporting requirements apply, plus will help you complete any required reporting.

Developing a sponsorship program is a large task, but some communities have done so successfully by looking at what other communities have done. For more information about forming a sponsorship program for your community, see the [Sponsorship and Advertising Opportunities page](#) of the Northeast Ohio chapter's website and contact the sponsorship chair if you have questions.

Incentives for Sponsorships and Advertising

In general, *sponsorships* promote a brand or company, while *advertising* promotes a product or service. Communities can collect funds from an unlimited number of sponsors and advertisers. There is no dollar limit on individual sponsorships, ads, or sponsorship/advertising packages.

If you receive more than \$1,000 in either sponsorships or advertising, contact the Society CEO for assistance. The CEO will help you determine whether any special taxes apply, plus will help you complete any required tax filings.

Corporate Matching Gifts

Some corporations allow their employees to request matching gifts for donations the employees make to non-profit organizations. Encourage your members to investigate their company's matching gift programs and contribute to your community!

Corporate Volunteer Grants

Some corporations award grants to organizations with which their employees volunteer. Encourage your volunteers to apply for volunteer grants, if their company awards these.

These programs might require validation of the employee's volunteer hours, so make sure you can track this information.

Keep It Local

As a Society, we need to guard against donor fatigue, or unintentionally turning off contributors by hitting them with multiple requests from multiple sources. A great strategy for avoiding this is to *keep it local*.

Specifically, you should seek sponsorships, advertising, donations, and contributions from local companies and establishments that are unique to your geographic area. They will appreciate – and your local economy will benefit from – the support and additional business your community will bring them.

You also can seek sponsorships, advertising, donations, and contributions from the local office or outlet of a national or international company. However, you should request sponsorships and donations from the headquarters of a national or international company *only* if it is in your geographic area.

Chapter 12: Samples and Templates

Meeting Announcement

Society for Technical Communication Schedules a Contractors' and Consultants' Roundtable

What is this about?

- Techniques for marketing independent practices
- How tax laws affect independents
- Ethical issues independents face
- Business trends affecting independents in the years ahead
- Business planning for independents

Explore these issues and others in a "Progression" on contracting and consulting.

Each table is facilitated by an experienced independent consultant, including some from outside our field.

When is it? April 7, 20xx --- 6:00 - 9:00 PM

Where? Hilton Inn & Towers, 2334 Smith Avenue

Take I-8855 to the Smith Avenue exit (exit 10). At the end of the exit ramp, go west approximately one-half mile to Smith Avenue. The Hilton is immediately to your left.

Register by March 27. For more information, contact Firstname Lastname, program manager, at (555) 555-5555 or firstname@domainname.com.

Meeting Evaluation

STC Name Chapter or SIG May 20xx Meeting

Qualitative Feedback

Describe the presentation in a few words:

What is the most valuable thing you learned in this presentation?

Least valuable?

The best thing about this presentation was:

If you were to change one thing about this presentation, it would be:

Quantitative Feedback

On a scale of 1 (low) to 5 (high), please evaluate the following:

Demographics

How did you hear about this meeting?

Are you an STC member? Yes No

How many years have you been working in the field?

Message to Presenter

Send an email to your presenter to confirm arrangements similar to the following:

Dear <Presenter>,

Thank you for accepting our invitation to speak on <topic> at the <date> meeting of the <CommunityName> of the Society for Technical Communication (STC). Your presentation will take place at the following time and location:

Wednesday, May 17, 20xx

6:00 PM

Dun and Bradstreet Software Building

As a speaker, you are our guest. To help you prepare your presentation, I have attached a brief fact sheet about our members.

Please send me a brief outline of your presentation, a 75-word description, and a 75-word biography by January 28. These materials will help us develop publicity for the event, which will be sent to STC members and local publications in the next few weeks. We will also announce the event in our newsletter and on our web site.

Please contact me if I can be of any help as you prepare your presentation. I would be glad to review your session outlines, visuals, and handouts to help you tailor the presentation to this audience.

Thanks again for accepting the invitation to speak to our members. We look forward to your presentation.

Best regards,

Firstname Lastname, Program Manager

STC Community

(555) 555-5555

firstname_email@domainname.com

Community Profile

The following is an example of a profile that could be used to provide a speaker with general background information about the community. This information can also reside on the community's website, along with links to speakers.

STC Community Name

About the Society for Technical Communication (STC)

STC is the world's largest professional organization for people involved in communicating technical information (technical writers, editors, illustrators, instructional designers and managers of technical communication departments, as well as consultants, researchers, educators, and students in the field). STC promotes the profession through its more than 150 chapters and special interest groups, and its publications, meetings, conferences, competitions, and research programs.

About Our Meetings

Our meetings focus on current developments in technical communication and related fields through interactive, workshop-like sessions and lively panel discussions. They tend to be more like training courses than academic conferences. Please prepare instructional and informational materials, but do not prepare a formal paper.

Membership Profile

Education: Nearly 100 percent have bachelor's degrees—about two-thirds in English or technical communication, about one-fourth in science, engineering, or computer science, and about one-twelfth in journalism. About one-half have had some graduate education, and many have master's degrees.

Experience: Average is five to ten years in the field.

Job Profiles: Nearly all working members develop one or more of these types of publications: documentation for software users, marketing collateral, training materials, and scientific reports. Most members are writers, but several are team leaders and managers.

Many members work on just one project for several months, while others work simultaneously on several smaller projects. Members write online documents, although some printed documents are still prepared. Our members tend to work for high-tech firms, but some members work in academia.

About one-fourth of the members work as independent contractors. Typical employers include Unisys, IBM, Hayes, DCA, Southern Bell, and Lanier. Employment is growing in environmental firms, although that still represents a small part of our work. Our yearly conference also attracts STC members from nearby states.

We have student members from X Tech and Y University, which have undergraduate and graduate programs. Many students are in their 30s, and are seeking to change professions or receive further training in the field.

Preferred Presentation Formats

Practical. Members prefer information they can immediately apply on the job. Members appreciate well-researched and cited information, but practicality is the overriding concern.

Interactive. Presentations should be one-third to one-half lecture, and two-thirds to one-half hands-on practice of the skills presented.

Mixed level. Members like intermediate and advanced presentations. However, the experience level of the audience varies widely so please include basic information, identifying it as such.

Handouts and visuals. These are most successful when they are not duplicates of one another, yet work together.

Membership Survey

This survey is oriented toward chapters planning face-to-face meetings but can be modified for communities planning online meetings.

Name (optional) _____

As a new STC community, to organize our activities to meet the needs of our members, we are striving to involve as many people as possible in the decision-making process. Please let us know your preferences by completing this brief survey.

Meetings

Are you interested in attending community meetings?

- ☐ Yes
- ☐ No

How often do you think the community should hold meetings?

- ☐ Once a month
- ☐ Every other month
- ☐ Quarterly
- ☐ Other _____

What type of meeting do you think would attract the most members?

- ☐ Informal “get-together” discussions
- ☐ Business-style meeting with a presentation/program
- ☐ Meal served at meeting with a presentation/program

If you would like a meal served at the meeting, how much would you be willing to spend?

- ☐ \$15-20
- ☐ \$25-30
- ☐ More than \$30

What location would be most convenient for you? _____

How far would you be willing to travel? _____

If you know of any available locations, please list them. _____

Participation

Would you be willing to participate in any of the following areas? Check any of interest.

- ☐ Help organize programs and presentations
- ☐ Help recruit members
- ☐ Help with administrative duties (meeting notes and notices, mailings, and so on)
- ☐ Help with employment services
- ☐ Locate meeting sites
- ☐ Develop the community website
- ☐ Write articles or take photographs for the newsletter
- ☐ Other (please list): _____

Presentations and Programs

Although we have already lined up our first few speakers, we would like a better idea from you—the members—on the types and scope of programs you would like to see in the future.

Which of the following programs would you like to see? Check any that apply.

- ☐ Computer issues and products
- ☐ General topics in communication
- ☐ Good management practices
- ☐ eNetworking and job hunting
- ☐ Technical writing and editing
- ☐ Other, general or technical (please list): _____

Presentations and programs can take several different forms; check those that most interest you.

- ☐ Single speakers
- ☐ Panel of speakers
- ☐ Progression
- ☐ Webinar
- ☐ Other

Many of us have special talents and expertise that could benefit our group. Would you be willing to share any of your knowledge with our membership in the form of a presentation or participate as a member of a panel discussion? If so, please suggest a topic or topics: _____

Suggestions or comments: _____

Chapter 13: Glossary

Terms and Usage

Correct term	Definition
Society for Technical Communication	Legal name of the association
STC	Acronym for the name
the Society	Short form for the legal name
Society-level	The Board, the Staff, and committees that serve the entire Society and report to the Board
Community-level	The chapter president or SIG manager, the administrative council, and committees that serve a chapter or SIG
STC Board of Directors, STC Board	The STC Board of Directors is responsible for leadership and oversight of STC activities.
STC office	The paid staff who administer STC. The staff works with Society and community leaders worldwide to ensure successful operation within STC's bylaws, policies, and procedures. The staff reports to the STC executive director, who reports to the STC Board of Directors.

Chapter 14: STC Contact Information

Office Staff

For a complete list of the office staff, see the [Staff Directory](#) web page (**stc.org > About-stc > The Society > Staff Directory**).

Board of Directors

For a list of the current Board of Directors, see the [Board of Directors](#) web page (**stc.org > About-stc > The Society > Board of Directors**).

Community Affairs Committee

The STC [Community Affairs Committee](#) (CAC), see the Leadership Resources web page (**stc.org > Member Center > Leadership Resources > Community Affairs Committee**).

Chapter 15: New Leader Checklist

The Basics of Running a Community

1. Notify the office (stc@stc.org) and Community Affairs Committee (cac@stc.org) of your new leadership.
2. Review the Community Handbook.
3. Subscribe to the presidents' or SIG leaders' email list.
4. Refer to the best practices post for more information: <http://www.cac-stc.org/resources/discussion-groups/>
5. Request access to your community's membership roster from the office.
6. Produce a membership roster and identify potential volunteers.
7. Listen to the "Planning for a Year in a Weekend" leadership webinar.

Note: Webinars are located on the Leadership Resources page, under **Leadership Webinars**.

8. 7. In October, start planning and budgeting for the following year; use the budget template furnished to you by the office; use the Community Success Plan at a minimum to plan.

Available Resources

Go to the following web sites for other documents to help you:

- _Leadership Resources web page (STC member login required) <https://www.stc.org/leadership-resources/>
 - Community Handbook
 - Community Success Plan
 - Treasurers' Handbook
 - Various policies and procedures
 - Leadership Webinars
- _Community Affairs Committee (CAC) web site with blog posts and best practices articles: <http://www.cac-stc.org/>
- _CAC Facebook page <https://www.facebook.com/stccac/>
- _CAC Twitter page <https://twitter.com/stccac>

Questions?

Contact the Community Affairs Committee at cac@stc.org or reach out to us through our social media channels.

Community (Chapter or SIG) Lifecycle Event	CAC Responsible	Office Responsible	CAC Support	Office Support
1.0 Initiating a Chapter or SIG				
1.1 Respond to queries about process and forms	X	X		
1.2 Bring motion to create to the Board	X			X
1.3 Initiate a web site and hosting, update STC web site		X	X	
1.4 For chapters, generate a new tax ID		X		
1.5 Request and receive funding templates		X	X	
1.6 Receive funding		X		
1.7 Update Leadership database		X	X	
1.8 Ensure access to community leader reports		X	X	
1.9 Send welcome email; offer suggestions for programming and other resources	X	X		
2.0 Running a Chapter or SIG				
2.1 Develop of chapter bylaws	X			X
2.2 Assist in describing	X			X

Community (Chapter or SIG) Lifecycle Event	CAC Responsible	Office Responsible	CAC Support	Office Support
leadership roles and having an election				
2.3 Assist in planning chapter events	X			X
2.5 Advertise community events (social media, newsletter, etc)	X			
2.6 Receive annual financial report template, complete, return to STC		X	X	
2.7 Receive annual budget request template, complete, return to STC		X	X	
2.8 Assist with succession planning	X			
2.9 Assist to maintain vitality	X			
3.0 General Assistance to all Communities				
3.1 Develop, update, and maintain the Community Handbook, leadership calendar, community success plan, and related procedures	X			

Community (Chapter or SIG) Lifecycle Event	CAC Responsible	Office Responsible	CAC Support	Office Support
3.2 Organize and manage Leadership Program	X			X
3.3 Schedule and deliver 'community member only webinars'		X	X	
3.4 Sponsor and administer community membership drives		X	X	
3.5 Submit information for community awards.	X			X
3.6 Schedule and deliver community leader webinars	X			X
3.7 Periodically contact communities to proactively offer support	X			
3.8 Post Society and CAC events on website and social media	X			X
4.0 Shutting down a chapter or SIG				
4.1 Assist in troubleshooting issues	X			X
4.2 Assist in merging with another community	X	X		

Community (Chapter or SIG) Lifecycle Event	CAC Responsible	Office Responsible	CAC Support	Office Support
4.3 Assist in shutdown of a community	X			X

Chapter 16: Strategic Plan

What is the current name of your chapter (geographic community) or SIG (virtual community)?

Do you want to change the name of your community? If yes, please enter the new name.

What has been your average annual cost of operating your community over the last 3 years?

Describe the members whom you hope to attract to your new community.

What are their concerns, professional needs, and interests?

What is your competition for their time and interest?

How will your community provide value to the larger STC community and further the overall goals of the Society?

What is the mission statement of your community?

List names of community members who took part in this re-chartering process. Put an asterisk next to the primary contact for re-chartering. (Add additional rows, as needed.)

Name	Role	Phone	Email address

Overview of Goals

On the next pages, please list at least three, but no more than seven, goals for your community for the next 1 to 2 years. Describe how you will achieve each of these goals, and what program(s) are tied to helping you achieve them.

Goal 1:

How 1:

Activity 1:
Activity 2:
Activity 3:

How 2:

Activity 1:
Activity 2:
Activity 3:

How 3:

Activity 1:
Activity 2:
Activity 3:

Goal 2:

How 1:

Activity 1:
Activity 2:
Activity 3:

How 2:

Activity 1:

Activity 2:
Activity 3:

How 3:

Activity 1:
Activity 2:
Activity 3:

Goal 3:

How 1:

Activity 1:
Activity 2:
Activity 3:

How 2:

Activity 1:
Activity 2:
Activity 3:

How 3:

Activity 1:
Activity 2:
Activity 3:

--

Thank you for participating in this important way to serve your members!

Chapter 17: Community Success Plan

This document lists activities that a community should do to be successful and includes recommended community standards; use it to help with annual planning.

Area	Activities
Annual Plan	➤ Create an annual community plan and submit it to the STC office and Community Affairs Committee (CAC)
Budget	➤ Using your annual community plan, create and submit a community budget to the STC budget review committee
Financial Report	➤ Submit a community financial report to the STC office and treasurer
File Taxes	➤ File 990N tax return online (US chapters only)
Membership	➤ Increase overall membership by participating in membership-drive contests
Elections	<ul style="list-style-type: none"> ➤ Hold annual elections ➤ Hold a leadership transition meeting ➤ Provide the STC office and CAC new leader contact information
Leadership	<ul style="list-style-type: none"> ➤ Send representatives to the Leadership Program at the STC Summit ➤ Community leaders attend the CAC's leadership webinars
Recognition	<ul style="list-style-type: none"> ➤ Research and encourage eligible members to apply for Associate Fellow and Fellow ➤ Hold an annual event to recognize all community volunteers
Programs	<ul style="list-style-type: none"> ➤ Chapters: Hold face-to-face meetings and invite virtual attendees ➤ SIGs: Hold virtual meetings and encourage SIG members in the same area to gather in person for the meetings
Outreach	<ul style="list-style-type: none"> ➤ Reach out to technical communication programs at local colleges and universities to promote technical communication and STC ➤ Reach out to members and non-members through a blog, LinkedIn Page, Facebook page, Twitter, email list, online forum, or newsletter (More than one medium recommended) ➤ Reach out to other communities; share your newsletters and invite their members to your programs

Chapter 18: Volunteer Code of Conduct

As a volunteer of the Society for Technical Communication, I am committed to the Society's primary purpose, which is to serve its members by identifying and promoting best practices in the field and by demonstrating the economic value delivered by technical communicators. My obligations as a volunteer include the following:

General Conduct

- I will serve the Society's mission and always strive to act in the organization's best interest.
- I will actively promote the Society and work in partnership with its professional staff.
- I will honor the ethical values of the Society in all of my interactions related to the organization. This means that I have a personal responsibility to comply with the Society's code of ethics and conflict of interest procedures. I will protect the confidentiality of the Society's proprietary or privileged information, including its intellectual property, business plans, personnel information, member lists and the identity of donors who choose to remain anonymous. I recognize that I have, together with all STC volunteers and staff, an obligation to safeguard the integrity of the Society, and I will report ethical misconduct to the appropriate individuals.
- I understand the importance of acting within the scope of my authority as specified in my volunteer job description (as well as in accordance with the organization's bylaws, policies, committee charges and other formal governing documents). I will make only those commitments I am authorized to make, or that the Society can reasonably keep, without violating established practices and policies.
- I recognize that my professional stature carries weight with others. I will make statements on organizational positions only if the Society has taken an official position and I have been authorized to speak for the organization. I will exercise personal responsibility when using social media or e-mail. If I have not been authorized to speak for the Society to the media or in public testimony, I will clearly state that my opinion is personal or professional, not organizational. I will also exercise care in lobbying and political activities to avoid jeopardizing the Society's tax exempt status or otherwise harming the reputation of the Society.

Conduct Related to Assignments

- I understand that the Society depends on my professionalism and integrity, and I will strive to meet its expectations. This means that I will adhere to the charge and work plan of the committee, subcommittee, task force or other entity to which I am assigned. I will prepare for and participate in meetings in a full and timely manner, and I will respond in a timely manner to communications from STC staff. If I accept specific responsibilities, such as developing written materials or obtaining information to aid in future deliberations, I will meet my obligation or make alternate arrangements acceptable to the Chair.
- I will honor the confidentiality of all Board, committee, subcommittee and/or task force deliberations, privileged discussions and information. I will not reproduce or communicate any material without the Chair's prior consent or until the Society has issued a public statement or posted information on the STC website.
- I understand that every volunteer must be a steward of the Society's limited resources. I will respect and comply with the Society's travel and reimbursement policies.
- I recognize that STC volunteer assignments are limited and highly valued. If circumstances prevent me from contributing as expected, I will discuss my standing aside with the President or Chair as appropriate.

I acknowledge that by signing this document, I am taking personal responsibility for upholding its provisions, and that my failure to do so could result in my removal from assignments and/or exclusion from future participation in STC volunteer activities.

Printed Name _____

Signed _____ Date _____

Chapter 19: Succession Planning

What is Succession Planning?

Succession planning is a process for identifying and developing new leaders who can replace old leaders when they leave. In business, it entails developing internal people with the potential to fill key business leadership positions in the company. - *Wikipedia*

Habits of Strong Leaders

- Continuously recruit new volunteers and recognize existing volunteers.
- Develop volunteers as leaders so that you can create a leadership pipeline.
- Post leadership opportunities online and keep the information current.
- Provide leadership training.
- Develop a community identity through communications, branding, and events.
- Cast a vision for your community.
- Be open to change so that your community meets today's needs and interests.
- Hold an annual leadership transition meeting.
- Create and regularly update standard operating procedures.
- Provide easy access to all community resources to new leaders.

Succession Planning Tips

- Recruit and retain members of all ages. Just understand that they may have different expectations of your community.
- Younger generations are used to quicker communications, easily accessible information, and getting their voices heard when they have something to say. They also want mentored leadership experiences.
- Deliberately plan changes to your community to keep energy high. Provide templates for activities to reduce frustration but resist "the way it's always been done," particularly when engaging new volunteers.
- Free leadership training is an effective way to recruit and develop new leaders. Many prospective volunteers are motivated by the opportunity to lead. Seek to create a culture of servant leaders who are also doers.

Discussion Questions

- Do you describe leadership roles and responsibilities on your website?
- What are some ways to actively seek new leaders?
- What are the ways you seek to increase volunteer engagement?
- What methods have been most effective for you to recruit new volunteers?
- Do you host a special event that you repeat every year?
- Do you offer annual leadership training?
- Do you provide opportunities for your volunteers to progressively develop their leadership skills?
- What is a typical leadership progression in your community (for example, competition judge -> competition committee member -> competition manager -> vice president -> president)?
- Do you have a leadership pipeline?

- Do you have a leadership succession plan for new leaders to replace existing leaders?
- Do you have an annual leadership succession meeting?
- Have you created any standard operating procedures for common community tasks? If so, which tasks?

Chapter 20: Membership Recruitment

New Member Recruitment Guide

Thanks for serving as a community leader or on your membership committee!

Retaining and growing membership is a primary goal for every STC community. This guide outlines some tasks that can help you to be successful in recruiting new members.

Review and update your community's information.

- **Update membership materials and community resources.** Visit the STC website's Membership, Join or Renew Now page to confirm that you have the most current version of STC's membership form and any other membership materials.
- Make sure your community literature and promotional materials are **up to date**.
- Verify that **names and addresses of your community's leaders** (including P.O. boxes, email addresses, Twitter handles, and web links) **are accurate** on all promotional and informational materials.
- Verify that **community leader email links on your website are correct and up to date**.

Identify potential members.

Many potential STC members can be found at your place of work and in local industries, not-for-profit organizations, and local colleges and universities. Keep the following questions in mind to help you identify potential STC members (including student members).

- **Are there others you work with at your own company/organization who might be interested in STC membership or attending an event with you?**
- **What other industries or professions in your area employ technical communicators?** Do you have any social networking connections or personal connections to potential members and/or their managers at these companies? If not, perhaps you can contact their HR department directly to send information about membership for employees.
- **Are there any other societies or groups to which you belong** (such as ASTD, local writing groups or forums, or technical societies) with members who would be able to use STC to supplement their education?
- **Who are you targeting to attend your meetings or events?** If you are publicizing your events through business/college/local publications or radio stations, what audiences do they reach? Are there other media venues through which you could connect to potential new members?
- Are there any **former members** who might be interested in returning to STC?

Contact potential members.

Contact potential STC members at your place of work, local companies and organizations, and other professional organizations and associations in your area.

- Avoid "cold-calling;" use your own members' connections.
- Send potential members an invitation to an STC community event.
- Ask if you can follow up with them to provide additional information about STC events, resources and membership.

Approach guests who attend your community's events.

- Make sure that **membership materials are available and easy to access** at each meeting or event. Examples: STC membership application, community brochure, fact sheet, calendar of events
- Ask guests **how they heard about the event** (if they were not personally invited by a community member). Note that information so you can use it again.
- **Make guests feel welcome.** If you invite a guest to attend an event, arrange to meet with them when they arrive. Make sure they receive a friendly greeting. Introduce them to other attendees.
- **Gather names and email addresses during registration or for door prizes.** Let potential members know that you will follow up with them to provide additional information about STC events, resources, and membership.
- **Determine what industries or professional disciplines they represent.**
- Find out if there **others they work with who may be interested in STC.**

Ask them to join.

- **Hand them an application or e-mail a link** to the online STC membership application.
- Remind them to **select your community when completing the membership application** so they join your community as well as STC International.

Build a contact list of potential members.

- **Follow up** to invite potential STC members to future chapter or SIG events.
- **Share** your community's potential member contact list with the STC office.
- **Send the list** to CAC liaison. **Note:** Potential member lists sent to the STC office will be used by STC **only** for following up about possible membership. These lists will not be distributed anywhere else.

Focus on the benefits of STC membership and the value of your community.

- **Draw on testimonials from members** who have benefited from STC. Share membership testimonials and resources with other communities.
- **Make it personal:** Talk about the reasons you volunteer and the value you have personally received from STC.
- Cite **articles** that emphasize the benefits of membership.
- **Be positive!** Do not complain or apologize for the cost of membership. It's clearly worth it.
- Remind them that **joining from October to December gets them the rest of the current year and all of the next year, plus drastically reduced member prices for the annual conference and other benefits.**
- **Promote the availability and benefits of becoming certified,** and that difference between the member and nonmember price is basically the cost of membership (\$200 difference versus \$215 membership).

If a prospective member has questions or wants to talk further, contact your Community Affair Committee (CAC) liaison to get in touch with a member who can help with recruitment.

Chapter 21: Membership Committee Resource Guide

Community membership committees actively work to make members feel welcome and included. They promote community activities to inspire prospective members to join STC and current members to stay actively engaged. The success of a community's membership committee enhances the success of the community it represents.

Purpose of This Guide

This Membership Resource Guide provides suggestions and resources to manage membership committees in STC communities. It includes membership committee tasks, associated resources, and the approximate time of year to complete them. There are examples and ideas of how other STC communities have successfully completed tasks and achieved membership goals.

This resource guide supplements existing community resources and procedures, and is intended to be used as a guideline for membership committee managers and other community leaders.

A companion guide for new member recruitment is also available.

Your Community's Membership Goals

The goals of a community's membership committee include:

- Retain current membership
- Recruit new members (the best way to garner new members)
- Welcome new members
- Generate enthusiasm about STC to encourage member retention
- Keep in contact with lapsed community members

Your Community's Membership Tasks

The following sections outline the typical tasks that your community's membership chair and committee need to perform throughout the year to recruit, retain, and serve your members.

June to September

GOALS: Transition of committee members and planning

From June to September, communities transition volunteers into new roles and plan activities for the coming year.

Goal	Supporting tasks	Resources and examples
Transfer knowledge to new membership committee volunteers	<p>Schedule a meeting to discuss membership management in your community: how you did it and expectations for your new membership manager and membership volunteers.</p> <p>Provide access to resources that your community uses to develop and maintain membership: file locations and URLs, and any passwords or other access permissions needed to use these materials.</p>	<p>This resource guide</p> <p>Instructions for completing membership tasks in your community</p> <p>Membership manager job description. (If your community does not have one, create one and have it reviewed and approved by your council.)</p> <p>Files and documents related to membership (certificate templates, membership applications, informational handouts about the chapter or SIG).</p> <p>Copy of your community's by-laws</p> <p>Copy of STC by-laws</p>
Plan membership-related activities	Set membership goals and determine recruitment activities for the year.	<p>Community goals or initiatives</p> <p>Membership development plan</p> <p>Example: Membership portions of CAA application (available from STC).</p>
	Work with committees (public relations, programs, web team) to promote activities or membership incentives.	<p>Articles on community websites</p> <p>Membership materials such as chapter brochures, fact sheets, or other promotional items</p>
	Recruit additional volunteers.	<p>Call for volunteers in your community's website or newsletter</p> <p>Verbal call for volunteers at your community meetings (announcement by chapter president or membership manager)</p>
Plan the budget for your membership committee	Determine committee expenses and discuss them with community membership	<p>Copy of your community's budget</p> <p>Budget template provided by STC</p>

September to December

GOALS: Membership renewal and new member recruitment

STC's Membership Drive is from October to December. Start promoting the renewal period to your community in September.

Goal	Supporting tasks	Resources and examples
Publicize STC's membership renewal period	<p>Send email reminders to all community members regarding renewing their STC membership. Include information about any current STC incentives (iPod or Kindle giveaways).</p> <p>Promote renewal in your community's website and newsletter.</p>	<p>Article about renewal in your community's website or newsletter</p>
	<p>Offer community-level incentives for membership renewals.</p> <p>Tie your community's renewal efforts to STC's renewal activities.</p> <p>Send e-blast to members, encouraging them to renew.</p>	<p>Prizes or rewards. Example: Raffle Amazon/Starbucks gift cards to all members who have renewed their membership who are attending the monthly seminar (Northeast Ohio chapter)</p> <p>STC Member Get A Member (\$10.00 off your membership renewal for each new member you bring in—up to \$50, which can drop your membership dues to \$165)</p> <p>Template for renewal e-blast to members</p>

January to February

GOALS: Membership renewal – targeting lapsed members

January to February is a “grace period” after the main renewal period. During this time, target any members who have not renewed to encourage them to renew their membership. Remind your members that they must renew before the end of February in order to vote in the annual elections.

Goal	Supporting tasks	Resources and examples
Encourage STC retention rate; contact members who have not renewed during the standard renewal period.	Monitor the community roster on the STC website at least once per month to identify lapsed members (members who did not renew during the October to December renewal period).	Instructions for downloading your community’s report: <ul style="list-style-type: none"> • Login required. • Only chapter presidents and membership managers can access the roster for their community.
	Email lapsed members about renewing their STC membership: Inform members about STC Membership Renewal Challenge. Emphasize your community’s sincere interest in keeping them as members. Make sure they know that it’s not too late to renew.	Email template especially for lapsed members.
	Send personal e-mails or call lapsed members in February, before the end of the membership grace period. Emphasize benefits of STC membership.	Guidelines, scripts, talking points. Call script from New York Metro chapter. Additional talking points to inspire a positive and open-minded dialog, inspire confidence in renewing, deal with difficult questions, and respond with empathy to situations that provide insurmountable obstacles to renewal.
	Offer additional community-level incentives for membership renewals.	Example: Raffle off Amazon/Starbucks gift cards to members who have renewed their membership who are attending the monthly seminar.

Goal	Supporting tasks	Resources and examples
Keep the door open to members who have dropped out (they are potential members in the future)	<p>Acknowledge their cessation of membership via email. Invite them to continue to receive mailings from your community</p> <p>Be sure members who have definitely dropped out know that they are welcome to rejoin in the future.</p>	<p>Template for "farewell-but-keep-door-open" email</p> <p>Welcome-back template for those who dropped out but come back.</p> <p>Examples:</p> <ul style="list-style-type: none"> Farewell but leave door open email Welcome back email

All Year Activities

GOALS: Welcome members and guests, recruit new members

Goal	Supporting tasks	Resources and examples
Welcome new members by email or social networking.	Monitor the community roster on the STC website at least once per month to identify new members (References to "new members" in the roster include any member adding your community to their STC membership).	<p>Instructions for running a community roster from My STC.</p> <ul style="list-style-type: none"> Member login required. Only chapter presidents and membership managers have access to membership rosters.
.	Add new members to your community's mailing list.	<p>Use a mailing list program to enhance the efficiency of your mailing lists and make it easier to separate member lists from lists of non-members who want to stay informed of your community's activities.</p> <p>Examples of mail programs (pricing varies):</p> <ul style="list-style-type: none"> Constant Contact Mail Chimp Mailman

Goal	Supporting tasks	Resources and examples
	<p>Send welcome email or letter to each new member. Suggested items to include:</p> <ul style="list-style-type: none"> • Schedule of community events • Information about community website, social networking groups, newsletter, and discussion forums/e-mail lists • Community contact information • An offer to schedule a meeting with new members (in person or remotely) to discuss technical communication, STC, or ways to get involved in the community 	Welcome letter template
Announce and welcome new members in newsletter	Submit one or more articles to your community newsletter announcing the names of any new members	
Hold special events to attract new members and keep current members engaged.	<p>Ask community volunteers to be a “buddy” for a new member – to provide additional information about the chapter or SIG and to be a resource about the community.</p> <p>Schedule a more casual social event to make new members feel welcome.</p> <p>Hold an information session about volunteer positions.</p> <p>Encourage everyone on your council to be “lookouts” for newcomers and visitors at chapter events.</p>	<p>Member-bring-a-guest for free meetings or events.</p> <p>Provide coupons for new members/guests attending their first event (SIG webinar or chapter meeting). Example: Discount coupon (Northeast Ohio chapter)</p>

Goal	Supporting tasks	Resources and examples
<p>Enhance feeling of belonging to a community and inclusiveness.</p>	<p>Announce new members at chapter meetings and give them a hearty welcome.</p> <p>Encourage your council to be sure that new members of your community have someone to sit with at their first few meetings.</p> <p>Emphasize the value of your community as a network.</p> <p>Recognize long-term members (for example, five-year, 10-year, or 20-year recognition).</p> <p>At every chapter event, make sure that those who are staffing the registration table greet each attendee warmly.</p> <p>Be positive! Do not complain or apologize for the cost of membership. It's clearly worth it.</p>	<p>Leadership training materials provided by your community or by STC</p> <p>Leadership Day materials from STC Summit</p> <p>Every Member Matters article (Rochester chapter)</p>
<p>Encourage existing STC members to add your community to their membership.</p>	<p>Be sure everyone on your council knows that STC members can add new communities to their membership at any time during the year.</p> <p>Encourage those who are members of multiple communities to share their stories.</p> <p>Encourage unaffiliated members (those who are members of STC but not to any community) to join your community.</p> <p>Have printed copies of the STC Membership Upgrade/Change Form available at all chapter meetings. Membership Upgrade/Change form (downloadable PDF from STC website)</p>	<p>Membership Upgrade/Change form (downloadable PDF from STC website)</p>

Chapter 22: Document Retention Policy Sample Template

Society for Technical Communication, _____ Chapter Document Retention Policy

General Guidelines

See <https://www.councilofnonprofits.org/tools-resources/document-retention-policies-nonprofits> for details.

Keep these documents permanently:

- Articles of Incorporation
- Audit reports, from independent audits
- Corporate resolutions
- Checks
- Determination Letter from the IRS, and correspondence relating to it
- Financial statements (year-end)
- Insurance policies
- Minutes of board meetings and annual meetings of members
- Real estate deeds, mortgages, bills of sale
- Tax returns

Purpose

The purpose of this Document Retention Policy (the “Policy”) is to standardize the procedures by which the records of Society for Technical Communication, _____ Chapter (“Chapter”) shall be maintained, stored, or destroyed in the ordinary course of business.

Governing Laws

It is the intent of the Chapter to adhere to all applicable federal, state, and local statutory and legal guidelines.

Definitions

- A. Record: for purposes of this Policy, the term “Record” refers to:
- any written document produced by a Chapter officer, director, committee member or volunteer during the ordinary course of business
 - any correspondence, order, invoice, or other business-related matter received by the Chapter during the ordinary course of business
 - any electronic communication or documentation created or stored in electronic form by the Chapter

Administration of the Policy

- A. The Chapter _____ will be responsible for the ongoing administration of this Policy (see Section V for specific duties of the Chapter _____).
- B. The Chapter shall maintain logs of Records destruction to document the regularly scheduled purges of valueless Records (“Records Destruction Logs”). The logs shall document what Records were destroyed, the manner of destruction, and the location from which the Records were taken. The logs shall be reviewed at least annually by the _____. All logs shall be retained permanently.

- C. The Chapter shall review annually its inventories of retained or stored Records ("Records Inventories") and update its Records Inventories as necessary.

Duties of the _____

The _____ shall:

- Coordinate and oversee the implementation and maintenance of this Policy throughout the Chapter.
- Work with the Chapter's officers, directors and volunteers on an ongoing basis to ensure that all have received, read, and understand the procedures implemented pursuant to this Policy as well as any subsequent updates or changes. This Policy shall be distributed to all Chapter directors and officers.
- Oversee the maintenance and updating of Chapter Records and Inventories.
- Review Record Destruction Logs on at least an annual basis.
- Work with other Chapter officers, directors, committee members and volunteers to classify stored Records and implement procedures to facilitate their identification, access, and retrieval.
- In the event of litigation as described in Section VII below, ensure that all Chapter officers, directors, committee members and volunteers comply with Section VII procedures for the retention of all potentially discoverable Records for the applicable time period.

Schedule for Retention and Destruction of Records

Chapter Records shall be retained and stored in accordance with the attached Schedule. After the time specified in the Schedule for retention of any Record has passed, such Record shall be eligible for destruction. Destruction of such Records shall proceed on a regular basis in accordance with the attached Schedule, except as provided in Section VII of this Policy (below) and subject always to the considered judgment of the Administrative Council. The _____ shall establish a procedure whereby Records may be maintained for longer periods than specified in the Schedule.

The Chapter should delete personal and non-necessary business-related electronic mail ("e-mail") on a regular basis. Deleted e-mails will be purged from the system routinely in accordance with the attached Schedule, except as provided in Section VII of this Policy (below).

Chapter officers, directors, committee members or volunteers who have any Chapter Records at their homes, offices or other locations shall comply with the provisions of this Policy and shall cooperate with _____ in the retention or destruction of any such Records created thereby.

In the Event of Litigation, Audit, or Investigation

In the event of pending or imminent litigation, audit, or investigation involving the Chapter, all routine Record destruction shall cease. All officers, directors, committee members and volunteers shall immediately stop performing routine Record destruction procedures, and _____ shall ensure that every Chapter officer, director, committee member and volunteer is aware of and is complying with the need to preserve potentially discoverable Records. Limited routine Record destruction may resume upon specific approval of Chapter or Society legal counsel.

Retention Periods Generally

All Records should be retained for as long as applicable statutory or governmental regulatory periods require, and for additional periods during which they may continue to be material for litigation, regulatory purposes, or business purposes. Electronic Records should be retained for the same length of time as their paper counterparts would be retained. The attached Schedule provides retention periods for particular kinds of documents.

Policy Review and Approval

This Policy has been reviewed and approved by the Administrative Council.

Document Retention Schedule

Accounting Records

TYPE OF RECORD	RETENTION PERIOD	METHOD/LOCATION (Paper or Electronic or Both)	PERSON RESPONSIBLE
Annual financial statements	Permanent		
Monthly financial statements	3 years		
Annual audit reports	10 years		
Canceled checks (Operating)	8 years		
Paid invoices	8 years		
Business expense records	8 years		
Credit card receipts	3 years		
Cash receipts	3 years		
Stop payment orders	3 years		
Bank statements (Operating)	8 years		
Bank statements (Endowment)	8 years		
Budgets	3 years		

Chapter 23: Whistleblower Policy Sample Template

Society for Technical Communication, _____ Chapter/Community

WHISTLEBLOWER POLICY AND PROHIBITION AGAINST RETALIATION

Fraudulent or Dishonest Conduct & Whistleblower Policy Statement

The Society for Technical Communication, _____ Chapter ("Chapter") will investigate any suspicious activities, behavior, or suspected violation of law in the area of organization-related misconduct, fraud or potential violation of Chapter Policy (as defined below) by directors, officers, staff, volunteers, or others associated with the Chapter. Anyone found to have violated any law or Chapter Policy is subject to disciplinary action by the Chapter or the Society for Technical Communication (the "Society"), up to and including termination of membership, employment and/or the prospect of civil or criminal prosecution when warranted.

Consistent with current nonprofit governance and administration best practices, the Chapter adopts this policy requiring the reporting of misconduct or fraud as part of its continuing efforts to foster ethical conduct and transparency of operation in all aspects of the Chapter and to ensure open communication throughout the Chapter. This policy is not intended to address claims or allegations of sexual or other forms of harassment or discrimination; those issues are covered by separate Chapter policies and procedures.

Definitions

Chapter Policy: The policies set forth in Chapter documents, or the Administrative Council minutes or any Chapter Manual.

Baseless Allegations: Allegations made with reckless disregard for their truth or falsity. People making such allegations may be subject to Chapter or Society disciplinary action (including termination of membership or employment) and/or legal claims by the individuals accused of such conduct.

Fraudulent or Dishonest Conduct: A deliberate act or failure to act with the intention of obtaining a material unauthorized benefit. Examples of such include, but are not limited to:

- material deviations from generally accepted accounting principles or circumvention of the Chapter's system of internal controls
- embezzlement of Chapter funds
- forgery or alteration of documents
- unauthorized alteration or manipulation of computer files
- fraudulent financial reporting
- submitting fraudulent or improper expense account reporting
- misappropriation or misuse of Chapter resources
- authorizing or receiving compensation for goods not received or services not performed

Whistleblower: A volunteer or employee who informs a director, officer, the Administrative Council, the Executive Director of the Society, Director of the Society Board, or STC legal counsel about an activity that person believes to be fraudulent or dishonest.

Rights and Responsibilities

Reporting

All volunteers and employees are required to report any conduct that the individual believes to constitute a violation of law or Chapter Policy (i.e., a whistleblower). A volunteer or employee should report his or

her concerns to a director or officer, the Administrative Council, the Executive Director of the Society or Director of the Society Board, or STC legal counsel.

Disclosure of reports of fraudulent and dishonest conduct to individuals not involved in the investigation will be viewed as a serious offense and may result in discipline, up to and including termination of membership or employment. Such conduct may also give rise to other actions, including civil lawsuits.

Directors and Officers

Directors and officers are required to report suspected fraudulent or dishonest conduct to the Administrative Council and the Executive Director of the Society. In addition, the Administrative Council is responsible for maintaining a system of management controls, which detect and deter fraudulent or dishonest conduct. Failure by the Administrative Council to establish management controls or report misconduct within the scope of this policy may result in termination of Chapter status. The Society's office is available to assist its chapters in establishing management systems and recognizing improper conduct.

Reasonable care should be taken in dealing with suspected misconduct to avoid:

- baseless allegations
- premature notice to persons suspected of misconduct
- violations of a person's rights under the law

Accordingly, the Administrative Council or a director or officer faced with a suspected misconduct:

- should not contact the person suspected to further investigate the matter or demand restitution
- should not discuss the case with anyone other than those previously identified or a duly authorized law enforcement officer
- should direct all inquiries from any attorney retained by the suspected individual to the authority conducting the investigation
- should direct all inquiries from the media to the Society's Executive Director

Whistleblower Protection

The Chapter will protect whistleblowers as provided below.

- The Chapter will use best efforts to protect whistleblowers against retaliation, as described below. Confidentiality is a priority, and the identity of complainants and their complaints will be treated confidentially to the fullest extent possible. Nonetheless, the Chapter cannot guarantee confidentiality. The Chapter will keep the whistleblower's identity and complaint confidential, unless (1) the person agrees to be identified; (2) identification is necessary to allow the Chapter, the Society or law enforcement officials to investigate or respond effectively to the report; (3) identification is required by law; or (4) the person accused of fraudulent or dishonest policy violation is entitled to the information as a matter of legal right or disciplinary proceedings.
- Chapter directors, officers, staff, volunteers, or others associated with the Chapter may not retaliate against a whistleblower with the intent or effect of adversely affecting the terms or conditions of the whistleblower's membership or employment (including but not limited to: threats of physical harm, loss of membership or job, punitive work assignments, or impact on salary or wages). Whistleblowers who believe that they have been retaliated against may file a written complaint with the Executive Director of the Society. A proven complaint of retaliation shall result in a proper remedy for the person harmed and the initiation of disciplinary action, up to and including termination of membership or employment, against the retaliating person. This protection from retaliation is not intended to prohibit the Chapter from taking action, including disciplinary action, in the usual scope of their duties and based on valid performance-related factors.
- Whistleblowers must be cautious to avoid baseless allegations and anonymous allegations are discouraged so that there can be appropriate follow-up questions and investigation which may not be possible unless the source of the information is identified.

Contacts

Questions related to the interpretation of this policy should be directed to STC's Legal Counsel or the Executive Director of the Society.

Effective Date and Publication

This policy will become effective on _____, 20xx, and will remain in effect until such time that new and/or supplementary procedures and guidelines may be written to assure compliance with current applicable laws, regulations and policies. The Chapter will post this Policy on its web site and include it in the Policy Manual.

Chapter 24: Conflict of Interest Sample Template

Purpose and General Rule

The purpose of this policy is to provide guidance to the directors, officers and committee members of the Society for Technical Communication, _____ Chapter (the "Chapter") in identifying and handling potential and actual conflicts of interest involving the Chapter. In most instances, conflicts of interest can be handled simply by disclosing them to the appropriate individuals within the Chapter and continuing to exercise good judgment concerning such situations. Indeed, the Chapter relies on the sound judgment of its directors, officers and committee members to handle these conflict situations appropriately.

The Chapter is committed to the highest levels of integrity. Directors, officers and committee members of the Chapter are expected to conduct their relationships with each other, the Chapter, and outside organizations with objectivity and honesty. **In general, Chapter directors, officers and committee members are obligated to recognize and disclose ethical, legal, financial, or other conflicts of interest involving the Chapter, and remove themselves from a position of decision-making authority with respect to any conflict situation involving the Chapter.**

This policy is intended to comply with New York law. If there is any inconsistency between the requirements and procedures prescribed in this policy and New York law, New York law shall control.

This policy cannot describe all conflicts of interest situations that may arise involving the Chapter. Therefore, directors, officers and committee members must use good judgment to avoid any appearance of impropriety. If you have any questions about this policy or its application, please err on the side of caution and transparency and seek advice from the Society of Technical Communication's legal counsel prior to entering into such transaction.

Definitions

- 1) A "Covered Person" is any person serving as a Chapter director or officer or as a member of a Chapter committee.
- 2) A "Family Member" is a spouse, domestic partner, parents, siblings, or children of a Covered Person and any other relative who resides in the Covered Person's household.
- 3) A "Material Financial Interest" in an entity is a financial interest of any kind, which, in view of all the circumstances, is substantial enough that it would, or reasonably could, affect a Covered Person's or Family Member's judgment with respect to transactions to which the entity is a party. This includes all forms of compensation.
- 4) A "Conflict of Interest" is a situation in which an interest or activity influences or appears to influence the ability of a Covered Person to exercise objectivity or impairs the Covered Person's ability to perform his or her fiduciary responsibilities in the best interests of the Chapter. By way of example and not by way of limitation, a Covered Person is considered to have a potential conflict of interest in any of the circumstances described below:
 - a) If there is a contract or transaction between the Chapter and a Covered Person or Family Member. This does not include, however, routine, incidental transactions conducted in the normal course of Chapter business (e.g., routine membership benefits, purchases of services or publications at regular rates; customary honoraria for participation in courses or seminars; or travel reimbursement for volunteer services).
 - b) If there is a contract or transaction between the Chapter and an entity (a) in which a Covered Person or Family Member has a Material Financial Interest or (b) of which a Covered Person or Family Member is a director, officer, agent, partner, associate, trustee, personal representative, receiver, guardian, custodian, conservator or other legal representative.
 - c) A Covered Person competing with the Chapter in the rendering of services or in any contract or transaction with a third party.
 - d) A Covered Person's having a Material Financial Interest in an entity that competes with the Chapter in the provision of services.

- e) A Covered Person's serving as a director, officer, employee, agent, partner, associate, trustee or personal representative of an entity that competes with the Chapter in the provision of services.
- f) If there is a Chapter contract or transaction that involves a Covered Person when a reasonable person, with knowledge of all relevant facts, would question the impartiality of the Covered Person with respect to such contract or transaction.

Procedures.

- 1) Prior to Board or committee action on a contract or transaction involving a Conflict of Interest, a Covered Person having a Conflict of Interest or potential Conflict of Interest and who is in attendance at the meeting shall disclose to the Administrative Council or committee all facts material to the Conflict of Interest. Such disclosure shall be reflected in the minutes of the meeting.
- 2) A Covered Person who plans not to attend a meeting at which he or she has reason to believe that the Administrative Council or committee will act on a matter in which the Covered Person has a Conflict of Interest shall disclose to the chair of the meeting all facts material to the Conflict of Interest. The chair shall report the disclosure at the meeting and the disclosure shall be reflected in the minutes of the meeting.
- 3) A Covered Person who has a Conflict of Interest shall not participate in or be permitted to hear the Administrative Council's or committee's discussion of the matter except to disclose material facts and to respond to questions. Such person shall not attempt to exert his or her personal influence with respect to the matter, either at or outside the meeting.
- 4) A Covered Person who has a Conflict of Interest with respect to a contract or transaction that will be voted on at a meeting shall not be counted in determining the presence of a quorum for purposes of the vote. The Covered Person having a conflict of interest shall not vote on the contract or transaction and shall not be present in the meeting room when the vote is taken, unless the vote is by secret ballot. The Covered Person's ineligibility to vote shall be reflected in the minutes of the meeting.
- 5) Covered Persons who have a Conflict of Interest with respect to a contract or transaction that is not the subject of Board or committee action shall disclose to the Administrative Council any Conflict of Interest that such Covered Person has with respect to such contract or transaction. Such disclosure shall be made as soon as the Conflict of Interest is known to the Covered Person. The Covered Person shall refrain from any action that may affect the Chapter's participation in such contract or transaction.
- 6) If it is not entirely clear that a Conflict of Interest exists, the Covered Person with the potential conflict or any other person who becomes aware of the potential conflict may disclose the circumstances to the Administrative Council, who shall determine whether there exists a Conflict of Interest that is subject to this policy.

Confidentiality.

Each Covered Person shall exercise care not to disclose confidential information acquired in connection with such status or information the disclosure of which might be adverse to the interests of the Chapter. Furthermore, a Covered Person shall not disclose or use information relating to the business of the Chapter for the personal profit or advantage of the Covered Person or a Family Member.

Review of Statement.

- 1) Each new Covered Person must annually review a copy of this policy and shall be reminded of the obligation to conform to it.
- 2) Each Covered Person must annually complete a disclosure form identifying any relationships, positions or circumstances in which the Covered Person is involved that he or she believes could create a Conflict of Interest. Such relationships, positions or circumstances might include service as a director or officer of, or consultant to, a nonprofit or for-profit organization that competes with the Chapter, or ownership of a business that might provide goods or services to the Chapter. Any such information regarding business interests of a Covered Person or a Family Member shall be treated as confidential and shall generally be made available only to the Administrative Council, except to the extent additional disclosure is necessary in connection with the implementation of this policy. When

deciding what kind of relationships should be disclosed, a Covered Person should consider the situation from the perspective of an outsider and decide whether the relationship is of such a nature that it could raise an allegation of an apparent or actual conflict of interest. In close situations, the Covered Person should err on the side of disclosure and transparency, since disclosure helps to alleviate or avoid future misunderstandings.

- 3) This policy shall be reviewed annually by the Administrative Council. Any changes to the policy shall be communicated immediately to all Covered Persons.

Approved by the Administrative Council, _____, 20xx

Chapter 25: Sample Contract for Conference Sponsorship

Please print or type in the following:

Company Name

Street Address P.O. Box

City/State/Zip

Phone Fax

Web Address

Email

Signature Date

Print Name

Contract Authorization: Signee agrees to abide by and be bound to all terms and conditions set forth in this contract, including the payment and cancellation terms on the reverse side (page 1).

[LEVEL 1 SPONSORSHIP NAME] — \$1,500

[LEVEL 2 SPONSORSHIP NAME] — \$750

[LEVEL 3 SPONSORSHIP NAME] — \$500

Additional Sponsorship(s):

Payment Methods:

☐ Bill me ☐ Credit card ☐ Check

STC [Chapter Name] will bill sponsor or you can supply credit card information and STC [CHAPTER NAME] will charge the credit card.

Checks should be made payable to STC [CHAPTER NAME].

Please send check payments to:

STC [Chapter Name]

Address Line 1

City, State, ZIP

If payment will be made by credit card, please complete the following:

☐ Visa ☐ MasterCard ☐ American Express

Amount to be charged: \$ _____

Credit Card Number

Security Code Exp. Date

Name on Card

Deposit: A non-refundable deposit and non-creditable fee of 50% of the total requested sponsorship amount is required with the return of this contract. Reservations for exhibit space will not be accepted without deposits. Deposits may be made by check payable to STC [CHAPTER NAME] or by VISA, MasterCard, or American Express. The deposit will apply to the total payment. The balance is due 90 days prior to the exhibit. ANY SPONSOR THAT FAILS TO MAKE THE FULL PAYMENT BY 90 DAYS PRIOR TO THE CONFERENCE WILL BE SUBJECT TO FORFEITURE OF THEIR BOOTH SPACE AND PROMOTIONAL MATERIALS.

Cancellation Policy: Each cancellation or reduction of sponsorship level or exhibit space must be made in writing. Cancellations by phone will not be accepted. The 50% deposit is nonrefundable and non-creditable at any time. If you cancel your sponsorship, the following penalty and refund fees will apply. Cancellation less than 90 days from conference date: Full payment is due.

Sponsored Seminars: A limited number of education sessions conducted by sponsors will be available at the [CONFERENCE NAME]. There is a charge of \$X per seminar, plus audio-visual rental, for each seminar conducted. Seminars are limited to confirmed sponsors on a first-come, first-served basis. Sponsor education seminars will take place in [DESCRIBE SPACE FOR SESSIONS].

Speakers: Whenever possible, speakers for sponsored educational sessions requested by sponsors will be utilized and have their names included in the published program. Sponsors do NOT have the right to choose the conference keynote speaker.

Group Meetings/Entertainment: Sponsors may not hold group meetings or provide entertainment involving conference attendees during STC [CHAPTER NAME] [CONFERENCE NAME] official program hours. Activities and parties held outside the adjoining hotels fall within this category.

Promotion: The STC [CHAPTER NAME] will make all reasonable efforts to promote the conference and its exhibitors/sponsors and to share any floor plans, schedules, deadlines, and related materials with sponsors as soon as they are available.

(OPTIONAL SECTION) Exhibit Space Request: Please indicate your exhibit space requirements by referring to the floor plan. Please list several alternatives in order of preference. Every effort will be made to allocate your exhibit space per your preferences following the rules stated under Deposit and Exhibit Space Assignment Procedures. If such allocation is not possible, booth space assignments and confirmation will be at Show Management's discretion.

Default Occupancy: An exhibitor failing to occupy

contracted space will lose the right to such space and STC [CHAPTER NAME] has the right to use such defaulted exhibit space as it sees fit. Exhibitors who lose exhibit space as described herein are not relieved of the obligation of paying the full rental price for this space.

Liability: Exhibiting companies and sponsors hereby release, relinquish, discharge and agree to indemnify, protect, and hold harmless STC [CHAPTER NAME] and its agents from any and all claims, demands, liabilities, costs, and expenses for injury, including death to persons, and any loss of or damage to property caused by, growing out of, or happening in connection with the use of or enjoyment by: the exhibiting company/sponsor, its management, personnel, guests or visitors of the hotel and convention center facilities or equipment.

Insurance: Exhibiting companies/sponsors are responsible for insuring their own display/materials/personnel and associated equipment. Neither STC [CHAPTER NAME], its representatives, agents, nor the [VENUE NAME] may be held responsible for damage to or loss/destruction of displays/materials. All claims for any such loss, damage or personal injury are hereby waived by the exhibiting companies/sponsors.

Amendments: STC [CHAPTER NAME] [CONFERENCE NAME] Policy, Rules, and Regulations may be amended from time to time and are to be enforced as interpreted by the Show Management. Any situation not covered by these Rules and Regulations is subject to determination of the STC [CHAPTER NAME].

Acceptance of Terms: I, the duly authorized representative of the above company, on behalf of said company, have read and agree to abide by the guidelines and regulations outlined in this contract including the provisions on liability and insurance and the regulations detailed in the exhibitor service kit. I have completed all sections of this form according to the instructions. I understand that violations of any of these regulations by my company are subject to such penalties as may be recommended by the Society for Technical Communication and/or its agent, including possible exclusion from future STC [CHAPTER NAME] events, conferences and expos, and sponsorships.

Chapter 26: Revision History

The Leadership Community Resource (LCR) reviews and updates this handbook continually and it is distributed via the STC web site. New versions are fully reviewed and approved by the Community Affairs Committee (CAC), which includes Board members and the LCR manager, and SIG Advocate. The STC office keeps the master files for the STC Community Handbook.

Date	Changes to Previous Version
May 2008	Original version
October 2008	May 2008 version completely rewritten with updated information for chapters, SIGs and student chapters.
April 2013	October 2008 version rearranged and edited with new and updated information throughout.
March 2017	April 2013 version edited with new and updated information throughout.
January 2019	Removed outdated references and links Added new document chapters, replacing previously separate document downloads (Volunteer Code of Conduct, Membership Committee Resource Guide, New Member Recruitment Guide, Strategic Planning template, Chapter Whistleblower Policy template, Conflict of Interest Policy template).

[Toc354605731](#)