

I. Introduction

A. About the Handbook

This handbook for Chapters of the Labor and Employment Relations Association is provided as a resource for serving LERA members and the local industrial relations community. The handbook contains important information to assist in making your Chapter an effective part of the national LERA organization.

The handbook has been designed to provide officers and members with important organizational information for establishing, maintaining, and building your Chapter. It is intended to help you create a unique forum for practitioners, academics, and others in your area who are interested in industrial relations practices and developments.

The online handbook will be updated regularly, as new information is received. The Chapter handbook is an important resource especially for newly elected officers. The staff of the LERA office and the members of the NCAC (National Chapter Advisory Committee) as well as your appointed NCAC Liaison are prepared to assist you. For inquiries, please contact LERA staff at LERAoffice@illinois.edu or the NCAC Chair or Vice-chair.

B. National Chapter Advisory Committee (NCAC)

The National Chapter Advisory Committee, or NCAC, is comprised of a Chair, a Vice Chair, and several members who serve three year-terms. The NCAC members are selected from Chapter leaders around the country to have experience running successful LERA Chapters. This group meets at least annually at the LERA Annual Meeting and is concerned with supporting and growing LERA Chapters.

Find the current NCAC roster at the LERA website here:

<http://www.leraweb.org/about/committee-rosters#ncac>

C. LERA Chapter Online Resources

LERA maintains its Website at <http://www.LERAweb.org> where we host Websites for all LERA Chapters. Please locate your Chapter's Website by visiting the LERA website and choosing 'Participate' and then 'Chapters'. Here, you will find both your own Chapter Website and all the LERA Chapters' Websites. You will also find information and resources available to LERA Chapters here.

Find Chapter information and resources and see all LERA Chapter Websites listed alphabetically by state here:

<http://www.leraweb.org/participate/chapters>

II. Labor and Employment Relations Association

A. History and Purpose

The Labor and Employment Relations Association (formerly IRRA-Industrial Relations Research Association) was established in 1947 when some 20 people organized a committee to form an association focusing on "labor theory"... in contact with reality.

"We started out as rebels...We first met almost like conspirators." Clark Kerr, President Emeritus, University of California, a founder of IRRA.

In the late 40's universities were including labor economics in their curricula, industrial relations centers were being created and professionals were entering industries, unions and government - the "rebels" had a cause...

To encourage discourse in the field, to provide a forum where practitioners can share ideas, and to bring together people from related fields to discuss matters having an impact on labor-management relations.

At the end of 1947, the fledgling group held its first meeting, and over 100 people attended. They selected the name "Industrial Relations Research Association", in the belief that it was all-inclusive, denoting the entire field. The word "Research" reflected the Associations' commitment to encourage and discuss a full array of research and ideas in all aspects of the field.

In 1948 IRRA was 1,000 members strong and held the first annual meeting in Cleveland. The Associations headquarters was established at the University of Illinois by the first secretary-treasurer, William H. McPherson, and editor, Milton Derber. In 1954, the office was moved to the University of Wisconsin-Madison and remained there until 1999, when it returned to the University of Illinois. Cincinnati was the site of the first IRRA spring meeting in 1951.

Chapters have always been a vital part of the Association, providing energy, resources for ever changing leadership, and continual and evolving reflection of the dynamic field of industrial relations/human resources. The first Chapter was formed in 1948 in Washington DC followed soon after by Chapters in New York, Detroit, Philadelphia, Chicago, Boston, and Wisconsin. Today there are approximately 50 active Chapters located throughout the United States and Canada that meet to discuss issues of mutual interest.

IRRA Bylaws established in 1947 required Chapter officers to be members of the National Association. An amendment passed by the Executive Board in 1990 requires Board members to be members of the Chapter where one is geographically available. In 1989, a Chapter Advisory Committee (NCAC) was formed to assist the Executive Board in identifying ways the national IRRA could work more closely with Chapter officers and members. Chapter officers and representatives meet with officers and NCAC members each year at the annual and spring meeting. Over the years, the National has drawn heavily on Chapter members for its officers and board members, and for participants in the two annual meeting programs.

In 2005, the IRRA changed its name to the Labor and Employment Relations Association to reflect the changing field, and we are now known as the LERA.

LERA publications have played a major role in fulfilling the Association's purposes of sharing ideas and knowledge. Annual research volumes, widely praised for their significant contributions to the field, have traced, assessed, analyzed and compared the changing issues, priorities, and concerns which have arisen in the industrial relations setting both in the US and abroad. Proceedings from annual and spring meetings have informed and stimulated discussion on topics of interest to members and the IR/HR community in general and have provided the ties that bind. The popular practitioner magazine *Perspectives on Work* covers issues such as the internet driven workforce and social security reform. The Membership Directory (now online for all current national members) is a handy guide for connecting with colleagues and professionals in the field. Quarterly Newsletters (also online) have for years kept members abreast of the activities of the association.

The LERA counts a membership of 3,200 professionals representing leaders from management and unions, their advocates, academics, representatives of governmental organizational members that support the research and publications of the association. Additionally, libraries and other agencies subscribe to the LERA publications.

Each period in our history has offered new challenges and today is no exception. The Electronic Age has accelerated and facilitated the flow of information and technology, sometimes at a pace which is difficult to comprehend. Organizations such as the LERA become even more important as a forum for dialogue between and among the many interests in the workplace setting and an excellent vehicle to promote understanding of the rapid changes and the priorities of a global economy.

B. Chapter Benefits of Affiliation with LERA

- Chapters gain the drawing power and prestige of the Association's name as a national organization with a history of more than 60 years.
- Up to date online information for all local Chapters, revised weekly.
- LERA Chapter online website hosting and event calendar, with Chapters able to maintain and upload information in real time.
- Group extension of the Association's nonprofit tax exemption status (501)(c)(3) is available to individual Chapters. Nonprofit bulk mailing privileges can then be obtained by Chapters with the tax exempt status, tax-exempt contributions can be accepted by the LERA Chapter, and the bulk of the IRS filing requirements are met. See Section IV, F and G for further information about filing requirements.
- Select volumes of LERA publications are available for display at Chapter meetings along with order forms (also available online). They are sent to Chapters several times per year or upon request.
- Mail list of national members in the Chapter area are supplied to new and reactivating Chapters and to Chapters upon request.
- Several workshops at LERA Annual Meetings are planned by the local (host) Chapter and the National Chapter Advisory Committee (NCAC) and have predominantly local and Chapter participants. With the advent of the newly minted independent LERA Annual Meetings, LERA Chapters will actively coordinate LERA's Annual Meeting in conjunction with program committees, beginning 2013.
- The NCAC was established in 1989 and its members are long-time Chapter and national members.

- The NCAC maintains a liaison list. Each member of the NCAC acts as an advocate and liaison for a number of LERA Chapters. Find your Chapter Liaison at the LERA Chapter Resources page.
- The NCAC/Chapter Representative meeting for officers and Chapter representatives is hosted by the LERA Annual Meeting. This enables Chapter people to become acquainted, exchange ideas, and channel suggestions to the Executive Board through the NCAC Chair. Minutes of these meetings are sent to each Chapter in the late spring.
- National Executive Board Members and officers are available to the Chapters as meeting speakers. A list of speakers and their topics is updated and sent to Chapter contacts and presidents each year and is available online.
- A listing of Chapter programs, topics and speakers is maintained online, enabling Chapters to see examples of other Chapter's programming.
- Chapters can submit events to the LERA Event Calendar, increasing their marketing of particular events with no additional cost.
- Current Chapter contact persons are listed in the Chapter Profiles, for easy inter-Chapter communication.
- LERA-Chapters Listserv functions as a resource for LERA Chapter Officers and Board Members to easily communicate between themselves, and connect with the NCAC for additional support and resources.
- Chapters have significant representation at the national level. The NCAC Chair is a member of the National Executive Board and gives voice to Chapter concerns to the Board. Most officers and Executive Board members have participated in local Chapter activities.
- All local Chapters are listed in the national membership brochure and dues notices. People are encouraged to call the office for the name and phone number/email of the local contact person nearest to them.
- Each quarterly Newsletter, available online, carries Chapter articles that describes Chapter activities, organization, and programs. Chapters are asked to submit a brief article and possibly a picture for inclusion in the newsletter.
- Chapters receive extra copies of LERA publications with bi-annual to quarterly Chapter mailings from the office. Additional copies are available upon request.
- The national staff and members of the NCAC consult with local Chapters needing advice on speakers, membership promotion, and program topics. Each NCAC member serves as a liaison to several Chapters.
- Information is available online at www.LERAweb.org, the official LERA website regarding Chapter grants and Chapter awards, and Chapter event, profile, and grant submission forms are also available.
- The NCAC assists people/members interested in forming a new LERA Chapter.
- Chapters are listed in the LERA membership directory available to all LERA members.

- The LERA publishes a wealth of information and research on industrial and employment relations. Publications include Annual Meeting Proceedings, Research Volume, and the magazine Perspectives on Work.

C. Individual Membership Benefits with LERA

Find information about benefits of being an individual member of the Labor and Employment Relations Association here. All Chapter Officers should become LERA individual members if and are encouraged to attend the LERA Annual Meeting. Please see benefits of individual membership here:

http://leraweb.org/membership?quicktabs_2=0#quicktabs-2

D. LERA Constitution and Bylaws

To learn more about the Labor and Employment Relations Association, please read the Constitution and Bylaws of the Association at the LERA website. Please visit this page:

<http://leraweb.org/about/labor-and-employment-relations-association-constitution>

E. LERA Logos and Guidelines

Using LERA Logos

The LERA logo is the identifying symbol of the Labor and Employment Relations Association used in most official LERA graphic communications. It may not be used by for any purpose unrelated to LERA programs or activities without express permission of the LERA Office. For assistance in using these graphics, please contact the Paula Wells, at (217) 333-0072.

All files are in Adobe Illustrator EPS files. The .eps version is a vector-based graphic that can be resized to any proportions. They may be downloaded by clicking on the sample image or file name below. Save the downloaded file to a hard drive location, then insert the image into a document, such as a Word or Publisher page.

Logo downloads can be found on the LERA Website:

<http://www.leraweb.org/lera-logos>

III. Chapter Information

A. Starting a LERA Chapter

1. Beginning the Process

Although there are numerous organizations which serve the interests of each of the groups and disciplines which are represented in the LERA, our organization is unique in that it has the greatest potential for inclusively of all those who labor in our field of industrial/labor/employee relations and related interests. Most Chapters have been started by members who moved to locations where there was not a Chapter, individuals who were introduced to the LERA through business or union acquaintances or by academics at universities who were teaching or researching in the field.

The first step in starting a Chapter is to form a committee to ascertain whether there is sufficient interest in forming a Chapter. This core group should include a wide spectrum of interests: mediators, arbitrators, attorneys, academics, government, labor and management representatives, human resources and personnel officers from a cross section of private, public and federal sectors.

If there is sufficient interest in starting a new Chapter, contact the national LERA to inform them of your interest in forming a chapter and supply them with contact information. New Chapters should always refer to themselves as Organizing Chapters until affiliation with national has been completed. New Chapters should maintain close contact with the office throughout the organizing process.

Next, the organizing committee should develop a large mailing list of people in the field or related fields who might be interested in participating in or joining the Chapter (see Sources of Members and Tips from Experienced Chapter Officers). The Federal Mediation and Conciliation Service is a good place to start locating names for your list. Check other governmental agencies, colleges and universities, bar associations, unions, and be sure to use the listing of national members in the area.

"Seed" money for initial start-up costs and mailings can sometimes be acquired through funds from a university, a co-sponsoring organization, a nearby sponsoring Chapter or a company or union.

2. Considerations before Moving Ahead

Is the area large enough to provide a membership base from all the constituencies? labor, management, neutral, academic?

Is the area located near an existing LERA Chapter? If so:

- a) Is the area large enough to support two existing Chapters without depleting the membership base of one or the other?
- b) Is the distance/commute between the two Chapters at least one hour in time and of significant distance?

If the answers to a and b are yes, the LERA asks that you seek to work with the existing Chapter to first

- a) See if the existing Chapter would mentor or sponsor a new group by planning one or more meetings in the new location. This would give the opportunity to try out the new location.
- b) See if joint memberships would work for the two groups.
- c) Work to schedule meetings that complement rather than compete with each other (evening vs. daytime; different times of the month). It is desirable to allow access and choice for the greatest number of people.

3. Recommendations of the National Chapter Advisory Committee

- a) Find a "home base" for the Chapter that provides a location for Chapter records and has access to computer and/or secretarial help.
- b) Select a contact person or secretariat that agrees to serve over an extended period of time. This provides continuity for the Chapter and an on-going liaison with the office.
- c) Consider bringing officers "up through the ranks" to President or ask officers to serve a two-year term to provide continuity and expertise.
- d) Keep recent past officers active by asking them to serve as chair or a member of a committee such as membership, program or nomination. They have the experience and expertise that should be shared.

4. Requirements for Chapter Affiliation with the National Association (from National Bylaws)

- a) The Chapter is formed to advance the purposes of the National Association (see national constitution, #2).
- b) Chapter Bylaws are consistent in purpose and intent with those of the Association.
- c) Officers of the local Chapter are required to be members of the National Association.
- d) No financial obligation of the local Chapter shall be a contingent obligation of the Association.

5. Process of Affiliation with LERA (from the LERA Bylaws)

- a) The Chapter will send to the Office
 - Its request for affiliation
 - An approved draft of Chapter bylaws
 - A list of planned programs
 - A list of elected officers
- b) The request for affiliation will be presented for confirmation to the Executive Board at its annual or spring meeting.
- c) The Executive Board may accept or refuse affiliation. If accepted, the Office will issue a certificate of recognition.
- d) The Association will not interfere with activities of the Chapter provided that they conform with the purposes of the Association. The affiliation of any Chapter whose program or activities are inconsistent with the aims and purposes of the Association, may be terminated by a vote of the Executive Board.
- e) Each Chapter will pay a fee to the national LERA. It is the policy of the office to waive dues from a Chapter during the first year of its affiliation.

6. Chapter Responsibilities to the Association

When Chapters affiliate with LERA, they are asked to be responsive to the developing relationship between the national and Chapters by:

- a) Informing the office when there are changes in Chapter officers or the contact person.
- b) Putting (and keeping) the office on the Chapter mailing list so it receives Chapter mailings of meetings and conference notices and information about becoming a member.
- c) Assisting with fulfilling the requirement that the Chapter officers be members of the national association.
- d) Paying Chapter dues to the national association in a timely manner.
- e) Answering requests for information from the office (such as writing an article about the Chapter for inclusion in an LERA Newsletter).
- f) Once a Chapter is firmly established, it needs to continue to seek ways to develop growth in membership and variety in programming. Often Chapters will seek out other groups with similar interests for joint sponsorship of programs or conferences. Collaboration with other groups has helped Chapters get their name out in public, increase attendance at meetings and enabled them to exchange mailing lists for membership promotion.
- g) Recently Chapters have followed in the footsteps of the National by developing "organizational memberships" where for a larger dollar amount, an organization receives a certain number of memberships and/or attendees at meetings or conferences of the local Chapter. The Gateway/St. Louis Chapter has been especially effective in raising Chapter money in this manner. By increasing the financial base of the Chapter, it is able to pay expenses or an honorarium for well-known speakers who must travel to the Chapter to speak for a program.
- h) Programming is perhaps the single most important criteria for keeping interest in the Chapter. It is always necessary to have programs of broad appeal. This can be done through panels where both sides of an issue are presented. It can also be done by alternating programs that appeal to specific sectors of the membership.
- i) The physical space, date and time of meetings are also important for membership to grow and mature. It may be necessary to survey Chapter members from time to time to assess the appropriateness of lunch vs. dinner meetings; quarterly vs. monthly meetings, etc. As the membership changes, sometimes the needs of the members also change.
- j) Chapters always need to work on developing their membership base. To keep the balance of the various constituencies, it is necessary to make sure that one group does not become dominant to the exclusion of the other constituencies.
- k) How is your Chapter doing? Take this quick Chapter Visibility Test to assess how your Chapter is doing in its communications and visibility within the community. If you can answer "yes" positively to these questions, your Chapter is probably doing well regarding growth and sustaining itself.

B. Growing and Sustaining a Chapter

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How is your Chapter doing? Take this quick Chapter Visibility Test to assess how your Chapter is doing in its communications and visibility within the community. If you can answer "yes" positively to these questions, your Chapter is probably doing well regarding growth and sustaining itself.

- Do you publish a Chapter newsletter monthly? quarterly? occasionally?
- Do you regularly provide info about your Chapter and the national association to non-members? to the business and labor community? to your members?
- Do you have a brochure that is updated every year with contact members, meetings, and co-sponsored events?
- Do you shamelessly borrow mailing lists from other sources and send out info on Chapter activities? Do you send and resend info to the same group of people?
- Do you co-sponsor events with other organizations?
- Do you maintain a speakers' bureau and offer to participate in conferences and panels? And do you notify the press when you do or regarding other issues?
- Do you use materials from the national LERA Chapter handbook or resources from the office to develop a visible program? Do you utilize resources from the Chapter Advisory Committee?

C. Chapter Administration

The majority of Chapters elect officers which include:

- President
- President-elect/Vice President
- 2nd Vice President
- Secretary
- Treasurer

Chapters may also appoint or elect chairs of various committees such as program, nominating, membership, etc. Some Chapters have Advisory Boards, Trustees, or a Board or Governors that act at the direction of the President. Trustees oversee the financial obligations of the Chapter.

The norm is for annual elections, usually in the spring with the rotation of officers occurring each year. A few Chapters operate on a two year cycle. Most Chapters work to bring officers up through the ranks until they become President. Following the lead of the national association, most Chapters seek to rotate its officers among the various constituencies of the Chapter. Although this is the norm, there are many variations across the LERA.

The strongest Chapters have maintained an ongoing administrator or contact person over a long period of time. This provides continuity for the Chapter and includes personal contacts with old and new members, knowledge of meeting place arrangements, practices, mailing lists, etc. In the past, two Chapters have hired a paid staff person to act in this capacity. This role can be aided by access to computers and having available help for handling mailing lists and directories. Whether it is a member who can work out of home or office or a university setting, this is a very important element as the normal rotations result in changes of leadership making it difficult to create a "stable" setting in the minds of the labor-management community.

Officers are generally unpaid, although many Chapters waive their local Chapter dues and/or pay their dues to the national association. Some Chapters reimburse their officers for expenses including luncheon fees and costs of travel to meetings. Some Chapters help with expenses of their representative to the annual national meeting and attendance at the Chapter Representative meeting. This depends on the size of the Chapter and its financial well-being.

D. Chapter Officers and Their Suggested Duties

Chapter President

- Serves as Chief Executive Officer
- Has final authority and responsibility over all functions of the Chapter
- Usually rotates through the representative groups: academic, labor, government/neutral, management
- Presides at all meetings of the Chapter and Executive Board
- Serves as Ex-officio member of all committees
- Appoints individuals to committees to perform functions as deemed necessary
- Co-signs all checks
- Solicits new members for the Chapter
- Plans regular and special meetings
- Serves a one or two year term

Chapter President-Elect

- Assumes the position (duties and power) of the President in instances of inability to serve or in the absence of the President
- Coordinates duties of vice presidents
- Co-signs checks
- Becomes the President-the Executive Vice President becomes President-Elect

Vice President(s)

- May serve as chair of a committee: membership, programs, nomination, publicity, planning/arrangements

Past President

- May become a trustee
- May chair a committee
- May assist with long-range planning

Secretary

- Keeps records of the Chapter
- Notifies members of the meetings (may take reservations)
- Circulates all bulletins and publicity
- Corresponds with Office and other Chapters
- Maintains Chapter mailing list

Treasurer

- Has custody of the funds of the Chapter
- Responsible for the collection of dues
- Makes a complete financial written/verbal report to the membership once per year (at fall or spring general meeting)
- Disperses funds for payment of expenses approved by the Executive Board
- Serves as guardian for any and all Chapter property

Suggested Chapter Committees

- Nomination
- Membership
- Programs
- Publicity
- Planning/Arrangements

Some Chapters have an Advisory Board or Board of Governors that assist the President in an advisory capacity or in planning programs

Some have Trustees that may review the financial records of the Chapter

E. Chapter Budget and Finances

Relatively few Chapters have a formal budget; most proceed on an informal basis. Some have a budget that covers large, general categories. Major costs of Chapters include: meeting notices-including necessary telephone costs for contacting vendors, community members, etc.; newsletters; meeting rooms; meals; speaker fees; miscellaneous costs associated with Chapter administration, for example printing, copying, and postage.

Chapters build into the fee charged for luncheon/dinner meetings any additional cost they might incur (announcements, charge for the meeting room, speaker fees, etc.). Some Chapters require payment before the event with no reimbursement for cancellations. If a Chapter combines advance and pay-at-the-door arrangements, the restaurant/hotel needs to be flexible about additional meals. Frequently, the restaurant/hotel will not charge for a meeting space room if it expects to do enough meal business. Hotels/restaurants may give Chapters special arrangements and prices if they commit to a year's meeting schedule of luncheons or dinners. Keeping costs and travel to a minimum is essential.

Speakers may be willing to waive fees in order to gain public exposure. Some Chapters have shared fees and travel costs with other Chapters by arranging for a series of meetings in a common geographic area.

Universities and institutions or enterprises relevant to the field which are willing to sponsor/co-sponsor meetings or luncheons are able to gain public relations opportunities and if the topic is of general interest, get press or trade paper coverage.

F. Chapter Dues to the LERA

Chapter dues are based on the size of the Chapter's membership. Chapter dues invoices are mailed to the Chapter contact, treasurer, and Chapter president (when possible) starting in February each year. Past due notices are also sent at this time. Unpaid invoices are reissued throughout the year, included in other Chapter mailings.

Chapter Dues Rates

	2011	2012	2013
25 or fewer members	100	125	150
26-50 members	175	225	250
51-100 members	300	375	450
101-200 members	350	425	500
Over 200 members	425	525	650

If your Chapter is having financial difficulty, please contact the LERA office at: <mailto:LERAoffice@illinois.edu>.

G. Dues Charged to Chapter Members

Local LERA Chapters charge a range of dues to their members, often depending on the size and activity level of the Chapter. Chapters may divide their membership into regular, student, retired, and organizational members.

Example of dues charged by Local Chapters (for the most current figures visit LERA Chapter Websites):

- Regular: \$10 (Gold Rush, CA) -\$50 (Atlanta)
- Student: \$5 (Chicago) -\$15
- Retired: \$5-\$15
- Organizational:
 - Patron Dues: \$80 (Gateway)
 - Regular Organization: \$50 (Detroit)-\$325 (TERRA)

The amount of the dues charged by Chapters to their members are included in the Chapter profile listing for each Chapter.

H. Chapter Grants

The LERA offers local Chapters the opportunity to apply for individual Chapter grants. Grants are awarded on a first come, first serve basis. The maximum award per grant is \$125.00, and a maximum of \$1,000.00 will be awarded each calendar year. Chapters may apply for one grant per year.

Chapter grants are intended to assist Chapters in promoting LERA activities and membership, both on the national and local level. Chapters are asked to submit a request to the LERA office. Applications are reviewed by the grant committee.

Chapter Grant Committee

The following National Chapter Advisory Committee members are members of the Chapter Grant Committee:

- Dennis Teel , Arizona LERA Chapter and Grant Committee Chair
- Talmage Reynolds, Alabama LERA Chapter
- William Canak, NCAC Chair and TERRA Chapter
- Lavonne Ritter, Southern Nevada Chapter

I. Chapter Meetings and Programs

Nothing is more important to a Chapter's vitality good programs (along with the mechanisms to inform many people about them). Successful Chapters put their best people on the program committee and make sure they represent all interests of the Chapter. Some Chapter have an advisory board whose only job is to meet once or twice a year to plan the programs. Often they are "senior members: who have good contacts

and know about past programs, but NYC reports asking younger members to serve as a way of getting them involved and bringing in fresh, new ideas.

The single best way to get an overview of the many possibilities for programs is to study the Chapter Profiles listing which describes the programs and activities of LERA's Chapters. The LERA Office also compiles a list of Chapter programs, topics and speakers taken from the meeting notices. Chapters are encouraged to use the Board Speakers List to invite officers and Executive Board members to speak at local meetings.

In addition to scheduling good speakers and interesting topics, each Chapter needs to consider the time and place of meeting that is best for the majority of members. Polling the membership as it changes through the years may be helpful. Most Chapters prefer the same time-same place structure. Some Chapters alternate between luncheon and dinner meetings, and a few Chapters have tried breakfast meetings. Some Chapters change the day of the week, some have meetings consistently on the same day of the week. The value of having meetings on the same day of each month is that people can regularly schedule on their calendar well in advance of the actual meeting.

Hotels/restaurants are most practical when public transit is nearby or low-cost parking is adjacent. Cities that draw people from surrounding areas during the workday seem best for meeting locations. Other Chapter meeting sites may include a university of faculty club, or a training or conference center. Chapters that cover a wide geographic may alternate sites to attract a wider membership. The more Chapters can make arrangements in advance and in a series, the better able they are able to draw a good crowd and negotiate a lower price for meals, etc.

Getting out the word requires careful attention to the choice of speakers. Good attendance requires something more-making sure that everyone on the mailing list receives timely and informative notices. Some Chapters send notices via email to their members. Include enough details about the meeting/speaker(s) to arouse interest, perhaps a clipping from a newspaper or journal, a picture or other background information about the speaker(s). Some Chapters use brightly colored paper to catch viewer's attention. Listing future Chapter meetings with the date, speakers, and topic is also important.

Some Chapters plan the programs for the entire year, usually during the summer, and then present the plan to members in the fall. Other Chapters plan only a few meetings ahead on their schedule. A few Chapters schedule only a month or two ahead so they can address timely topics and get speakers who might be visiting their area. Contacts and arrangements for speakers is generally done by the Program Chair or assigned to a Program Committee.

Program planning should be delegated to members who are aware of the need to schedule to meet the interest of all constituencies sometime during the year. Some Chapters include past officers, especially the Past-president on the Program Committee because often they have been active in the Chapter over time. These leaders should be able to entice the top people for presentations. Chapters that have developed financial reserves over the years may offer to pay the travel expenses of speakers.

A listing of topics and past Chapter speakers can be found at the LERA Website here:

<http://www.lera.illinois.edu/chapters/handbook/ChapPrograms.htm>

J. Chapter Awards

LERA maintains the Chapter Awards Program to recognize the exemplary work of Chapters each year. These are ceremoniously awarded at LERA's Annual Meeting each year, and Chapters are encouraged to self-nominate for Chapter Awards.

Please see complete information at the LERA Website here:

<http://leraweb.org/opportunities/awards/10>

K. Other Chapter Activities

Chapter newsletters can assist a Chapter in publicizing meetings, reporting on past meetings and topics of interest in the field of industrial relations. Some Chapters also introduce new members through their newsletter.

As we have moved into the electronic age, Chapters are encouraged to use this resource to their advantage. The LERA web site offers information on meetings and programs, membership information, publications, Chapter meeting information and profiles, the Event Calendar, Awards, section and committee information. Chapters can post their meeting information online at <http://www.LERAwEB.org> or by emailing LERAoffice@illinois.edu. Some Chapters send information to members via email or fax, less costly and more timely than regular mail.

Some Chapters have developed their own web site or asked the office to post a web site with in the national web pages. Chapters often include a home page, a member directory to assist members as they network and to encourage members to become better acquainted, meeting information, a listing of officers and board/committee members, and information or a printable form describing how to join the Chapter. Please contact the office if you are interested in setting up a web page for your Chapter.

Some Chapters provide scholarships, grants or prizes or other services for members and families. Some examples are Alabama (scholarship), Western New York (award), Southern California (scholarships and project grants), and TERRA (services).

IV. Chapter Resources

A. Sources of Membership

General Information and Agencies Listing

The Industrial Relations and related fields include many disciplines and interests. In addition to the LERA membership directory, which is available online to active national members and includes the names of individuals who may live in your area, there are also professional organizations and government agencies which are involved in the field:

- American Arbitration Association (AAA)
- American Bar Associations, including Labor Law sections
- Association for Conflict Resolution (ACR)
- American Federation of State County & Municipal Employees (AFSCME)
- Chamber of Commerce and their subgroups
- Department of Personnel Administration (State, county, city)
- Employment Relations Departments
- Employer Associations (Association Gen Contractors, National Electrical Contractors)
- Federal Labor Relations Authorities (FLRA)
- Federal Mediation and Conciliation Service (FMCS)
- Human Resource or Labor Management Councils
- Local Labor Unions
- Manufacturer's Councils
- Merchants and Manufacturers Associations
- National Labor Relations Board (NLRB)
- National Mediation Board (NMB)
- Personnel Associations
- Public Employment Relations Boards/Commissions (PERB)
- State Board or Labor Relations
- State Employment Services
- State Industrial Relations Departments
- State Mediation and Conciliation Services
- State Industrial Relations Departments
- State Mediation and Conciliation Service
- Society for Human Resources Management (SHRM)
- University IR/HR Schools and Labor Education Departments

How do Chapters interest people from these groups in LERA membership? Some get mailing lists and send letters of invitation and a Chapter brochure. Other Chapters invite groups as their guests to a meeting with the speaker chosen to interest the visiting group. Many Chapters join with other groups to jointly sponsor an annual conference or seminar, or simply schedule a joint meeting.

A one-on-one approach is considered most productive. This often takes the form of inviting a colleague to a meeting as a guest or a personal phone call by a Chapter Officer to the office of the head of a firm, union, etc. (the latter approach is most important when seeking organizational/institutional memberships).

The LERA Office will provide a listing of the national members in your area. Chapters can then send brochures and letters of invitation to national members who are not Chapter members.

Information for Prospective Chapters: A letter from Bill Canak, TERRA Chapter

We founded our Tennessee Chapter in 1997 and were chartered by IRRA in 1998. I began by identifying a group of labor relations professionals from around Tennessee, public and private sector managers, union officials, AAA and FMCS representatives, professors who work in labor relations, and attorneys (mgmt and labor). It's very important to contact the state labor council and let them know what you are doing and solicit their support. In Michigan you have strong ILR programs at two universities, Ann Arbor and MSU. If you don't have contact information, please tell me and I can provide names, addresses and phone numbers. You also have two Labor Education centers in Michigan, one at Northern Michigan (Ted Balzarini) and MSU (Scott Tobey). These centers are part of the University and College Labor Education Association and usually have very experienced and well-connected practitioners who know the state thoroughly and can help you to make contacts and avoid mistakes. I also asked IRRA for a list of its members in the state. In 1997 we had two organizing meetings to which I invited people I'd identified. Along with the invitation I sent information about IRRA (which they supplied).

Those attendees who were supportive then became part of my organizing committee and we did a couple things. First, we began building a mailing list. Use every contact and source you can think of. Second, we started a website. Universities are well equipped to do this gratis and one of the labor education centers may help. Third, we began planning a "kick-off" conference.

Then we began program planning. IRRA was very helpful and several national figures who are active in IRRA came to the conference. Pick a set of hot topics for sessions, panels and workshops. DO NOT MAKE IT ACADEMIC. DO NOT ASK PEOPLE TO WRITE PAPERS. I recommend sessions on such things as health and safety, FMLA, Workforce Investment Act, recent issues at the NLRB, a panel of arbitrators talking about how they make decisions, a grievance mediation workshop, violence in the workplace, etc.

You know the things that interest people in the field. We always have (now after three years and three conferences we can write "always") a plenary session with two teams, one public and one private, of managers and union officials. Each team gives a presentation about their progressive and innovative cooperative relations programs and talk about how this has helped the business. It's always very interesting and very successful.

Then publicize it. Contact the media throughout the state. We built up a media contact list for press releases. Have the FMCS commissioners talk up your Chapter. Engage the AAA staff and officers.

Hold the conference at a hotel and don't make it too expensive. Do craft the registration fee so it includes a one-year membership in your local Chapter. If you like, and IRRA would like this, you can make a first year membership in IRRA part of the registration fee too.

Choose a union hotel!! If that isn't possible, make sure all the union people know you tried.

All this takes lots of work and it helps to distribute the labor.

If you get some attorney involved with the early planning, have them get you registered as a non-profit corporation. Also, to subsidize photocopying and mailing costs, get some help from various sources. We got help from the university, from the labor education centers, from various companies and unions who helped subsidize these costs with sponsorships.

Sponsorships for the conference are also important. Target those companies and unions who have good relations. Also, sell booths at the conference (we charge \$500) to companies and to AAA.

Once you have your kick-off conference and a body of core members, begin having dinner meetings. These will bring in more members and give everyone a sense of continuity.

There must be many other things we did that I'm not thinking of yet.

After three years we have over 100 members, bi-monthly dinner meetings in Knoxville, Chattanooga and Nashville. In January of 2003 we have over 200 members! It can be done!

Professor William Canak
TERRA Chapter LERA, Dept. of Sociology, Middle Tennessee State University, Box 10,
Murfreesboro TN 37132 Phone and Fax: (615/898-5361) email: wcanak@comcast.net

B. Chapter Organization Tips

An ongoing administrator/contact person/home office is key to a Chapter's vitality. Chapter members want someone they can call to make or cancel a reservation, or to answer a question. Some Chapters report success using an answering service or voice mail for making and canceling reservations because calls can be taken at any time. Mailing lists will ideally be stored in a Microsoft Excel or Access format, at the least in Word, but a knowledgeable person who will check the list for address changes and lapsed members is critical. Using "address correction requested" on bulk mailings once or twice a year insures that the Chapter is informed when a change occurs. A "home office" helps maintain both the continuity and momentum. Chapters have a "home" in a university, union, business or government office where mailing lists are easier to maintain. The Chapter headquarters function on a continuing basis, providing an element of stability to overcome the discontinuity associated with officer rotation.

A lack of continuity resulting from officer rotation is a problem for some Chapters. Chapters have responded in various ways. Some bring their leaders up through the ranks, i.e. the vice president becomes the president elect, or there are 1st and 2nd vice presidents who advance to president. Other Chapters ask officers to serve a two year term. Other ideas: past officers plan the first meeting of the new year; past officers turn over records of the office to the incoming counterparts and give verbal or written summaries of their duties.

The effectiveness and strength of an LERA Chapter depends on maintaining a strong representation from the three sides of the Industrial Relations triangle: labor, management, and neutral or public sector. If members detect a weakness they must assume the responsibility for recruiting effective new members to strengthen that side. If any one side becomes dominant, the result weakens the whole organization.

The difficulty of maintaining a mailing list is a specific problem often mentioned by Chapters. Several Chapters publish a formal Membership Directory annually or every two-three years. many feel that the directory is worth the effort as a marketing or promotional vehicle. Other Chapters maintain an informal list

of members that gives basic contact information. In either case, maintenance is sometimes a problem. This is one area where a home office with a computer is useful. A computerized list, especially in Microsoft Excel or Access format, is most efficient and flexible.

Co-sponsorship of the Chapter by an organization such as FMCS (Northwest) or AAA (Boston) or a University (Alabama) allows the Chapter to function and be organized. Consistency of personnel keeps the Chapter going. Co-sponsorship of local meetings or conferences provides dual mailing lists, ensures representation from differing sides of the IR triangle and brings new people in all the time.

How to get new members is the concern of every Chapter. One group urges its members to spread the word: "For persons engaged in the business of conducting or influencing the region's labor-management relations, LERA membership should come with the job." Some Chapters offer an incentive for new members to join. A number of Chapters sponsor joint meetings with other groups i.e. arbitrators, attorneys, AAA, ABA, ACR, FMCS, NLRB, SHRM, and use those lists for recruitment of new members. Several Chapters have golf outings, social events, or holiday parties, etc., when members can bring guests. The Philadelphia Chapter invites students to attend speaker's presentations, and invites professors to bring a student as the Chapter's dinner guest in an effort to interest young people in Chapter membership.

When a program has a particular appeal to members of another organization, those members might be sent an invitation and information about the program. An example would be sending attorneys and arbitrators the information about a program on new federal labor legislation.

Good publicity can be a key in gaining new members. Some Chapters list themselves in the phone book, some get the meeting notice and speaker information in the local newspaper, some put meeting info in other groups' newsletter and then reciprocate. Some Chapters issue new member certificates. Many Chapters list their officers/board members names and affiliation, or names, addresses, affiliation, and phone number on Chapter stationary. This provides visibility for the Chapter.

Getting members to attend meetings is a concern for all Chapters. Chapters vary the meeting site and combine with different groups because this brings in new people. Some Chapters send paid-up members meeting notices by first class mail, some use creative artwork on their notices, or use brightly colored paper to attract attention. Some Chapters earn significant income through an annual conference and can subsidize their lunch meetings. Some Chapter bill their no-shows. Some Chapters have organizational memberships, allowing a firm or organization to join as a group and then send 2-3 people to meetings, not necessarily the same people each time.

Cutting costs and money issues are always of concern. By finding an institutional home some Chapters are able to arrange for free computer service. Avoid using first class mail unless it is vital to reach members on time, and then only use it for paid-up members. Include information on upcoming meetings with each meeting notice so members can plan ahead. Extra funds can be used to give scholarships, journalism or research awards, purchase books for a library, sponsor a paper competition, subsidize student memberships, or subsidize member luncheons. Publicity generated from these activities can bring in new members.

C. Sample Chapter Bylaws & Constitutions

Tennessee Employment Relations Research Association (TERRA) Bylaws can be found at:

<http://www.leraweb.org/participate/communities/tennessee-employment-relations-association-tera/bylaws>

D. Chapter Programs/Events Listing

To see examples of LERA Chapter events, visit the LERA website and view the individual Chapter Websites at <http://www.leraweb.org/participate/Chapters> where events for each Chapter are displayed on their web profile pages at upper left., the LERA Events Calendar (http://www.leraweb.org/events_table), and the LERA Homepage (<http://www.LERAwEB.org>):

When LERA Chapters post events to their Chapter Website, they will automatically display both on the LERA Events calendar above and on the LERA Homepage as the event approaches. If you need help posting events to your Chapter page, please contact LERA office at LERAoffice@illinois.edu or at 217-333-0072.

E. CEC/CLE Credits

Continuing Education Credit (CEC) should be pursued whenever it serves the purpose of educating our members (national and local) and guests. The form of credit, whether as Continuing Legal or Accounting Credit or even, perhaps, college credit, should be under continuing discussion. If credit is pursued along these lines, our meetings (local and national) should attract additional quality fee-paying participants who not only will take away interesting information and skills, but will be also able to meet criteria for continuing success in their chosen fields.

Procedure: The organization or sub-organization with the greatest number of current and future members would most likely be the entity which should arrange for CEC. For example, the Philadelphia Chapter has secured continuing Legal Education Credit in Pennsylvania for the National and Local meetings. if there is a national accrediting agency for a particular field/sector/profession, the national organization would be the organization which should secure the credit. The organization or sub-organization securing credit should be the initial financial underwriter of such credit, arranging for some type of payment from organizations that might benefit from such CEC. For example, the Philadelphia Chapter might seek some offsetting reimbursement for the Pennsylvania CLE credit authorized for the National Meetings from LERA Local Chapters in Pennsylvania that would likely benefit from having the national meeting qualify for credit.

Establishing the Initial Contact: When establishing a relationship with the accrediting organization, a member for that organization would be more likely be able to "speak the language" and understand the nuances of that accrediting process.

Notice and Process: CEC should be sought as far in advance as possible so that members, future members and guests will know that such credit either has been approved or that credit approval has been requested. The entity can then use the accrediting agency's approval or pending approval in it's publicity for the program, thus attracting even more attendees. It must be acknowledged that each accrediting agency has different procedures and that each agency's procedures must be respected. This will require 1) sign-in sheets, 2) quality written materials, and 3) a person in the organization who is authorized to be a program sponsor (that person must be able to answer the questions from accrediting agencies and sign verifications of attendance)-in Philadelphia it is the Secretary-Treasurer of the Chapter who fulfills this role.

Other Chapters, such as Wisconsin and Orange County have applied for and received CEC.

F. Exempt Organizations – Required IRS Filings (Tax Returns)

Although they are exempt from income taxation, exempt organizations are required to file annual returns (<http://www.irs.gov/charities/article/0,,id=163753,00.html>) of their income and expenses with the Internal Revenue Service. Beginning in 2007, small tax-exempt organizations that previously were not required to file returns because their gross receipts did not exceed a certain threshold (<http://www.irs.gov/charities/article/0,,id=177783,00.html>) are required to file an annual electronic notice (<http://www.irs.gov/charities/article/0,,id=169250,00.html>).

Accountants Stotlar and Stotlar, S.C., (previously accountants for the Office in Madison Wisconsin) have provided the following information: “The National Association is required to file forms with both the Internal Revenue Service and the State of Illinois. These forms **DO NOT** report the activities of the individual Chapters.

- Each Chapter must file its own forms IF the filing requirements are satisfied. The requirements for filing federal tax forms are contained in the instructions for Form 990 and 990 EZ (short form).
- In general, filing is based on the receipts collected during the fiscal year. To obtain your copy of these forms and the instruction booklet, you may call the toll free number for federal tax forms: 1-800-829-3676 (1-800-Tax-Form) or online at <http://www.irs.gov> in PDF format.
- The state filing requirements differ from state to state. And so, each Chapter should consult its local taxing authorities or tax advisors.”

Links for additional information at the IRS Website

- Return **Due Dates** for Exempt Organizations (<http://www.irs.gov/charities/article/0,,id=210781,00.html>)
- **Resources/Tools** for Exempt Orgs. - Form 990 (<http://www.irs.gov/charities/article/0,,id=214269,00.html>)
- Annual Electronic Filing Requirement for Small Exempt Organizations – **Form 990-N (e-Postcard)** (<http://www.irs.gov/charities/article/0,,id=169250,00.html>)

Automatic Revocation of Exemption

What happens if a Chapter does submit its annual filings with the IRS? After three years of not filing in accordance with the IRS requirements, a Chapter would be removed as a subsidiary to LERA’s 501(c)(3) status.

If you aren’t sure if your LERA Chapter has completed its Form 990 yet, confirm this information with your Treasurer/fellow officers, or call the IRS at 1-877-829-5500. Find more information at the LERA Website (<http://www.leraweb.org/participate/chapters>).

From the IRS Website: “An automatically revoked organization must apply to have its status reinstated, even if the organization was not originally required to file an application for exemption.” To have its status reinstated, the Chapter must:

1. File Form 1023 if applying under section 501(c)(3)

2. Pay the appropriate user fee. The organization's annual gross receipts generally determine the amount of the fee. Fees could range from \$100 to \$850.
3. Write "Automatically Revoked" on top of the application and the envelope so the application goes to the proper personnel.
4. Smaller organizations eligible for transition relief will instead write "Notice 2011-43" on the application and letter.
5. Send the application and letter to:
Internal Revenue Service P.O. Box 12192 Covington, KY 41012-0192"

G. Group Exemption Procedures

For Chapters to qualify for inclusion as a subordinate group of the LERA association for the purpose of exemption from federal income taxes under section 501(c)(3) of the Internal Revenue Service code, each subordinate must have its own employer identification number – applied for through the district office (<http://www.irs.gov/localcontacts/index.html>) of the IRS area where the Chapter is located – even if it has no employees.

When a new Chapter has received its EIN, it should notify the LERA office of their number and ask in a letter to be included in the yearly update of the subordinates covered by a group exemption letter (resubmitted each year in September). This procedure relieves each of the subordinates covered by a group exemption letter from filing its own application for recognition of exemption. In fact, a subordinate included in a group exemption letter should not apply separately for recognition of exempt status unless it no longer wants to be included in the group exemption letter.

Chapters receiving nonprofit status through their state are entitled to use non-profit bulk mailing privileges through the post office at a much reduced rate. You will need:

- Form PS 3624 (<http://www.usps.com/forms/pdf/ps3624.pdf>), the Application to mail Nonprofit Standard Mail Rates and Checklist
- Letter approving LERA Office Nonprofit Standard Mail Rate mailing privileges in Champaign, IL, 61820 post office (upon request, LERAOoffice@illinois.edu)
- Letter from IRS recognizing LERA Office and its subordinates as exempt from Federal income (upon request, LERAOoffice@illinois.edu)
- Most recent letter from IRS showing continued exempt status for office and Chapters or subordinates (upon request, LERAOoffice@illinois.edu)
- Section of national annual report listing the Chapter's tax ID number (upon request, for new Chapters this is after the Chapter EIN is obtained and office files for exemption in September)

H. Sample Chapter Meeting Notices

Alabama Chapter Meeting Notice – Email Sample

Don't forget about our

Alabama Chapter, Industrial Relations Research Association's

“Annual Legislative Dinner Meeting” in Montgomery!!!

Where: Embassy Suites, 300 Tallapoosa Street, Montgomery

When: April 15, 2003

Cash Bar: 5:30 – 6:30 pm

Dinner: 6:30 pm

Speakers:

Phyllis Kennedy, Director, Alabama Department of Industrial Relations

D. Stewart Burkhalter, President, Alabama AFL-CIO (invited)

Jim Gray, Vice-President, Business Council of Alabama (invited)

Cost: \$25.00

Please make your reservation today by calling Trevor Bain at (205) 348-8939 so he can confirm our guaranteed Dinner reservations with the Embassy Suites. Your quick response is greatly appreciated. I look forward to seeing you in Montgomery.

Richard Brooks

Chapter President

LERA Northwest Chapter Meeting Notice – Brochure Sample

34th Annual Collective Bargaining and Arbitration Conference can be viewed here:

<http://www.leraweb.org/sites/lera.cloud.ojctech.com/files/Participate/Events/2011/LERA2011Bro-NWChptr.pdf>

I. Sample Chapter Directory

New Brunswick Chapter – Directory Sample:

<http://www.leraweb.org/sites/lera.cloud.ojctech.com/files/Chapters/2002/NBChapIRRADirectory2002.pdf>

J. Sample Chapter Websites

TERRA Chapter: <http://www.leraweb.org/participate/communities/TERRA>

Northwest Chapter of LERA: <http://www.nwchapterlera.org/>

LERA Gateway Chapter: <http://lera-gateway.unionactive.com/>