



Chapter President Handbook

Revised March 2012

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Foreword

The contents of this handbook are a compilation of information from various ITEA Chapters and other volunteers. It is intended for use by any Chapter President, newly elected or long-serving, as a tool to assist him/her with the guidance necessary to maintain a viable and healthy Chapter.

Chapters have certain responsibilities they must satisfy. These responsibilities are detailed in the *ITEA Bylaws* and the *ITEA Operations Manual*; portions of these documents are summarized in this *Handbook* as appropriate. Each Chapter President is expected to have a working knowledge of both of these documents, as well as any other ITEA policies or procedures.

The more successful you are as a Chapter President, the more likely it is that your Chapter will be highly effective and impact the T&E community in a positive way. An effective ITEA Chapter strives to meet the goals and mission set by the Board of Directors to help individuals and organizations in our T&E community to be successful.

Responsibility for annual review and revision of this handbook lies with the Chair of the Chapter and Individual Membership Development Committee. He/she will solicit inputs from the Chapters, Regional Vice Presidents, ITEA Board of Directors, and the ITEA Executive Office staff.

Our Vision

*To be recognized as the premier
professional association for the international
Test and Evaluation community.*

Our Mission

*To advance the field of Test and Evaluation worldwide
in government, industry and academia.*

About ITEA

For over thirty years the International Test and Evaluation Association (ITEA), a not-for-profit education organization, has been advancing the exchange of technical, programmatic, and acquisition information among the test and evaluation community. ITEA members come together to learn and share with others from industry, government, and academia, who are involved with the development and application of the policies and techniques used to assess effectiveness, reliability, interoperability, and safety of existing, legacy, and future technology-based weapon and non-weapon systems and products throughout their lifecycle.

ITEA members embody a broad and diverse set of knowledge, skills, and abilities that span the full spectrum of the test and evaluation profession. All of which is shared with others through *The ITEA Journal*--the industry's premier technical publication for the professional tester--and at ITEA's Annual Symposium, regional workshops, education courses, and local Chapter events. Join the thousands of ITEA members—your peers in the industry—in contributing to *The ITEA Journal* and participating at ITEA events so that you also can benefit from the opportunities to learn from others, share your knowledge, and help advance the T&E industry.

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1. PURPOSE & OVERVIEW

While serving as Chapter President, you will assume many different roles. With that in mind, it is important to maintain focus on the many tasks at hand and truly represent the Chapter to the best of your ability. The role of Chapter President is not intended to involve assisting in every area of operations for the Chapter; rather, your role is to develop and maintain a robust Chapter. In order to do this successfully, you must have an active team of volunteers supporting your efforts. Only with a combined effort of everyone within the Chapter can the Chapter's organization become successful and live up to its expectation of providing Chapter members with the ideal ITEA experience.

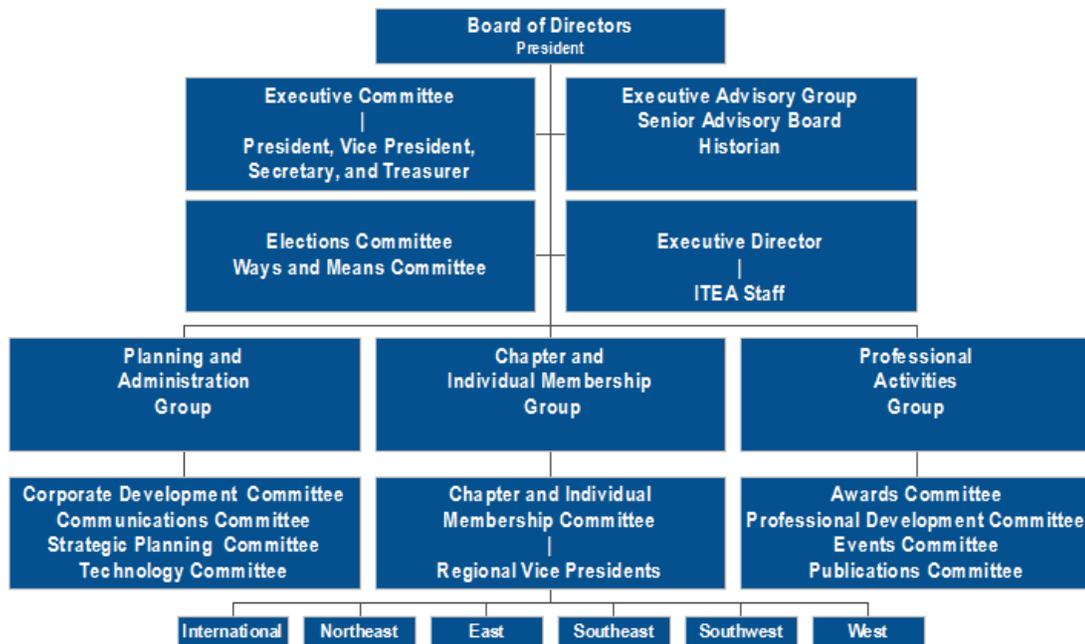
As the President of a Chapter, you will be subject to many different expectations that reach beyond maintaining the basic operations of a Chapter. The Chapter's Executive Committee, local members, the Regional Vice President and the ITEA Board of Directors look to you for strength and stability within the Chapter. It is very important for a Chapter President to recognize his/her role as a leader in the community and to communicate with other leadership for information and guidance. As Chapter President, people will look to you as the premier example of what ITEA represents at your location. The image that you present, as a result of your conduct, will have a direct effect on the image of your Chapter. Overall, the role of Chapter President is filled with many unique roles, responsibilities and expectations, and it will allow you to share your leadership qualities within the community.

As Chapter President you are now in a position to directly affect the Chapter's performance and future, as well as the future of ITEA. This position can be one of the most rewarding within the ITEA organization. You can be a catalyst for positive change and provide direction for the Chapter. Through your efforts and active leadership, your Chapter can benefit and prosper with the lasting legacy you leave behind.

1.1 Definitions

International Test and Evaluation Association (ITEA) – The legal entity which was incorporated as a 501(c)(3) not-for-profit individual membership professional association in the District of Columbia on January 18, 1980, for the expressed purpose:

- A. To provide an organization for individuals who have a common interest in the discipline of test and evaluation and who wish to foster, preserve, and advance the art and science of test and evaluation.
- B. To provide for the exchange of ideas and information in the field of test and evaluation.
- C. To conduct professional meetings, including symposia, seminars, workshops, and courses on the technology and management involved in the field of test and evaluation.
- D. To promote education in the field of test and evaluation by conducting symposia, seminars, workshops and courses in the theory and practice of test and evaluation.
- E. To support and promote the development and advancement of the state of the art in test and evaluation in allied branches of science, technology, and management.
- F. To encourage similar objectives in related organizations, including government, industry, academia, and professional societies.
- G. To recognize advances in, and contributions to, testing and evaluation.
- H. To document the history of test and evaluation.
- I. To fittingly commemorate the achievements of persons who have made substantial contributions to the field of test and evaluation.
- J. To sponsor publications concerning test and evaluation.



ITEA Board of Directors - The term ITEA Board of Directors, or ITEA Board, shall apply collectively and solely to elected and appointed Directors of the Association, who shall undertake management of the business and affairs of the Association. The Directors shall in all cases act as a board, and they may adopt such rules and regulations for the conduct of their meetings and the management of the Association as they may deem proper, not inconsistent with these bylaws and the laws of the District of Columbia.

ITEA Executive Director (ED) - The non-elected, paid staff person hired by the Board of Directors to serve as the Chief Executive Officer of ITEA.

ITEA Executive Office (EO) - The principle physical office location at which the ITEA Executive Office staff works and the Association records are maintained.

ITEA Board Officers - The President, Vice President, Secretary, or Treasurer of the ITEA Board of Directors.

Chapter - A formal geographic organizational subdivision of ITEA with local members established and conducting ITEA affairs as acknowledged by the ITEA Board of Directors. Each Chapter is established by the ITEA Board of Directors and technically an “agent” of ITEA. And any debts incurred by the Chapter are ultimately the responsibility of the ITEA Board of Directors. Chapters avoid filing a separate federal tax return by operating as a subunit of ITEA. ITEA’s not-for-profit status extends to all ITEA Chapters; therefore, it is incumbent on all members involved with financial matters not to jeopardize the tax-exempt status the Association holds as a 501(c)(3) organization. Financial records provide an overview of the operation of the Association and should be maintained in a manner that facilitates reporting to the Board of Directors and the membership.

Chapter Officers - Chapters of the International Test and Evaluation Association shall have, as a minimum, the following officers: President, Vice President, Secretary, and Treasurer. A single individual may hold more than one office at any one time, except the offices of President and Treasurer. All chapter officers should be elected in the first quarter of the calendar year, if possible, by vote of the chapter membership and should hold office for a period of one year or until a successor shall have been duly elected or appointed. Such other officers and assistant officers as may be deemed necessary may be appointed by the chapter President.

Executive Committee (EXCOM) - The Executive Committee is comprised of the principal officers (President, Vice President, Secretary, and Treasurer).

Regional Vice President (RVP) - ITEA is divided into six geographic regions: Pacific, Northeast, East, Southeast, Southwest, and West. A RVP is elected by all Chapters in a region to represent and serve as an advocate of the Chapters’ interests before the Board of Directors. RVPs also serve as channels for communicating the Association’s policy and intent to Chapters and as a catalyst and coordinator of regional activities.

1.2 As Chapter President, What are your Main Objectives?

- To support and uphold Chapter Bylaws as well as the ITEA Vision and Mission
- To oversee Chapter operations and general membership
- To manage crisis situations
- To promote positive professional relationships with the primary location of your Chapter and surrounding local communities – such as government, industry and academia, etc. - and ITEA community
- To conduct a successful transition with your successor

While serving as Chapter President, you should be working with many diverse groups and organizations within and outside the primary location of your Chapter. Your role as Chapter President involves maintaining constant communication with your Chapter Executive Committee, Chapter members, your Regional Vice President, the ITEA Executive Office staff and any individuals who assist the Chapter on a regular basis. Maintaining these crucial relationships is the foundation of developing a successful Chapter and the ITEA experience.

1.3 Difficulties of Being the Chapter President

Many situations can arise that can affect your overall performance as a Chapter President. Some examples of situations and conflicts that may exist during your term as Chapter President can include:

- Conflicts between your Chapter and following ITEA's guidance and policies
- Resolving sensitive situations within the Chapter
- Understanding the appropriate role of the Chapter President
- Recognizing that one person cannot make a successful Chapter by themselves
- Maintaining high levels of enthusiasm and standards for appropriate conduct
- Being flexible with your schedule

Your ability to control and manage these distractions effectively will positively impact your term as Chapter President and help your Chapter to be highly effective.

1.4 Chapter Organization

An ITEA Chapter can be an extremely complex organization to operate, and one person cannot be expected to manage it alone. With this in mind, your most valuable source of assistance is the Chapter's Executive Committee and the general membership. In order to be a consistently successful Chapter, activities require excellent planning that is performed well in advance. The Chapter's Executive Committee is charged with this basic expectation.

A great deal of flexibility is permissible with the composition of the Chapter's Executive Committee, but per *ITEA Bylaws*, officer positions that must be filled are the Chapter President, Vice President, Treasurer, and Secretary. Other positions to consider for the Chapter's Executive Committee include committee chairs such as Recruitment, Sponsorship, Scholarships, Activities, etc. The following is a brief summary of some expectations for the

Chapter's other elected officers:

- **Vice President:** Performs the duties of the President in his/her absence; Serves as personal representative of the Chapter's Executive Committee; Assists in the facilitation of Chapter goal setting; In charge of overseeing all committees; Reports to the Chapter's Executive Committee on the functioning of each committee; Upholds and is familiar with all Chapter Bylaws as well as any policies or procedures established with the Chapter's primary location.
- **Treasurer:** Develops and maintains the Chapter budget; Submits budget statements to the ITEA Executive Office as required or when requested; Completes the annual ITEA / IRS form when sent by the ITEA Executive Office staff; and ensures that the Chapter is compliant with the financial guidelines, requirements, and practices as stated in the *ITEA Operations Manual* and any other ITEA Board policies and procedures.
- **Secretary:** Keeps an accurate and detailed roster of Chapter members and coordinates with the ITEA Executive Office staff; Keeps a record of minutes for all Executive Committee and Chapter meetings.

With the assistance of a strong Chapter Executive Committee, the Chapter as a whole will be better suited to developing into a successful organization. Furthermore, the Chapter President will have more time to dedicate toward motivating Chapter members and improving public relations, instead of performing the duties and tasks of other Chapter officers and committee chairs.

2. THE IMPACT OF AN EFFECTIVE CHAPTER PRESIDENT

The Chapter President plays a vital role in the overall success of a Chapter. With the aid of a strong Executive Committee, the Chapter President is able to dedicate more of his/her effort toward improving public relations, motivating Chapter members, and organizing comprehensive goals and strategies for the Chapter. In addition, the Chapter may see an improved relationship with officials of the Chapter's primary location, such as government, industry and academic, etc. as well as other organizations and surrounding local communities. Finally, all areas of Chapter performance will be improved because the Chapter President will be more accessible to provide insight and advice to Chapter officers, committee chairmen, and general members. The success of your Chapter's membership, financial management, public relations, and applicable programs/events are all dependent upon the strategic leadership and planning of the Chapter President.

The Chapter may suffer numerous consequences because of an irresponsible President. First and foremost, Chapter performance may become inconsistent in all areas. With an unorganized and unmotivated Chapter President, the education of members on the importance of leadership and involvement within the Chapter will be lost. The relationship with the Chapter's primary location, membership and other resources may become jeopardized. The Chapter could become negatively represented because public relations efforts will be nonexistent. Finally, the Chapter will lack direction for the future, which will result in the poor planning and organization of Chapter events. This lack of planning may threaten the long-term status of the Chapter, create conflicts within the membership, or increase levels of financial instability for ITEA.

As Chapter President, you should take pride in your position. Now that you are the lead spokesperson for the Chapter, you can improve many Chapter-programming areas, and more importantly, are charged with upholding the ideals of ITEA. This, above all, is the ultimate expectation for every Chapter President.

3. CHAPTER PRESIDENT'S CHECKLIST & TASKS

3.1 Immediately Following the Election

- Inform the ITEA Executive Office staff and Regional Vice President of your recent election to the position
- Review this *Chapter President Handbook*, the *ITEA Bylaws* and the *ITEA Operations Manual*
- Review the Chapter's Bylaws
- Meet with the Chapter's Executive Committee to become familiar with current practices, expectations, committee roles, objectives of the Chapter. Inquire as to what has previously worked for the Chapter, where improvements could be made, and what the Executive Committee expects of the Chapter President. This initial meeting's sole purpose as the new Chapter President is to be inquisitive, not discuss your plans.

3.2 Within the 1st Month

- If one doesn't exist, develop a logo for "branding" your local Chapter. Include this in all communications, advertisements, hand-outs, etc. By developing a consistent 'look' that is associated with your ITEA Chapter, people will associate the "logo" with your ITEA Chapter. (See Appendix 2 for example).
- Set personal goals for yourself as Chapter President
- Meet with the Chapter's Executive Committee to discuss Chapter goals, needs and objectives for the upcoming year
 - Short-term goals (to be accomplished within one year)
 - Long-term goals (to be accomplished within three years)
 - Factor in any overall goals previously set by your Chapter and/or the ITEA Executive Office staff
 - Develop objectives and strategies for accomplishing these goals
 - Monitor the progress of the Chapter
- Develop, at a minimum, a skeleton calendar for regular Executive Committee meetings, regular Chapter meetings, Chapter-level events, ITEA workshops, deadlines for ITEA journal submissions, ITEA Annual Symposium, local community events and other pertinent activities
- Review the budget required to support the Chapter's goals and objectives and communicate this with the ITEA Executive Office staff. The Treasurer should have the ability to communicate appropriate use and distribution of Chapter funds.
- Notify the Chapter members of the newly elected officer(s) via email, word-of-mouth, etc.
- Have a conversation with your Regional Vice President to discuss all these topics and to learn his/her expectations. Use the Regional Vice President as a resource to assist you in being successful.

3.3 Two Months out and Beyond

- Communicate your Chapter's progress with your members, other Chapters, local organizations and surrounding community, and the ITEA Executive Office staff
- Continuously ask for input, feedback, and assistance – this will improve your Chapter's performance
- Assess your Chapter's strengths (continue to emphasize these) and weaknesses. Strive to correct any weaknesses.
- Re-assess your Chapter's short- and long-term goals – be specific
- Utilize various communications methods and adapt to the most responsive means
 - Executive Committee meetings
 - Chapter meetings
 - Newsletter (Recommend Quarterly)
 - Chapter website
 - E-mails
 - Journal submissions
 - Periodic interaction with your Regional Vice President (recommend monthly)

3.4 Annually to Achieve Excellence

- Review your Chapter Bylaws and maintain a full slate of Officers in good standing with ITEA
- Submit Year-End Financial Statements to the ITEA Executive Office staff
- Hold at least four (4) general membership meetings and at least two (2) officer meetings within the year. A general membership meeting is often a lunch meeting with an invited speaker. An officer meeting is usually held at a separate time, and usually attended by just the Chapter officers.
- Publish and/or distribute meeting notices in advance of all general membership meetings
- Hold a T&E fundraising activity during the award year to outreach to the T&E community, broadening the knowledge of T&E and ITEA. (Examples: workshop, crosstalk, tutorials, golf tournament, luncheon)
- Develop or maintain an active scholarship program awarding at least 1 scholarship in the year.
- Recruit at least one (1) new corporate member in the year.
- Submit a T&E professional Awards nomination to the ITEA Executive Office staff
- Have a Chapter member submit at least one technical article to *The ITEA Journal* each year
- Submit a Chapter News article for *The ITEA Journal* – quarterly is recommended
- Chapter provided a website or newsletter over the course of the year to communicate with its members.
- Attend the ITEA Annual Symposium
- Attend the Annual Chapter Leadership Meeting at the Annual Symposium
- Plan to attend, support, and/or conduct an ITEA Workshop

4. SUGGESTIONS ON HOW TO BE A SUCCESSFUL CHAPTER PRESIDENT

The following are a few suggestions that will assist you in your efforts to becoming a successful Chapter President:

1. ***Lead and motivate by example.***

While Chapter President, always strive to represent the highest ideals of appropriate conduct for all members of your Chapter. Since you are the foremost representative of the Chapter, people will tend to model their behavior after the example you provide. Maintain a positive attitude.

2. ***Utilize your Executive Committee.***

Use the Chapter's Executive Committee to review the progress and operations of the Chapter to make certain that everything is being accomplished. This makes for a great forum to discuss issues within the Chapter, as well as to delegate tasks amongst Chapter officers.

3. ***Stay consistent.***

A large responsibility of being a Chapter President involves the ability to maintain impartiality. In order to be successful and impartial, you must stay consistent with decision-making and judgments of members' behaviors. No respected leader is ever accused of being a hypocrite.

4. ***Be Accessible.***

At times, problems or situations can be resolved with immediate intervention. Being easily accessible allows a Chapter President to build better relationships with all members of the Chapter, and in turn, will put you in a better position to assist with any Chapter conflicts.

5. ***Learn from your mistakes.***

Nobody is perfect, so recognize that not everyone will make the right decisions all the time. If it's your mistake, own up to it, make corrective actions, and move on.

6. ***Recognize your own personal shortcomings and strive to improve in those areas.***

For example, if you have problems managing your time, make sure you are delegating tasks to the appropriate Chapter officers or members, and continue staying organized with the assistance of a daily planner or calendar. Being organized actually helps motivate the entire Chapter as well as the Executive Committee members.

7. ***Take a personal interest in members.***

Keeping members motivated is a constant battle. By taking a personal interest in the different activities of the members, as Chapter President you will be better suited to encourage the efforts of Chapter members and can better motivate others to be active contributors in the Chapter.

8. ***Recognition.***

You will motivate others by recognizing outstanding contributions and efforts by individual members. Remember that people tend to support what they help to create.

9. ***Delegate responsibilities and tasks, then trust the outcome.***

Delegation is the key to success with any organization. The ability to delegate, and accept the subsequent outcome, is essential for the successful management and operations of a Chapter.

10. ***Utilize your available resources.***

The ITEA Executive Office staff; ITEA's Committee Chairs, Chapter and Individual Membership Development Committee; ITEA Regional Vice Presidents; other ITEA Chapter Presidents; Regional/International Conferences, Conventions and Workshops; Chapter's primary location (government/industry/academia) resources (Leadership, Officials, Subject Matter Experts, Peers) are all great resources that are readily available to assist you on a daily basis.

5. THREE KEY CHARACTERISTICS OF A SUCCESSFUL CHAPTER PRESIDENT

STRETCH	Reach outside of your comfort zone. Don't be afraid of new opportunities. Think outside the box.
COLLABORATE	Never stop communicating with peers and don't be afraid to talk to people you don't know. You will be amazed at what you can learn and what you can offer others.
ASK FOR HELP	<u>DO NOT</u> be afraid to ask for help!

6. RECURRING ACTIVITIES

Chapters have considerable latitude in designing programs that best suit the needs and interests of their constituent members. Many Chapters have hosted educational events on behalf of the entire association; others have sponsored independent educational programs for those in their immediate area. Numerous Chapters have begun scholarship programs designed to provide financial aid to college students whose course of study is related to test and evaluation. All Chapters participate in ITEA's annual awards program, which honors individuals and organizations that have made outstanding contributions to the field of test and evaluation.

6.1 Chapter Events

Chapters have considerable latitude in designing programs that best suit the needs and interests of their constituent members. Many Chapters have hosted educational events on behalf of the entire association (ITEA sponsored / Chapter Hosted); others have sponsored independent educational programs for those in their immediate area (Chapter Sponsored). Numerous Chapters have begun scholarship programs designed to provide financial aid to college students whose course of study is related to test and evaluation. All Chapters participate in ITEA's annual awards program, which honors individuals and organizations that have made outstanding contributions to the field of test and evaluation.

Meetings and Educational Events

The ITEA Board of Directors fully supports and encourages special educational activities that are in keeping with the Association's stated objectives. The Board applauds the initiative, drive, and imagination of Chapter leaders who have conducted many worthwhile, educationally oriented activities. These events have illuminated many important issues for discussion and communicated timely information on new developments and emerging technologies to ITEA members. An *ITEA Events Manual* is available from ITEA EO to assist Chapters in planning educational events.

As a volunteer organization, Chapters conduct most of ITEA's educational events. A distinction is made between an event sponsored by ITEA and an event sponsored by an ITEA Chapter. This distinction is described below.

ITEA Sponsored / CHAPTER HOSTED EVENTS

An event *sponsored* by ITEA is frequently *hosted* by an ITEA Chapter. The event is normally held in the vicinity of the hosting Chapter. The annual ITEA Test Instrumentation Workshop is an example of an event *sponsored* by ITEA and *hosted* by a Chapter or Chapters. ITEA can provide a host Chapter with seed money for an internationally sponsored educational event such as this. An individual Chapter shares in the net revenue or loss from an internationally sponsored event it hosts as detailed in the ITEA Scholarship Program Policy (Appendix C).

The primary responsibility of the host Chapter is to develop and execute the technical program for the event. Host Chapters work closely with the chair of the ITEA Events Committee and report regularly at meetings of the Board of Directors. Other Chapter responsibilities for these events may include arrangements for facilities, food and beverages, exhibits, promotional materials, security, local transportation, and social activities.

When an event is sponsored by ITEA, the resources of the EO are available to provide administrative support such as: design and publication of promotional materials (e.g., calls for papers, registration brochures, pocket schedules, *ITEA Journal* advertisements); bulk mailing and email promotion services; registration (both advance and on-site); exhibit coordination; budget preparation; and accounting (e.g., bill payment, invoice preparation, and collection of accounts receivable for registration and exhibit fees).

With regard to national events (e.g. Annual Symposium, Technology Review, etc.), the Technical and Program Chairs for the event in conjunction with the EO Staff will assess the participation and support provided by the supporting Chapter(s) and make a recommendation to the EXCOM regarding eligibility for an added incentive. The EXCOM will make the final determination regarding Chapter eligibility for an additional bonus.

Chapter Sponsored Events

Because each Chapter is established by the ITEA Board of Directors, each Chapter is technically an "agent" of the International Test and Evaluation Association, and any debts incurred by the Chapter are ultimately the responsibility of the Board of Directors. Therefore, it is incumbent upon ITEA EO to establish policies and provide guidelines for such events. With the exception of

regular, recurring Chapter meetings, all Chapter workshops, symposia, and educational conferences should be reviewed by the corresponding RVP and by the ITEA Events Committee. Short courses, tutorials, and other programs of formal instruction fall under the purview of the Chair of the Education Committee.

ITEA is committed to meeting the educational needs of its members. Participants at ITEA events have come to expect a high degree of professionalism and quality in the educational programs offered by the Association. Chapters are encouraged to continue the established practice of sponsoring workshops, seminars, and other educational events to meet local needs.

To maintain the high standard of ITEA events, it is essential that the Board of Directors, through the Events Committee or the Education Committee, be informed of Chapter events. Each Chapter planning an educational event must notify EO as soon as possible, but no later than 180 days prior to the event. Notification should include, in addition to the dates and location, an overview of the program, a rationale for holding the event, the names of planning committee members, intended audience, format, names of key resource individuals, and a budget, if the anticipated revenue or expense is expected to exceed \$1,500. In the case of short courses or tutorials, Chapters should include the course title, a description of the material to be covered, and the curriculum vitae of the instructor(s).

Any Chapter event (except regular, recurring Chapter meetings) where revenue or expenditures are anticipated to exceed \$1,500 requires the submission of a budget for review by the ITEA Ways and Means Committee. Any contract or agreement that involves an ITEA obligation of more than \$1,500 must be sent for review and approval by the ITEA ED. Any net revenues from an event are retained by the sponsoring Chapters; similarly, net losses incurred remain the responsibility of the sponsoring Chapters.

ITEA EO provides complimentary advertising in the *ITEA Journal* for Chapter-sponsored events.

Bulk Mailing Restrictions

The EO office maintains a non-profit postal permit with the U.S. Postal Service for bulk third-class mailings. The permit is registered at the main office of the Fairfax Post Office, 10660 Page Street, Fairfax, Virginia 22030-0008. Chapters may use the permit for mailing meeting announcements, newsletters, and other items that relate to the primary purpose of the Association.

Chapters using the permit will be billed for the amount of postage charged against the permit. All mailings, however, must be made from the Fairfax Post Office and must be sorted and bundled in accordance with current postal regulations. A minimum of 200 pieces, or 50 pounds, is required for each mailing. All pieces must be identical in weight and size and include the bulk mailing permit number (340) and the return address of the ITEA office as shown below. *Postal regulations require the use of the EO office return address and not the Chapter's address.*

International Test and Evaluation Association	Non Profit Org
4400 Fair Lakes Court	U.S. Postage
Suite 104	Paid
Fairfax, Virginia 22033-3899	Fairfax, VA
	Permit No. 340

Activities to be Avoided

As a not-for-profit educational association, the Internal Revenue Service places certain restrictions on ITEA's activities. Proscribed activities include meetings that are: strictly political in nature; do not support the purpose of the Association, as stated in the Bylaws; or are for the purpose of soliciting funds for charitable causes. This does not prohibit a Chapter from inviting a political official to speak or participate in an educational event, provided the individual's presence is not primarily for electioneering or construed as an ITEA endorsement. If there is any question regarding the propriety of a Chapter's activity, the Chapter president should consult with the RVP or the ED.

Guidelines for Use of Chapter Funds

As part of a tax exempt 501(c)(3) organization, an ITEA Chapter is prohibited from permitting any of its net revenue to inure to the benefit of the officers of ITEA or to the officers of a Chapter. A Chapter is precluded from contributing funds to candidates for public office or political committees, and from establishing its own Political Action Committee (PAC). Revenue generated by a Chapter should directly and visibly contribute to one or more of the purposes stated in the ITEA Bylaws.

Acceptable uses of funds include: funding of local educational events, including workshops and symposia; providing for ITEA scholarships and awards programs; participating in science fairs and technical institutes; routine administrative expenses associated with the conduct of Chapter affairs; and support of membership drives.

Funds may not be used for social events such as a Chapter party or picnic; for the travel of a Chapter officer to ITEA events; or to subsidize membership dues.

6.2 Chapter News Articles for *The ITEA Journal*

Chapters are encouraged to submit articles highlighting Chapter activities and events to the ITEA Executive Office for publication in *The ITEA Journal*, which is published quarterly. Here are approximate due dates for Chapter News to be submitted to the ITEA Executive Office.

March issue	Due January 15
June issue	Due April 15
September issue	Due July 15
December issue	Due October 15

6.3 Chapter Excellence Recognition Program

Chapters are eligible for recognition at the ITEA Annual Symposium if they meet certain criteria, assessed over the course of the year from the previous Symposium. The following approximate timeline will be used by the Chapter and Individual Membership Development Committee Chair for administering the program.

- Four months prior to the symposium: The Chair will alert the Chapters of the program, discuss processes and timelines, and redistribute the nomination form containing the eligibility criteria.
- Three months prior to the symposium: Completed nomination forms are due to the Chair.
- Ten weeks prior to the symposium: The Chair distributes *Chapter of the Year* instructions and questions to eligible Chapters.
- Two months prior to the symposium: Completed *Chapter of the Year* responses due to the Chair.
- Seven weeks prior to the symposium: The Chair provides *Chapter of the Year* scoring packages to the Regional Vice Presidents.
- Five weeks prior to the symposium: Completed score sheets are due to the Committee Chair. The Chair compiles the scores to determine the “Chapter of the Year” and informs the ITEA Executive Office staff so that proper preparation can be made for the Awards program. The results are kept confidential.

6.4 ITEA Scholarship Program

The ITEA Scholarship Program is designed to foster interest and education in technical fields that may benefit the test and evaluation profession. The program furthers the goals of ITEA by providing financial aid to qualified students attending or scheduled to attend an institution of higher learning (i.e., universities, colleges, and community colleges) in a technical field and/or offering grants to educational institutions, including schools with Science, Technology, Engineering, and Mathematics (STEM) programs, to purchase equipment that has the potential to impact their technical curriculum.

The ITEA Scholarship Program is administered by ITEA Chapters with the assistance of the ITEA Executive Office (EO) and under the cognizance of the ITEA Board of Directors. Chapters may, at their discretion, develop relationships with local universities and colleges to assist with

the selection and award of scholarships. Chapters will develop eligibility guidelines such as, required grade point average, course of study and application requirements. The selection of individual scholarship awardees is at the discretion of the local Chapter. Each Chapter must provide the ITEA Executive Office with the names of individual scholarship recipients.

The ITEA EO will assist the Chapters with the financial administration of the Scholarship Program including the issuance of scholarship checks and the establishment and maintenance of an Education Account. The ITEA EO will send the Chapter a check for presentation to the designated educational institution. The check will be written payable to that institution. In accordance with IRS reporting requirements for year-end tax returns, each Chapter must provide the ITEA EO with the names of the individual scholarship recipients, their tax ID numbers, full postal mailing address, telephone number, along with the name, address, telephone, and tax ID of the educational institution and the financial/program point of contact.

6.5 ITEA Professional Awards

In addition to recognition for Chapters, ITEA annually recognizes individuals and teams for outstanding accomplishments in the test and evaluation field. The ITEA Board of Directors relies on ITEA members and Test and Evaluation (T&E) leaders to identify and submit nominations of individuals and teams worthy of recognition by the ITEA T&E Professional Awards Program. This recognition is a testament of their outstanding accomplishments in T&E. The award categories include:

- **Allen R. Matthews Award** established in honor of ITEA's founder and presented to an individual for a lasting, significant contribution to the field of T&E, such as the cumulative effect of a distinguished career. It is the highest award bestowed by ITEA.
- **Special Achievement Award** recognizes a recent outstanding achievement in T&E engineering, technology, or management such as the solution of a major problem or a notable project success for which there is evidence that tangible benefits have accrued.
- **Technical Achievement Award** recognizes an individual or team for outstanding use of Instrumentation, information technology, modeling and simulation, time-space-positioning information, electro-optics technology, or other T&E technology to cause a T&E program to be better, faster, and less expensive.
- **Cross Award** was established in honor of the late Major General Richard G. Cross, Jr., USAF (Ret), one of the most highly respected individuals in the field of T&E in the 20th century. ITEA presents this award to recognize outstanding achievements in the development or administration of T&E education.
- **Publication Award** recognizes outstanding contributions to T&E literature. ITEA presents this award to honor individuals whose published books or technical papers have improved and increased the general body of knowledge relevant to better understanding and development of T&E technology.
- **Junior Achiever Award** recognizes a young professional who, during his/her first 5 years of practicing in the T&E field, has accomplished a significant achievement(s) which enhances and strengthens the T&E profession.

APPENDIX A: SAMPLE CHAPTER BYLAWS

[CHAPTER NAME]

ARTICLE I

NAME

Section 1. The name of the chapter shall be [Chapter Name], and will be referred to herein as the Chapter.

Section 2. The principal location of the Chapter shall be in the vicinity of [name of city or geographic location].

ARTICLE II

DEFINITIONS

Section 1. Chapter. A formal geographic organization of the International Test and Evaluation Association (ITEA) consisting of at least ten ITEA members in good standing.

Section 2. Individual Member. A member in good standing of one of the various classes of individual membership as defined and used in the ITEA bylaws.

Section 3. International Test and Evaluation Association (ITEA). A 501(c)(3) professional, educational organization, incorporated according to the laws of the District of Columbia and referred to herein as the Association.

Section 4. ITEA Board of Directors. The elected and appointed Directors of the Association who undertake the management of the business and affairs of the Association.

Section 5. ITEA International Headquarters. The Association's principal office located at 4400 Fair Lakes Court, Fairfax, VA 22033-3899, phone: (703) 631-6220.

ARTICLE III

PURPOSE AND ORGANIZATION

Section 1. Purpose. The purpose of the Chapter shall be to support the goals, objectives, and activities of the International Test and Evaluation Association as set forth in the ITEA bylaws. The Chapter shall be organized exclusively for educational purposes and will operate under the IRS guidelines set forth for a 501(c)(3) organization, the *ITEA Bylaws*, and the *ITEA Organization and Operating Procedures Manual*.

Section 2. Officers. The Chapter officers consist of a President, Vice President, Secretary, and Treasurer. A single individual may hold more than one office at any one time, except the offices of President and Treasurer. Chapter officers serve as the chapter's Executive Committee, which evaluates and guides the affairs of the chapter. Officers shall be members of ITEA in good standing and shall be elected by the chapter membership for a period of (one, two) year(s) or until a successor has been duly elected or appointed. Other officers and assistant officers as may be deemed necessary may be appointed by the Chapter President. All Chapter officers serve without compensation.

Section 3. President. The President is the chapter's chief operating officer and is generally responsible for managing all chapter activities. The Chapter President is the principal point of contact between the chapter, its members, the Regional Vice President, and the ITEA International Headquarters. Duties of the President include, but are not limited to, the following:

- (1) Preside at all chapter meetings and report pertinent information to the membership.
- (2) Appoint regular and special chapter committee members.
- (3) Assign and manage all chapter objectives, projects, and task force activities.
- (4) Act as the chapter liaison with the ITEA Regional Vice President and with ITEA International Headquarters.
- (5) Coordinate chapter activities with the Regional Vice President and ITEA International Headquarters.
- (6) Ensure that chapter reports are submitted in a timely manner.
- (7) Attend, when feasible, the annual meeting of chapter officers held in conjunction with the ITEA annual symposium.
- (8) Provide assistance in pursuing the overall objectives of the Association.

Section 4. Vice President. The Vice President shall act on behalf of the President when necessary and shall perform such other duties as assigned by the President. The Vice President shall serve as an ex-officio member of all major chapter committees.

Section 5. Secretary. The Secretary is responsible for maintaining all chapter records of meetings and communicating the information to the appropriate members and other interested individuals. Duties of the Secretary include but are not limited to the following:

(1) Recording and publishing minutes of all chapter meetings in a timely manner.

(2) Assuring that the minutes of prior meetings are available for review and approval at all chapter board meetings.

(3) Submitting to ITEA International Headquarters, on a quarterly basis, a brief synopsis of chapter activities for inclusion in *The ITEA Journal of Test and Evaluation*.

(4) Maintaining a current roster of chapter officers and committee members and informing ITEA International Headquarters of changes as they occur.

(5) Maintaining a repository of chapter records.

(6) Preparing chapter correspondence as directed by the chapter President.

Section 6. Treasurer. The Treasurer is responsible for the safekeeping, receipt, disbursement, and proper accounting of all chapter funds as authorized by the chapter officers, and in accordance with the approved chapter budget. Regardless of source, the Treasurer handles all financial transactions for the chapter. Required duties of the Treasurer include, but are not limited to, the following:

(1) Establish a chapter checking account and obtain signature cards and resolutions in an appropriate institution per chapter policy.

(2) Issue all checks for budgeted expenditures and mail them in a timely manner.

(3) Ensure that all expenditures are approved and verified prior to payment.

(4) Ensure that all financial procedures conform to the procedures as outlined in *ITEA Organization and Operating Procedures Manual*.

(5) Ensure that all deposits are made in a timely manner with appropriate documentation and receipt.

(6) Prepare and present a financial report at chapter meetings.

(7) Prepare the chapter's annual financial report and forward the report to the ITEA International Headquarters by February 15.

(8) Provide appropriate assistance to the annual audit process.

ARTICLE IV

MEMBERSHIP MEETINGS

Section 1. Notice of Meeting. Membership meetings in which issues require vote or affirmation of the member populace shall be announced by written or printed notice stating the place, day, and hour of the meeting and, in the case of a special meeting, the purpose or purposes for which the meeting is called, to be delivered to each member of the chapter whose membership is current and eligible to vote. Meeting notices shall be mailed at least 30 days prior to the date of the meeting and are considered delivered when deposited in the (United States) mail.

Section 2. Quorum. At any meeting of members, a majority of the votes entitled to be cast, represented in person or by proxy, shall constitute a quorum. If less than a majority of the votes entitled to be cast are represented at a meeting, a majority of the votes so represented may adjourn the meeting from time to time without further notice. If a quorum is present, the affirmative vote of the majority of the votes represented at the meeting and entitled to be cast on the subject matter shall be the act of the members. The members present at a duly organized meeting may continue to transact business until adjournment, notwithstanding the withdrawal of enough members to leave less than a quorum.

Section 3. Proxy. Written correspondence with an original signature, submitted to the President at least 20 days in advance of the meeting addressing a specific issue and how the member would like his or her vote cast, shall constitute a valid proxy. The President shall confirm the eligibility of the member.

Section 4. Eligibility. To be notified of a membership meeting and to be eligible to vote, a member's ITEA membership dues must be current.

Section 5. Rules of Order. Meetings and proceedings of the Chapter shall be conducted in accordance with Robert's Rules of Order.

ARTICLE V

DISSOLUTION OF A CHAPTER

Section 1. The ITEA Board of Directors may dissolve the Chapter if the Chapter has failed to satisfy its obligations or to adhere to *ITEA Bylaws*. The Chapter may be declared inactive and be subject to dissolution if it has less than ten members, or if there are no active officers, or if no meetings have been scheduled during a two-year period. Three months prior to a decision by the Board of Directors, the Chapter will be notified of pending action, and will be given an opportunity to present arguments for or against its dissolution. If the Chapter is dissolved, all property, assets, and records revert to the Association and are to be sent to the ITEA Executive Office after payment of the Chapter's bona fide debts.

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APPENDIX B: SAMPLE CHAPTER BYLAWS FROM THE MID-PACIFIC CHAPTER

Mid-Pacific Chapter

BYLAWS

ARTICLE I

Name

Section 1. The name of the Chapter shall be Mid-Pacific Chapter, and will be referred to herein as the Chapter.

Section 2. The principal location of the Chapter shall be in the vicinity of the Pacific Missile Range Facility (PMRF).

ARTICLE II

Definitions

Section 1. Chapter. A formal geographic organization of the International Test and Evaluation Association (ITEA) consisting of at least ten ITEA members in good standing.

Section 2. Individual Member. A member in good standing of one of the various classes of individual membership as defined and used in the *ITEA Bylaws*.

Section 3. International Test and Evaluation Association (ITEA). A 501(c)(3) professional, educational organization, incorporated according to the laws of the District of Columbia and referred to herein as the Association.

Section 4. ITEA Board of Directors. The elected and appointed Directors of the Association who undertake the management of the business and affairs of the Association.

Section 5. ITEA Executive Office. The Association's principal office located at 4400 Fair Lakes Court, Fairfax, VA 22033-3899, phone: (703) 631-6220.

ARTICLE III

PURPOSE AND ORGANIZATION

Section 1. Purpose. The purpose of the Chapter shall be to support the goals, objectives, and activities of the International Test and Evaluation Association as set forth in the *ITEA Bylaws*. The Chapter shall be organized exclusively for educational purposes and will operate under the IRS guidelines set forth for a 501(c)(3) organization, the *ITEA Bylaws*, and the ITEA Organization and Operating Procedures Manual.

Section 2. Officers. The Chapter officers consist of a President, Vice President, Secretary, and Treasurer. A single individual may hold more than one office at any one time, except the offices of President and Treasurer. Chapter officers serve as the Chapter's Executive Committee, which evaluates and guides the affairs of the Chapter. Officers shall be members of ITEA in good standing and shall be elected by the Chapter membership for a period of (one, two) year(s) or until a successor has been duly elected or appointed. Other officers and assistant officers as may be deemed necessary may be appointed by the Chapter President. All Chapter officers serve without compensation.

Section 3. President. The President is the Chapter's chief operating officer and is generally responsible for managing all Chapter activities. The Chapter President is the principal point of contact between the Chapter, its members, the Regional Vice President, and the ITEA Executive Office. Duties of the President include, but are not limited to, the following:

- (1) Preside at all Chapter meetings and report pertinent information to the membership.
- (2) Appoint regular and special Chapter committee members.
- (3) Assign and manage all Chapter objectives, projects, and task force activities.
- (4) Act as the Chapter liaison with the ITEA Regional Vice President and with ITEA Executive Office.
- (5) Coordinate Chapter activities with the Regional Vice President and ITEA Executive Office.
- (6) Ensure that Chapter reports are submitted in a timely manner.
- (7) Attend, when feasible, the annual meeting of Chapter officers held in conjunction with the ITEA annual symposium.
- (8) Provide assistance in pursuing the overall objectives of the Association.

Section 4. Vice President. The Vice President shall act on behalf of the President when necessary and shall perform such other duties as assigned by the President. The Vice President shall serve as an ex-officio member of all major Chapter committees.

Section 5. Secretary. The Secretary is responsible for maintaining all Chapter records of meetings and communicating the information to the appropriate members and other interested individuals. Duties of the Secretary include, but are not limited to, the following:

- (1) Recording and publishing minutes of all Chapter meetings in a timely manner.
- (2) Assuring that the minutes of prior meetings are available for review and approval at all Chapter board meetings.

- (3) Submitting to ITEA Executive Office, on a quarterly basis, a brief synopsis of Chapter activities for inclusion in The ITEA Journal of Test and Evaluation.
- (4) Maintaining a current roster of Chapter officers and committee members and informing ITEA Executive Office of changes as they occur.
- (5) Maintaining a repository of Chapter records.
- (6) Preparing Chapter correspondence as directed by the Chapter President.

Section 6. Treasurer. The Treasurer is responsible for the safekeeping, receipt, disbursement, and proper accounting of all Chapter funds as authorized by the Chapter officers, and in accordance with the approved Chapter budget. Regardless of source, the Treasurer handles all financial transactions for the Chapter. Required duties of the Treasurer include, but are not limited to, the following:

- (1) Establish a Chapter checking account and obtain signature cards and resolutions in an appropriate institution per Chapter policy.
- (2) Issue all checks for budgeted expenditures and mail them in a timely manner.
- (3) Ensure that all expenditures are approved and verified prior to payment.
- (4) Ensure that all financial procedures conform to the procedures as outlined in ITEA Organization and Operating Procedures Manual.
- (5) Ensure that all deposits are made in a timely manner with appropriate documentation and receipt.
- (6) Prepare and present a financial report at Chapter meetings.
- (7) Prepare the Chapter's annual financial report and forward the report to the ITEA Executive Office by February 15.
- (8) Provide appropriate assistance to the annual audit process.

ARTICLE IV MEMBERSHIP MEETINGS

Section 1. Notice of Meeting. Membership meetings in which issues require vote or affirmation of the member populace shall be announced by written or printed notice stating the place, day, and hour of the meeting and, in the case of a special meeting, the purpose or purposes for which the meeting is called, to be delivered to each member of the Chapter whose membership is current and eligible to vote. Meeting notices shall be mailed at least 30 days prior to the date of the meeting and are considered delivered when deposited in the (United States) mail.

Section 2. Quorum. At any meeting of members, a majority of the votes entitled to be cast, represented in person or by proxy, shall constitute a quorum. If less than a majority of the votes entitled to be cast are represented at a meeting, a majority of the votes so represented may adjourn the meeting from time to time without further notice. If a quorum is present, the affirmative vote of the majority of the votes represented at the meeting and entitled to be cast on the subject matter shall be the act of the members. The members present at a duly organized meeting may continue to transact business until adjournment, notwithstanding the withdrawal of enough members to leave less than a quorum.

Section 3. Proxy. Written correspondence with an original signature submitted to the President at least 20 days in advance of the meeting addressing a specific issue and how the member would like his or her vote cast, shall constitute a valid proxy. The President shall confirm the eligibility of the member.

Section 4. Eligibility. To be notified of a membership meeting and to be eligible to vote, a member's ITEA membership dues must be current.

Section 5. Rules of Order. Meetings and proceedings of the Chapter shall be conducted in accordance with Robert's Rules of Order.

ARTICLE V DISSOLUTION OF A CHAPTER

Section 1. The ITEA Board of Directors may dissolve the Chapter if the Chapter has failed to satisfy its obligations or to adhere to *ITEA Bylaws*. The Chapter may be declared inactive and be subject to dissolution if it has less than ten members, or if there are no active officers, or if no meetings have been scheduled during a two-year period. Three months prior to a decision by the Board of Directors, the Chapter will be notified of pending action, and will be given an opportunity to present arguments for or against its dissolution. If the Chapter is dissolved, all property, assets, and records revert to the Association and are to be sent to the ITEA Executive Office after payment of the Chapter's bona fide debts.

APPENDIX C: DEVELOPING A CHAPTER “LOGO” AND OTHER MATERIALS

Consider developing the following Chapter materials:

1. Start with a Logo that represents your Chapter, area, local region.



Francis Scott Key Chapter
Baltimore, Maryland



Mid-Pacific Chapter
Kauai, Hawaii

2. Develop a website. Please visit www.itea.org/ChaptersLinks/asp for ideas and recommendations.
3. Obtain business cards for each Executive Committee member. There are several sites that offer free services, such as design, printing and/or shipping, such as VistaPrint.
4. Develop a Newsletter – Quarterly or semi-annually



APPENDIX D: ESTABLISHMENT LETTER

[Date]

Board of Directors
International Test and Evaluation Association
4400 Fair Lakes Court, Suite 104
Fairfax, Virginia 22033-3899

Dear Directors:

1. In accordance with the bylaws of the International Test and Evaluation Association (Article IX, Chapters), this letter is to advise that I, _____ [name], acting as organizer, arranged a meeting of interested parties to form a chapter of ITEA in the _____ [general location] area.

2 The meeting was held at _____ [time] on _____ [date] at the _____ [location] in _____ [city, state, country].
At least ten ITEA members attended.

3. The elected officers' signatures and membership numbers are affixed to this letter, and the signatures of all members in attendance who desire to form the proposed chapter are attached as an enclosure. The following officers were elected by majority vote:

President _____
Vice President _____
Secretary _____
Treasurer _____

4. By motion duly made, seconded and passed unanimously, the members agreed to adopt the bylaws of the International Test and Evaluation Association and the procedures outlined in the *ITEA Organization and Operating Procedures Manual*.

5. The members also proposed by majority vote to adopt the chapter name as the _____ Chapter.

Board of Directors
International Test and Evaluation Association
4400 Fair Lakes Court, Suite 104
Fairfax, Virginia 22033-3899

_____ [Date], page 2

6. The official contact for correspondence to the _____ [chapter name] Chapter is:

Name _____
Organization _____
Address _____
City/State/Zip _____
Country _____
Telephone _____
Fax _____
E-mail _____

7. In accordance with the ITEA bylaws, we the undersigned do hereby petition the ITEA Board of Directors to accept the _____ [chapter name] Chapter as a chapter in good standing.

Very truly yours,

_____ Organizer	_____ ITEA Membership Number
_____ President	_____ ITEA Membership Number
_____ Vice President	_____ ITEA Membership Number
_____ Secretary	_____ ITEA Membership Number
_____ Treasurer	_____ ITEA Membership Number

Board of Directors

International Test and Evaluation Association
4400 Fair Lakes Court, Suite 104
Fairfax, Virginia 22033-3899

_____ [date], Enclosure 1, page 1

ORGANIZATIONAL MEETING OF THE _____ CHAPTER OF ITEA
_____ [date]
ITEA Members in Attendance Desiring to Form the Above Chapter

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- | | | |
|----|--------------------------------------|-----------|
| 1. | Printed Name, ITEA Membership Number | Signature |
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| 2. | Printed Name, ITEA Membership Number | Signature |
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| 3. | Printed Name, ITEA Membership Number | Signature |
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| 4. | Printed Name, ITEA Membership Number | Signature |
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| 9. | Printed Name, ITEA Membership Number | Signature |
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| 10. | Printed Name, ITEA Membership Number | Signature |
|-----|--------------------------------------|-----------|

Board of Directors
International Test and Evaluation Association
4400 Fair Lakes Court, Suite 104
Fairfax, Virginia 22033-3899

_____ [date], Enclosure 1, page 2

ORGANIZATIONAL MEETING OF THE _____ CHAPTER OF ITEA
_____ [date]
ITEA Members in Attendance Desiring to Form the Above Chapter

11. Printed Name, ITEA Membership Number Signature

12. Printed Name, ITEA Membership Number Signature

13. Printed Name, ITEA Membership Number Signature

14. Printed Name, ITEA Membership Number Signature

15. Printed Name, ITEA Membership Number Signature

16. Printed Name, ITEA Membership Number Signature

17. Printed Name, ITEA Membership Number Signature

18. Printed Name, ITEA Membership Number Signature

19. Printed Name, ITEA Membership Number Signature

20. Printed Name, ITEA Membership Number Signature

APPENDIX E: SAMPLE ANNUAL CHAPTER FINANCIAL REPORT

CHAPTER NAME:			
A.	CHAPTER CASH ON DEPOSIT DECEMBER 31, 20xx:		
B.	20xx REVENUES:		
	1. Educational Meetings:		
	a. Symposia		
	b. Workshops		
	c. Luncheons		
	d. Other		
	<i>Total Educational Meeting Revenues</i>		
	2. Donations		
	3. Interest Income		
	4. ITEA Membership Dues Collected Locally		
	5. Dues/Rebates from ITEA Headquarters		
	6. Awards From ITEA Headquarters		
	7. Advances From ITEA Headquarters		
	8. Other (Explain)		
	B9. TOTAL 20xx REVENUES (Sum of B1-B8)		\$0.00
C.	20xx EXPENSES:		
	1. Educational Meetings:		
	a. Symposia		
	b. Workshops		
	c. Luncheons		
	d. Other		
	<i>Total Educational Meeting Expenses</i>		
	2. Postage and Office Supplies		
	3. Bank Charges		
	4. ITEA Dues Transferred to ITEA Headquarters		
	5. Savings Transferred to ITEA Headquarters		
	6. Other Transfers to ITEA Headquarters (Explain)		
	7. Scholarships Awarded (Attach list of recipients)		
	8. Other Expenditures (Explain)		
	C9. TOTAL 20xx EXPENSES (Sum of C1-C8)		\$0.00
D.	NET REVENUE/EXPENSE (Revenues less Expenses - B9 less C9)		\$0.00
E.	BALANCE AS OF DECEMBER 31, 20xx (A+D) – See NOTE below.		\$0.00
<i>NOTE: Chapter funds on-hand should not exceed three months operating expense requirements. Excess funds should be sent to the ITEA Executive Office for deposit in the Chapter's educational account. Attach reconciled Bank Statement(s) as of December 31, 2011 and return by February 1, 2012 to: ITEA, ATTN: Executive Director, 4400 Fair Lakes Ct., Ste. 104, Fairfax, VA 22033, Fax 703.631.6221.</i>			
Explanations (Use reverse side if needed):			
Prepared By:			
Address:			
Telephone:			

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APPENDIX F: SAMPLE CHAPTER RECEIPT LEDGER

Chapter Name _____

Year _____

<i>Date Received</i>	<i>Received From</i>	<i>Check Number/Cash</i>	<i>Date Deposited</i>	<i>Luncheons</i>	<i>Dues</i>	<i>Rebate</i>	<i>Interest</i>	<i>Other (specify)</i>

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APPENDIX G: SAMPLE CHAPTER DISBURSEMENT LEDGER

Chapter Name _____

Year _____

<i>Date</i>	<i>Check Number</i>	<i>Payee</i>	<i>Luncheons</i>	<i>Postage/ Supplies</i>	<i>Bank Charges</i>	<i>Scholarships</i>	<i>Other (specify)</i>

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APPENDIX H: SAMPLE CASH RECEIPT

Receipt Number _____

Date _____

Amount Received _____

From _____

Purpose _____

Received by _____

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INTERNATIONAL TEST AND EVALUATION ASSOCIATION
4400 FAIR LAKES COURT, SUITE 104
Fairfax, VA 22033-3899
Phone: 703-631-6220 ~ Fax: 703-631-6221
www.itea.org ~ info@itea.org