

ISOC Chapter Guide – DRAFT – 23 March 2011

The following operational guide has been developed to provide chapter leaders with suggestions and tools they can use to enable their Chapters to thrive while advancing ISOC’s mission to assure “open development, evolution and use of the Internet for the benefit of people throughout the world.” It is intended that this be a living document which grows and evolves over time as the experiences of Chapter leaders are added to each section. It is NOT intended that this be viewed as a mandatory set of procedures. It is, however, expected that Chapter leaders will bring all their intelligence, creativity and experience to the effort and view each new chapter initiative as an opportunity to improve on those which preceded it.

Click on the links to explore each area. Feel free to make comments and suggestions and share relevant experiences.

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Annual Planning Model

The Project Plan

A Chapter leader has many things to attend to, but the most important is project planning: deciding and overseeing what your Chapter will get done in the coming year that will make a meaningful difference for the Internet Society and the community we serve.

If your Chapter is like most Internet Society Chapters, you have limited resources, so having a clear focus and well-defined priorities is essential. This usually means keeping the list of potential projects/activities restricted to one or two that have the greatest potential for success. Spreading resources too thinly and/or picking the wrong projects can quickly cripple a Chapter—and it will significantly diminish the likelihood of achieving measurable success.

Ideally, the project-planning process moves forward by asking and answering a series of questions. Start by setting a strict deadline for getting the questions answered. This will help keep you and everyone you work with on track.

1. Who are the planners/deciders?
 - a. Usually these are Chapter leaders; however, it is often useful to bring in others...or at least solicit input from individuals outside the core leadership team. This also serves as a means to involve more members in core chapter operations to grow the chapter's leadership team.
 - b. It is best, but not always possible, to bring everyone together for a face-to-face planning meeting. Whether your meeting is virtual or face-to-face, make sure everyone involved is familiar with:
 - i. The Internet Society's mission and strategic initiatives [link]
 - ii. The Chapter's membership and/or target audience which, for example, could include a combination of local business people, academia, university students, community leaders, and representatives of government agencies.
 - iii. The Chapter's resources, including financial and human like, for example, chapter leaders, active volunteers [link to Volunteer Toolkit], membership, etc.
 - iv. Local issues that would be of interest to the Chapter, such as access, cyber-security, privacy, censorship, and Internet stability, to name a few topics that the Internet Society regards as priorities. One way to determine the needs and engage Chapter members is to survey your Chapter's mailing list in advance to get a general sense of the issues of interest. This has the added benefit of staying in touch with your members [link to info about Chapter portal bulk emailer tool]
2. What project(s) do we want to complete this year? What follows is some advice for planning for and completing projects:

- a. *Do what you're passionate about.* Remember, passion is everything. If you and your colleagues don't really care about the project it won't get done, so be sure to pick something that moves you.
 - b. *If you can't do it well, do something else (or nothing at all).* Don't waste your time, your energy, or the Chapter's resources if the effort won't make a difference worth making.
 - c. *Keep the list short—pick one or two projects at the most.* When resources are spread too thin, projects don't get done. It is far better to do one well than several poorly. Success, even of a small project, will help attract sponsors and volunteers; failure will drive them away.
 - d. *Decide what you want to accomplish.* For each project, put in writing precisely what the outcome(s) will be so you know when you are done. For example, if the project is an event, then holding the event constitutes an outcome. If the project is an informational or training document, then the final publication and dissemination of the document is the deliverable and its use by the target audience the outcome. If you are launching an awareness-raising campaign, then write down your benchmarks so you know what you are aiming to accomplish.
3. For each project, create a project plan that includes:
- a. *A list of who is responsible for what.* Every project includes multiple responsibilities. Break down the project into functions and decide who will be taking care of each function. For example, if you are running a meeting, someone will need to oversee planning; someone else will need to secure a room and make sure it is set up; someone else will need to be responsible for promotion, etc. (link to Volunteer Toolkit).
 - b. *A timeline for getting the project completed.* Be sure to include schedules for completing all of the steps along the way.
 - c. *Interim benchmarks.* Include a mechanism that enables everyone involved to check in throughout the process to be sure that everything is going according to plan.
 - d. *Communications/reporting.* During the project-planning phase, make sure there is a way for everyone to report on progress (or lack of progress). You want to know ahead of time if aspects of the project are behind schedule or running into problems.
 - e. *Celebrating accomplishment.* This is a critical step in the process. If you want to ensure future successes, be sure to spread the kudos and thank-you's far and wide!
 - f. *Budget*
 - g. *Risk evaluation/management.* There are various factors that might influence or hamper the project's advancement. Try to spell out what some of the risks are (e.g. extended power cuts that trigger higher operating costs, if a sponsor that has promised his/her support pulls out at the last minute, etc.), how you would deal with such situations and what the impact on your project might be.

The Operational Plan

An operational plan ensures you can successfully implement your project(s) by getting your team to:

- Be clear about how you will get the resources for the project
- Use resources efficiently, to help allocate scarce resources to the most critical needs.
- Think about the project(s) outcome in terms of its targets and impacts.

To complete projects successfully, build systems that ensure the right:

- Leadership – Making decisions and recruiting volunteers
- Volunteers – Getting stuff done [link to Volunteer Toolkit]
- Membership – Your Chapter’s audience, constituency and source of volunteers
- Communications – Letting everyone who should know what we’ve done
- Finance – Paying for things
- Administration – Handling mailing lists, websites, banking, etc.

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Programs & Activities

The best way to learn how your Chapter can put together a great event, launch a public relations campaign, or develop an information product is to tap into the Chapter network to see what other Chapters are doing and, if necessary, get advice from them on how they do it. Contact information for all active Internet Society Chapters is available at: <http://www.isoc.org/isoc/chapters/list/>

Experienced Chapter leaders know that the key is to start small and simple, focus on a topic, and keep your objectives manageable. If your Chapter is just forming, we encourage you to think less about building an organization and more about developing projects and activities that will advance our joint mission to promote the open development, evolution, and use of the Internet for the benefit of people throughout the world.

Generally speaking, those activities will fall into a handful of categories:

- Events and presentations
- Campaigns
- Education and training
- Information products

Remember: As part of your Chapter's agreement with the Internet Society [[link to affiliation MoU](#)], you are required to conduct at least one mission-related activity [[link to ISOC's mission](#)] every 12 months. With a little planning, and some help from other Chapters and the Internet Society, that goal should be easily manageable. Successful projects, large or small, will more than likely pay dividends in terms of the excitement and enthusiasm they generate from those who are actively involved in making them happen as well as those who benefit from the results.

Don't forget to explore the financial and other resources made available by the Internet Society to help Chapters get their activities up and running. The Community Grants Program [[link](#)] has become an increasingly popular mechanism for raising funds to create events, campaigns, and other types of projects. Internet Society funding should nevertheless not be the only source of revenue for your Chapter, which should be sustainable in its basic functioning even without this additional funding.

I. Events and presentations

Events and presentations can range from organizing a simple, introductory, 'About the Internet Society' presentation to your Chapter's members and other interested individuals to participation in a larger regional event to hosting a regional INET conference. (To find out more about hosting an INET, contact your Regional Bureau manager. Be sure to familiarize yourself with the Internet Society's regional INETs at <http://www.isoc.org/conferences/inet/>.) If you are building your Chapter, consider participating in already established technology, business, or policy events that are local or regional.

Using established local or regional meetings to get in front of a wider audience is a popular strategy among Chapters. Some real life examples follow:

The Internet Society U.S. Colorado Chapter got itself in front of potential new members by setting up a booth at a regional event. Armed with enthusiasm, pamphlets, pens, stickers, and other giveaways they obtained from the Internet Society, they introduced the Internet Society and their Chapter to an interested audience.

In November 2010, the Internet Society Spain Chapter participated in the 6th Spanish Network Operators Group (ESNOG) in Madrid, where they gave a brief presentation about the joint goals of the Internet Society and the Chapter to a group of motivated Internet Service Providers, hosting companies, hardware vendors, and others. The participation paid off: as reported by Chapter leader Carlos Fragoso, “[s]ome attendees were interested in receiving more detailed information about the Internet Society’s regular activities and were willing to join our successful Internet Society Spanish Chapter bimonthly ‘expert meetings,’ which we broadcast in real time from our eight official Chapter supporting sites.”

II. Campaigns

Campaigns are a useful and often effective strategy for drawing attention to a cause as well as to your Chapter. By educating yourself on the Internet Society’s objectives, strategic initiatives, and other priorities [LINKS] with regard to technology development and public policy, you should be able to find causes that match up with the issues that concern your Chapter’s constituents and others you want to reach, engage, and influence. Some real-life examples follow.

The Internet Society Israel Chapter launched a campaign to protect minors from harmful Internet content and managed to get several Internet service providers, content providers, and other interest groups to participate. The Internet Society Tunisia Chapter participated in the Your First Step Campaign, which was initiated by a group of young activists who took part in the CIVICUS Youth Assembly 2008 in Glasgow, Scotland. The Chapter offered Internet resources and hosting for the group as a means for helping support their efforts to demonstrate how to take action on issues that matter most to people.

III. Education and training

Internet Society Chapters are often led and populated by technology experts and individuals who are knowledgeable about Internet policy, technology, education, and cultural issues. Creating opportunities to help train and educate your membership and your community help further the Internet Society’s goals and reward the Chapter with new (or renewed) credibility. Some real-life examples follow below.

The Internet Society India Bangalore Chapter, which conducted an Internet Awareness and Training Session for Self Help Groups, the Chapter managed to create an activity that not only was education, but also rooted in raising awareness (along the lines of a campaign). As the Chapter described, the event was designed to create awareness of computers and the Internet among the leaders of the self-help groups supporting artisans in and around Bangalore.

The Internet Society Serbia Belgrade Chapter One offers an example of how an activity can be both effective and fun. They helped organize an ICT quiz with the students of the Anglo-American School in Belgrade after having contacted the school to ask about involving students and teachers in learning more about the Internet and its future. The students said they not only enjoyed taking part in the quiz, they look forward to similar activities. The school indicated that they looked forward to establishing further cooperation with the Internet Society Serbia Belgrade Chapter.

IV. Information and communication products

Information and communication productions—such as brochures, booklets, or pamphlets—help establish a Chapter within a desired community and create mechanisms for lasting recognition. When done right, these tools help brand both the Internet Society and Chapters in the minds of those who are unfamiliar with the organization, and they help establish Chapters as experts and reliable and trusted sources. Some real-life examples follow.

The Internet Society Australia Chapter, which, over the years, has cultivated a reputation in Australia as a credible and trusted resource for expertise, knowledge, and authority, finalized a ‘broadband handbook’ for the Australian telecommunications consumer peak body ACCAN. The booklet explains what the National Broadband Network will be and what it will provide and it speaks to many of the issues the NBN is likely to raise.

The Internet Society Argentina Chapter combined training with an information product when it created (with the help of the Internet Society's Grants Program) a handbook to be used as a training tool by IT professionals and service provider staff that have not yet experienced IPv6. The handbook helps teach them to configure IPv6 in different environments through detailed instructions and experiments. The Internet Society Italy Chapter created an Italian-language booklet to help sensitize the local community to the legal issues around Internet governance.

Build on small success

Again, don't forget to start small and work your way up to larger projects and activities. A simple pamphlet could lead to a small meeting, which could lead to a larger meeting. Similarly, a small meeting could inspire a Chapter to create a pamphlet that outlines pertinent issues, which could then attract sponsorships to help your Chapter take on slightly larger or more diverse projects.

More important than becoming a large organization that is concerned with Chapter management is staying flexible and responsive to the issues and challenges that are relevant to your Chapter's community. Small events and small projects can help energize your Chapter's members; and small successes will keep everyone interested and involved. **Plan ahead.**

Whatever activity you have in mind, your ultimate success depends on good planning (“You get what you plan for!”). The plan should include a number of key elements including:

1. **The Goal** – Broadly, the goal should answer three questions: What will happen? Who benefits? Why is it important? More specifically, the goal should define the desired outcome in meaningful, measurable, specific, achievable and time-constrained metrics. These metrics will, in turn, drive the resource requirements and production timeline.

2. Resource Requirements – Develop a list of all the resources needed to complete the project. These should include:
 - a. Human resources: volunteers with relevant content knowledge (who knows what) and/or skills/expertise (who knows how) and/or relationships (who knows whom)
 - b. Financial resources: Sources and uses of funds (see also Chapter on “Financial Management”)
 - c. Project collateral: e.g. facilities, documents, registration, catering, audiovisual, etc. as applicable
 - d. Marketing & communications collateral and channels
3. Production Schedule – Working backwards from “done”, list all the important benchmarks which will help you and your team ensure that the project is on track and on time. This timeline should clearly identify who will do what, when and how as well as the resources in play at the time.
4. Marketing Communications Schedule – It’s great to do good work, but the value of that work is often proportional to the degree others are aware of that work. Plan ahead who you will tell what, when and how. Putting the right words in the right ears at the right time can boost the overall value and impact of your effort exponentially!
5. Celebration – Be sure to celebrate (and publicize) your success and loudly thank all who helped.
6. Debrief – While it’s still fresh in your mind, set up a face to face or virtual meeting with all the key players in the project to review the results and identify what could be improved the next time around.

To be followed by categorized list of examples from Chapters...

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Volunteer Development

Internet Society Chapters quickly learn that without an active and engaged membership, it is hard to realize the Chapter's mission, gain credibility in the community, or grow. In other words, it is one thing to get 25 interested individuals to sign up during your Chapter's formation; it is another thing to get even a handful of those individuals to roll up their sleeves and get involved in specific Chapter activities. And without volunteers to take on the tasks involved with getting events, campaigns, and other types of activities off the ground, the Chapter will find it hard to thrive.

You don't have to look far to find Chapters that have developed winning strategies for getting members and others to spring into action. For example, the Internet Society Hong Kong Chapter tapped into the growing popularity of the Internet Governance Forum (IGF) (and the growing interest in Internet policy and governance) to organize the first Asia Pacific Regional IGF in Hong Kong (a formidable undertaking—we recommend you start with smaller projects if your Chapter is just starting up or does not have experience with larger events). The Internet Society India Kolkata Chapter responded to the problem of rogue elements penetrating public and private servers through unsecured WiFi networks to launch a public awareness campaign around the need to keep WiFi secure. And the Internet Society U.S. San Francisco Bay Area Chapter addressed the Internet Society's theme of Internet trust and identity at a regional INET meeting it organized.

When it comes to connecting with members, nothing beats face-to-face events. The Internet Society Puerto Rico Chapter has been organizing monthly events for members and the general public nearly every month of the year for the past five years. During those activities, Chapter leader Eduardo Diaz personally greets everyone who attends. "First I tell them who I am and what the Internet Society is about," Eduardo wrote by email. "After that, I ask them what they do and what kind of Internet exposure they have had. If I am not sure I understand, I ask other questions to clarify. I ask these questions so when I see a possible connection between attendees with the same interests, I invite the person to meet other people who have more or less the same backgrounds and experiences. I also ask them how they heard about us and then invite them to become a member of our Chapter. Finally, depending on the number of people, I ask everyone to say who they are and what they do. As a result of these interactions, I have heard of people who have connected to do future business together or who are currently cooperating with each other in other ways. And I see them coming back to our activities. It feels really good when you see people opening up and start networking with each other."

In all of these examples, the Chapter was able to inspire its members, making it easier to engage members in the Chapter's work.

In order for your Chapter to be *active*, the leadership needs to have a plan and it needs to stay focused and organized. That means taking the time to find out who your members are, what they can do, and how much time they have to spare for chapter activities. At most meetings there are no limits to how many great ideas are thrown on the table. The real challenge is knowing which of those ideas is worth pursuing and getting your members engaged and excited enough to volunteer to help get them done. The Internet Society's Chapter toolkit on mobilizing volunteers is a great place to start. [LINK]

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Leadership Development

What qualities should we look for in Chapter leaders?

We believe an effective Chapter leader possesses three basic qualities:

- A solid understanding of the Internet Society’s vision, mission, strategic initiatives and operating principles and the ability to clearly communicate this understanding to a variety of constituencies and audiences;
- An inclusive and enabling management style that attracts others to the leadership team, values their input, shares his/her responsibilities and supports their active engagement in Chapter management
- A commitment to advancing our joint mission and goals as well as the energy and drive to make it happen

What can/should leaders do? Authority and Responsibility

The authority and responsibility of Chapter leaders should be defined by the Chapter’s operating principles. Further clarification should be detailed in a Chapter’s organizing principles and by consensus of a Chapter’s leadership and membership. An inclusive planning and budgeting process as in [LINK] also describes a Chapter leader’s scope of authority and responsibility in the implementation of Chapter projects and administration.

Where do we find Chapter leaders and how should we choose them? Recruitment & Selection

Very often, individuals who take the initiative to form a Chapter already possess leadership qualities. However, as a Chapter grows and develops, leaders almost invariably begin their involvement as volunteers in a different capacity. In fact, an ideal role for “retired” Chapter leaders is that of a participant on a leadership development team that monitors and mentors current volunteers. The goal of such a team would be to identify volunteers who consistently demonstrate leadership qualities. It is important to keep in mind that a leadership role should not simply be a reward for hard work alone; without the essential qualities listed above, the “hard worker” will not be able to effectively communicate the vision or attract and engage others in the effort.

How do we ensure they continue to grow and stay on track? Mentoring

More often than not, successful leaders benefited from one or more senior individuals who were willing to help them develop and master the broad range of skills needed to succeed in a leadership role. While Chapters don’t necessarily need to establish formal mentoring programs, it is important that current

leaders accept and embrace mentoring as a key responsibility. Only then can a Chapter ensure a pool of qualified leaders, which is a critical component of an effective succession plan.

How do we ensure that leaders move on? Succession planning

There is no single condition that can undermine the success of a Chapter more than stagnant leadership. When members believe that the opportunity to take on leadership roles has been limited to one or two individuals, they will slowly but surely walk away from all volunteer responsibilities, leaving the Chapter unable to implement current programs or develop new ones that are responsive to the needs of its constituency.

For this reason, as well as others, it is critical that Chapters establish some form of term limits that ensure turnover in all key leadership roles. Whether by election or appointment, a transparent and regularly recurring process that keeps the door open to new leaders will help the Chapter keep members engaged and sustain a deep volunteer pool.

How can we ensure the ongoing participation of former leaders? Retirement

When dedicated leaders reach the end of their leadership term, it should not necessarily mean the end of their involvement with the Chapter. These individuals possess a deep institutional knowledge worth holding onto as well as experience which could be useful in any number of areas. While we don't want their continued participation to block the development and advancement of new leaders or undercut the authority of current leaders, their willingness to serve as advisors and mentors for new leaders could be invaluable to both. This role could be ongoing or ad hoc depending on the capacity and desire of the individual.

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Marketing and Communications

Promotion and marketing are ways in which you tell the world about your Chapter, including announcements about its formation, its projects and events, and its role and position in the community. Anything you do to get the word out—from press releases to announcements on e-lists to a mention on a social media site—is promotion.

Promotion and marketing do not have to be complicated or expensive. The best programs are intentional, well planned, and followed through. Start by coming up with a plan to promote the Chapter's launch. Then follow up with regular announcements about its activities. And don't forget to tap your membership for individuals who have experience in marketing or promotion or who are good writers. Also, connect with other organizations/people with similar interests to widen participation (and membership).

Here are some tips for spreading the word and attracting attention:

- **Press Releases.** Identify news agencies in your region. They can range from local news media outlets to online publications, blogs, or mailing lists that focus on the themes that best represent your Chapter's goals and objectives. If your region has one or more professional technical societies, let them know. Rather than seeing your Chapter as competing with other organizations, look for ways to present your Chapter as a potential partner. Be sure to make note of these organizations and the publications that you are e-mailing and begin building a database of potential media contacts.
- **Create a 'welcome' event.** Find a small room or office and let the community know that your Chapter will be holding a social event/evening to get to know the community. Be sure to have Internet Society materials on hand so the community can become familiar with us if they aren't already. Say a few words to explain what your Chapter is about and then give a brief presentation about the Internet Society and its mission and goals. Touch on key topics and issues that are important to the Internet Society, such as those derived from the Strategic Initiatives. It is usually good to choose a specific topic that is of particular interest to your region and your audience. This will make attracting participants much easier. The simple fact of presenting an organization and its activities often doesn't seem particularly interesting to those whom you invite.

Don't forget to gather contact information from attendees so you can develop a mailing list for future events. You might also want to send them a follow-up message after the event with a "Thanks for attending our event" as well as a link to the Internet Society member sign up page at <http://www.isoc.org/members/>

Remember: Chapters have access to Internet Society promotional materials, such as annual reports and marketing brochures, which can be used for these types of events. Order from <https://www.isoc.org/isoc/reports/order/index.php>. There are also Internet Society videos (http://www.youtube.com/results?search_query=internetsociety.org&aq=f) and at <http://www.isoc.org/tools/blogs/scenarios/>) that you can access and use in Chapter activities.

- **Align the Chapter with local issues.** Keep an eye on local and national business and technology news and find opportunities for your Chapter to “weigh in” on developments. For example, if your country is considering legislation or regulatory issues that could affect Internet communications, such as spam, censorship, or Net neutrality, issue a statement to the media about the Internet Society’s position on those issues. By establishing your Chapter as an authority and as a presence in the community or country, you will attract attention and establish your Chapter as the “go-to” resource when these issues arise.

- **Create a ‘flagship’ program.** According to Internet Society Regional Bureau manager Dawit Bekele, Chapters, particularly new Chapters, benefit from creating flagship programs. A flagship program is any project, activity, or theme that your Chapter regards as its most important pursuit. By having a flagship program, your Chapter is better able to form its own identity. The Internet Society Morocco Chapter launched a flagship program called Internet ça s’apprend (you can learn the Internet), which consisted of going into underserved communities and teaching Internet skills. The Internet Society Mali Chapter set up Internet capacity-building training workshops. The Internet Society Ghana Chapter does a weekly FM radio program about Internet issues. They also deliver a basic networking-skills course to network engineers in partnership with the other members of the Internet community. See <http://isoc.org/wp/newsletter/?p=1203>.

- **Have a Website:** A Chapter's website will add to the credibility of the organization as well as to provide a place for anybody to be informed as to the chapters mission and goals, activities, issues, membership, links to chapter's social networks, etc. ISOC will launch a funding programme in 2011 to cover the cost of webhosting for Chapters.

- **Use social media to stimulate interest.** Social media has become a popular and widely accepted means for notifying members of activities and issues and rallying individuals with shared interests. See our discussion about social media later in this section.

- **Issue a comment or statement.** Very often there are items in the local news about Internet technology itself or on specific topics, such as children and the Internet (safe Internet surfing), education, censorship/freedom of expression, Net neutrality, online identity management, and identity theft, among others (not all have to be specifically Internet-related, they can be topics where the Internet can be part of the solution, such as making sure that kids have access to educational materials). Armed with information you have gathered from the Internet Society’s website and briefing papers, a Chapter leader can write a letter to the editor or issue a formal statement commenting on the issue, explaining the Internet Society’s position on the issue or the principles that drive the our position. In the case of Net neutrality, the Internet Society has adopted a position on open internetworking that has proved highly valuable (and visible) among policymakers and other experts and individuals. By issuing a statement or writing an opinion piece, you can draw attention to your Chapter and help your Chapter build credibility. Remember: free publicity is worth far more than paid publicity.

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Financial Management

It would be great if we could depend on volunteer effort and in-kind contributions to get things done, but invariably there will come a time when cash is needed to purchase goods and/or services. Cash might be required for a project or as part of your Chapter's general operating expenses.

To ensure that adequate funds are available and that they are being appropriately handled, consider the following questions:

How much do we need? Creating a budget

Some Chapters are able to operate without any funds at all (they depend on virtual offices and donated services, such as Web hosting, email services, etc) while others have "physical" offices, part-time paid staff members and other operating expenses. Even if your Chapter does not require funds for general operating expenses, chances are you will need cash for projects. That means you will want to become familiar with creating a budget.

Here are a few tips on managing a budget:

- Income and expense estimates need to be realistic and, if possible, based on historical performance.
- If you depend on cash for operating expenses, except in extraordinary circumstances, your Chapter should run a positive net income each year, which is then placed into reserves (ideally representing around 6 months operating expenses).

Where will we get it? Generating Funds

Funds can be generated by a number of sources, including membership dues, sponsorships, event fees, and grants, to name a few. For more detailed information about generating funds, [click here](#).

Where will we keep it? Banking

Funds generated by the Chapter are generally kept in a bank account in the name of the Chapter (not an individual). In some cases, a Chapter may be operating under the aegis of another group, such as a university or another nonprofit organization, which may offer these types of services. However, as a general rule, the individual authorized to write the check (or e-payment) should not be the one who signs the check or authorizes the e-payment.

How will we spend it? Cash management

You should determine how much is spent and for what. However, there should always be independent validation/authorization for expenditures

How will we track & report it? Accounting

- Balance Sheet (how much do we own/owe)
- Income Statement (how much have we made & spent)

- Cash Flow (how much do we need/have to pay the bills)

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Administration

When it comes to managing your Chapter, the best advice is “think minimal”. As a volunteer whose first obligation is to your job and your family, the last place you want to spend your time is getting bogged down with Chapter administration activities.

To avoid getting bogged down in details and busy-work, most of which will not contribute to the functionality of your Chapter or ensure that projects are launched, regularly ask yourself: “If I don’t do this, can we still get the important things done?” If the answer is yes, then whatever it is should probably be dropped from your to-do list, or at least postponed.

Chapter administration covers the general operational functions that support a Chapter’s work. To begin, for most of you, this probably means a virtual office.

The rest of the Chapter’s administrative policies and procedures can best be assembled by answering a series of questions.

How do we manage...

- Member Records? In general, these will be handled through the Internet Society’s Chapter Portal or Association Management System (AMS). Whatever system you use, the Internet Society must have an up-to-date and current membership list for each Chapter.
 - Decide who in your Chapter will have access to the database (it is always good to have two persons in this capacity in order to share the workload and act as backup). Make sure the names of these persons is in the list of “roles” in the Chapter portal.
 - Create a system for ensuring that the database be kept current (General Chapter data, List of members, List of current Chapter Officers – this is very important, since otherwise the Internet Society HQ will not be able to contact your Chapter and the Officers might eventually drop off some of the Internet Society mailing lists).
- Office Functions?
 - Word processing
 - Spreadsheets
 - Other
- Chapter promotion?
 - E-communications/mailling lists
 - Website development and updating
 - Press releases and general outreach

- Social media
- Collaborative Spaces where Chapter can manage projects?
 - Social media
 - Wikis
 - Other
- Sponsorship?
 - Pursuing sponsorship (for direct funding, in-kind, or both)
 - Sponsorship relationships (someone needs to stay in touch with sponsors and keep them interested)
- General administration and legal requirements?
 - If your Chapter is incorporated as a nonprofit, (which we highly encourage),, annual paperwork and filings
 - Reporting to the Internet Society (i.e., everything from submitting updates to the monthly newsletter to general reporting)
 - Finance (if your Chapter is collecting dues or fees for events)–
 - Insurance
 - Back-ups of important records and documents
- Communications?
 - Telephone (VOIP, Skype, cell, etc.)
 - Email/Text Messaging/Fax
 - Postal Mail
 - Webcasting
- Filing & Storage?
 - Where and how are hard copies and e-copies kept?
 - How are files tagged?
 - Who has access?

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