



# **Book 9**

## **Establish or Reactivate your AFE Chapter**

**How-to tips**

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## Establish or Reactivate A Chapter

### **Establishing a New Chapter**

One of the most worthwhile and rewarding chapter projects can be the establishment of a new AFE chapter. Although chapters are currently chartered in most major cities, there are still many areas where an AFE chapter would flourish.

The basic requirements for forming a new chapter can be easily met. It can be a challenge to locate prospective members and plan the first organizational meeting but AFE can help. Contact AFE Headquarters at (571) 203-7171 or by email at [afe@afe.org](mailto:afe@afe.org). AFE Headquarters maintains lists of prospective members throughout the U.S. and Canada.

### **Why Start a New Chapter**

Chapters are a prime part of the delivery system of membership benefits.

Consequently, chapters are vital to the success of AFE. Chapter activities are informative, stimulating and fun. But a number of members (about 10% of the total) don't currently belong to a chapter. Why? Usually, all the reasons boil down to just one - there isn't a chapter in the area. This means that members who aren't participating are missing out on a good bet. It also means that untold thousands of non-members, who could be included in AFE and aren't now, are missing out. With over 150,000 member prospects in the U.S. alone, just think of the potential for AFE growth through chapter expansion...it's tremendous!

Perhaps you were previously active in an AFE chapter. If you've recently moved, and there's no chapter in your area, you know how much you've lost. Maybe the chapter you're now a member of is not as accessible as you'd like; or perhaps it's becoming impersonal; or the meetings are a three-ring circus-or whatever. Starting a new chapter may be one of the best things you can do...for YOU...and the process can be made reasonably easy.

### **Here's what to Do**

Your first step is to contact AFE Headquarters. The seasoned staff at AFE is ready to start working with you. Also, the VP-Region Director in your area is willing to help set up new chapters.

As a professional, you probably know numerous other professionals like yourself who would be interested in the benefits of a chapter. If you are new to the area, the AFE Headquarters staff can help by giving you a batch of name contacts from their huge list of thousands of prospective members, plus the member-at-large in your area. The list can be broken down by geographic area, zip code or almost any way you would require. These lists are available at no charge for chapter information purposes.

Once you think about it, 15-25 prospective chapter members should be easy just from personal contacts and AFE's available mailing lists. With a little work, the number could easily be two, three, five or ten times larger. There is no limit; the more you have to start with the better your chapter can be. (There's a "critical

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mass”, numerical/prospect level you’ll need to achieve in order to get things really moving.)

Once you have line up 15-25 professionals there are a few administrative procedures to complete and papers to be drafted. The sooner you start to form that new chapter the quicker you’ll start to benefit. Here are some other helpful hints to get you started.

#### **Five Basic Requirements**

- Objectives of the local group must be the same of those of AFE
- The individuals who ultimately constitute the local group must be eligible for membership in AFE, and must become AFE members to be a part of an AFE chapter
- There should be 15-25 members in the new chapter. (Official minimum is 12, which may not create enough “critical mass” to get a chapter really moving; 20 to 25 is better)
- Chapter bylaws and other charter materials are approved by the AFE officers and directors
- All charter materials must be completed before chapter charter can be awarded

#### **Ten Steps to a New Chapter**

1. Identify prospective members in your area
  - Your local contacts-pyramid
  - Suppliers’ customer lists
  - Other industrial, commercial and institutional lists
  - AFE members-at-large
  - AFE prospect list
  - Other sources
2. Contact prospective members and schedule an organizational meeting
  - Letter of introduction
  - Membership brochure/application
  - Follow-up mailings
  - Personal phone calls and visits
  - Issue notice of first meeting
3. Hold first organizational meeting
  - Determine chapter mission

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- Determine/discuss, member needs and expectations
  - Review AFE objectives and activities
  - Elect/appoint officers and/or steering committee
  - Begin planning “chapter” activities
  - Schedule additional meetings
4. Notify AFE of intention to organize chapter
  5. Launch recruiting campaign
    - Expand initial base of interested parties
    - Ask suppliers for a lot of help
    - Build membership commitments
    - Keep at it!
  6. Draft chapter bylaws
    - Model bylaws are available from AFE, and are included in Book 10 “Forms” of this manual.  
(This makes a sometimes difficult task easy)
  7. Expand and refine chapter operations/activities
    - Appoint needed committees (get everyone involved.)
    - Plan a full schedule of activities
  8. Complete membership forms; collect dues and fees (from “charter” group.)
  9. Schedule Charter Night
  10. Submit required forms, fees and documents to AFE:
    - Chapter bylaws
    - Membership applications; fees/dues
    - Roster of members and officers
    - Letter of intent
    - Calendar of activities
    - Chapter name and scope
    - Tentative charter date

Upon receipt of all items, the AFE officers and directors vote to award charter. The charter date is confirmed and on that day, the charter is conferred and officers installed (if possible, by an AFE Headquarters official.)

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### **What Makes a Chapter Successful?**

An effective chapter will have the following characteristics:

- Publicly accessible meeting place for members
- Setting goals and regularly measuring their progress
- Established systems for administrative and financial functions
- An active membership recruitment and retention program
- Ongoing programs that serve identified interests of the chapter members
- A broad-based fundraising plan
- Enough capable leaders to carry out the daily work of the chapter

Remember, no matter what stage of chapter development you may be in, chapters are part of a larger association. AFE chapters work hand-in-hand with the national organization to ensure that their individual and joint efforts support the work of the association as a whole.

### **AFE's Mission Statement**

AFE provides education, certification, technical information and other relevant resources for plant and facility engineering, operations and maintenance professionals worldwide.

### **Where do I find members and sponsors?**

Everyone who comes in contact with the chapter is a prospective member or sponsor. Callers, walk-ins, program attendees, trade show participants, meeting sponsors – all of these people (and others who contact AFE Headquarters directly) are potential members, contributors and volunteers. These names should be included in your prospect list and should also be forwarded to AFE Headquarters. An easy way to develop a prospect list is to enter the names, addresses, phone, and fax and email addresses into an Excel file. Don't let them get away!

### **REACTIVATING A CHAPTER**

All the principles and motivations for creating a chapter are pertinent to reactivating an existing one.

AFE Headquarters and/or your Regional Vice-President can provide a list of existing chapter members with contact information to give an initial contact database of members. You will find that some members will actually thank you for your efforts to reactivate the chapter and will most likely tend to be your first volunteer assistants. Some members, for whatever reason, do not wish to take the responsibility but are willing to help.

Some long-time members may be able to help with historical information concerning the chapter so you will

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not have to “reinvent the wheel”. Without this information, it is difficult (if not impossible) to determine if the chapter has existing bylaws, articles of incorporation, bank accounts or other financial information. Without this data, you will most likely have to recreate all these documents/accounts.

#### **What do I do first?**

Here is a summary of the steps to complete as you begin exploring the possibility of reactivating this chapter

- Make contact with individuals on member lists provided by AFE headquarters to inform them of the possibility of reactivating this chapter
- If possible, identify past officers who might have historical information especially existing bylaws, articles of incorporation, EIN/bank account information, etc
- Hold an exploratory meeting to determine interest and resources available
- Recruit 10-15 people who will help redevelop the chapter
- Identify the area to be served by this chapter
- Set up meetings and/or tours, chapter members may initially suggest their place of business
- Review and/or re-write outdated chapter bylaws
- If the chapter does not already have an Employee Identification Number (EIN) you can use the instructions and application enclosed in **Book 11** to apply for one
- Establish a chapter leadership structure; elect or appoint officers; notify AFE Headquarters
- Establish the chapter budget and set up a chapter checking account (must have an EIN number to do this). Contact AFE Headquarters for additional chapter financial information

Establishing and/or reactivating an AFE chapter is an ongoing process that will not be accomplished overnight and does require a commitment of energy and dedication. By inquiring how to bring the benefits of AFE to your local area, you have completed the initial step. The AFE Headquarters staff and region volunteers will guide you every step of the way.

The Headquarters staff works with existing and emerging chapters to provide technical assistance in all areas of chapter management and development. In addition, they are available to assist with chapter functions, including public relations, finance and administration, and program services.