Chapter Information Manual

Revised November 2018

Approved by the Board April 28, 2019
About this Manual

This manual has been comprehensively revised since the 2015 version. Please refer to this version rather than to any previous versions of the manual.

Chapter officers should download or print a current copy of this manual for frequent consultation. Updated versions will be posted on the AWG webpage (http://awg.org/chapterresources) when the AWG Board determines the document needs to be revised. Chapters will be notified by email of changes. If you believe that other information should be included in this manual, please contact the Association Secretary (secretary@awg.org) or your Regional Delegate with your suggestions.
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Introduction

AWG was started in 1977 to address the continuing under-representation of women geoscientists in academia, government, and industry. The Association’s goals are to encourage the participation of women in the geosciences; to exchange educational, technical, and professional information; and to enhance the professional growth and advancement of women in the geosciences. AWG works to achieve these goals through support for undergraduate and graduate students, programs for professionals, and outreach to young people, especially those from under-represented groups in the sciences. Other activities benefit the geoscience profession and our broader society.

AWG is a 501(c)(6) not-for-profit organization and professional association. We are affiliated, or associated, with other professional societies such as AGI, GSA, AAPG, AGU, AIPG, etc. Membership is always open to all who support our goals. We encourage membership regardless of gender identity and we seek to be an inclusive organization. (We are the “Association for Women Geoscientists”, not the Association of....)

This Chapter Information Manual serves as a reference guide for potential and established chapters of the Association. It consists of several sections that address three basic needs. The first section outlines the steps involved in forming a new chapter. The second section specifies the reporting requirements for a chapter, suggestions for planning activities, and the management practices of a chapter. Additional sections focus on legal obligations, fundraising, the role of the AWG Foundation in chapter programs, and special circumstances that may arise.

As a chapter officer, you should be familiar with the information in this manual and particularly the information relevant to your office. Chapter officers should also be familiar with the AWG Bylaws, particularly Article X provisions regarding chapters, as well as with your chapter bylaws (AWG’s bylaws and other relevant documents mentioned throughout this report can be found at http://awg.org/chapterresources or at www.awg.org/about). The chapter President is responsible for ensuring that a chapter performs all the required tasks each year.

Role of Chapters

AWG is composed of a central organization (the Association), its members, and chapters. The Association is governed by a Board of Directors that consists of the following officers: President-Elect, President, Past President, Treasurer, Secretary, Editor, Communications Coordinator, and Regional Delegates. Members of AWG may be individuals (see Table 1 for current list of member types), institutions or corporations. To facilitate local activities, members may form chapters that are subordinate to the national organization. This overall structure is codified in AWG’s Bylaws.
AWG differs from many other professional organizations by having chapters based on geographic location. Local chapters create a sense of community and provide opportunities for networking, outreach and learning experiences, and for developing enrichment programs important to local members. Chapters are also encouraged to become involved in, or sponsor, regional, national, and international activities of AWG.

While each chapter essentially operates independently in its local activities and finances, we are interrelated as an Association and must maintain a coherent identity. This identity has several aspects:

- Common goals
- A common image, reflecting our professional conduct as expressed through our programs, online presence, and written materials
- Shared legal foundations and federal income tax obligations

The following sections provide information for new and existing chapters on how to establish and sustain vibrant AWG chapters that align with the Association goals and with the financial and legal requirements of AWG.
Starting a New AWG Chapter

Basic Steps to Form a Chapter

Following are the basic steps to form an AWG chapter. At any point in this process, reach out to your Regional Delegates or Alternate Delegate if you need assistance; their contact information (including an alias to automatically send email to all of them) can be found at: http://awg.org/Officers. The “Initial Planning” and “Submitting Your New Chapter Application” sections below will provide more specific details on the individual steps.

1) The first step is to determine if organizing and maintaining a chapter is feasible. To be feasible, there must be enough individuals interested in forming a group that aligns with AWG goals and interests, including several strong leaders who can take charge of the process.
   - Start recruiting members - need at least 10 individuals to become dues-paying members of AWG for approval of a new chapter
   - Need a steering committee of at least 3 acting officers [for student chapters, the committee should consist of at least 3 student officers and one faculty advisor]

2) Choose the type of chapter that will work best for your group, within the following guidelines (Table 2 provides a quick comparison of chapter types):
   - Rebate earning chapter: These chapters can include any type of individual member – student, professional, retired, etc. These chapters are a subsidiary of AWG and will hold bank accounts in their own name and will fall under the AWG tax umbrella. Chapters can conduct fundraising activities using the AWG name. A rebate earning chapter MUST file financial report forms to AWG and they are eligible for dues rebates from AWG based on their membership and contingent on compliance with requirements.
   - Student chapter: These chapters are affiliated with an accredited university or college, and chapter members are primarily students, but can include faculty, staff, and alumni of the university. All chapter finances will be handled through the university; no bank account may be opened using the AWG name. Collection of outside funds and/or fundraising specifically under the name of AWG is prohibited for student chapters; however, financial sponsorship may be solicited to assist in covering expenses (see section below on “Handling Money and In-Kind Donations as a Chapter”). Student chapters do not receive dues rebates from AWG. Subject to university rules and regulations, students, faculty, staff, and alumni from neighboring colleges that lack chapters may be included as members if there are no other AWG chapters in the area.
   - Non-rebate chapter: This type of chapter is rare and is most commonly used when the members cannot have regular meetings due to geographic distance or other obligations, and/or do not have enough people willing to fill leadership positions but want to maintain some formal ties to AWG. Such chapters are open to all individual membership categories. Collection of outside funds and/or fundraising specifically under the name of AWG is prohibited for non-rebate earning chapters; however, financial sponsorship may be solicited to assist in covering expenses (see section below on “Handling Money and In-Kind Donations as a Chapter”). Non-rebate chapters do not
receive dues rebates from AWG and cannot have a bank account using AWG’s name. The only benefit to non-rebate earning chapter status is that you do not have to deal with financial reporting.

- **International chapter**: Any chapter forming outside of the United States and its territories will by default be an international chapter. These chapters are open to all individual membership categories. Collection of outside funds and/or fundraising specifically under the name of AWG by international chapters is prohibited; however, financial sponsorship may be solicited to assist in covering expenses (see section below on “Handling Money and In-Kind Donations as a Chapter”). International chapters do not receive dues rebates from AWG and cannot have a bank account using AWG’s name.

Table 2. Comparison of chapter types

<table>
<thead>
<tr>
<th></th>
<th>Based in United States and its Territories*</th>
<th>International* (outside US and its territories)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Members</strong></td>
<td>Rebate Earning</td>
<td>Student</td>
</tr>
<tr>
<td></td>
<td>Any individual member type</td>
<td>Members are students of the affiliated institution; may also include faculty, staff or alumni of that institution*</td>
</tr>
<tr>
<td><strong>Finances</strong></td>
<td>Subsidiary of AWG, hold bank accounts in AWG name, included in AWG federal tax filing</td>
<td>Through university; cannot have bank accounts in AWG name</td>
</tr>
<tr>
<td><strong>Fund Raising</strong></td>
<td>Encouraged under AWG name</td>
<td>Prohibited under AWG name; must follow university regulations</td>
</tr>
<tr>
<td><strong>Rebate Status</strong></td>
<td>Earn rebates from AWG based on membership</td>
<td>No rebates</td>
</tr>
</tbody>
</table>

*Can include neighboring institutions (see discussion below on recruitment).
+ Determined by where chapter is officially “doing business”

3) Select a chapter name and identify a mailing address. For all chapter types, AWG will be part of the formal chapter name.
4) Fill out your AWG new chapter application packet and submit to AWG; be sure to copy your Regional Delegates if you email the forms. The forms are available at http://awg.org/chapterresources; be sure to select the appropriate application for the type of chapter you are forming. Depending on the type of chapter you have selected, your forms will consist of:

• AWG Chapter Application Form
• New Chapter Membership Roster Form
• Chapter Programs and Activities Form
• Estimated Budget
• Tax Authorization Letter

5) Student chapters also need to apply with their university to become a recognized organization. Seeking university approval and AWG approval can be a simultaneous process and your faculty advisor can guide you through this process.

AWG will notify you that they have received your packet. If you already have 10 AWG dues-paying members, and if everything in your packet is complete, you will be notified that you are officially a chapter. If you have not met the 10-person minimum, you can begin to meet informally and build up your membership – be sure to encourage people attending your meetings to sign up and identify your chapter as their affiliation when they pay their dues to AWG.

Once you are an official chapter, you can elect your official officers, create a chapter email, and determine the best way to disseminate information to chapter members. Most chapters create and maintain a webpage and/or a Facebook page or other social media accounts. Your social media pages can be linked through the Association website once you are officially recognized (for student chapters, this means by both AWG and your university).

Initial Planning

The key to getting a chapter started is to enlist the support and commitment of several people who share a vision for forming a group aligned with AWG goals. These people can be new to AWG or current members. Things to consider at your initial planning meetings are:

• Who are your potential chapter members and how can you reach them?
• How will you maintain chapter membership?
• What kind of programs should you provide?
• Where can you find financial support?

Ideas for finding new chapter members

1) Ask the AWG office to send you a list of current AWG members in your area and invite them through email or create an event on Facebook and share. Send potential members a link to your webpage or other social media pages, so they can follow your chapter’s activities.

2) Email secretary@awg.org so your new chapter or planned activities can be publicized on AWG’s social media accounts or tag AWG in your local chapter posts:
   AWG Facebook: @AWGeoscientists
   AWG Twitter: @AWG_org
3) Attend a meeting of other professional organizations or clubs with similar interests and make an announcement that you are looking for interested individuals or extend an invitation to a specific event.

4) Contact geoscience employers in your area and extend invitations to the employees to attend a meeting or event.

5) If you are not already affiliated with a university, reach out to local campuses. Contact the geoscience or related departments and potentially plan a joint event.

6) Set up a booth at a local and/or campus event (AWG office (office@awg.org) can supply membership applications and recruitment materials) to increase your visibility and potentially recruit members.

Throughout the process of forming your chapter, continue to recruit members. New members can either register and pay their dues online or send applications directly to the AWG Office. However, be certain your group records their information on the New Chapter Membership Roster (see step 8).

The steering committee

Your initial steering committee can be elected, or the committee can decide what role each committee member will take. Ideally you should have at least an Acting President, Acting Secretary, and Acting Treasurer. These acting officers will most likely hold office until the chapter has been officially recognized and its members can officially elect the acting officers or their replacements.

Student chapters must identify a faculty advisor and the advisor should be aware of committee activities. The advisor needs to be committed to helping and maintaining a student chapter to ensure the continuity of the chapter as chapter officers graduate and leave the institution. The advisor will assume the responsibility of being the contact person for the student chapter and will ensure all forms and reports are submitted to the Association Office. Other institutional faculty, staff, or alumni who are AWG members should be invited to affiliate with the student chapter to help maintain the chapter over the long term.

Selecting a name and mailing and email addresses for your chapter

Most student chapter names reflect their university. For all other chapter types, the name usually reflects the geographic region, city, or state(s) that the chapter will serve. If your chapter will cover multiple states, decide in which state the chapter will “do business” and hold a checking account. A review of the different states’ tax regulations may be a deciding factor. Check the list of existing chapter names at http://awg.org/Chapters to be certain the name you are considering has not already been used. After approval, your chapter will be referred to as AWG “New Name” Chapter or the “New Name” Chapter of AWG. Try to select a name that will be widely understood and easily recognized.

During the planning stages your mailing address can be temporary (for example, an acting officer’s address). Student chapters usually use the address of the department hosting their organization. During this stage, use an email address of one of the officers, or select a temporary group name.
Checking accounts

Depending on the type of chapter you are planning, and your individual needs, you may want to open a temporary checking account to process donations or other funds that you raise to cover initial expenses. Please note that you may not open checking accounts in the Association’s name (i.e. AWG-New Chapter) until formally approved as a Chapter by the Association. It may be most convenient for your Acting Treasurer (or possibly the Acting President) to open the account in their name. Student chapters must follow their own university rules regarding finances for on-campus organizations. Non-rebate earning and international chapters cannot open checking accounts in AWG’s name.

Submitting Your New Chapter Application

Application materials are available at http://awg.org/chapterresources; be sure to select the appropriate application for the type of chapter you are forming. Table 3 indicates which forms are required as part of your chapter application.

Table 3. Forms needed for applications for different types of chapters

<table>
<thead>
<tr>
<th>New Chapter Application Forms</th>
<th>Rebate Earning</th>
<th>Student</th>
<th>Non-Rebate</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>New Member Roster</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Programs &amp; Activities</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Estimated Budget</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Tax Authorization Letter</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>IRS Form SS-4*</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Obtain from IRS website as indicated below. Not part of downloaded application packet.

Forms

- **AWG Chapter Application Form** asks for the proposed chapter name and address, as well as names and contact information for members of the steering committee (must include at least three members). Student chapter applications must also include a faculty or staff member of the institution who is also an AWG member.
- **New Chapter Membership Roster** lists the names of current and new AWG members wishing to affiliate with your chapter. Any new members that you have recruited should submit their AWG membership applications to the Association Office (office@awg.org) directly (either online or via mailed application) and indicate that they wish to affiliate with your chapter. The AWG Office will transfer affiliations for existing AWG members who wish to affiliate with your chapter.
- **Chapter Programs and Activities Form** requests information about meetings your group has had to date, and planned activities for the new chapter. In addition, it asks how you plan to publicize your meetings and events.
- **Estimated Chapter Budget Form** helps your group to form a start-up financial plan and think ahead about possible expenses and sources of income.
- **Tax Authorization Letter** is needed to extend the Association’s non-profit status to your chapter [only applies to rebate earning chapters]. This permits your chapter to be included in the Association’s annual income tax returns and allows AWG to file annual federal taxes on your behalf. Prepare and sign a letter using the sample text provided in the application packet.

- **IRS Form SS-4** allows your chapter to get a sub-EIN number (a federal Employer Identification Number) under the AWG name so that you can open a bank account. A template of the SS-4 form can be provided to you by contacting the AWG Treasurer at treasurer@awg.org. The link to file for an EIN is:
  

  You will fill out the top portion of the form and list AWG as the responsible party. Once you have received an EIN number (it usually only takes a few days), send that information back to the Association Office (office@awg.org) and the AWG Treasurer, along with your Tax Authorization Letter. AWG will handle filing this with the appropriate IRS office.

When you’ve completed the forms listed above for your chapter type, you can either email digital copies to the AWG office (office@awg.org) and cc your Regional Delegates, or mail paper copies to the AWG office at:

Association for Women Geoscientists  
1333 West 120th Ave, Suite 211  
Westminster, Colorado 80234

**Approval Process**

When a new chapter application packet is received, the new member roster is reviewed for consistency with official AWG membership records. If you have ten or more members that are already on the AWG membership roster, then the AWG Board will generally act quickly to approve your packet. (The importance of copying your Regional Delegates is so that they can provide follow up with the Board, plus it alerts them to a new chapter joining their region.) For student chapters, you can simultaneously submit your AWG packets and be working on approval at your university.

While you are waiting for official approval (AWG and/or university), or to build up to your ten required members, you can continue to meet informally, recruit additional members, and plan for future activities. However, you cannot conduct business as an AWG chapter, set up a webpage, social media page, an email account, etc., using the AWG name until you are officially recognized.

**Final Steps in Forming Your Chapter**

After your chapter is approved you need to complete the following tasks to finalize the organizational structure of your chapter.
1) **Adopt chapter bylaws within 90 days of officially being recognized as a chapter.** Your bylaws cannot conflict with the Association’s Bylaws. You may use the Association Bylaws as the basis for your document by downloading a copy of the Bylaws template (available at [http://awg.org/chapterresources](http://awg.org/chapterresources)) and adapting the text as needed to refer to your chapter. After your members have ratified the bylaws, you must send a copy to the AWG Board (BOD@awg.org) for review and approval.

2) **Hold elections for chapter officers.** According to the Association Bylaws, a chapter must have, as a minimum, three different elected individuals serving as President, Secretary, and typically a Treasurer, who form the core of the chapter’s Executive Committee. A Treasurer is required if the chapter collects funds, so rebate earning chapters must have a Treasurer; student chapters will need a Treasurer if they are using university funds. Other useful Executive Committee positions are Vice President or President-Elect, Editor, and Past President. Chapters also have the leeway to create additional positions as needed to fulfill the goals of the organization, such as an outreach coordinator, or a communications officer / webmaster. These additional positions can be elected or appointed by the chapter Executive Committee as specified in the chapter bylaws. All officers, whether elected or appointed, must be current AWG members in good standing (i.e., have paid their Association dues for the current membership year), and be affiliated with the chapter. Chapter bylaws must specify chapter officer positions, terms, and any term limits.

3) **Arrange for a permanent mailing address, such as a post office box that is conveniently located.** Each chapter must have a physical mailing address. A post office box is recommended but not required; the address should be semi-permanent for the chapter so use a member’s address only if that person is willing to receive and distribute chapter mail over an extended period. Student chapters typically use the address of the sponsoring department on campus.

4) **Arrange for a chapter email that all chapter officers can access.** A chapter email eliminates the need to constantly update records every year as new officers are elected. You can use any email provider; however, the AWG Board utilizes gmail.

5) **REBATE EARNING CHAPTERS ONLY – Open a checking account in the official AWG chapter’s name.** The Treasurer and another officer, usually the President, must both have signature authority. However, the other officer must not write checks without the Treasurer’s knowledge. Your bank may require your chapter Executive Committee (the officers of the chapter) to complete an authorization form. Student, international and non-rebate earning chapters are prohibited from opening checking accounts under the name of AWG.

Every chapter seems to encounter different requests when opening a bank account. To open a bank account, you’ll need your EIN, a letter from AWG saying that your chapter falls under our tax umbrella (request this from the AWG office, office@AWG.org), and a copy of the AWG National Articles of Incorporation, which can be found on the chapter resource page ([http://awg.org/ChapterResources](http://awg.org/ChapterResources)). You may also be requested to provide a copy of
the chapter bylaws, meeting minutes, or the outcome of election results. Check with your bank ahead of time to see what is required.

6) **REBATE EARNING CHAPTERS ONLY** – Obtain state and local income tax exemptions, if needed (details below in “Legal Information and Responsibilities” section). Check with your Secretary of State to determine the requirements for your state. If you do obtain exemptions, send copies of all forms to the Association Office (office@awg.org) and Treasurer (treasurer@awg.org).

7) Determine how your chapter will communicate with its members. It is recommended that at the very minimum you send out regular emails. Some chapters choose to email newsletters. In addition, you may set up a webpage and/or social media pages such as Facebook, LinkedIn, Twitter accounts, etc., to keep your members informed and to spread the word about your chapter and your goals. Share this information with the AWG Secretary (secretary@awg.org) and your Regional Delegates.

8) **OPTIONAL** – Design a logo. Chapters that have an online/social media presence must develop a chapter logo. Many chapters enjoy designing a logo that makes a unique statement about their chapter. All logo designs need to be submitted to the Board (BOD@awg.org) for approval and cannot be used until you receive approval. Be sure to copy your Regional Delegates on any correspondence so they can facilitate a prompt Board vote.

9) **OPTIONAL FOR STUDENT, NON-REBATE, AND INTERNATIONAL CHAPTERS** – Open an unofficial checking account for your chapter. If you do plan on handling some type of chapter funds (donations, product sales, contributions for an event), it may be beneficial to have a designated repository for the funds, but remember, if you are NOT a rebate earning chapter, your bank account name CANNOT include AWG. The reason is that student, non-rebate, and international chapters do not have an EIN number that allows AWG to file taxes on their behalf, so the account cannot show any official affiliation to AWG. For example, you can have a bank account in the name of the chapter’s Treasurer; however, it’s still recommended that at least two chapter members have access to the account. **Student chapters must follow their university rules regarding finances for on-campus organizations and it’s recommended that faculty advisors have access to the account.**

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**Chapter Reporting Requirements, Activities, and Management**

All chapters have reporting requirements to remain in good standing within AWG and they must comply with the AWG Bylaws and current policies. Failure to comply with these requirements can result in a chapter being placed on probationary status (see “Chapter Probation and Dissolution” section for a discussion of the probationary process). The following section discusses these requirements.
Reporting Requirements

Chapter officers are responsible for the completion of all reporting requirements, with the exception of student chapters. For student chapters, the faculty advisor is responsible for ensuring that the chapter complies with the reporting requirements. The advisor can delegate the responsibility to the student officers but must ultimately be certain the tasks are completed so that the chapter remains in good standing. All forms can be found on the Chapter Resources page of the AWG website (http://awg.org/chapterresources).

The following are the annual and bi-annual requirements:

- **ALL CHAPTERS - Chapter Officer Reporting Form**: To be submitted once per year, no later than two weeks after the election of new officers. On this form, please provide names and contact information for the chapter’s Executive Committee, as well as the chapter’s physical mailing address. The officers listed should be those who have recently been elected to serve during the next term of office. Remember, it is mandatory that all chapter officers listed on the form are current members of AWG. If they have not paid their dues by the beginning of their term, they cannot be an officer.

- **ALL CHAPTERS - Chapter Reports**: Required two times per year for review at the Spring and Fall AWG Board meetings. Reports are due by September 15 and March 15 of each year and should be submitted to your Regional Delegates (emails of delegates can be found at http://awg.org/Officers). Templates are available on the Chapter Resources page of the website (http://awg.org/chapterresources). Reports should summarize and highlight chapter activities since the last report, particularly with regard to AWG missions and goals, emphasizing the programs that are consistent with tax-exempt status of AWG. In addition, these reports will serve as a basis for the Board to decide eligibility for chapter awards.

- **REBATE EARNING CHAPTERS ONLY - Financial Reporting Forms**: Must be submitted twice a year (by August 15 for first half of fiscal year (January-June) and by February 15 for second half and full fiscal year (January-December)) to the AWG Treasurer (treasurer@awg.org). The Form includes a request for continuing inclusion in group income-tax exemption. This information is necessary to satisfy the requirements of the IRS. Failure to comply will have legal consequences, as explained below in the section on “Legal Responsibilities of Rebate Earning Chapters.”

- **REBATE EARNING CHAPTERS ONLY – Dues Rebate Forms**: Chapters must submit a rebate request to AWG office (office@awg.org) and AWG Treasurer (treasurer@awg.org) by March 15th of each year to receive a chapter rebate for that year. (Additional details on rebates can be found in the “Dues Rebates for Rebate Earning Chapters” section.) Note: chapters must be active for one full year before being eligible for a dues rebate.

- **INTERNATIONAL CHAPTERS ONLY –** Chapters must submit financial reports to their local taxing authority as determined by the rules and regulations within your country.
The following are required at any time that changes occur:

1. **ALL CHAPTERS** – Chapter Officer Reporting Forms must be sent to the AWG Board (BOD@awg.org) and your Regional Delegates when any changes are made in your officers or officer contact information, regardless of when in the year this occurs. Notification should occur within two weeks after changes have been made.

2. **ALL CHAPTERS** – Updated bylaws must be sent to the AWG Board (BOD@awg.org) for review and approval whenever changes are made to your chapter bylaws. Revised copies should be sent within one month of changes for review and approval.

Ongoing Chapter Business

The following are part of the ongoing business activities of any chapter throughout the year.

- **Recruit new members**: AWG programs and services depend on member participation and dues income; continuing recruitment replaces members lost through turnover. As a chapter, continue to recruit members to affiliate with your chapter and record their names. Have new members apply online or send applications and dues to the AWG Office (office@awg.org), indicating their chapter affiliation. An established student chapter can also recruit members from neighboring colleges that do not have a chapter, subject to university rules and provided they meet the qualifications of student membership; however, if there is a local rebate-earning or other type of AWG chapter in the area, it is recommended that potential members from neighboring colleges be directed toward the other chapter (check with your Regional Delegate if you are uncertain).

- **Retain current members**: Remind the members of your chapter to renew their memberships online or by mail with AWG annually. Memberships are based on the calendar year – January 1 to December 31. Members will receive membership renewal reminders from AWG if their contact information is up to date, and specific questions about an individual’s membership should be handled between that member and the AWG office (office@awg.org) directly. Changes in chapter affiliation, membership type, address, etc., are the responsibility of individual members. And remember – **chapter officers MUST be AWG members**.

- **Track member count**: Be sure your list of affiliated members matches the list distributed by the AWG Office. You can request a copy of this list for your chapter from the AWG office (office@awg.org) or your Regional Delegates. These can be reviewed to keep your chapter roster up to date. Your Secretary can also search for at-large AWG members who live in or near your chapter service area but who did not select a chapter. If an at-large member responds positively to an invitation to join your chapter, this information can be forwarded to the AWG Office with a request to update the affiliation. Whenever you notice that a new member has joined your chapter, it’s a good idea to send an email welcoming that person to the chapter, along with reminders of upcoming events and social media pages.

- **Develop talent**: Involve members in chapter activities and provide leadership opportunities. Officers can delegate responsibilities to other chapter members for planning meetings or activities, taking the lead on developing a new program, etc. In addition, identify potential
future officers and have them work closely with existing officers to learn the responsibilities of the job.

- **Refer candidates for AWG openings**: Watch for announcements from AWG and nominate chapter members for elected positions on the AWG Board and encourage members to volunteer for AWG committees or to help with AWG programs.

- **Identify candidates for AWG awards**: Awards are listed on the AWG website ([http://awg.org/Awards](http://awg.org/Awards)). Be aware of the types of awards, who in your chapter might be eligible, and what the deadlines are. Mention these at the beginning of chapter meetings and in your chapter communications.

- **Write proposals to AWG Foundation**: Apply through AWGF to fund chapter awards, scholarships, and outreach activities. (See section below on AWG Foundation.)

- **Contribute to Gaea and E-News**: Submit articles and news from your members to the AWG Editor ([editor@awg.org](mailto:editor@awg.org)) to include in *Gaea* or E-News. The due dates for submission to these venues are listed on the calendar on the AWG website.

- **Share Chapter newsletters**: Send copies of your chapter newsletters to your Regional Delegates and to the Editor ([editor@awg.org](mailto:editor@awg.org)). This keeps your Delegates up to date with your chapter activities and provides the Editor with potential material to include in *Gaea* or E-News.

- **Participate in the Quarterly Chapter Web Conference Calls**: These calls are a good forum for asking questions, learning about activities of other chapters, and finding out about new AWG programs and policies. The schedule of calls is posted on the calendar feature on the AWG website’s home page. Please note that times listed on the calendar are for the AWG Office’s time zone.

- **Raise issues**: Bring issues that are important to your chapter to the attention of the Board of Directors, either through your Regional Delegates or during the Quarterly Chapter Web Conference calls. AWG cannot represent you if you do not speak up!

## Election of Chapter Officers and Officers’ Duties

As stated above, according to the Bylaws of the Association (Article X), a chapter Executive Committee must consist of at least three elected individuals who fulfill the duties of the President, Secretary, and typically Treasurer. The duties of these officers are described in the AWG Bylaws and should be specified in the chapter bylaws. Additional officers may be elected or appointed by the chapter Executive Committee. All officers, whether elected or appointed, must be current AWG members in good standing and affiliated with the chapter.

All members in good standing should be informed of an upcoming election, including the slate of candidates, with a minimum of two weeks’ notice. To ensure you notify all members, electronic files of members names and contact information can be requested at any time from the Association Office ([office@awg.org](mailto:office@awg.org)). Voting may be conducted by mail, electronically, or in person at a meeting, as specified in the chapter bylaws, but care should be taken to accommodate all chapter members in good standing. The candidate receiving the highest number of ballot votes shall be elected to office.
results of each election must be announced promptly to all the candidates and the chapter membership. An updated Chapter Officer Reporting Form should be submitted promptly to the AWG office and your Regional Delegates, but no later than two weeks following the election. For chapters with bank accounts, if signature authority changes, the signature card at the bank must be updated.

Suggestions for Chapter Meetings and Activities

When you are planning your chapter meetings and activities, keep the goals of the Association in mind. AWG exists to ensure that women and under-represented groups may fully contribute to and participate in the geosciences. The Association’s goals are:

• To **Encourage** the participation of women in the geosciences;
• To **Exchange** educational, technical and professional information;
• To **Enhance** the professional growth and advancement of women in the geosciences.

Incorporate these three “E’s” in your planning. Also, keep in mind that your meetings and other activities should be conducted in a tasteful and professional manner that reflects well on the Association. Chapter events often attract new members, so these events should be positive and enjoyable for all participants.

Typically, the actual business of operating the chapter usually defaults to the chapter’s Executive Committee. It is often more efficient if the details of operations are discussed at separate Executive Committee meetings rather than at general membership meetings. The Executive Committee’s business meetings should be announced in advance and open to any interested members. Some chapters hold an annual business meeting for all members, during which goals for programs and activities are set and elections or other business are conducted.

For your general meetings, it is a good idea to keep the business portions brief by focusing on issues of concern to your membership, while ensuring that the members know about and feel welcome to participate in the chapter’s business. Chapters are encouraged to try a variety of activities to meet the needs and maintain the interest of their members. Your meetings can cover a variety of topics: technical science-based discussions, career paths and opportunities, career development, or issues relevant to your members, such as work-life balance, diversity, equity, etc. Consider holding occasional joint meetings with other local organizations with similar goals and interests.

Ideas for meeting-based activities:

• Dinner meetings at a local restaurant, possibly followed by a speaker
• Pizza party or taco night (great for student chapters)
• Invite speakers on themes of interest to your chapter. AWG has a list of distinguished speakers – your chapter can apply to the AWG Foundation and request support to bring a speaker to your chapter meeting. (See section on AWG Foundation for more information.)
• Arrange a panel discussion on issues important to your members (careers, graduate school, work-life balance, resume writing, etc.)
• Work in teams to develop outreach activities for K-12 groups in your area
• Have members share their research or field experiences
Planning and holding events as a chapter can be fun and rewarding experiences. Field trips are a common activity of AWG chapters. These can be local or overnight depending on your chapter’s interests. You can invite someone to lead your trip or find organizations in your area that run regular field trips that you can sign up for as a group. If you have questions about organizing a fieldtrip contact the AWG fieldtrip committee chair (fieldtrips@awg.org). (Be sure to have all participants sign a liability release, available at www.awg.org/fieldtrips.) Social events such as picnics, cookouts, or camping trips can also be fun. Activities that involve outreach are particularly in alignment with AWG goals and can be very rewarding. Watch for volunteer opportunities in your local area in which your chapter can participate (e.g., science fairs, science Olympiads), or organize your own event, for example to celebrate Earth Science Week. AWG’s Gaea newsletter and E-News often have articles about other chapters’ events that might give your chapter good ideas. Also, the Quarterly Chapter Web Conference calls are a good opportunity to exchange ideas.

Rebate earning chapters can also hold fundraising events that raise money to provide scholarships, pay for student trips to GSA or AGU, or any number of activities that interest your chapter and fits AWG goals (see section on “Fundraising Guidelines and Suggestions for Rebate Earning Chapters” below).

Communicating with Members and with AWG

Active and motivated chapters are based on good communication and a sense of purpose. It is important that chapter officers take responsibility for keeping their members informed and keeping AWG informed. The officers serve as the connection to the larger organization and they should communicate regularly with your Regional Delegates. Also, sharing AWG posts to your chapter’s social media pages and tagging AWG posts on your local pages are ways to keep your chapter connected to the Association at large. By sharing information on social media, chapters help each other with ideas for activities and recruitment. The Quarterly Chapter Web Conference calls (see calendar on AWG home page for schedule) are another way for chapter officers from across the country to share ideas and to talk to members of the Board. These calls are a great way to exchange ideas, learn what’s working for other chapters, and get your questions answered.

Chapters are encouraged to develop web pages and use social media (Facebook, Twitter, etc.) to communicate with their members between meetings and/or newsletters, but it is important to be certain that each member gets an email reminder of upcoming meetings. Social media serve as good platforms for broadly disseminating information about your chapter but should not take the place of direct communications with your members, typically via email. There are no formatting requirements for how websites or social media pages should look but it is important to keep all content professional because your chapter’s social media pages directly represent AWG as a whole. Chapters can also post directly to AWG social media pages.

Many chapters also put together chapter newsletters and send these out electronically to members. Chapter newsletters often include calendars of upcoming events, member profiles, chapter member awards and honors, member news, links to interesting reports or articles that have been released, and book reviews. You can also use the newsletter to summarize meetings, report on ongoing chapter plans, and update members on events being planned by the AWG Board or awards being offered by the AWG.
Foundation. Be sure to send copies of your chapter’s newsletter to your Regional Delegates, to keep them informed of your chapter events, and to the AWG Editor (editor@awg.org). The AWG Editor will sometimes pull local chapter articles into Gaea and AWG E-News.

A few reminders regarding individual privacy of your members:

1) Group emails should have individual emails listed in the “bcc” field to maintain privacy.
2) Before publishing information in a newsletter or posting on social media be sure the individuals involved approve.
3) Be sure you have permission to publish or post photos of individuals on social media (a photo release form is available at http://awg.org/chapterresources).
4) Always respect the wishes of anyone who declines to be included in information releases of any kind.

Social media can be a very powerful tool in terms of communication and should be used wisely and appropriately. An officer serving as a “social media coordinator” should be an active social media user. This person would be responsible for keeping up with the rules and regulations established by specific social media platforms and any relevant laws. Social media are constantly changing, so it is important that someone in your organization is informed and understands any legal consequences of publishing or posting information. Please reach out to your regional delegates or the AWG Board for any questions or concerns.

Handling Money and In-Kind Donations as a Chapter

**IMPORTANT REMINDER:** Only rebate earning chapters can raise funds using the AWG name!!!

Rebate earning chapters are the only chapter type that is authorized to have bank accounts in the AWG name, and as such will have additional financial reporting requirements and legal obligations outlined below (section on “Legal Responsibilities of Rebate Earning Chapters”). Also, rebate earning chapters are the only chapters that can conduct fundraising in the AWG name (see “Fundraising Guidelines and Suggestions for Rebate Earning Chapters” section below).

Student chapters cannot have bank accounts or collect money under the AWG name; however, depending on their university rules for clubs and organizations, they may be eligible to receive funds from the institution (for example, student activity fees). Chapter officers should work with their faculty advisor to follow the university guidelines on management of funds.

All chapters may receive in-kind donations to the extent allowed by local laws. For example, a local business might offer to make copies of a flyer or host your webpage; a local restaurant could provide food or drinks for an event or provide a venue for a meeting.

International chapters cannot have bank accounts or collect money under the AWG name; however, they may solicit financial sponsorship to cover specific expenses (for example, food, drinks, meeting venue, speaker expenses) for a local event, to the extent allowed by local laws. Any funds collected for local events shall be left in the possession of an agreed-upon designated authority (the chapter contact or chapter Treasurer), and preferably within a local bank account established by the chapter’s designated authority.
For more information regarding the financial guidelines of AWG, please contact the Association Treasurer at treasurer@awg.org.

Dues Rebates for Rebate Earning Chapters

Dues rebates are payments from the Association to a rebate earning chapter that return a portion of the Association dues to the chapter for local use. AWG will reimburse your chapter a portion of the dues paid by each person in your chapter once a year, if you have submitted both required financial forms and submitted a chapter rebate request. Rebates will be based on the number of AWG dues-paying members from the chapter that are on the Association roster at the end of the preceding fiscal year (December 31) and the amount rebated will be based on the dues structure (fees for specific membership types) from the preceding fiscal year. The AWG Board of Directors sets the rebate amount for each membership type.

To be eligible to receive rebates, a rebate earning chapter must submit the rebate request form to the AWG office by March 15 of each year and, in addition, must have submitted all the required reports for the preceding fiscal year (see list of required forms). Chapters should request a member roster as of December 31 of the previous year from the AWG Office (office@awg.org) to use in filling out the forms. If all chapter procedures and responsibilities have been met, the AWG Office will mail a check for the dues rebates to the chapter by May 30th of the year in which the forms are filed.

Legal Information and Responsibilities

Legal Foundations of AWG

The Association for Women Geoscientists is incorporated in the State of Colorado as a non-profit mutual benefit corporation. It has been designated as a 501(c)(6) organization by the Internal Revenue Service. AWG rebate earning chapters, within the United States, are listed as subordinates to the central Association under a Group Exemption Letter from the IRS.

The Association is required by law to annually file updated information about Association finances, chapter finances, chapter status, and operations with the IRS and with individual states as needed.

The Association’s fiscal year follows the calendar year and runs from January 1 through December 31. The Association uses the accrual method of accounting. Chapters use the cash receipts and disbursements method of accounting.

All chapter responsibilities are derived from AWG’s corporate Bylaws, IRS documents, and state or local laws. They are the basis for the procedures described in this manual. Because rebate earning chapters are a subsidiary of AWG, hold bank accounts, and fund raise using the AWG name, these chapters have additional legal responsibilities as described in the next section.
Legal Responsibilities of Rebate Earning Chapters

Rebate earning chapters, by definition, exist only within the United States and its territories and must fulfill the following obligations.

1. Each chapter must have its own bylaws and must meet the requirements determined by the AWG Board of Directors.

2. Each chapter must have a federal Employer Identification Number, as required by the IRS. The Association will help new chapters obtain an EIN as described in the section “Submitting Your New Chapter Application.”

3. Each chapter must give annual written authorization to the Association to include the chapter in the Group Income Tax Exemption Letter. This is done by an authorization letter in the New Chapter Application and is renewed annually by a statement on the Financial Reporting Form.

4. Rebate earning chapters are responsible for obtaining their own state and local tax exemptions (see next section for more details), if applicable. A copy of these exemptions should be filed with the Association Office (office@awg.org) and Treasurer (treasurer@awg.org).

5. Chapters are responsible for filing any required state and local income tax or other forms.

6. Required reports to the Association must be submitted to the Association Office (office@awg.org) by the stated deadlines.

7. Delinquent chapters will be placed on probation. If they do not meet minimum reporting requirements, they will be removed from the Association group tax exemption as discussed more fully in the subsection on “Chapter Probation and Dissolution.” The chapter will then be responsible for obtaining its own federal income-tax exemption and for filing a tax return directly with the IRS. The chapter (or individuals) responsible may be liable for any fines or penalties imposed by the IRS due to their failure to file this information.

IMPORTANT!!! Failure to provide financial reports to the Association that are complete and on time will have serious consequences for both the Association and the chapter. Under the Association’s group income-tax exemption, its tax return must contain financial information for all its rebate earning chapters. If this return is late or incomplete, the IRS may require the Association to pay large fines and penalties. The Association will require the individual chapter and officers who are responsible to reimburse AWG for these costs. The chapter will also lose its eligibility for inclusion in the Association’s group income-tax exemption for future years and will then be legally responsible for obtaining its own federal income-tax exemption and for filing an income-tax return directly with the IRS. The potential difficulties are so great that the Association’s Board of Directors may initiate an inquiry into the possible dissolution of the chapter, in accordance with the Association’s Bylaws.

State and Local Tax Exemptions for Rebate Earning Chapters

The procedures for obtaining state- and local-tax exemptions vary widely. It is legally the responsibility of each rebate earning chapter to contact its state and local agencies, determine their specific
requirements, submit necessary information, pay required fees, and file tax returns. The Association Office will give you any documentation that your state and local offices require. Once your chapter has received confirmation of state and local tax status, copies of all documentation should be filed in the legal files at the Association Office (office@awg.org) and a copy sent to the AWG Treasurer (treasurer@awg.org).

The office of your Secretary of State can usually give you more guidance. In general, most states require chapters “doing business” there to file an “organizing document” (your chapter bylaws), obtain a state identification number, and file annual tax returns. According to the IRS, “doing business” includes earning rebates and maintaining a checking account, both of which are common rebate earning chapter activities.

When you contact your state agencies, explain that your chapter is a subordinate to a central organization that is incorporated in the state of Colorado, and that your chapter is to be included in the federal Group Exemption letter of the organization. Your chapter does not wish to incorporate as a separate organization in your state, but you want to know if there are state filing requirements that you must meet to operate within your state as a subordinate to a Colorado corporation. Some states may consider the Association as an out-of-state entity; others may classify it as a foreign corporation. Anticipate that your initial contact may be confusing.

Emphasize to your state agency that AWG is a non-profit mutual benefit corporation organized under section 501(c)6 of the IRS code. Most professional societies fit this classification. Your state tax code will contain equivalents to the IRS code sections 501(c)3 and 501(c)6. Both types of organizations are tax-exempt, meaning that they do not have to pay federal and state income taxes (within certain guidelines and income limitations). Funds or goods provided to a 501(c)6 organization may be deductible as business expenses. However, monetary donations are tax deductible by a donor as charitable contributions only when given to a 501(c)3 corporation. (The AWG Foundation is 501(c)3.)

In many states, a 501(c)(6) organization is not exempt from sales tax. If your chapter is not exempt from sales tax, you may have to collect state sales tax when selling products, etc. It is important to ask your state tax authority what sales are covered under the state sales tax law and whether you might be eligible for an exemption.

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Fundraising Guidelines and Suggestions for Rebate Earning Chapters

**IMPORTANT REMINDER:** Only rebate earning chapters can raise funds using the AWG name!!!

Fundraising is an important part of any organization and it is especially important to AWG because our income from dues must be supplemented by contributions if we are to provide the quality programs our members expect. As a rebate earning chapter, you may take several approaches to fundraising. Additional details are provided below in separate sections.
• Sponsor activities that bring in revenue
• Seek contributions-in-kind (non-cash services or supplies) from local companies
• Solicit local corporations for contributions
• Sell products such as T-shirts or tote bags with your chapter logo – remember to charge state sales tax as appropriate
• Write grant proposals to AWG Foundation or to other external foundations for support of your education programs, as long as these foundations are in alignment with AWG goals and do not violate AWG Bylaws

Sponsor Activities

An example of a chapter-sponsored activity may be a student awards dinner or some other event recognizing the achievements of a particular group. You can sell tickets to the event and calculate the amount to add for each professional member’s ticket to cover student expenses, and potentially add an additional few dollars as chapter income. This type of fund-raising activity is allowed for non-profit organizations because the money will be used for the chapter’s programs.

Another way to raise funds and encourage more people to join your organization is to charge somewhat more for non-members to attend a function than for members, thus giving members a “discount.” Other fundraising activities can include auctions, raffles, garage and bake sales. Frequently, the E-News and Gaea contain articles about a specific chapter’s fundraising activities. These can be a good source of ideas.

Contributions In-Kind

Contributions in-kind are non-cash contributions of a goods or service. For example, perhaps your company will allow you to make copies of a flyer for a chapter activity, or if you are hosting a bake sale, a local bakery might donate some goods. Many restaurants will provide donations of food to feed volunteers at a service project or for refreshments on a field trip or allow their venue to be used for a meeting or event free of charge.

Soliciting Corporate Contributions

Personal contacts are the most effective means of fundraising. Ask friends and colleagues to recommend a person with the authority to commit their company’s funds. And don’t forget to approach your own employer. Consider corporations, consulting firms, engineering firms, other women’s groups, and anyone with whom you do business. The possibilities are endless.

When preparing to meet with a potential donor, do your homework. Plan your conversation. Has your chapter done exciting things recently? Have you or the company benefited from networking through AWG? What are the benefits the company will realize through their support? How does the AWG mission align with the goals of the company? Remember to emphasize the AWG mission and goals.

You should know in advance what amount you are requesting as a donation. Have two figures in mind, one that is high and one that is more realistic. Base your request on the nature of the project for which
you are requesting funds and the size of the potential donor’s organization. Be flexible in finding a niche for the donor. At the very least, perhaps you can convince the donor to become a corporate member of AWG (check the AWG website for a list of existing corporate sponsors); this will not benefit your local chapter, but it will contribute to AWG funds as a whole. A benefit to the corporation is that dues to AWG are tax deductible.

Make an appointment to meet with the contact. During the meeting conduct yourself in a professional manner (be on time, dress appropriately, be pleasant yet professional). Explain your goal, present the person with an AWG brochure or specific proposal, make your request, and close the meeting. Always follow your request with a letter and/or email. Thank the person for their time, summarize your meeting, and close with a specific timetable for an expected response (if appropriate). This letter is often the “clincher,” convincing the person that AWG is legitimate and worthy of their money. An example fundraising letter is included in the chapter resources found at http://awg.org/ChapterResources. Even if you are unsuccessful raising funds this time, this letter may be the key to a contribution in the future. If a reasonable amount of time has elapsed and you still have not heard from them, contact the person again. Persistence pays.

If the person demurs, find out if there would be another person to contact in the same company or if there is a better time in their budget cycle. Do not accept a simple “no.” Gather more information to aid your fundraising effort in the future. Persistence pays.

Keep good records of your efforts. Record contact name, organization, dates, amounts requested for which programs, and results. Repeat these contacts again next year. Persistence pays.

AWG Foundation and Its Role in Chapter Programs

In 1983, AWG established a separate entity called the AWG Foundation (AWGF). AWGF consists of a Board, separate from AWG’s Board of Directors, who generously volunteer their time to provide support for the educational programs and projects of AWG that serve the public. These activities comprise almost 90% of AWG projects. These projects are typically carried out by AWG members (who donate their time and talents) and utilize AWGF funds to assist in paying the expenses of the project. AWGF does not pay overhead, salaries, or benefits for project personnel.

Examples of projects currently or recently supported by AWGF:

- College scholarships, including regional undergraduate and graduate scholarships, as well as Association scholarships such as the Chrysalis Award.
- AWG’s Distinguished Lecturer Program maintains a list of women geoscientists available to academic and other organizations and provides funding for their travel (see http://awg.org/DistinguishedLecturer for more information).
- Girl Scout programs such as geology badge workshops and extended summer field camp activities.
• Expanding Your Horizons programs that show girls how geology is integrated into their lives.
• The Outstanding Educator Award for Excellence in Geoscience Teaching is given each year to a college professor who has outstanding teaching skills and professional credentials.
• Awards for earth science projects at local, regional, and international science fairs.
• Educational conferences, career workshops, and forums that help develop professional skills.

The AWGF can be an avenue for funding support for chapter activities and programs, if those activities are educational in nature (for example, workshops, Girl Scout activities, hosting speakers). A chapter interested in obtaining AWGF funds submits a project application to the Foundation (see instructions below). In some cases, for example the Distinguished Lecture Series, the Foundation may have designated funds and provide direct support for the program. In other cases, the Foundation can serve as an avenue for donors your chapter has identified. For example, if the Foundation agrees that the proposed program meets the public* benefit requirements, then donors you have identified can write tax-deductible checks to the Foundation designated for your chapter’s program; the Foundation will then reimburse your chapter for the program expense. In the case of scholarships, AWGF typically provides matching funds for donations and, in this case, the scholarship funds would go directly to the recipient, not to the chapter, although chapter program expenses may be included in the funding request.

*Important: Any program funded by the Foundation must be available to the public, not just to AWG or chapter members.

Because AWGF is classified as a 501(c)(3) charitable organization by the IRS, this tax status provides a tax-deductible avenue for donations or contributions toward AWG’s missions and goals. Some companies may feel more comfortable giving to the Foundation than to the Association itself or to an individual chapter. If your chapter is conducting fundraising activities, remember to mention the Foundation as a possible avenue for contributions. (It is advised that all donors/contributors consult with a tax advisor for eligibility on all tax deductions.)

Remember that the Foundation exists to educate geoscientists and to promote the cause of women in the geosciences. Their mission is to fund high-impact programs that work to fulfill the mission of AWG. AWGF is intimately connected with AWG and is not in competition with AWG for funds. Your chapter may solicit and accept contributions on behalf of the Foundation, even though funds that are earmarked for the Foundation do not contain a chapter or Association component; 100% of the funds raised on behalf of the Foundation are turned over to the Foundation – no exceptions. Checks must be made payable to “AWG Foundation.” Be sure to inform the Foundation Treasurer whenever you are planning a fundraising effort on behalf of the Foundation and notify the Foundation of the results.

Forms and instructions for submitting a funding proposal to the Foundation can be found at http://awg.org/RequestFunding. Proposals should be submitted at least 45 days before the AWGF Annual Meeting, usually held the weekend before the annual meeting of the Geological Society of America.
Changing Chapter Status or Name

Chapter Probation and Dissolution

Failure to comply with the chapter reporting requirements described in the “Reporting Requirements” section can lead to a chapter being placed on probationary status and potentially dissolved. The AWG Board does all that it reasonably can to support chapters that are having difficulties. It is important that chapter officers notify your Regional Delegates and/or the AWG Board regarding any difficulties you are having in fulfilling AWG requirements, maintaining membership, finding officer candidates, etc.

In some chapters, membership fluctuates so much that the critical mass of interested people may not be available in some years to maintain all chapter functions. For example, the chapter may not be able to find candidates for office or hold elections. A chapter that does not meet minimum requirements is allowed a one-year probationary period in the hope that the chapter can maintain its structure until new leadership emerges. However, certain minimum requirements must be maintained.

Minimum requirements for chapters in probationary status:

- ALL CHAPTERS - Have at least three acting officers who submit required forms and serve as contacts for AWG Board.
- ALL CHAPTERS - Chapter Officer Reporting Form
- REBATE EARNING CHAPTERS ONLY - Financial Reporting Forms (due by August 15 and February 15). A chapter in probationary status is not eligible for dues rebates, but it is still required to file the Financial Reporting Form, so AWG can fulfill Internal Revenue Service requirements and file federal income tax forms.

IMPORTANT!!! Rebate earning chapters that do not submit Financial Reporting Forms are subject to immediate dissolution by the AWG Board of Directors. In addition, they must file income-tax returns directly with the IRS for any years when they are not included in the Association’s group income-tax return.

The process:

When a chapter only meets the minimum requirements listed above at the end of a fiscal year, its probationary year will begin at the start of the following fiscal year (the year after the one covered in the financial reports). The Association Office will notify a chapter when it is placed on probation.

A chapter on probation may return to good standing by filing all the required forms. If the chapter still does not have the critical mass of individuals needed to revitalize after one year of probation, it will be asked to dissolve. Upon dissolution, the chapter’s funds must be returned to the Association, but these funds will be reserved in the chapter’s name for two years following its probationary year. If the chapter is able to revitalize within that time, these funds will be returned to the chapter, and the chapter can continue as before. If more than two years elapse, any members wishing to re-establish the chapter will be required to start a new chapter following the procedures outlined in this manual.
If a chapter elects to dissolve, it should send a request, via the Regional Delegates, to the Association President (president@awg.org) for consideration at an upcoming Board meeting and should follow the procedures identified in Article X, section 15, of the Association Bylaws. If the Board approves the request to dissolve, all financial assets of the chapter must be turned over to the Association.

Chapter Name Changes

If a chapter is considering changing its name, it must first determine that the potential new name is not already in use by checking the AWG webpage (http://awg.org/Chapters) and by contacting the Board (BOD@awg.org). Once it is determined the new name is not in use, the chapter should bring the name change up for a vote at a regularly scheduled meeting or through an email vote, and a majority of the current members must agree to the change. If the change is approved, the chapter must notify the AWG Office (office@awg.org) and Board (BOD@awg.org) as soon as possible.

If the chapter is a rebate earning chapter, the chapter officers are responsible for contacting the AWG Treasurer (treasurer@awg.org) to discuss the change. The AWG Treasurer can provide guidance on steps necessary to update IRS and EIN documents, which MUST agree with the official chapter name. The IRS needs to change the name it associates with the Employer Identification Number. Copies of new or altered federal, state and local tax forms (if applicable) must be filed promptly with the Association Office (office@awg.org) and Treasurer (treasurer@awg.org).

Merging or Splitting Chapters

Two chapters within the same state or adjoining states may decide to become one chapter, especially if one of the chapters has declined to the point that it’s in danger of dissolution. The first step is to contact your Regional Delegates and discuss your intentions with them. Your Delegates and the Board (BOD@awg.org) can provide guidance on procedures, but any change in chapter status must be agreed to by a majority of members in each chapter. A newly merged chapter must hold new officer elections and revise its bylaws to reflect the change. If both chapters have treasuries, the treasuries are then combined into a single chapter account.

Occasionally chapters become very large and/or cover such a broad geographic area that it is difficult to organize programs that will benefit the entire membership. If this occurs, it might be time to consider dividing the membership to form two smaller chapters. If you feel your chapter may be in this position, contact your Regional Delegates and the Board for guidance on how to proceed.

Switching Chapter Type

Under some circumstances, a chapter may wish to switch from one type to another. For example, a non-rebate earning chapter may acquire enough active members who express a strong interest in regular activities, or a desire to raise funds for AWG programs, to enable the chapter to shift to rebate earning status. Conversely, a rebate earning chapter may lose members and have a hard time maintaining a regular program and managing the financial reporting requirements, so they may wish to shift to a non-rebate status. Student chapters may wish to switch status to allow for a more diverse membership. In all these cases, the first step is to start a conversation with your Regional Delegates, who can guide you through the pros and cons of making a switch in chapter type. If you decide to
proceed, the Board will need to approve and guide you through the process. It is important to note that international chapters cannot switch their chapter type.

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**Closing Thoughts**

Chapters are an integral part of AWG, and many of the Association’s goals cannot be fulfilled without them. Consequently, the AWG Board sincerely thanks chapter officers for your service and vitally important contributions to AWG. Chapters are the front lines of serving our members and often pioneer projects that turn out to be applicable to the entire organization. Your creativity and commitment to the goals of AWG are very much valued and appreciated.

The Association is always ready to help and support chapters. Feel free to contact your Regional Delegates, the AWG Office, and members of the AWG Executive Committee with any questions and suggestions for improving AWG’s functions.