PREFACE

Manual Goals

This Chapter Leader Manual is intended for use as a reference by chapter leaders and those interested in forming ICC chapters. This manual has been designed to include a variety of guidelines, suggestions and ideas essential to chapter administration. While there are other possible approaches, those compiled in this manual are some of the more common and effective chapter management practices. Many of the guidelines contained in this manual are recommendations and not requirements. Each chapter must select the methods which are most effective and beneficial for its own situation.

Guidelines for Manual Use

The Chapter Leader Manual is intended as a reference document rather than as a book to be read. In most cases, users will refer only to specific parts of the manual to obtain information and ideas as the need arise.

Please direct any questions or comments regarding this Chapter Leader Manual to ICC's Chapter Relations Department at 1-888-ICC-SAFE (422-7233), ext. 7205.

How to Use the Sample Documents and Forms

Here are some ideas on how to use the sample documents.

- The sample documents in this book are being provided to you in electronic format. Please feel free to download them for your own use.
- Supplement the ideas in the sample documents with examples and feedback from other sources. Look for ideas everywhere.
- If you find worksheets or documents that you think would help other chapter leaders, please fax, mail or e-mail such items for consideration to the attention of the Chapter Relations at the ICC Ohio Field Office, 1245 Sunbury Road, Suite 100, Westerville, OH 43081-9444; fax 614-890-9712.

CHAPTER 1: INTRODUCTION TO ICC

ICC Vision, Mission & Values
- **Vision:** Protecting the health, safety, and welfare of people by creating better buildings and safer communities.
- **Mission:** Providing the highest quality codes, standards, products, and services for all concerned with the safety and performance of the built environment
- **Values:**
  - Customer value
  - Integrity and trust
  - Member-focus
  - Professionalism
  - Public service
  - Quality

ICC Membership
At ICC, the members are the backbone of the organization. Our success as the premier building safety organization depends on the active participation of our members. Though chapter membership is not necessarily contingent on ICC membership, the two are designed to be mutually beneficial. ICC members include architects, engineers, builders, contractors, government officials, manufacturers and others interested in the code enforcement industry. They use the many advantages of ICC membership to improve skills, earn certifications, serve local communities, develop technologies, network with peers and stay current on code changes.

Our mission today is more important than ever as we face changing weather patterns, natural disasters and global terrorism. Compared to the enormous benefits of ICC membership, the dues are nominal.

As a member of the ICC, you can expect nothing less than world-class services. ICC member benefits include generous discounts on products and services as well as the most contemporary codes in the world, quality publications such as ICC's *Building Safety Journal*, expert technical assistance, professional training and personal, friendly customer service.

For a detailed list of member benefits and to access an ICC membership application, click here.

ICC Certification
Becoming ICC Certified is a significant professional accomplishment. The ICC credential is recognized by most code officials and state agencies that regulate inspection personnel. ICC Professional Certificates are available in most code administration and construction inspection professions, whether employed in public or private sectors. There is no guarantee that certification will be accepted or recognized by a governmental agency. If you are seeking a state or local license, you should first contact the appropriate agency regarding specific state and local requirements.

The ICC Certification Program provides unprecedented benefits to all its candidates, including a national registry, standardized competency examinations and the professional recognition of being certified by the organization that is Setting the Standard for Building Safety – International Code Council.

ICC's Certification Program is the oldest, largest and most prestigious professional certification program in the U.S. for construction code administration and enforcement. It provides a nationally recognized credential that attests to comprehensive knowledge of construction codes and standards used by professional code enforcement personnel.

Examinations are maintained to the highest standards, which include continuous peer review by national certification committees of experienced, practicing professionals.

For more information on ICC Certification and for online documents, click here.

ICC Professional Education Opportunities

One of the primary responsibilities of a professional association is to make resources available that will assist its members and constituents in being successful. ICC's Training and Education department answers that responsibility by developing and delivering economical, accessible educational activities that foster career development and promote job satisfaction and professional advancement.

The aim of Training and Education is to support and advance the professions by promoting professional practices while upholding technical competence and facilitating career progression. ICC strives to assist its members to become qualified professionals and excel in their professions.

To meet these goals, Training and Education offers a collection of career-building resources which provide variety, relevancy, quality, convenience, affordability, timeliness and hands-on, in-depth and interactive sessions. ICC delivers training in the classroom, via the Internet and over the telephone. For more information on ICC's Training and Education opportunities, click here.

Hire ICC to Teach for You

With a variety of seminars, decades of experience, proven, practical content and a cadre of more than 100 instructors, ICC has the resources and expertise to provide seminars focused on improving your group's ability to apply the *International Codes* more effectively and efficiently. ICC's extensive offerings — ranging from half-day to three-day sessions — can meet the needs of any group on most code topics. Hiring ICC to teach for your group means that you will be receiving training that is effective and economical. For more information, click here.

Telephone Seminars

Telephone seminars allow ICC to bring training directly to an office or home via speakerphone. Events are typically 90 minutes in length. These events are provided for a single site fee. For a list of current telephone seminars, click here.

Institutes

Institutes are three- to five-day programs that bring individuals in a chosen field together. Attendees have the opportunity to address issues of major importance, learn current techniques and trends and network. To view current opportunities, click here.

Online Seminars/Certification Exam Practice Course

ICC Campus Online is the virtual training environment of the ICC. Designed with the busy professional in mind, the campus allows individuals to select what they want to learn and when they want to learn it.

The campus features two types of courses:

- ICC Certification Exam Preparation Courses – These courses contain a series of practice quizzes, a timed practice exam, and the exact task list used to develop the actual certification exam itself. The quizzes and test included in the Certification Examination Practice Courses (CEPs) are created from this exact task list (which is also included in the course) proportionally to how they will appear on the exam. In other words, the CEP courses are formatted to train you the most on the sections that you will be tested on the most. Each quiz will contain hints, tips and/or feedback on the questions.

- Code concepts courses – A code concepts course, such as 2003 IBC – Residential Accessibility Provisions, utilizes graphs, charts, tables and photographs as it guides individuals through the specific requirements of the code.

For more information, click here.

Academic and Degree Programs

ICC partners with colleges and universities to provide code enforcement professionals opportunities to earn academic credentials. Obtaining an academic certificate, associate's degree or bachelor's degree provides credentials in addition to any certifications obtained through ICC or other professional certification programs. Academic programs combine technical course work, including the *International Codes*, and traditional academic subjects such as math, science and communications. ICC currently has a partnership with Red Rocks Community College in Lakewood, Colorado. For more information or to register, click here

Continuing Education Unit (CEU) Recognition

Many agencies and organizations, including ICC, mandate accumulation of continuing education credits/hours for maintenance of certification, renewal of licenses or maintenance of membership. The ICC Continuing Education Department makes every effort to obtain approval for ICC seminars and courses by all appropriate approving bodies. For more information, click here.

Purchase ICC Manuals and Textbooks

ICC training materials are available for purchase online. From the basic code enforcement college curriculum taught in colleges and universities around the country, to the fundamental series of manuals, ICC curriculum can be used to create a professional library, conduct training and deepen understanding of code topics. For a list of available workbooks and videos, click here.

Customized Training

ICC's Training and Education Department can deliver customized curriculum on any of the International Codes or legacy codes that will meet your training requirements. Qualified and experienced staff will assist you by developing brand new content, modifying existing seminars, mixing and matching portions of existing training, increasing the scope or focus of a seminar and delivering training in a variety of formats. For more information, click here.

ICC Foundation

Around the world, thousands of lives are lost and billions of dollars in damage occur in places where people and property are not protected by safe building codes and standards. The International Code Council Foundation (ICCF), a subsidiary of ICC, is a nonprofit organization dedicated to alleviating the devastating effects of natural disasters and other building tragedies by promoting ideas, methods and technologies that encourage the construction of durable, sustainable buildings and homes. ICCF promotes programs like Building Safety Week, Project H.E.R.O., the Silent Defender Awards Dinner, the Hurricane Relief Fund and several scholarship funds. For more information on ICCF including opportunities for tax-deductible donations, click here.

International Accreditation Service, Inc. (IAS)

IAS accredits testing and calibration laboratories, inspection agencies, building departments, fabricator inspection programs and IBC special inspection agencies. IAS is a nonprofit public benefit corporation that has been a recognized accreditation body since 1975. Today, IAS is one of the leading accreditation bodies in the United States and a signatory to several international mutual recognition arrangements (MRAs) worldwide.

IAS provides a wide range of accreditation services, including accreditation of testing laboratories, calibration laboratories, inspection and quality control agencies and fabricator inspection programs for structural steel, concrete and wood-based manufacturers. IAS also has plans to expand its activities to include accreditation of providers of personnel and product certifications and training programs.

For more information on IAS, click here.

ICC Evaluation Service, Inc. (ICC-ES)

ICC-ES is the United States' leader in evaluating building products for compliance with code. A nonprofit, public-benefit corporation, ICC-ES does technical evaluations of building products, components, methods and materials. The evaluation process culminates with the issuance of reports on code compliance, which are made available free of charge to code officials, contractors, specifiers, architects, engineers and anyone else with an interest in the building industry and construction. ICC-ES evaluation reports provide evidence that products and systems meet code requirements. Click here for more information about ICC-ES.

ICC Awards

ICC Awards are presented at the Annual Conference each year in several categories to honor individuals and organizations for their accomplishments and service to ICC and the building safety industry. All awards presented by the ICC can be found in the Council Policy on Awards (CP #16-03).

CHAPTER 2: CHAPTER FORMATION

What is a chapter? A chapter is a local branch of a larger organization. ICC chapters develop and advance the professional skills of their members in the application and enforcement of codes. ICC chapters are designated as Regional, State, Local, Professional, Student or International.

- Regional chapters shall represent all chapters established within the geographical boundaries of one of the 12 designated regions and serve as the coordinating body.
- State chapters shall represent jurisdictions that enforce or administer codes within the geographical area of the state/province.
- Local chapters shall represent jurisdictions that enforce or administer codes in a geographic area smaller than that of a state.
- Professional chapters shall represent individuals from any geographic area whose profession or business will benefit from participation in ICC.
- Student chapters shall represent students whose course of study will benefit from participation in ICC activities. A Student chapter shall have a Regional, State, Local or Professional chapter as a sponsor.
- International chapters represent chapters outside the United States.

Purpose of Forming a Chapter
The need to form a chapter is usually developed by individuals who are interested in:

- Providing a forum for the exchange of knowledge and ideas concerning building safety and construction regulation;
- The desire to be part of the larger association;
- The benefits of chapter status; and
- The recognition of chapter status.

Benefits of Chapter Formation
The advantages of forming a chapter depend on the specific chapter. In general, the major reasons are contacts and collaboration with other professionals in the local area or specialized field. Opportunities to provide continuing education to members also exist. Each chapter has its own personality developed from the needs of its members. More compelling reasons to develop a chapter include:

- Educational seminars and training;
- Keeping its members apprised of issues that pertain to the related industry;
- International support network and voice;
- Shared expertise and ideas;
- Professional networking;
- Social gatherings of professionals in the field;
- Periodic meetings on topics of common interest;

- Information concerning employment needs;
- Information on construction methods and materials.

While the procedures for forming an ICC chapter are relatively simple and straightforward, forming a new chapter can be time-consuming work. A core group of dedicated people may spend between one and two years establishing a new chapter as a viable organization.

ICC has over 300 chapters across the United States. Before forming a new chapter, individuals should become familiar with existing chapters within the state or in an adjoining state. Click here to access a map listing ICC chapters and their president's contact information.

CHAPTER 3: ICC CHAPTER PROGRAM

The ICC recognizes that, at the local level, people in our industry often seek a forum for promoting the ideals of their profession, for meeting like-minded colleagues and for affiliating with the world's leading building safety and fire prevention organization. Through local chapters of the ICC, members can take full advantage of opportunities to stay current with building safety industry news, network with colleagues, potential business partners and even future employers and enhance your reputation in your local community. ICC boasts over 300 chapters worldwide, with new chapters being formed each year. Chapters encompass a wide range of specialized fields and have their own personality and focus. They represent industry professionals such as building code and fire officials, plumbing, mechanical and electrical inspectors, code enforcement officers, city administrators, architects, engineers, contractors and other related professions.

The requirements for becoming an ICC chapter and maintaining chapter status are described in the ICC Chapter Policy (CP #10-04) which governs chapters. In general, the chapter must have a written constitution and/or bylaws which do not conflict with those of ICC and meet other criteria as outlined in the policy. For more information on how to become an ICC chapter or to request a chapter application, e-mail ICC's Chapter Relations staff.

Chapter Benefits

- **Education Benefit** – Each chapter in compliance with the ICC Chapter Policy (CP #10-04) is entitled to an annual Chapter Education Benefit. A special chapter discount rate is earned when you contract additional seminars. For more information, click here.

- **Complimentary Training Materials Benefit** – Anyone who attends a Chapter Education Benefit Day will receive complimentary training materials. This makes the cost to the chapter for the seminar completely free! For more details, click here.

- **Complimentary Registration to Conference** – As an ICC Chapter President, you are entitled to a complimentary registration to ICC's Annual Conference and Codes Forum. Specially-marked, complimentary registration forms are mailed to chapters who have submitted an Annual Report by June 1. Chapter presidents should not pre-register or register online.

- **Chapter Discount Program** – Every chapter receives a complimentary ICC membership to be used for placing bulk publication orders for the chapter. A special chapter discount will be applied to bulk orders for ICC designated products, shipped and billed to the chapter. Complete details are listed here. No other discounts apply. ICC products can be found on-line.

- **ICC Logo** – Your chapter is entitled to proudly display the ICC logogram on your letterhead, newsletter, plaques, pin, etc. Click here to review the logo guidelines, complete a licensing agreement and download the logo.

- **Chapter Recognition Program** – Each year, ICC recognizes the professional achievements of its chapters by presenting a Chapter of the Year Award. Applications for chapter awards are solicited in the spring of each year and are due by June 1. Guidelines for all awards presented by ICC are found in the *ICC Awards Policy* (CP #16-03).

- **Partnership Opportunities** – ICC chapters are encouraged to deliver training that is targeted to your local needs and aimed at increasing the benefits of chapter membership. To help meet your training needs, ICC has up-to-date comprehensive I-Code technical curriculum, top rate instructors and customization services available. Call 1-888-ICC-SAFE (422-7233), extension 33818, to discuss available options.

- **Complimentary Magazine** – Chapter President's receive a complimentary subscription to the award-winning *Building Safety Journal* magazine. You can read about chapter activities in the "Chapter Channel" area of the magazine. To submit articles regarding your chapter news for inclusion in the magazine, click here.

- **Chapter eNewsletter** – ICC's *Chapter eNewsletter* is a quarterly publication that contains important, up-to-date information about the ICC chapter program, activities and events. It is sent via e-mail to the President, Vice President, Secretary and Treasurer of every chapter and is also available for download on ICC's web site. To read past issues or subscribe to the newsletter, click here. To submit your articles and chapter news, click here.

Chapter Responsibility

Each ICC chapter must submit an Annual Report by June 1 per ICC Chapter Policy (CP #10-04) in order to receive their full benefits. The report includes:

- A current list of chapter officers including address, phone number, fax number and e-mail address.
- The dates of annual or general membership meetings.
- Any changes in the chapter's constitution or bylaws since the last annual report.
- Any significant changes in the geographical area served by the chapter.
- Current number of chapter members.
- The number of ICC members within the chapter membership.
- The year the organization was established.

Beginning in January of each year, the Annual Report can be completed on-line. In the spring of each year, a hard copy of the Annual Report is sent to every President and Secretary.

Chapter Rewards Program

The Chapter Rewards Program allows chapters to earn points for the tasks they accomplish. In turn, the points can be used to purchase certain products and services. Chapters can submit one application each year.

First, chapters list qualifying activities. These can include purchasing a contract training day, sponsoring a Building Safety Week activity, purchasing a sponsorship opportunity or chapter officer registration at ICC's Codes Forum or Annual Conference, donating to an ICCF fund and more. Next, the chapter "spends" their points by choosing which reward they desire. Rewards can include one day of training, an audio virtual seminar, an online campus course, ICC publications, registration to ICC's Annual Conference and more.

Once Chapter Relations staff receives and reviews the completed application, certificates will be issued with instructions on how to use them. Each certificate must be redeemed prior to its expiration date. Any unused points or certificates will be converted to ICC Bucks at the end of the program period.

For complete details on the Chapter Rewards Program, download the application here.

ICC has a web page devoted just to chapters where you will find a Chapter Officers Update Form, Chapter Meeting Request Form, Chapter Rewards Program Application, information on Regions and their activities, the Chapter eNewsletter back issues and subscription form, chapter web site links, a chapter map listing all the ICC chapters and much, much more.

CHAPTER 4: CHAPTER CONSTITUTION, BYLAWS AND POLICIES

Why Should a Chapter Have a Constitution?

Almost since the beginning of time, people have gathered in groups sharing a common interest and have found it necessary to create rules that govern their group's activities. Can you imagine an organization without basic rules? What chaos would ensue! Every individual doing what they think is "right" or making rules as they went along from day to day! Wouldn't you agree that the need for developing guides that maintain order is obvious? The rules of any organization should be tailored to its goals and needs, and their adoption should be a creative activity of the group's members.

- **What is a constitution?** A constitution is a document that states the relationship between the purpose of the organization and its members.
- **When does a chapter create a constitution?** A chapter's constitution should be put together when the chapter is formed.
- **Does the constitution have to be written this early in the chapter's life cycle?** Yes! Remember, a chapter's constitution defines the purpose of the chapter. A chapter's purpose establishes its reason to exist.

How to Construct a Chapter's Constitution

A chapter should first review ICC's Bylaws. This is important because a chapter's bylaws and purpose cannot be in conflict with the ICC Bylaws and purpose.

Next, review preexisting chapter constitutions/bylaws for additional ideas. This will enable a chapter to include important issues while still tailoring the document to its own goals and needs.

Every chapter's constitution should include the following articles:

- The name of the chapter
- The purpose of the chapter
- Membership
  - Who is eligible for membership
  - How to become a member
  - Types of membership
- Officers
  - Description of governing body
  - Terms of office
- Elections and Meetings
  - Election procedures
  - Filling of vacancies
  - Removal from office
- Amendments

What are Bylaws?

Bylaws describe the relationship between the members and the working groups within the chapter. Some chapters may desire to have bylaws and additional policies which further define organizational matters.

How to Create Chapter Bylaws

A bylaw should be much more flexible and easier to change than a constitution. Frequently the article headings for bylaws will be the same as those in the constitution. In essence, the constitution should deal with basic rules which are seldom changed (for example, annual meetings). Bylaws would prescribe the how and when (for example, every September or every July).

 [Click here](#) to see a suggested format for a constitution and bylaws.

What are Policies?

Chapter policies are usually established and changed by officers and boards. They differ from the constitution and bylaws in that they do not require membership approval by vote and they are concerned with implementation, rather than organization. Policies may cover such issues as specific responsibilities, job descriptions, authority for expenditures, formation and dissolution of committees, etc.

CHAPTER 5: CHAPTER ORDER AND DUTIES OF OFFICERS

The Need for Order and Structure

Order and structure enable the chapter to meet the needs of the membership through proper management of all its functions and resources. Without order and structure, members would always be uncertain where the chapter is going, what the real purpose of the chapter is and what role they play in the organization. When people are not certain what is going on and who should be doing what, they naturally avoid participating in such an unstable environment.

How to Get a Chapter in Order

- Identify the major functions that must be performed for the chapter to be successful.
- Structure the organization to carry out its functions.
- Complete job descriptions for each officer and/or job task.

Once the basic structure and order is in place, a chapter can develop other strategies that help chapter leaders evaluate the efficiency and effectiveness of their organization. An example of a useful device that helps in the organizing process is a Chapter Profile Log. The Profile Log is:

- ✓ A yearly source of organized, quick reference material about the chapter's activities, services and end results of such activities and services.
- ✓ A historical chart that cites events and lessons learned.
- ✓ An at-a-glance document that highlights "need to know" information that makes the decision-making process less time-consuming.

Although the Chapter Profile Log is a useful source of chapter information, it is not intended to replace any other document because it does not include all necessary information in every area of an organization.

 [Click here](#) for the suggested format for a Chapter Profile Log.

Duties and Functions of Officers

Officers of chapters have the duty to conduct the chapter in accordance with the ICC Bylaws and that chapter's constitution. Those officers who do not act in accordance with the bylaws or in accordance with the ICC board policy should be dismissed and replaced as soon as possible. Here are six precepts of ethical power for organizations:

1. Purpose – The mission of our organization is anchored by a purpose larger than the organization itself. No matter what happens, our organization is guided by the vision and values provided by our purpose.

2. Principles – Our purpose provides principles of conduct for all members of the organization, which help us to determine what is acceptable and unacceptable behavior within our organization.
3. Pride – We are proud of ourselves, our commitment to our purpose and our commitment to excellence in our work. We know when we feel this way, we can resist temptations to behave unethically.
4. Patience – We believe holding to our ethical values will lead us to success in the long term. This involves maintaining a balance between obtaining results and caring how we achieve these results.
5. Persistence – We have made our commitment to live by ethical principles. We hold to that commitment even when it is inconvenient.
6. Perspective – Our members take time to pause and reflect, to touch base with our larger purpose, recommit ourselves to our principles, take stock of where we are, evaluate where we are going and determine how we are going to get there.

There is often a natural progression in the chapter leader positions. It is expected that the secretary/treasurer will eventually become the vice president, then the president of the organization. It is extremely important that the chapter leader becomes familiar with all of the chapter officer's duties, functions and unique stresses of the different officer positions because there is a high probability that each officer will have to serve in each capacity (secretary/treasurer, vice president and president) within his/her chapter.

Duties of the President

The chapter president is the general manager of all parts of the chapter in reaching the ultimate goals of that chapter. It is the president's duty to appoint appropriate people to committees. The chapter president may not physically be involved in every chapter project, but must oversee each project to guide all parts of the chapter in the same direction. The chapter president must be able to oversee many different tasks effectively and efficiently, no matter how diverse they may be.

The president should also make sure that the chapter has a different person in the office of treasurer. Appropriate checks and balances demand that the decision-maker is not also the one handling the money for an organization.

The president may facilitate but the board decides what objectives the chapter must accomplish (e.g., educational, fundraising). The chapter president must anticipate problems with accomplishing those goals and be prepared to circumvent potential problems. Three ways a chapter president can accomplish goals are through decision-making, prioritizing and delegation.

Decision-making – What is decision-making, and why does it matter? Decision-making is a process of problem-solving. Decision-making is a way to bring the future into the present so that the chapter can do something about it now. The president should make realistic decisions and solve anticipated problems. The decision-making process also allows the chapter president to identify milestones and set deadlines for completion.

Decision-making is often hard work because it involves making choices, as well as compelling both the president and the chapter to recognize what criteria to use when setting priorities. Although decision-making takes an initial investment of time, it will save considerable time later.

The president should perform the following steps when making decisions:

1) Analyze the present situation
   a) Clearly identify the root causes of the problem or situation. Before jumping straight into the how-to-solve-it phase, be sure that the underlying issue or problem has been clearly identified.
2) Establish objectives and checkpoints
   a) What is the objective that the chapter is trying to accomplish? How will the president determine the success of the plan? What are the logical checkpoints where the chapter can measure its progress?
3) Define tasks
   a) Identify the specific activities necessary to reach the chapter objectives. After that is established, each activity should be prioritized and assigned an appropriate time frame. Consider staffing, needs, costs and available resources.
4) Set a deadline
   a) A date must be set for when the project should be completed.
5) Follow-up
   a) A follow-up phase is good for evaluating the plan. Questions should be asked such as: How effective was the plan? Did the plan work? What could be improved next time? What did I learn from this process? This would also be a good time to wrap up final details and issue a final report.

Priorities – Setting priorities is the act of assigning weight to a list of items. It is a matter of determining what is more important than something else. When setting priorities, a simple A, B and C system is effective.

- "A" Priorities: An "A" priority is anything that must be done. The task is critical to the successful achievement of goals. It is important because it has a high payoff and it is also urgent. An "A" priority task needs to be done quickly, or the consequences may be severe.
- "B" Priorities: A "B" priority is something that should be done. It is also critical to successful performance because it has high value, but it is not as urgent as an "A" priority. A priority "B" task can temporarily be postponed, if necessary.
- "C" Priorities: A "C" priority is "nice to do." It is desirable to complete the task, but it is not critical to the overall success of the job. A priority "C" task is often important, but rarely urgent.

Delegation – Delegation is sharing the workload. It is assigning projects in a way that allows others freedom and creativity within a scope of authority that has clearly defined limits. Delegation allows the chapter president to accomplish more goals while utilizing members of the

chapter who are best suited for a project. The chapter president is still in control of all projects, yet is not burdened with having to be an expert in every area.

Duties of the Vice President

The vice president should assume the duties of the president in the absence of the president or in case of an emergency. The vice president should also assist the president in the conduct of the office of president. The vice president should have similar qualifications to that of the president.

Duties of the Secretary

This job includes keeping accurate minutes and records in a meeting and maintaining correspondence.

Duties of the Treasurer

The treasurer receives and controls funds and supervises financial affairs in general. In some chapters, the office of secretary/treasurer is held by one person.

Strategic Planning

A dynamic chapter will also have a strategic plan. A strategic plan plays a key role in the success of the chapter by establishing a game plan for successive leaders and members to follow. Clearly defined goals, strong leadership and a commitment to striving for and achieving those goals are necessary in order for a strategic plan to work. Staying on the path and cultivating support along the way will depend on how well you incorporate the plan into your organization. Members are more likely to participate in the organization when they know what the goals are and see them as being attainable. The strategic plan should be referenced in your bylaws and made easily accessible to the members, especially new ones, printed in the newsletter or engraved on a plaque where it can be displayed proudly.

Your chapter may already have a strategic plan or mission statement. If you do not, it is a good idea to develop one so that everyone has a clear understanding of the premise for which the chapter was established and what you are collectively striving to achieve through the activities of the organization.

Click here for a sample of a Chapter Strategic Plan.

CHAPTER 6: CHAPTER FINANCES AND RECORDKEEPING

Why Be Concerned About a Chapter's Finances?

A chapter's financial standing is determined by how accurately the designated financial officers keep records and work with credible accountants well-versed in their organization's financial status. A chapter that does not keep up with the rules and procedures dictated by the government concerning tax status may put the existence of the chapter into jeopardy.

Nonprofit Status

The following information was obtained from the Internal Revenue Service on November 20, 2006. Please check with the Internal Revenue Service for the latest information.

If the chapter has gross receipts totaling less than $5,000 per year, there is no need to file for nonprofit status. Because the chapter clearly qualifies for nonprofit status, but is very small financially, the IRS is willing to assume that the organization does not exist for profit.

If the chapter has gross receipts exceeding $5,000 for any given year, it must file for nonprofit status with the IRS or be subject to corporate income taxes on funds remaining in the treasury at year-end.

Chapters have the option of filing for nonprofit status under one of two provisions in the Federal Tax Code:

- 501 (c)(3): In this case, the chapter presents itself as a nonprofit Educational Organization and individuals' dues, contributions and other expenses are deductible on their individual tax returns. The appropriate IRS form used to apply for 501 (c) (3) status is form 1023.
- 501 (c)(6): In this case, the chapter presents itself as a nonprofit Business League and individuals' dues, contributions and other expenses are not deductible on their individual tax returns. The appropriate IRS form used to apply for 501 (c) (6) status is IRS form 1024.

Forms 1023 and 1024 are both called Application for Recognition of Exemption. Either form (1023 or 1024) must be supported by the following documentation:

- A copy of the chapter's Articles of Incorporation or Constitution;
- A copy of the chapter's bylaws;
- A statement of receipts (Income) and expenditures (Expenses) for the current year and 3 preceding years;
- A balance sheet for the current year;
- The chapter's Employer Identification Number (if your chapter does not have an EIN, you will need to complete form SS-4, *Application for Employer Identification Number*);
- A description of the chapter purpose and activities; and

- A User Fee based on average annual gross receipts.

Organizations that submit a complete application will receive an acknowledgement from the IRS. A ruling or determination letter will be issued to your organization if its application and supporting documents establish that it meets the particular requirements of the section under which it is claiming exemption.

Once nonprofit status is confirmed, the chapter will be required to file annual information returns.

For detailed information on nonprofit status, consult IRS Publication 557, *Tax-Exempt Status for Your Organization*. This publication and other IRS forms are available on the IRS web page or can be ordered via telephone or the IRS Fax-On-Demand system. Click here for more information.

In addition to the federal forms, it is probable that the chapter is required to file for nonprofit status with the State Government.

Accounting methods such as those proposed under the Model Accounting System in this part of the manual will make filing for nonprofit status relatively simple. The problems faced by many chapters in filing with the IRS are mainly caused by poor accounting practices resulting in inadequate information for completion of the forms.

> **Chapters are advised to obtain the advice or review of a Certified Public Accountant prior to filing with the IRS. The information provided here is meant to give readers a general view of nonprofit status. It is not intended to be relied on solely as a source of complete information. The IRS may change requirements and conditions at any time. Please contact the IRS at 1-800-829-1040 or click here for complete information.**

Finance Basics

- **Checking Account:** The chapter should maintain a checking account and pay all its bills by check. All income to the chapter should be deposited in the checking account and disbursed from there to other bank accounts or creditors. An Employer Identification Number is normally required to open any bank account in the U.S.

- **Savings Account:** The chapter should maintain at least one interest-bearing savings account. Some chapters maintain a "working funds" account and a "reserve" account.

- **Deposit Slips:** Deposit slips from all bank accounts should be saved. If the bank does not provide deposit records, get a deposit book with carbon or another type of duplicate record.

- **Receipt Book:** The chapter should maintain a book of receipts which may be issued to provide members with proof of payment.

- **Paid Bills:** Paid bills should be marked to indicate the date and check number of payment. They should be filed and retained for 7 years.

- **Petty Cash:** It is recommended that chapters avoid the use of petty cash. Petty cash complicates record keeping. If small amounts of cash are required for purchases or reimbursements, it is recommended that the person responsible for chapter finances pays them personally and reimburses himself or herself from the checking account when a reasonable amount has accrued.

- **Posting of Accounts:** It is recommended that accounts be posted (entered in a ledger) either weekly or monthly.

- **Record Retention:** All records pertaining to chapter finances should be retained for 7 years. These records include the chapter books, income tax forms, check stubs, deposit slips, bank statements, paid bills, expense reports, receipts and treasury reports. Chapters are advised to check with their state or province for additional requirements.

- **Membership Roster:** The chapter should maintain a list of members which shows the following information:
  - Name of member
  - Address and other pertinent contact information
  - Type of membership (local and/or international)
  - Membership approval date
  - Expiration date
  - Amount due
  - Amount of dues paid

- **Collection of Dues:** Chapter dues may be collected by the chapter.

- **Security Measures:** The following basic security measures are recommended to prevent any implications of impropriety in the handling of funds:
  - Checks should be signed by two officers, one of whom is the president or a board member. The president or board member may pre-sign a number of checks, leaving the other signature blank until the time of issuance.
  - The chapter should purchase a rubber stamp which is used to record information on each paid bill. This information includes: the check number, the date of payment, the category of expense and a place for approval by the person in charge of finance.
  - At the end of each accounting period, the president or board member should review all paid bills to ensure that expenditures are legitimate.

An Accounting System

Each chapter must maintain a set of books which will account for all revenues, expenses, assets and liabilities. The following model accounting system is generally intended to support the requirements for nonprofit organizations. The system has four parts:

1) Cash Receipts Journal
2) Cash Disbursements Journal
3) General Ledger
4) Operating Report

The size of your chapter and amount of financial activities will determine the type of forms your chapter will decide to use to keep financial records. The following types of financial accounting forms are the most commonly used and can be purchased at most office supply stores:

Cash Receipts Journal

Revenue should be recorded in a Cash Receipts Journal. There must be a new Cash Receipts Journal for each month. Entries must be specific. The Journal should be reconciled against bank statements. All revenues should "pass through" the main chapter checking account. The following is a list of some categories of revenues:

- **Membership Dues:** Posted in the Cash Receipts Journal by member's name.
- **Contributions:** Cash revenues from grants, corporate contributions, individual gifts of money, or fund raising.
- **Meeting Fees:** Fees collected for chapter meetings.
- **Workshop Fees:** Fees collected for chapter workshops.
- **Interest:** Interest revenue collected from bank accounts.
- **Other Revenue:** Income from sources other than those listed above.

Because a chapter's income may be heavily dependent upon membership dues, it is recommended that the Cash Receipts Journal have only two categories of income – Dues and Other.

[Click here](#) for a model of a Cash Receipts Journal.

Cash Disbursement Journal

Expenses should be recorded on a Cash Disbursements Journal under the following suggested categories. There must be a new Cash Disbursements Journal for each month. Entries must be specific. All paid bills should be retained and filed. The Cash Disbursements Journal should be reconciled against the chapter checking account. It is not a good idea to maintain petty cash. Recordkeeping is much easier if expenses are paid by check.

- **Room Rental:** Expenses for rental of facilities for meetings or workshops.
- **Equipment Rental:** Expenses for renting audio/visual or other equipment.
- **Refreshments:** Expenses for food, beverage or catering.
- **Postage:** Expenses for mailing newsletters, brochures or announcements.
- **Printing and Binding:** Expenses connected with the production of all printed material.
- **Honorariums:** Expenses for speaker fees.
- **Personal Expenses:** Expenses reimbursed to chapter members or others in connection with chapter business. Personal expense reports and receipts should be required (personal expense report forms may be purchased at most office supply stores).
- **Salaries:** Expenses through payment of salaries or wages to paid employees.
- **Withholding Taxes:** State, Province or Federal taxes withheld from employee's wages.
- **Office Supplies:** Expenses for supplies used to conduct chapter business.
- **Transfer Deposits:** Checks written to deposit funds in chapter savings accounts.
- **Miscellaneous Expense:** Expenses for items other than those listed above.

[Click here](#) for a model of a Cash Disbursements Journal.

General Ledger

The General Ledger is a statement which shows the total chapter financial picture. Normally it is not prepared each month. It is recommended that a General Ledger be prepared quarterly or twice each year. A General Ledger has three components:

- Income vs. Expense
- Assets vs. Liabilities
- Retained Funds or Deficits

Income and expenses are totaled by category for the period being studied. They are separately compiled from the Cash Receipts and Cash Disbursements Journals and totaled for the period.

In many cases, a chapter does not own capital assets, inventories, securities or other depreciable assets. Thus, assets are compiled by simply adding cash in bank accounts to any accounts receivable. These are compiled by category and totaled. In determining assets, it is important to know the amount of funds retained by the chapter at the end of the previous year (or accounting period). This comes from the previous ledger.

Liabilities include such items as outstanding loans, accounts payable and unpaid taxes. Liabilities are compiled by category and totaled.

The formula for a general ledger is:

- Income – Expenses = Current Retained Funds (or Deficit)
- Assets – Liabilities = Total Retained Funds (or Deficit)
- Total Retained Funds – Retained Funds = Current Retained Funds (from previous year's general ledger)
- Current Retained Funds from Assets and Liabilities must balance with Current Retained Funds from Income and Expenses.
- Total Liabilities + Total Retained Funds must balance with Total Assets

[Click here](#) for a model of a General Ledger.

Operating Report

Each month, the chapter should generate an Operating Report showing the current status of finances. Essentially, an Operating Report is an "Income vs. Expenses" statement for the period being studied. Its main function is to show cash flow.

Total income is compiled from the Cash Receipts Journal.

Total expenses are compiled from the Cash Disbursements Journal.

An opening balance is obtained from the previous reporting period. The "bottom line" is simply the ending balance for the period studied.

[Click here](#) for a model of an Operating Report.

CHAPTER 7: LEADERSHIP

On Being a Chapter Leader

In addition to performing daily responsibilities and protecting the public health, safety and welfare as code officials, many code officials have the honor of being an officer of an ICC chapter. Being a chapter leader involves a significant amount of extra commitment and dedication. Chapter leaders are the persons responsible for the preservation, direction and growth of a chapter.

Chapter leaders are chosen by their peers for their leadership skills, experience and ability to motivate others, among other reasons. The chapter leader is elected by a majority vote and is granted a chapter leader position because the membership believes that the candidate is the best person for the job. The challenges of being a chapter leader are many, but leaders are willing to accept such challenges and use them as learning experiences. In essence, a chapter leader derives great satisfaction from encouraging others to grow as leaders and being able to use their talents and knowledge for a just and good cause.

The Leadership Process

When an individual is placed in a leadership position, there is a distinct change in that person's relationships with his/her peers and a whole new set of tasks becomes priority. These tasks, taken together, are generally referred to as the leadership process.

Planning

Planning is the "thinking that comes before doing." Planning is concerned with setting goals and objectives for an organizational unit and with defining steps to accomplish them. The following is a checklist that enables a leader to be an effective planner:

- ✓ Interpret established goals and objectives passed down from above as the result of planning performed at another level.
- ✓ Gather the thoughts and ideas of persons who are directly involved with or affected by the current issue as well as their own thoughts and ideas.
- ✓ Formulate policies and procedures to accomplish the represented individuals' goals and objectives.
- ✓ Examine alternatives and select the activities and programs that will lead to successful results and are in the best interest of all involved.
- ✓ Establish timetables and completion targets in keeping with priorities.
- ✓ Determine standards and how results will be measured.
- ✓ Identify the resources necessary for task accomplishment (i.e., people, time, money, material) and determine their availability.

Organizing

Once planning is underway, organizing becomes essential. Resources – people, capital, equipment, raw materials and facilities – must be brought together in the most productive way to accomplish goals and objectives. The organizing function includes all activities that translate the planned activities into reality. These include specifying who does what, how it will be done and when it needs to be done. A good communications system is also an essential element of the organizing function.

Motivating

Motivation, along with planning and organizing, plays an important part in the level of performance that will be achieved in any undertaking. Although planning and organizing provide guidelines and directions, people do the work. And people have their own needs, ambitions, personalities and attitudes. Leaders must take into account different people's perceptions and direct them to a common purpose. In other words: motivate. To check your motivational skills, review the following statements and choose which are true and which are false.

True	False		
		1	The needs and desires of represented individuals have little bearing on motivation.
		2	It is important to create an environment in which everyone can meet their needs while meeting the needs of the organization.
		3	Results generally improve when people are able to participate in deciding what the results should be.
		4	Motivation to achieve results is improved when individuals are recognized.
		5	Studies have shown that communication has very little to do with motivation.
		6	Coaching and training tend to raise personal levels of motivation.
		7	Motivation to achieve results usually increases as individuals are given authority to make decisions affecting those results.
		8	Good leaders pay close attention to the way individuals respond when they assign work.
Answers: 1. False; 2. True; 3. True; 4. True; 5. False; 6. True; 7. True; 8. True			

Controlling

Controlling is concerned with results. It involves follow-up to compare results with plans and to make adjustments where results differ from expectations. In the following list of statements about controlling, identify those you believe to be true and those you believe to be false.

True	False		Controlling requires:
		1	Devising ways to assess whether goals, objectives or standards have been met in a timely and effective manner.
		2	Punishing individuals for making mistakes.
		3	Formulating methods by which the use of various resources can be measured and evaluated for future planning purposes.
		4	Establishing check points that provide feedback at key points as the work progresses, so that deviations from the plan can be identified, evaluated and acted upon.
		5	Limiting an individual's authority to minor details.
		6	Reporting the status of activities and projects to those who need to know.
Answers: 1. True; 2. False; 3. True; 4. True; 5. False; 6. True			

How Work Gets Done

Leadership is an effort to integrate and effectively use a variety of resources to accomplish an objective. The need for effective leadership applies to all organizations, big and small. Leaders will do well to remember there is no one best way to plan, organize, motivate or control. Each leader must continually increase his or her knowledge of leadership concepts and draw upon them until a winning combination is found that fits him or her, the organization's people and the work involved. The leader is ultimately responsible for getting things done.

A leader is in a position of power to direct the organization. The leader's behavior has a direct effect on how members will react. If members react negatively to the leader's behavior, the end result will, consequently, also be negative. The organization may voice its displeasure with a leader's negative behavior by dismissing the leader from that position. If a leader handles situations appropriately, the members are more likely to react positively with end results that are positive. When a leader uses his/her power in a positive fashion, the membership will continue to react positively and the "flow" of positive leadership continues.

Delegation

One factor is central, however, to every leadership task: delegation. The leader must know what is expected of his or her resources, when it is expected and how to best employ resources to obtain the desired results. This means assigning work in a planned and thoughtful manner.

 [Click here](#) to read a Case Study demonstrating the importance of delegation.

Symptoms of Poor Delegation

There are many symptoms of poor delegation. They can usually be seen in the work habits of the leader, the attitude of individuals in the organization or the accomplishment of projects in the group. These symptoms include:

- Deadlines are frequently missed.
- Some individuals are much busier than others.
- The leader is usually too busy to talk to others.
- Everyone is uncertain of their authority.
- Individual decisions are often overruled.
- The organization is plagued by slow decision-making.
- No one seems to know who is in charge of a project.
- Changes in plans and objectives are not communicated.

CHAPTER 8: MEMBERSHIP

Chapter Member Profile

A chapter leader should know what spectrum of code enforcement disciplines and construction industry interests exist in his/her particular chapter. This will help the chapter leader to focus the goals and activities of the organization to meet the needs and interests of such represented groups.

Leader Membership Responsibilities

A chapter leader is responsible for ensuring that the chapter recruits new members and retains current members as needed to maintain a viable organization.

- Determine the needs of current and prospective members.
- Recruit new members into the chapter and ICC.
- Retain current members through involvement in chapter activities.
- Develop members into chapter leaders.

Membership Needs

If a chapter is to address the needs of current and prospective members, it is important that the needs are adequately defined. Members require satisfaction of these needs from the organization and if the organization fails to deliver, there is no further reason for affiliation.

The following list reveals some key factors in membership needs:

- Programs – The member must receive value from chapter programs.
- Participation – The member must be offered the opportunity to participate in chapter activities.
- Timely Information – The member must receive high-quality information from the chapter in a timely manner.
- Networking – The member must have opportunities to interact with others in similar positions and learn about opportunities for career development and advancement.
- Perceived Value – The member must believe that the benefits of membership outweigh the costs.
- Identification – The member must possess a sense of "belonging" to the organization.
- ICC Support – The member must get high-quality support from ICC in a timely fashion.

Assessing Membership Needs

To assist in assessing membership needs, a survey could be conducted by the chapter. The survey is a tool that is used when a thorough assessment is desired. The Member Needs Survey located in this section can be used as a guide. Formal surveys are by no means the only way to gather information about chapter member needs. While the other methods discussed below are less formal than a written survey, they may be sources of valuable information. Other effective methods might include the following:

- Conduct debriefings immediately following chapter meetings in order to assess members' reactions to programs and chapter operations.
- Conduct telephone surveys to assess needs and increase participation. The best use of this technique is when callers are assigned members to contact and ask prepared questions.
- Invite members to attend board meetings. While they do not officially participate in the discussion or vote, members can offer observations about the chapter's performance in meeting their needs.
- Develop a member-at-large position whereby that individual is charged with the responsibility of listening and responding to members' needs.
- Hold discussions about member needs during meetings. This might work best when prepared questions are used.
- Investigate the programming and services offered by other chapters in order to identify gaps which could be filled by the chapter.
- Create a meeting or training evaluation form.

[Click here](#) for an example of a Member Needs Survey.

Retaining Members

Membership Involvement

The retention of members is a key factor in long-term chapter health and growth. Experienced chapter members are needed to fill leadership positions. Current members who are involved in the chapter tend to draw in new members. In fact, membership retention in chapters is closely related to the issue of membership involvement.

The chapter officers are responsible for getting its members involved. This is one reason why it is critical to elect the "best" officers possible. It is a crucial issue in chapter success. Autocratic officers or officers who fail to stimulate member involvement will tend to negatively affect both chapter performance and membership retention.

When confronted with the problem of dissatisfaction with leaders, members of volunteer organizations would rather disaffiliate than change the system. The first step in disaffiliation is for members to withdraw from involvement in chapter activities. This is a clear indication that

members are unhappy with the chapter's leadership. If a pattern of disaffiliation begins, the officers must look long and hard at their leadership styles and consider what can be done to change the members' perceptions. This part of the Chapter Leader Manual contains many ideas that can be used to get members involved.

Most organizations have a "core group" of people who keep the chapter running. This group often includes only about 20 to 30 percent of the membership. In a few cases, the core group is larger, due to the efforts of officers who are able to stimulate involvement from members.

Leadership Factors

There seem to be three leadership-related factors that affect membership involvement:

- The nature and quality of the chapter's programming. The more closely chapter programs match member needs, the more members will get involved. The leadership implication of this statement is that the chapter's programming effort must involve many members to make sure their needs are met. If the officer(s) responsible for programming develops programs in a vacuum, the likelihood of missing the target increases and membership involvement will probably decrease.

- The number of chapter activities. The more active the chapter, the more members will get involved. In one sense, this statement is simply a mathematical reality. The more activities needing attention, the more involvement is required. In another sense, the idea of having many different activities tends to create more opportunities for member involvement. In addition, different activities will tend to create a variety of involvement needs, thus satisfying individual preferences within the member population.

- The amount of recognition for involvement. The more members are recognized for their contributions, the more members will get involved. Recognition for member involvement can take many forms. A few possibilities are private thanks from officers, acknowledgement at chapter meetings, letter of recognition, certificates of appreciation and chapter awards.

Involvement Techniques

Below is a list of involvement and retention techniques that may be used by chapters:

- Involve many members in programming decisions.
- Have a "Chapter Notebook" for each member.
- Provide networking opportunities at meetings.
- Conduct short business sessions as part of meetings.
- Hold a chapter workshop.
- Conduct a "Senior Member Forum." This is a good way to keep retired and honorary members involved.
- Host a regional conference.

- Use real cases from members in meetings.
- Have members mail in meeting fees with reservations to prevent no-shows.
- Set up committee structures and stick to them. Ask for involvement from many people.
- Have members understudy officers.
- Conduct a few extended member introductions at meetings.
- Ask many people for small contributions of help.
- Ask for feedback on all aspects of chapter operations and performance.
- Respond to suggestions or complaints.
- Get student volunteers to help with chapter activities.
- Invite members to make presentations at chapter meetings. Depending on a chapter's time, more than one presentation per meeting increases the opportunity for involvement.
- Hold a chapter event at ICC's Annual Conference.
- Vary seating arrangements at meetings to avoid cliques.
- Have officers mix with the group at meetings.
- Analyze why people leave the organization. Look for patterns.
- Provide dues discounts for senior members.
- Include member profiles in the newsletter.
- Create a "Post-Presidential Council" to keep past presidents active in the chapter.

Rebuilding Involvement

If you are a new officer entering when membership involvement has dropped off, you must first reestablish credibility with the membership. The most important chapter goal must be to regain momentum through increased participation. Here are some suggested steps:

- Conduct a Member Needs Survey. A written survey, followed by personal follow-up calls, is suggested.
- Hold an "Officers-only" planning session and clearly state the problems and challenges.
- Involve as many members as possible in a second, "open" planning session to set objectives and programs for the year.
- Begin implementation with a highly publicized meeting to present the chapter's plan for the year. The objective is to get together as many people as possible to hear the chapter's message that things are about to change for the better.
- Continue implementation, using all possible techniques to increase member involvement in the chapter. Expect momentum to increase gradually.

Leadership Development

Leadership, as discussed throughout this manual, is the highest level of involvement in ICC and in chapters. In an active chapter there are many opportunities for leadership, in addition to elected offices. A successful chapter takes care to develop members into chapter leaders. Individuals should not be "thrown" right into a position of high responsibility straight from "regular" membership status. The transition should be gradual and begin with defining what traits are needed to be a chapter leader. Next, assess potential candidates and then assign those individuals a variety of tasks, including committee work. Those persons willing to meet such challenges are oftentimes elected to an officer position.

Mentoring

In chapters, mentoring can be a simple but effective leadership development technique. Mentoring can be implemented by asking selected candidates to understudy current position holders. Mentoring is not a new idea; it is an old idea that works. The term "mentor" has become synonymous with a wise teacher, guide and friend. Mentoring is a continuing relationship between a junior person and a more experienced person who helps the less experienced person navigate in the world of the senior person.

How does it work?

- Relevant positive and negative feedback is given by the chapter leader to enhance a member's potential. This should be done one-on-one and informally. This is not a formal judgmental procedure; rather it is intended to provide friendly assistance in the potential future leader's growth.
- Support is provided in difficult situations. The member should not be given a project and left to "sink or swim."
- Opportunities are provided for the "mentee" to demonstrate competence where it counts.
- Assignments are delegated that stretch the member's knowledge and skills in order to stimulate growth and preparation to move ahead.
- Valued behavior, attitudes and/or skills are demonstrated that aid the member in achieving competence, confidence and a clear professional identity.
- A helpful and confidential forum is provided for exploring personal and professional dilemmas.

Mentoring serves three purposes within a chapter:

1. Aids in membership retention;
2. Members become more confident in their abilities; and
3. Makes succession planning easier.

New Members and What They Mean to the Chapter

New members not only add to the membership count but also bring in valuable information, experience and expertise that contribute to meeting member needs.

Attracting New Members

Good programming is one of the strongest appeals to attract new members. A year's programs should deal with subject matter diverse enough to keep attendance at a good level. This would be a good time to use the Membership Needs Survey to determine what the members want in programs.

ICC's membership list for your geographic area may include potential members. Contacting those potential members by sending out an invitation to be a guest at a meeting would be an inexpensive, yet effective, way to gain members. Guest meetings to which prospective members are invited give them an opportunity to get the "feel" of your chapter. A chapter may schedule a

special meeting or a dinner to entertain and inform prospective members, or they may be welcomed at a regular meeting. Whichever plan the chapter chooses, guests should be made especially welcome. Keep the meeting on schedule to display that the organization gets things done on time, and have fun doing it!

Give New Members the Facts

Many organizations provide new members with a small "orientation booklet" containing the basic facts about the chapter. The various headings in the booklet can follow a format like this:

1) What a Member Should Know
    a) Constitution and bylaws
    b) History of chapter
    c) How policies are decided
    d) Value of active participation
2) Member's Responsibilities
    a) Attendance at meetings
    b) Program participation
    c) Project participation
3) Dues, Meetings, Projects
    a) How dues money is used
    b) Dates and times of meetings
    c) How projects relate to chapter
4) Where to Find Information
    a) Publications
    b) Membership directory
    c) Handbooks
5) Are You a Good Member?
    a) Checklist of attendance at meetings, dues payments, committee service

In addition to suggestions mentioned, it is of paramount importance that you spell all members' names correctly, in all documents.

CHAPTER 9: EFFECTIVE MEETINGS

Planning

The first step in planning a successful meeting is preparation. Meetings are one way to bring underlying problems to the surface for consideration. They are a good place to solve problems. They are excellent for increasing communication, sharing information and getting commitment from participants. Meetings can resolve conflicts, help develop a team spirit and are good for overall planning of strategy. Follow these guidelines when planning a meeting:

- Consider the desired outcome
  - How will you measure the success of this meeting? What would you like to accomplish? Be sure you can state this clearly, preferably in one sentence.

- Set the agenda;
  - What needs to be covered? How long does each agenda item need to take? List the items in proper order so that the least important item has the least amount of time and is toward the end of the meeting when people may be distracted or tired.

- Consider the participants
  - Who really needs to be involved? Who are the key players? What is the best way for them to attend? Do they really need to attend the entire meeting or can they come when it is time to present a report or to hear someone else's presentation?

- Set a time frame
  - How long should the meeting take?

- Determine what kind of record you are going to keep
  - Will written minutes be taken or will you record the meeting? Who will be responsible for the minutes or the audio/visual recording?

- Be sure that the meeting environment is comfortable;
  - Seating arrangements should support the purpose of the meeting. If it is a brainstorming session, everyone should be able to see and hear each other. Is all of the equipment available and working? Is the climate comfortable? Meetings are difficult enough without the room being too hot, too cold, cramped or noisy.

- Control interruptions
  - If the meeting will go on for several hours, have an agreement about how messages are going to be handled. Provide frequent breaks so that people can pick up messages without having to be disruptive. Discuss how you feel about pagers and phones going off during meetings.

- End the meeting effectively.
  - o Repeat any decisions that were made, conclusions that were reached, problems that were solved and assignments that were given. Make sure the minutes are distributed within 48 hours.

When to Avoid Meeting

- When a decision by a responsible party will do.
- If your mind is already made up and a decision has been determined.
- When the reason for calling the group together is not clear in your mind.
- When you need to organize large amounts of data, or when numerous options need to be analyzed in-depth.
- When key people are unavailable.
- When there are personal issues involved, like reprimanding or firing an individual.
- When it only serves to flaunt power or gain personal prestige.
- If critical data are unavailable.

Agendas

Meetings can be very productive, useful and an important way to get information. They can also be long-winded, time-consuming, unproductive, frustrating, boring and downright brutal. One of the best ways to make meetings effective is to create an agenda and circulate it to all participants in advance of the meeting.

The meeting agenda should include the date, the time and the location. Participants should be told what type of meeting it is: informational, brainstorming, decision-making, etc. The agenda should state specific objectives for the meeting. The agenda should also tell participants how to prepare for the meeting and what information or materials they should bring with them. Topics that will be discussed during the meeting should be listed along with a time limit proportional to their value. The agenda should be distributed at least 48 hours in advance of the meeting.

The items on the agenda should be placed in an order that makes sense. The more energy required for a topic, the earlier it should be placed in the agenda. The agenda should make known who is presenting the topics. The agenda should never be overscheduled with topics. The result might well be a group of tired people not making rational decisions and getting on each other's nerves.

 [Click here](#) for a sample Agenda.

Speakers and Programs

Selecting the speaker and the program can pose problems. The three questions that must be answered are: What is the subject I want my speaker to introduce? Where can I go to find the speaker? Whom should I get?

After the subject is chosen, there are many important elements that can make the subject more relevant. The information introduced should be the most current information available. The goal is to teach your chapter something new, or to have the members look at an old topic in a new light. The topic must be relevant to the audience. Make sure that your chapter will benefit after obtaining the information from the speaker. It is also helpful if the speaker has examples and illustrations of his or her topic. The old adage "a picture is worth a thousand words" is true.

The place to find a speaker may be right within the chapter. Always look internally within the organization first before going outside the "group." Chances are if the chapter is looking for a speaker to present a topic that is related to the industry that the members are in, someone internally will have some knowledge on that topic. The member may not be the speaker that the chapter leader is looking for, but if it is of interest to him or her, the member may be able to refer you to someone who is an expert. Look in the area where the chapter is located, if there is no one in the chapter itself. Other places to find speakers are colleges, speaker bureaus and service organizations like the Lion's Club or industry representatives.

The speaker should be an authority on the topic that is being presented. Additionally, the speaker must be able to communicate the ideas to the audience. This is a serious consideration. The goal is to get a certain message across, not to impress the audience with facts and figures. Another important consideration is always to have a contingency plan or back-up speaker in case of some unforeseen mishap with the scheduled speaker.

Controlling the Meeting

Appointing a chair for a meeting is essential for direction. The chair's job is to take control before, during and after a meeting. The chair should start the meeting with a clear agenda, keep the meeting focused and end the meeting effectively.

There are several ways to keep a meeting focused. It depends upon the leadership style of the chapter leader. Make no mistake though; control must always be restored to the chair no matter what style of leadership is utilized. This does not mean that a slight digression in a topic is necessarily bad. Feedback on any given topic is important to any chapter leader. The key is to know when a digression on a subject turns into idle chit-chat. Here are some key phrases that the chapter leader can use when a meeting begins to stray from the agenda:

- Thank you for the input, but the direction I want to go in is here;
- That really is not relevant to this topic;
- Let me tell you what I think; or
- We are not looking at the central point.

These are strategies that the chapter leader can use to steer the meeting in the direction set forth in the agenda. The key objective in leading a meeting is: take control. If the chapter leader does

not take control of the meeting, someone else will! Other participants in the meeting may become resentful if the meeting is allowed to stray far from the agenda.

Parliamentary Procedure

Not all chapter leaders choose to use parliamentary procedure, but its use is encouraged as it promotes getting to each point quickly and fairly while maintaining order. More can be accomplished if a group stays organized. The basis of parliamentary procedure is to allow courtesy to everyone while offering each member the same weight to their opinions on each individual issue.

It may be a good idea to consider including parliamentary procedure, such as Robert's Rules of Order, in your chapter bylaws. Parliamentary procedure saves time and snuffs out potential arguments before they get a chance to start.

The rules of parliamentary procedure are meant to help, not hinder. Applied with common sense, they should not frustrate the meeting or entangle it in red tape. Retain control at all times, give clear expectations and keep things as simple as possible. Good advice from the chair as to the wording of motions and the best way to proceed will avoid needless complications. When in doubt, the rule should be: Respect the wishes of the majority, protect the minority and do what seems fair and equitable.

A Brief Overview of Robert's Rules of Order

Parliamentary Law

Parliamentary law is a complex subject. A comprehensive knowledge of it requires serious study as well as practical experience and an understanding of its principles. The following information is a basic reference that provides the reader with general information.

A Little History about Robert's Rules of Order

Henry Martyn Robert was an engineering officer in the regular Army. Without warning he was asked to preside over a church meeting and realized that he did not know how. He tried anyway and his embarrassment was supreme. This event, which may seem familiar to many readers, left him determined never to attend another meeting until he knew something of parliamentary law.

Ultimately, he discovered and studied the few books then available on the subject. From time to time, due to his military duties, he was transferred to various parts of the United States where he found virtual parliamentary anarchy since each member from a different part of the country had differing ideas of correct procedure. To bring order out of chaos he decided to write *Robert's Rules of Order* as it came to be called. The first edition of the book was published in February, 1876 and its procedures were loosely modeled after those used in the United States House of Representatives. Through a family trust, and later through the Robert's Rules Association, several subsequent editions of Robert's work have been published.

Definition of Terms

- Chair - The presiding officer.
- Floor - The position of persons other than the presiding officer.
- "On The Floor" - When a motion is "on the floor," it is the topic to which the group should direct its attention.
- "Has The Floor" - When a member "has the floor," he has the opportunity to exercise his speaking rights.
- Motion - A formal proposal by a member in a meeting that the assembly take certain action.
- Pending - Being processed by the chair.
- Precedence - Priority or rank applied to motions. For example, if motion "B" takes precedence over motion "A", motion "B" is in order when motion "A" is pending and merits consideration at the time. Motion "A" thus temporarily yields to motion "B."

Committees and Informal Action

A committee has a number of advantages over a general group meeting. For example, with a small number of people there is more opportunity for each member to take part. Therefore, committees can work more effectively on many tasks. For this reason, it is wise to keep committees relatively small. Of course, the size of the committee is determined by the nature of the task and the nature of representation needed on the committee. When numbers become too large, it is often more effective to divide the total task among subcommittees which, in turn, report back to larger committees.

- A committee may be a "standing committee," which is authorized for an indefinite time.
- A committee may be a "select committee," which is authorized only to fulfill a temporary purpose.
- A committee may be a "committee of the whole," which consists of the entire assembly.
- Informal consideration - It has become customary in some assemblies, instead of going into committee of the whole, to consider the question "informally" and afterwards act "formally."

 Click here to view excerpts from "Simplified Parliamentary Procedure."

Minutes

At each meeting, the minutes of the previous chapter meeting should be approved (this is a verification that everyone agrees on the happenings of the last meeting). This seemingly routine portion of the meeting should not be taken lightly. The minutes record the motions and deliberations in a meeting. The minutes generally focus on outcomes of debates and not the deliberation process.

Minutes, when approved by a formal vote of the chapter leaders, are the official and legal record of what happened at the chapter meeting. They must be accurate or you should withhold your vote in approving them.

Before voting on the minutes, the president should ask if there any corrections to be made. Every chapter leader has the right to ask for a correction if there are errors in the minutes before voting to accept them. It is crucial to have "accurate" minutes. Accurate not only refers to what was said during a meeting, but also who attended (a good way to track who is dedicated to the organization), where the meeting was held and to verify that everyone agrees with the minutes of the past meeting.

There are some critical elements that need to be included in the minutes:

- Name of the organization;
- Where and when the meeting was held;
- Attendance record;
- Quorum announcement;
- Confirmation of the accuracy of the previous meeting's minutes; and
- Action items, decisions, motions and votes.

Although not essential, some helpful information that should be considered for inclusion in the minutes is:

- Time and length of any recess;
- Start and end times of the meeting; and
- Discussion of the locations and times of future meetings.

The minutes should be "user friendly." All new points should be given separate headings to make it easier to find and read at a later date. Recording exactly what is said on various topics is optimal, but not always possible. A useful way to promote consistency in the recording of the minutes is to create a standardized form. One of the advantages of a standardized form for minutes is that, if the secretary is absent, the minutes can be taken uniformly. It is sufficient to summarize the discussion on a certain topic while indicating the points for and against an issue of dispute. However, during a motion, accuracy is essential to proper minutes. The party making a motion, as well as the person seconding the motion, must be identified. If the motion comes to a vote, the minutes should directly reflect the final tally and if the motion "carried" or not.

The minutes are permanent records and should be kept in excellent condition and as legible as possible. Minutes should be:

- Brief but accurate;
- Kept with the greatest efficiency possible (taped, stenographer, etc.);
- Stored in an orderly, durable and safe place, not kept loose;
- Kept with any documents cited within the minutes; and
- Recorded during or soon after the meeting is adjourned.

[Click here](#) for sample chapter minutes.

Meeting Troubleshooting

Here is how to deal with some common situations.

- Latecomers
  - Do not confront them publicly. If being late is a habitual problem, meet with them privately.
  - If they have reports to deliver to the group, schedule their presentations early in the agenda, forcing them to come on time.
  - Call key players in advance to remind them of the meeting.
- Low-Energy Groups
  - Get people involved. Use brainstorming when appropriate. Brainstorming has been defined as a technique that "promotes creativity by encouraging idea generation through noncritical discussion." (Gibson, E. L., J. M. Ivancevich, and J. H. Donnelly, Jr. Organizations. Burr Ridge, IL: Irwin, 1994.) People in a group say the first thing that comes to mind and no idea is ridiculed or discarded. Each idea belongs to the group whose members build ideas off of each other. The entire group takes credit for any useful ideas that may be generated from this practice.
  - Ask for feedback. Ask if further clarification is needed.
  - Call people by name.
  - Ask if the group is ready for a break.
  - Always be positive, upbeat and enthusiastic.
  - Create a safe atmosphere so that people are more willing to communicate.
  - Have stretch breaks as well as regular breaks throughout a long meeting.
  - Make sure the group understands the benefits associated with their participation in the meeting.
- The Whole Group is Arguing
  - Summarize all of the points of view.
  - Bring items to a vote or table items for another meeting.
  - Ask participants to mull over the ideas and bring their ideas and suggestions back.
- Long-Winded Talkers
  - Set time limits.
  - When these people stop to catch their breath, break in, summarize briefly and invite the opinions of others.
  - Suggest they continue their discussion privately.
- Negative People
  - Stress the importance of suspending judgment until all ideas are considered and/or strategies have been demonstrated.
  - Do not argue with them or defend yourself.
  - Validate their feelings: "I can see you are frustrated and impatient. It appears that you do not think that this idea will work."
  - Ask for other points of view from the group.

- Ask the negative person for his or her positive suggestions.
- The Meeting Goes Off on a Tangent
  - Refer the group back to the agenda.
  - Ask leading questions referring to the meeting's objectives.
  - Suggest that the new items be discussed at the end of the meeting if there is time, or that the ideas be added to the next agenda.
- Distractions
  - Arrange the room so that people enter from the back.
  - In restaurants, have coffee service held until the business portion of the meeting is over.
  - Have the group agree to have all calls and messages held unless it is an emergency.

Closing a Meeting

Meetings can cover a lot of territory. It is easy for participants to forget earlier decisions and assignments. Before ending a meeting, allow the participants a few minutes to assess the original objective one more time and compare it with what has actually occurred.

There should be a summary of the main points in the meeting. Items that need to be on the next agenda should be identified. There should be a brief evaluation of the meeting. Ask each member to describe how the meeting was or was not helpful for them. Evaluations can be done verbally, or use note cards for written statements. Conduct a round robin (an activity in which each participant is asked to respond to the rest of the participants). Some options are:

- Ask participants to name one or two things that they learned.
- Invite each participant to give a personal affirmation (something that he or she believes to be true).
- Invite each person to give an appreciation for another person on the team (positive reinforcement).
- Ask each person to commit to a task or an action.
- Ask each person to give a one-word comment, thought or feeling to summarize the meeting.
- Thank people for taking time to attend. Tell them how much you appreciate their participation.

Meeting Checklist

This checklist will help ensure that all of the factors that contribute to a successful meeting have been considered.

BEFORE —

- ❑ Has an agenda been prepared?
- ❑ Is there a clearly stated objective?
- ❑ Is there enough time to distribute the agenda in advance?
- ❑ Are individual items on the agenda given a time limit proportional to their values?
- ❑ Is all necessary information and support material available?
- ❑ Are key players available?

❒ Is the meeting room comfortable?

AFTER —

❒ Tie up loose ends; add unfinished business to next agenda.
❒ Clearly indicate assignments made.
❒ Expedite the preparation of the minutes.
❒ Summarize decisions reached and actions to be taken.
❒ Distribute minutes to all interested parties.

CHAPTER 10: COMMUNICATION

Communication with Members

Good communication is essential to the success of a chapter. Chapter leaders and members who meet often are better informed and tend to be more active. Well publicized activities and events increase participation, recruit new members and build awareness and support in the community. Several communication methods are popular among chapters.

Meetings

It may seem obvious, but the main function of a meeting is to communicate ideas from person to person. No matter what the subject, length or mood of a meeting may be, on its basic level, it is an exchange of verbal and nonverbal signals to accomplish some goal. An agenda communicates what will be happening at a particular meeting, and minutes communicate to everyone what actually happened at the meeting.

Great meetings only occur when everyone receives the same message. Keep in mind, the best meetings occur not necessarily when everyone agrees, but when every member receives and understands the same message. Everyone could agree to something but have a different interpretation as to what they agreed. This is when the minutes become extremely important. If a member of an association thinks, "there is no way I would have voted that way," the minutes will confer exactly what was said and resolve any questions. An example would be if the chapter voted to change the color of their newsletter from red to blue. Everyone agrees that it is a good idea. It is voted on and passed unanimously. When it comes back from print, not one person is happy with it because some think it is more green than blue, some wanted navy blue and some wanted sky blue. Referring back to the minutes will show that every person voted on blue, but it will not show that everyone had a totally different interpretation of what exactly blue is. The goal is to communicate the idea so that everyone understands the subject equally.

Newsletters

Chapter leaders are responsible for uniting members and identifying how the organization's goals serve the members. A newsletter is an effective means by which to carry out this important function. The newsletter should be a vehicle both for two-way communication and for keeping members up-to-date. Its purpose is to:

- Provide information about chapter activities;
- Identify volunteer and member involvement;
- Unite members who share a specific purpose;
- Help members understand the significance of their efforts;
- Report results of goals and events;
- Keep membership current on issues in the profession;
- Inform membership about industry happenings and opportunities.
- Announce meeting issues and outcomes;

- Be an opportunity to poll the membership on certain issues;
- Gather statistics about members;
- Be a source for recruiting volunteers and future members; and
- Allow members to voice and express themselves freely.

Remember, a newsletter is not successful until it is read and understood. A chapter's newsletter must look interesting enough to attract the attention of its members, must convey a clear message and must reflect a professional image of the chapter.

The first task involved in creating a newsletter is to decide on a masthead. A masthead usually contains the name, date and volume number of the newsletter. If possible, incorporate a bright color or a piece of art, such as the chapter's logo, in the masthead. The masthead is always on the top front side of the newsletter.

The next consideration is the format or layout that is preferred. This will affect the size of paper required, the number of pages and column width. It would be a good idea to review the layout of newsletters from other chapters and organizations to decide what layout and format is best suited for the chapter. In any case it is important that somewhere in the newsletter a masthead containing the following items should be found:

- The chapter's name;
- The chapter's mailing address;
- The chapter's fax and/or phone number;
- A section identifying the newsletter's editor, contributors and staff; and
- Frequency of publication.

An attractive, low-budget newsletter with a minimum of artwork can be prepared by having the newsletter's masthead printed in an unusual color on enough sheets of paper to produce a year's worth of newsletters. The chapter can then use an office copier or duplicator to print the manuscript copy on the blank portions of the pages. The result is a low budget, two-color publication! However, if a chapter does not have the financial resources available, consider having a sponsor assist.

What Should a Newsletter Do and Show?

Get attention!

To begin with, choose colored paper for the sheet that is outermost when folded. Then once it is opened, do not let the readers down with a boring listing of events, times and places. Start off with a letter from the chapter's president about the most exciting news on the horizon, the next program or the next outing.

Include the News

Announcements from members go in next. The factual information for announcements should be given to the "editor" of the newsletter, preferably in writing, at least a week before the newsletter deadline.

"Oh, if only people wouldn't wait till the last minute!" sighs a long-suffering editor. "The day and night before I'm supposed to give the copy to the typist, my phone rings constantly. Everyone has some kind of excuse, but it ends up with me burning the midnight oil."
A Rock-of-Gibraltar policy on insisting on the deadline for news announcements to be turned in is the only way out. Refuse to accept last-minute items. This will not win the editor and staff a popularity contest, but contributors will eventually get the message that deadlines are firm.

On those occasions when there is not enough information to complete the newsletter, consider using ICC news releases to fill in the spaces.

Flavor with Style and Personality

Do not try to use the items in their exact wording as they were submitted. Put some style and flare on it. Be casual; add a touch of light humor and spontaneity…within space limitations, of course. Make it as if you are dashing off a note to a friend telling them what the chapter is up to these days. Think of the mimeographed letter sent to friends during special holidays and use the same warm, conversational approach.

A newsletter should be fun to read from beginning to end. New members and possibly prospective members will be reading it, too. It is an introduction to the chapter. They may look it over several times, reinforcing their original impression. The newsletter must catch their attention and hold it. The newsletter also serves as an arm of the membership and social committees at the same time.

Add Some Personal Touches

The chapter's newsletter should include what members of the organization have been doing. For example, it can include accomplishments, good news, member thanks and recognition. Ask members to share personal news of happy experiences they have had, educational and recreational opportunities they have discovered.

Many of today's popular word processing and publishing softwares come with templates to help the user design a newsletter. For example, Microsoft's website has many helpful templates that can be downloaded. Also, type the words "newsletter sample" into any Internet search engine to find lots of helpful information.

Websites

Beyond e-commerce, the Internet has become a forum for sharing ideas and opinions on many issues. Chapter websites are a useful tool to chapters and their members who appreciate having access to chapter information all the time. Approximately one-third of ICC chapters already have web sites and the number is growing every year. Newsletters and other paper mailings can be eliminated, netting the chapter significant savings. With many chapters now in existence for several decades, a web site is also a place to document and share the history, accomplishments, milestones and contributions of the organization and its members.

Some chapters have members willing to offer their services to develop and maintain a chapter web site. There are thousands of vendors available on-line who will help you create a website. These are a few of the general terms you will see when reviewing information.

- **HTML – Hypertext Markup Language:** This is code that converts into a web page. It is the basic language web pages are written in. There are other languages that are more advanced, e.g., Cold Fusion. Those pages have an extension of *.cfm. These types of pages pull their information from a database.
- **ISP – Internet Service Provider:** A company that provides access to the Internet. For a monthly fee, the service provider gives you access to the Internet and e-mail.
- **Domain:** The official name of a computer connected to the Internet. Domain names act as easy-to-remember addresses for product or company information (e.g., "www.iccsafe.org" helps you remember ICC and safety).
- **Hosting:** A web host is in the business of providing server space, web services and file maintenance for web sites controlled by individuals or companies that do not have their own web servers. Many ISP's, such as America Online, will allow subscribers a small amount of server space to host a personal web page. Other commercial ISP's will charge the user a fee depending on the complexity of the site being hosted.
- **IP - Internet Protocol:** An IP address is a unique number that devices use in order to identify and communicate with each other on a computer network. Any participating network device including routers, computers, printers, Internet fax machines and some telephones must have its own unique address (e.g., 216.70.103.128). An IP address can be thought of as the equivalent of a street address or a phone number for a computer or other network device on the Internet.

Planning Your Site

The first step is to plan your site on paper. Think about what you want and who your users will be. Make a list of your objectives, design ideas and features. Knowing the type of site you want will help you decide on design and hosting options. Consider how much time you will be able to commit to the development, design and maintenance of your new site. Many web sites contain outdated material. Not only is this a waste of money and a frustration to the user; but, it also sends the message that the chapter leadership does not care.

Site Features and Objectives

What is it you want to achieve? A static website has general information that never goes out-of-date. This would be the easiest to maintain but will not be as useful to your members. A dynamic site contains regularly updated information. What information do you want to include?

- Announcements of upcoming meetings, special events, training opportunities
- Agendas and minutes of meetings
- Rosters or member information
- Membership information and on-line applications
- List of board members or other important contacts
- Committee members and reports
- Links to other sites (don't forget ICC!)
- Calendar of events
- Scholarships and awards
- ICC Logo

Show that you are a proud member of ICC by displaying your chapter logo and/or ICC's logo. ICC logos can be downloaded here. You will need to select the logo type, agree to ICC's licensing agreement and complete a request form. The logo will be sent to you via e-mail. To use the logos, simply right click the attachment and save the image to your computer.

A list of links to other helpful websites can be beneficial to your members. Please be sure to add ICC's website to your list, too. In addition, ICC will add your chapter's website to our list of chapter website links. Send an e-mail giving ICC Chapter Relations staff your website address along with a statement giving us permission to add the link.

Site Look and Feel

There are basically three styles of sites:

- **Informal** has simple colors, limited graphics and contains mainly text.
- **Professional** is a site that is designed professionally.
- **High-Tech** has a flash introduction and lots of graphics.

Browse First, Create Second

There are over 100 chapter sites on ICC's chapter website links page that can be reviewed to get ideas for your site. Some of the sites are designed or maintained by chapter members while others are done professionally. There are also plenty of books and magazines available about website design.

Site Maintenance

In addition to the time needed for the planning and implementation phase, decide who will maintain the site and how much time that person can set aside each week or each month to keep your site up-to-date.

Research Website Vendors

Using any available on-line search engine, conduct a search for "web site design or hosting." A recent Google search came up with over 1 million hits. Your search will include numerous vendors who will help you design your site with their on-line site building tools and host your site. Others give you more freedom in the design and content but you will need more web design experience. You can also search for templates. Templates are pre-designed pages that you can buy and then modify with your information. Some of these companies will also host your site for you. Before choosing a vendor, compare features and prices so that you are not paying for more than you need.

Host Your Own Site

If you are interested in hosting your own site, you will need advanced computer knowledge, a web design background and a static IP address.

Communicating with ICC

Chapters can communicate with ICC through the following:

- The *Building Safety Journal* magazine
- ICC Chapter eNewsletter
- Annual Chapter Report
- Minutes of chapter meetings
- Spring code development activity
- Annual Business Meeting, Conference and Education Program
- ICC Board Liaisons, Staff Liaisons and Chapter Relations staff
- ICC instructors at seminars

The Building Safety Journal

The Chapter Channel section found in ICC's magazine is a regular feature spotlighting chapter activities, upcoming meetings and events. The Chapter Channel offers chapter leaders the opportunity to read other chapter reports, learn what other chapters are doing, notice awards and recognitions granted to chapter members, note other chapters' fundraising and training activities and gather names and telephone numbers listed. The Chapter Channel is a free communications link with other chapters. If a chapter would like to participate in this exchange they may fax, mail or e-mail their information to the ICC Managing Editor. Each ICC chapter president receives a subscription to the magazine via their complimentary ICC membership. In addition,

ICC members receive a subscription to the magazine as part of their membership benefits. Click here for more information on ICC's Periodicals.

Chapter eNewsletter

The Chapter eNewsletter is a source of information designed around chapter leaders' interests and concerns. Standard features are important chapter information from ICC, reports from recent chapter meetings and updates on regional chapter activities. ICC sends this electronic newsletter out quarterly to all chapter officers of record who list a valid e-mail address and to those who have subscribed. Chapter leaders are encouraged to fax, mail or e-mail their submissions for the newsletter to ICC Chapter Relations staff. To read current and back issues of the Chapter eNewsletter or to sign up to receive it in your e-mail inbox, click here.

Chapter Annual Report

The chapter Annual Report includes vital information from the chapter and provides ICC with the chapter's current officers and upcoming meetings. ICC requires chapters to complete the annual chapter report by June 1 every year to ensure the chapter receives full benefits. Annual report forms are mailed to each chapter president and secretary in the spring of each year.

Codes Forum

Chapter leaders attending the Codes Forum, usually held in the spring, become a part of the nationwide input that makes ICC a leader in the development of progressive performance-oriented model codes. It is an opportunity for chapter leaders to hear and meet other professionals who share the same concerns. It is a time to ask questions and solve problems. Chapters may request information on the Codes Forum by calling or faxing ICC or watching periodicals for up-to-date information, registration forms and schedule of hearings.

Annual Business Meeting, Conference and Education Program

A must-attend event for ICC members and chapter leaders is ICC's Annual Business Meeting and Education Conference, held in the fall. Chapters who have completed their Annual Report will receive a complimentary registration for their president. Chapter presidents can network and exchange information with each other at the complimentary President's Breakfast. The President's Breakfast fosters communication and is an opportunity for chapters to voice their concerns and needs. Chapter leaders are encouraged to offer suggestions to ICC about ways in which ICC could assist chapters in achieving their goals.

Chapter leaders and officers are also invited to attend the Chapter Leadership Program at the Annual Conference to learn and develop effective chapter leadership skills and techniques. Chapter leaders are able to communicate the challenges and opportunities they encounter as a chapter leader with colleagues and ICC. The Leadership Program is another opportunity for chapter leaders to network with one another and is also designed to address chapter concerns as well as provide leadership development and improvement.

Qualifying chapter presidents will receive a specially-marked registration form they can use to register for conference.

ICC Board and Staff Liaisons

ICC Staff Liaisons are a chapter's immediate response team. They address a chapter's concerns and questions. The liaisons can communicate to ICC what the needs are in their assigned region and work with ICC in meeting those needs. Chapters may keep apprised on topics affecting the building profession and release information through the Staff Liaisons attending a chapter meeting. Meeting with an ICC Staff Liaison is a chapter's chance to relay information and receive needed information. Chapters may contact their assigned staff liaison directly to invite them to attend a chapter meeting.

Each chapter is also assigned a Board Liaison from ICC's Board of Directors. The Board Liaison is able to maintain regular participation in both the chapter and the parent organization. This arrangement provides a local link and two-way perspective that serves the shared membership. The Board Liaison or other Executive staff can be invited to attend a chapter meeting by completing the Chapter Meeting Request Form.

ICC Instructors at Seminars

ICC Chapter Education Benefit and Contract seminars present an opportunity for chapter members to "pick the brain" of the instructor. Seminar participants gather real life information from other participants as well as the instructor. ICC seminars allow a chapter and its members to focus their communication on a specific topic. By attending an ICC seminar, participants directly communicate their views on the subject, its content and the instructor by completing an evaluation form. Chapters may contact their Chapter Seminar Coordinator to receive information on scheduling a seminar.

Communicating with the Community

Your chapter should not operate in a vacuum. The activities, accomplishments and recognitions of your chapter and its members directly affect the community. A chapter that publicizes its members' achievements shows the community that its building and construction industry is committed to the safety and welfare of its people. In addition, the chapter builds confidence with its neighbors and is viewed as a worthwhile and respectable part of the larger community. A News Release is a cost effective and efficient way a chapter can get its message to the public.

To aid in preparing news releases, read some of ICC's News Releases here. Click here for a sample media contact sheet. In addition, your word processing and/or publishing software may come with a template that can be downloaded.

Click here for some news release tips.

Stepping Up Community Support

For code enforcement to be respected, supported and fully funded in the budget process, an understanding and cooperative relationship must exist between code officials and the groups they serve. A community and its leaders must also know how code officials support the enforcement and mitigation goals of their community, and the important role the building department plays in the mitigation of disaster damage.

[Click here](#) for some strategies that will help your chapter step up community support.

Quick Interchapter Communication

A chapter leader may communicate messages or information to members and officers without having to call a "special meeting" or wait for the next issue of the chapter's newsletter to come out. An efficient way of communicating information quickly to members is through the written/typed word. This may come in the form of an e-mail, a short informal memo or a longer, more formal document.

Abraham Lincoln once said, "When I'm getting ready to reason with a man, I spend one-third of the time thinking about myself – what I'm going to say – and two-thirds thinking about him and what he's going to say." A similar process takes place in writing good memos or letters.

Always plan and organize in writing. Plans written down will be remembered more clearly and you will also be less likely to be thrown off by doing multiple tasks at the same time. A document planning sheet may be a good starting point in organizing the correspondence.

To get started writing longer memos, letters and reports, try breaking up the writing task into manageable chunks by using "section brainstorming." After the creative brainstorming phase comes the organizing phase and then the final "pen to paper" stage.

[Click here](#) for an example of section brainstorming, a sample long memo and a sample letter.

CHAPTER 11: CHAPTER ACTIVITIES

Education & Training

Most ICC chapters meet on a regular basis for the purpose of increasing their knowledge of the *International Codes* and their profession. Chapter education is often combined with a business meeting and held on a monthly, quarterly or annual basis. Topics will vary depending on the primary focus of the chapter. For example, a chapter which consists primarily of building inspectors will generally concentrate on presentations and seminars that relate to building codes.

Chapter education programs are usually a balance between what members want and what the chapter can afford. Since most chapters are non-profit education organizations, chapter program planners are always on the lookout for high quality training and instructors at a reasonable price. In addition to the quality training offered by ICC, chapters will look to a variety of sources for educational offerings, including their own members. Qualifying chapters will find their Chapter Education Benefit is a great value they can take advantage of every year. Chapters get a substantial discount when they purchase additional days consecutive to a Chapter Education Benefit day of training or hire ICC to teach for them. Click here to view both types of seminars.

Chapter members want training that is affordable, applicable to their job and conveniently located. Surveys are a good tool in determining what the chapter member wants in this area. In addition, every contact hour of education delivered by an ICC chapter qualifies for continuing education credit towards maintaining ICC certifications. This is an important qualification for certified individuals seeking to maintain certification status in order to meet job requirements.

Many chapters are willing to take outsiders or accept registration from members from another chapter. Additional professional development opportunities are hosted annually by ICC such as the Code Official Institute. More opportunities exist through chapter annual institutes held by various chapters or chapter regions. Consult the training area of ICC's web site for additional information.

Fundraising

Essentially, a fundraising project means that a chapter is "going into business." Therefore, any money-raising activity must be treated as carefully as it would a profit-making enterprise.

So what can a chapter do to raise funds? Here are some examples:

- Educational programs
- Dinner gathering
- Entertainment
- Exhibits
- Fair or festival
- Raffles to win prizes
- Recreation and sports activities
- Selling of merchandise – old and new

- Sponsoring guest speakers
- Theater shows
- Theme dances
- Tours
- Yearbook

The following outlines 12 basic steps to follow when selecting, organizing and conducting a fundraising event. These steps are described to help you develop a better understanding of what your chapter will need to do to sponsor an event. Custom tailor these steps to reflect your chapter's own ideas and the special needs of the event, chapter and area.

➢ **Step 1: Explore the possibilities**
Identify activities that members will support. A fish fry might work in one chapter, while a formal dinner/dance might work for another chapter. To obtain a feel for the type of event members would most likely support, ask them to submit their ideas for fundraising events they would enjoy participating in or volunteering for. Also, read publications that describe fundraising projects. Even chapters with limited resources can identify many events. The goal is to provide an event tailored to your participants needs. This can happen only if you use the ideas and ingenuity of your members.

➢ **Step 2: Select the event**
The chapter's governing body – the board of directors or equivalent – should make the final decision committing the chapter to an event. The board may have several interrelated reasons for sponsoring an event: to raise money, to provide members with an educational opportunity, a social or cultural occasion, to get members involved, to recruit new members or to gain publicity for the chapter. The board should determine what it wants to accomplish and choose an event accordingly.

The board must also judge the enthusiasm and commitment of its members to work on the event and choose an event that will complement, not complicate, the chapter's other activities. A board should also prepare an initial budget estimate to determine if the chapter has sufficient "start-up" funds.

Once it selects an event, the board should also establish procedures for how an event will be organized. For small groups organizing small events, the board may want to organize the event itself.

For a major event, however, the board should establish a special committee system specifically organized to conduct the event. Naturally, the board should continue to fulfill its responsibility as a governing body, setting ground rules for committees, monitoring progress and controlling expenditures. However, the board should also delegate authority to an events chairperson and committee coordinators to enable them to conduct the event. Board members can, of course, volunteer for key assignments and help recruit volunteers.

➢ **Step 3: Appoint the event chairperson**
The president or board should appoint an events chairperson who must be a willing volunteer capable of handling this major responsibility. Along with the steering committee, the events chairperson will plan the event, prepare a budget, set a timetable and recruit committee heads. The events chairperson must also coordinate the event, make sure that all committees understand their duties, prevent duplications of effort or omissions among committees, monitor committee progress to ensure that work is done on time and handle the inevitable crises.

➢ **Step 4: Establish a committee system**
Initially, the organizers of an event may feel overwhelmed by innumerable tasks and details. The purpose of the committee system is to divide the workload of an event into manageable arenas. Once these arenas are defined, it becomes much easier for the events chairperson or committee head to identify what must be done and how it can be accomplished.

A committee system will vary in size. A small event may require only a few committees, each containing only one or two persons. Large events may require numerous committees with many members who are further divided into subcommittees. Exactly how an event is divided depends on the nature of the event and upon the skills and interests of available volunteers and committee heads.

Below is an example of the committee structure for two different events:

Pancake Breakfast:	Home Tour & Festival:
• Publicity and decorations • Tickets and finance • Food • Door prizes • Picnic tables • Cooks • Serving • Cleanup	• Arts, crafts and flea market • Cleanup • Entertainment • Games • Publicity • Security • Transportation, parking and barricades • Brochures, posters and tickets • Children's refreshment • Bake sale and flower shop • Information booth • House selection • Food • Ticket sales

➢ **Step 5: Form a steering committee**
As an event is being organized, an event steering committee should be formed to plan and coordinate the event. Initially the committee would consist of the events chairperson and the initial committee heads. Newly appointed committee heads would automatically become members of the steering committee.

For a new event, a steering committee can meet regularly (weekly) to plan the event and discuss details and ideas (What is the best date? What hours? Do we need a permit? Should we have posters or flyers? What about games for children?). Steering committee meetings also enable committee heads to get to know each other and coordinate their activities, and enable everyone to reassure each other that everything is being done.

Chapters that have previously sponsored the same or similar events are less inclined to hold regular steering committee meetings. Because precedents have been established and duties identified, event organizers usually have a desire to get on with it without losing time in steering committee meetings. Still, some steering committee meetings should be held to discuss new ideas and techniques, to coordinate activities and to give new volunteers a chance to meet the event "veterans."

➢ **Step 6: Define committee tasks**
Committee heads and other committee members, following guidance provided by the events chairperson, should list in very specific detail what their committees must do to fulfill their responsibilities.

Suggested Tasks: Prepare a list of every member of the steering committee, their committee assignment and their contact information including phone numbers and e-mail addresses. Distribute copies to every member of the committee.

➢ **Step 7: Itemize the budget**
The events chairperson should be able to identify all expenses: printing costs, hall rental, supplies, food, insurance, permit fee, acoustical equipment and others. Using these estimates, the chairperson can confirm that the initial budget estimate was accurate, that the organization does have the financial means to produce the event and that the start-up funds appropriated by the board are sufficient. Based on these figures, the events chairperson can also apportion the available funds among the different committees.

Suggested Tasks: Prepare a budget. List expenses. List advance revenue, including possible donations and advance ticket sales. (Be liberal with expense estimates, conservative with revenue.) Estimate what it will cost to produce the event. Estimating the total revenue/expenses of an event is difficult, as turnout (and the weather) is difficult to predict. Estimate gross revenue/expenses for difficult circumstances: good weather/large turnout, poor weather/low turnout, rainout/cost to reschedule.

➢ **Step 8: Develop a timetable**
Establish a timetable for an event. Many deadlines must be met. There are always tasks which must be done immediately if an event is to be undertaken at all. Also, one committee may not be able to do its job until another has completed its tasks.

Jointly, the events chairperson and the committee heads should establish due dates for each committee task. The events chairperson should stress to each committee how the other committees are counting on them, keep track that tasks are accomplished and reassign tasks if a committee becomes overwhelmed or disorganized.

Suggested Tasks: Prepare a timetable, which can be a graph or a log, of what must be accomplished each week or month before the event.

> **Step 9: Recruit volunteers**
>
After identifying specific tasks, the group should reach out to involve numerous members. For most events, there is usually something for everyone to do. These volunteers can spread out the workload of an event so that all can enjoy themselves and no one is overburdened. In addition, when volunteers work on an event, their commitment to that event (and the chapter) increases. It is quite likely they will attend and will bring their friends and families.

When recruiting volunteers, be specific and personal. Never assume that volunteers will arrive solely because of a printed appeal or an announcement. Instead, call or visit the member or resident, explain why they are needed, ask them to do a very specific, manageable task and get a yes or no answer for this request for help. Assuming the event is worthwhile, there should be many positive responses. Keep committees open for new members, but do not demand that all volunteers come to committee meetings or accept open-ended assignments.

The individual committees can recruit their own volunteers and committee members should be encouraged to involve family and friends. Events requiring a large number of volunteers for specific assignments can form a volunteer committee.

> **Step 10: Do it!**
>
Having completed Steps 1 through 9, the chapter should be organized to produce its event. This preparation will make it easier but not easy. To be successful, many people will have to work cooperatively, learn new skills, shoulder responsibility and be prepared to handle the unexpected.

Suggested Tasks: Carefully coordinate all activities on the day of the event. Prepare a fact sheet for committee/volunteer use, describing each major activity, its location, time and the name of the person in charge. Detail standard procedures, such as how money will be collected, provide answers to likely questions ("Where is the restroom?") and list emergency phone numbers.

> **Step 11: Clean up and give thanks**
>
An event is not finished when everyone goes home. Always plan in advance to have volunteers assigned to take down decorations, remove signs and posters and clean up.

Thanking everyone who helped is essential. All organizers of an event should personally thank those who helped them. Volunteers and donors should also be thanked at meetings and/or named and thanked in a newsletter or an event program. Thank you letters are always appropriate. Also, do not forget to thank any public employees who were helpful.

➢ **Step 12: Conduct an evaluation**
The experience gained by a chapter in conducting a fundraiser is an invaluable asset that can make it easier to sponsor the same or similar event or a more ambitious event in the future.

Soon after a fundraiser, the steering committee plus at least some board members should meet to discuss what worked well, what could have been done better and how the event could be improved and/or expanded.

All documents, including worksheets, budgets, receipts, records of donations, lists of volunteers, guest registers and copies of all printed materials, should be assembled and stored for future reference.

Suggested Tasks: Review Steps 1 through 11 to determine how the event could have been better planned and organized.

[Click here](#) for a Fundraising Worksheet that will help your chapter organize details of your fundraising event.

Scholarship Program Formation

A scholarship program would allow the chapter to contribute to the current and future development of code enforcement and related occupations.

Such recognition awarded to selected individuals is usually in the form of financial assistance and may be appropriate for:

- Chapter members who are seeking professional development.
- Chapter members' immediate family member pursuing a degree at the associate or bachelor level in a code-enforcement-related field.
- High-school or post high-school students in the community seeking an associate or bachelor's degree in a field related to code enforcement, such as construction technology.

A chapter should select scholarship recipients based on established criteria.

The following sequence of steps is recommended when starting a scholarship program:

1. Establish a working committee to draft scholarship bylaws and regulations.
2. Present to Board of Directors. Obtain acceptance.
3. Gather a committee to develop procedures for administration of the scholarship fund and create applications.
4. Establish criteria for selecting candidates.
5. Finalize bylaws and regulations.
6. Present to membership for approval.

7. Establish a fund for the scholarship program. Require, if possible, that the fund be restricted to individuals who meet a specific criteria.
8. Get the word out about the scholarship to chapter members.
9. Raise funds. If funds exist, raise funds to maintain program.
10. Appoint a selection committee to review/evaluate applications.
11. Notify recipient. Notify others.
12. Present award/write newsletter announcement.

Below are some suggested types of scholarships that can be given:

- Tuition reimbursement for institution of higher learning.
- Grant for specific educational event.
- Tuition reimbursement for continuing education.
- Grant for credentialing.
- Certification maintenance.

Scholarships can be offered to chapter members, family members or individuals in the community interested in the building code industry. It is up to the individual chapter to decide who they want to offer the scholarship to. The advice of a qualified lawyer and accountant is recommended to ensure that your scholarship program is structured under legal and financial requirements. If your chapter chooses to consult with a lawyer and/or accountant they should be involved at the time of drafting bylaws and regulations and throughout the fundraising and fund maintenance process.

Participating in Code Development

The following are three major questions that chapters frequently ask concerning code development and a chapter.

Question:	Why should chapter members participate in the code development hearings and on committees?
Answer:	The strength of being in a chapter comes from the strength of its members. When a spokesperson goes to the podium at ICC's Annual Conference or code change hearings and states for example, "I speak for the Southern Indiana building officials group of 200 members," it has a profound effect. Participation in code development hearings gives a chapter an opportunity to influence issues that will affect their membership.
Question:	How does a chapter get its members on current committees?
Answer:	Click here for a complete list of committees on which chapter members can serve and any calls for committee members including applicable forms.
Question:	Is there a limit as to the number of chapter members that may serve on a committee?
Answer:	There is no limit as to the number of members that may serve on a committee.

Code Development Committees

Code development committees are appointed to represent the membership in the evaluation of proposed code changes through the development cycle. The *International Codes* are published in new editions every three years. Each new edition incorporates the results of code change activity since the last edition. Current Code Development Committees include:

- International Building Code - Fire Safety Committee
- International Building Code - General Committee
- International Building Code - Means of Egress Committee
- International Building Code - Structural Committee
- International Existing Building Code Committee
- International Energy Conservation Code Committee
- International Fire Code Committee
- International Fuel Gas Code Committee
- International Mechanical Code Committee
- ICC Performance Code Committee
- International Plumbing Code Committee
- International Property Maintenance/Zoning Code Committee
- International Residential Code - Building & Energy Committee
- International Residential Code - Plumbing & Mechanical Committee

Click here for more information on ICC Code Committees and to access an application for serving on a committee.

Submission of a Code Change

Code changes for the *International Codes* must be submitted to ICC by the posted deadline. Code change proposals must be submitted on the proper form (original and a copy). Code change forms can be downloaded on the ICC website. The code change proposals must consist of the following:

- The applicable code and section
- The proponent with mailing address
- The scope and intent of the proposed change
- The existing and revised text
- The supporting statement, including the purpose of the code change proposal, the reasons why the proposed change is requested and the substantiating data, information and material.

Applicable Code: A proposal must refer to the latest edition, and for the second phase, to the conference report of final actions from the first phase. Also, a code change proposal must be submitted for each code intended to be revised.

Proponent: Anyone can submit a code change. If your chapter submits a code change, then the proponent would be the leader with "prime responsibility."

Scope: The proposal should state the impact and intent of the change in relation to the affected section.

Text: The proposal should be submitted in the specific wording desired.

Supporting Statements: The proposal should state why the code section should be changed and give reasons to support those reasons with facts.

Building Safety Week

As part of its mission to promote ideas, methods and technologies that encourage the construction of durable, sustainable buildings and homes, the International Code Council Foundation sponsors Building Safety Week (BSW) each year to promote the use and understanding of construction and building codes.

The event is usually held in May of each year and typically hosts a wide array of national and local programs that demonstrate the importance of making homes and buildings safe places for people to work, live and play.

For building safety and fire prevention personnel, this is a week of awareness; an opportunity to share and educate communities about building safety. Many chapters will host their own activities locally. Some chapter representatives will travel to Washington, D.C. to participate in Capitol Hill Day activities with members of ICC's Government Relations Advisory Committee (GRAC.) The GRAC was created to support ICC's Federal Legislative concerns. The GRAC and chapter representatives visit Capitol Hill each year to seek support from Members of Congress. For information on participating in Capitol Hill Day, contact your Staff Liaison or the Government Relations Department.

For the general public, Building Safety Week is a time to learn important information about a wide range of community issues – from mold prevention and disaster preparedness to the benefits of building codes. Of course, there is always something for the kids. One of the most popular items is CODiE the Cougar's Building Safety Activity Book published by ICCF.

Building Safety Week Campaign Kits can be purchased from ICC. These promotional kits offer a wide range of items designed to promote Building Safety Week to kids and adults in your community at an affordable price. The kits include posters, code and building permit brochures, disaster preparedness information, as well as coloring books, activity books, pencils and stickers for the kids.

For more information on Building Safety Week, click here. When the week nears, this same web site will afford you access to Building Safety Week materials available for purchase, free informational brochures that can be downloaded, additional materials to help you promote Building Safety Week in your community and much more.

Chapters and Legislation

Bills and the Law

A bill is an idea or action that represents the interests of a group intended to create a beneficial circumstance. It should be written and promoted with the intention of protecting and improving rights and conditions for all citizens. A bill is created with the hopes of becoming an enforceable law.

As a chapter leader, you represent the concerns of your membership and of your profession. There are instances whereby members and the building profession may be interested in introducing, promoting or speaking out against a bill:

- Instances whereby making a proposed bill "law" may have a negative impact on the building profession.
- Instances whereby individuals in the building profession desire a procedure, idea or condition to be uniformly implemented, enforceable and have a positive impact if made "law."

A chapter gets involved in introducing, promoting or speaking out against a bill through lobbying. Lobbying is influencing the decision of legislators to change, "pass" or "veto" a proposed bill. Ideally, a chapter can gather detailed information on the lobbying process from those professional organizations representing a chapter's interests who have lobbied. Textbooks are also available at libraries – though they may require a great deal of time and legal interpretations. Generally, organizations will "unite" in a common cause so that they may have a stronger voice when trying to influence legislator's decisions concerning a bill.

To keep informed on issues affecting a chapter's specific interests, contact the appropriate state agency or department, other building departments which may be affected, the chapter's own members, other chapters, the chapter's staff liaison or read trade journals and magazines.

Monitoring a Bill

Keep track of a bill by calling your local government representative's office or the representative's office who was responsible for introducing the bill and ask for an update on the status of the bill (the journey determining the final "fate" of a bill is very long and time consuming). Generally, all reasonable requests as well as letters are answered promptly. One other way is to telephone the Office of Legislative Affairs in Washington, D.C. All governmental telephone numbers are readily available at local libraries.

Although any individual or organization may champion a certain idea to be presented as a bill, it is recommended that chapters unite with those organizations that represent or will consider representing their specific interests.

Building Support for the I-Codes: An Introduction to Grassroots Advocacy

Members have the strongest stake in legislative outcomes and can best perform the work of building relationships with elected officials and decision makers. Members can take the message to decision-makers/community and have the greatest impact. You can be empowered to work with law makers and decision-makers to achieve legislative success. ICC has the tools you will need to effectively carry-out your goals. These tools will help you to improve your effectiveness in promoting the *International Codes* in your community.

- **Field Support:** Each chapter is assigned a [Staff and Board Liaison](#) to assist with code adoption and governmental relations activities. Your ICC Liaisons can be an important resource to the code official as well as the community and your elected officials. They can support and leverage your efforts by providing information and making presentations at public meetings and hearings.
- **Technical Support:** [ICC Technical staff](#) can assist you in understanding code changes and how they affect your community or code adoption effort.
- **Training & Education:** Update [seminars](#) familiarize the code official with significant changes from one code edition to the next. Transition seminars focus on helping users familiar with one code edition to adapt to a newer code edition.
- **Code Adoption Toolkit:** ICC has a [toolkit available on-line](#) to assist you with the code adoption process. It has a variety of printed information you can reproduce, distribute or use to fill in the blanks when creating your own customized information pieces.

Promoting adoption of the *International Codes*. Communities have a choice when adopting building codes. ICC can provide a code of higher quality and compatibility at a lower cost. You can help by promoting the *International Codes* to decision-makers at your local and state levels. With so many other issues on the minds of our local leadership, many are not aware of the many benefits of adopting model codes. The adoption of the *International Codes* lessens the burden of government.

The image of the code official is also very important. It has been said when the code official does his/her job, nothing happens. All code officials must be recognized as the safety advocates in the building industry whose only interest is safer buildings for the public to live and work. As a code official and a member of ICC, you have a responsibility to protect the public you serve by supporting adoption of the *International Codes*. The *International Codes* provide minimum safeguards for people at home, at school and in the workplace. The *International Codes* are a complete set of comprehensive, coordinated building safety and fire prevention codes. Building codes provide for public safety in the built environment and support the industry's need for a single set of codes.

A well-informed code official can affect a certain degree of influence on decision-makers by establishing a relationship of mutual respect, information and education and by appealing to a politician's sense of fair play. The effort to build and maintain a healthy relationship with elected officials must be on-going and requires regular maintenance.

A successful grassroots campaign involves a series of events or activities such as public forums, meetings, hearings, etc., that build on each other. The following steps represent a local residential model code adoption campaign. You may use the following steps as a general framework for your local code adoption effort. You know best what your situation is and can adapt these guidelines to suit your needs. Some of the steps assume a fair amount of opposition which you may or may not have depending on your situation.

➢ **Step One: Take Your Position**
As code officials and members embarking on a local code adoption campaign, you already know where you stand on the issue. You will already have the support of a few people; those who have asked you to investigate and pursue code adoption for the jurisdiction. You may have already won a small battle convincing one or more of your administrative or elected officials who support you in your position to pursue code adoption. Hopefully, you do not have to go it on your own. You will need to draw on some sales techniques. Know your "product" inside and out and be prepared to defend it on many levels.

➢ **Step Two: Set Goals**
Where do you focus your initial efforts? One of the most important steps in a campaign, after determining the target focus, is to choose the short range goals. Long range goals are easy, like adoption of the *2006 International Residential Code*. If short term goals are not clearly defined the campaign could be stalled. Short range goals should be winnable in the near future, providing a boost and the encouragement needed to keep moving toward the longer range goals. For example, you may already know that you will be dealing with a great deal of opposition from the local home builders association unless you reach a compromise on the stair riser requirements in the IRC.

A goal has little value unless it is measurable. In setting your goals, you might consider establishing a bottom line on what is acceptable, to guard against being coerced into ending the campaign without making any fundamental changes at all. The bottom line might be to get the IRC adopted with several amendments and then work toward further purification in the future. Or maybe you will settle for an older edition of the IRC if it means the alternative is not having a residential code at all. There is something to be said for compromise. You may lose the battle but win the war!

➢ **Step Three: Identify Your Supporters**
After the goals have been set, an analysis should be made to see who the participants in the campaign are and how they can aid the campaign. Who will be making the ultimate decision and who do you need to participate in the campaign in order for it to succeed? Who is on your side now and how can they be reached? Beyond ICC, your own building department and a handful of elected officials may be the only support you have at this stage of the game. Consider those who will most be affected by the adoption, such as local home builders and contractors and make a list of the persons or groups on each side of the issue based on your best assumption. Who will you need to educate and convince? Consider other governmental agencies and associations such as municipal leagues, county or township associations, your local fire officials, planning and zoning commissions, economic

development departments and housing code enforcement and rehabilitation offices. Also, consider lenders, neighborhood associations, realtors and corporate leaders.

➢ **Step Four: Consider Your Opposition**
Try to identify, in advance, where opposition is likely to come from and what that opposition will be about. How can they or their supporters be won over or neutralized? If an issue arises that has not been addressed, establish a task force or ad hoc committee to study the issue and report back. Seek the assistance of your chapter code development or legislative committee, if you have one, or another chapter. Refer to the resources in the tool kit first, because many issues have already been addressed.

➢ **Step Five: Test the Local Waters**
For the code official pursuing adoption locally, the first step will be to determine how much the local decision-makers actually know about the code, the issues likely to arise from the community and where they stand on it. It will also be important to assess the level of support found in your local home builders association, design professionals and contractors.

Poll the key players. Anyone making this contact should be as knowledgeable about the issue as possible and able to answer technical questions when asked. If you are unsure, do not provide information that is suspect because you will lose all credibility on this issue and future ones, as well.

Your contact's first impression of you will lay the ground work for the relationship. If you find when making the first call that the contact is on your side, take the opportunity to build some community support. It is a good time to develop some coalition contacts you can team up with down the road.

➢ **Step 6: Develop your Advocacy Strategy**
Next, develop your advocacy strategy. A clear plan of action on a timetable is needed. Is there a particular date or council meeting when you will be making your adoption presentation? Consider the time needed to complete the following tasks:

- Investigation and research – Know your code, how it will be applied, the scope of what it will apply to, its strengths, any shortcomings and how they can be managed. If there is already an existing code, some will want to know the differences. Look into allegations and be prepared for countercharges. (For example, adopting a residential code will drive-up the cost of housing.)
- Build support through public forums and the media – Promote code adoption to the public and through the media. Develop a coalition of community support by providing basic, public education information on the code to the community. What are the advantages to business owners, property owners and citizens? Safety, quality construction, new technology in building products, energy efficiency, protecting property values, better insurance rates, well-trained code officials and quality workmanship among contractors. Use mailings and the local media. Attend community, business and professional meetings.

- Negotiation and arbitration – Try to meet with opponents to settle conflict before going public. This may involve meeting with adamant citizens, politicians, home builders and contractors.

➢ **Step 7: Make Final Assessment**
Evaluate the current health of the campaign effort. Report back to the persons supporting your adoption endeavor. Communicate your findings or impressions of the level of support for the adoption. Do you have enough support to move forward? Check to see that all of the key components and elements are in place?

➢ **Step 8: Prepare for Public Hearing**
A successful vote will be the result of many long hours of behind-the-scenes efforts combined with a carefully executed public performance. Attempt to settle any points surrounding the issue prior to the public hearing. You do not want to spend the few minutes you have explaining the finer points of the legislation to people who could have been educated earlier!

If you can get help, select persons who are equally knowledgeable to assist you. Select one person to provide an overview of the issue. Present the findings or recommendations that have come from the community. Consider having consumers or citizens read letters to support these ideas. Present each point or argument that you feel is important and persuasive. Be prepared to rebut opposing views. Be careful not to alienate any member of the legislative body. Know when to end your presentation.

➢ **Step 9: Evaluate Success**

- Did you get everything you had hoped for?
- What is left to be done?
- When does the code become effective?
- What kind of support will be needed to start enforcing the code?
- Do you need to purchase code books?
- Do you need to hire more staff, get more training for staff or get current staff certified?
- What about plan review staff, permit staff and counter service personnel?

➢ **Step 10: Analyze a Failed Campaign**
Determine what did not work and how to fix it. Whether you win or lose, continue to strive for unity and agreement on this issue. Do not burn your bridges. If anything, you have greatly improved public awareness and educated many on the importance of codes. You have built credibility for your department n the eyes of your elected officials and the community.

It is also crucial that you do not lose your coalition supporters. As a follow-up, make phone calls or send letters to thank them for their support. Maintain an open dialogue with non-supporters. Continue to communicate with your internal supporters. Update them on your future progress and endeavors.

This is just one approach you can use that will provide you with a framework to start with. You know best what to do in your community and you can use a variety of plans or strategies.

[Click here](#) for more information on ICC's Government Relations department and how they can assist you.

CHAPTER 12: SUCCESSION PLANNING

Succession Planning Defined

Succession planning is a technique that is employed by chapter leaders at every level. It ensures that the organization's flow of operation is uninterrupted. Furthermore, it guarantees that all incoming leaders are kept informed as to the work of predecessors. All of this planning ultimately keeps the chapter focused on completion of stated goals and objectives.

The best time to begin thinking about your successor is when you take on the job of chapter leader. From the beginning you should establish and maintain orderly files so that they can be easily transferred and understood by someone unfamiliar with the position.

Which note file is more organized and understandable?

Note File #1
1. Met with people concerning establishing a scholarship fund.
2. Need to get with an investment broker and accountant
3. Will meet in the future
4. Scholarship fund established
5. Scholarships awarded

Note File #2				
Date	*Issue*	*People Involved*	*Action*	*Results*
8/1/XX	Formation of scholarships fund	J. Smith L. Jones L. Lucas T. Mars	Formed Scholarship fund	Will meet on 9/1/xx at 6:30 p.m. to discuss next step in scholarship fund formation.
9/1/XX	Formation of scholarship fund.	Same	Membership okayed fund. Bylaws for scholarship approved.	• Investment broker & accountant will be contacted to help establish, maintain & monitor scholarship fund. • J. Smith to handle. • Next meeting will be 10/1/XX at 6:30 p.m.

In addition, you may be asked for recommendations for your successor. As you work with your chapter officers and membership, you should be assessing their strengths as potential successors.

Along with handing down organized files, it is advisable for you to meet in person with your successor to discuss and share related information. Please be conscientious about this golden rule: turn things over as you would have them turned over to you.

Succession planning means planning for the continued leadership and success of a chapter. It involves developing people at three levels in your organization:

- Chapter
- Small Group
- Individual

Succession Planning at the Chapter Level

Succession planning needs to begin with your chapter. Start working here for good leadership succession. The four basic questions that need to be answered are:

- Does your chapter have a vision/mission?
- Are clear job descriptions in place for each major chapter position?
- Is there a system for frequent reward and recognition?
- Does your chapter have short- and long-term goals, and a method to review and adapt them?

Succession Planning at the Small Group Level

The small groups that exist within your chapter are where future leaders will learn and grow. Working on these elements will help ensure that leaders in your organization will start with success and then build on it! To carry this out the following must be asked:

- Does your chapter have a method for team-building among all chapter groups (see the Involvement Techniques section in Chapter 8 of this manual)?
- Does your chapter have a transition meeting or period between old and new boards, between specific board members and between committee chairs?
- Does your chapter have a recording method that allows successors to review what happened, when it happened, who was involved, the actions taken and the results of those events?
- Two keys to member development are the chapter newsletter and the membership list. Are steps and methods of creation documented for successors to use?
- Are board members and committee chairs forming and using committees rather than doing all the work themselves?
- Are organizational leaders dividing job responsibilities into small chunks so that it is easy to get members to commit to some involvement?
- Do the committees and board have short- and long-term goals and a method to review and adapt them?
- Is there a method for changing basic chapter processes when needed?
- Is there a formal recognition process for committees/small groups?

Succession Planning at the Individual Level

Recruiting volunteers and helping individual members develop their skills is important to successful future leadership. Use these elements to help you strengthen this aspect of succession planning:

- Has your chapter defined its primary type of members?
- Does your chapter have a New Member Orientation plan in place to acquaint new members with your organization and with opportunities for involvement?
- Are there a variety of ways for members to get involved? Do people know about these ways?
- Does your chapter leadership actively promote participation by members in the organization whenever possible?
- Does your chapter encourage membership in the international organization?
- Are members encouraged and recognized for attending the ICC Annual Conference? Is there any support for chapter leaders to attend?
- Does someone in a leadership position attend the chapter leader's meeting at the Annual Conference each year?
- Are leaders delegating responsibility?
- Are volunteers recognized and rewarded?
- What is the "career" path for a new volunteer? (Is it possible for them to start with small responsibilities and progress to larger responsibilities with guidance?)

A Chapter's Life Cycle

By paying attention to a chapter's position in the life cycle, leaders may help a chapter improve its performance more effectively. What stage of the life cycle is your chapter experiencing?

Stage One: Initiation

During a chapter's creation, founders spend a great deal of time and energy informing others about the organization. Chapter founders are influenced by the desire to establish an identity while building a framework and an enthusiastic membership. Usually during this stage, financial resources are limited yet commitment and creativity are high. There is a strong sense of optimism yet members are uninformed about the future.

Stage Two: Growth

After the new chapter is chartered, it enters the growth stage. During this time, the group works to increase its membership, activities and recognition. Chapter leaders focus on expanding its resources and achieving identified goals. Momentum builds as do "growing pains." During this stage, conflict is inevitable as competing energies may lead to misunderstandings and multiple directions. Good chapter leaders recognize that conflict is a natural part of the maturation process and promotes team building within the chapter. When a group resolves conflict, the sense of community within the membership becomes stronger. Doubt evolves into a spirit of hope.

Stage Three: Maturity

The third stage, maturity, is an important one in a chapter's life cycle. By this phase, procedures and policies are routine, chapter identity is well established and membership has stabilized. A chapter encounters a crossroads in its development: complacency or excellence. It is critical for leaders to assess the strengths and weaknesses of the chapter objectively.

Stage Four: Decline

Avoid this stage! Chapters may retain popularity for decades before encountering the last stage – decline. During this phase, interest virtually disappears because the chapter no longer suits members' needs, interests or professional goals. If a chapter is experiencing this stage they should contact their ICC Staff Liaison.

Click here to see a list of characteristics to help you check the health of your chapter!