A Guide for Creating an I2SL Chapter

Last Updated: November 2023

Table of Contents

About I2SL

The International Institute for Sustainable Laboratories (I2SL) is a 501(c)(3) nonprofit professional organization that specializes in training and education, research through international and industry collaboration, and technical assistance to help improve the energy and environmental sustainability of laboratories and related high-technology facilities worldwide. I2SL provides a global forum for information exchange to foster international cooperation in creating and maintaining more sustainable laboratories and related high-tech facilities that accommodate the rapid pace of science, medicine, research, and development in an ever-changing and dynamic world.

Incorporated in Washington, DC, in 2005, I2SL is headquartered in Arlington, Virginia, USA. I2SL Headquarters (I2SL HQ) maintains a growing network of thousands of individuals representing hundreds of companies from around the world.

I2SL's Mission Statement

I2SL's mission is to engage all stakeholders in advancing the safety and sustainability of laboratories and other high-tech facilities globally. Our vision is that I2SL will be the global leader and primary resource connecting stakeholders and providing information and education to ensure safe, sustainable laboratory design, operation, and use. I2SL facilitates a network of technical professionals to address a whole-building approach to sustainable, low-energy, and decarbonized laboratories. I2SL offers:
- A national conference of technical speakers and technology and services fair
- A virtual education event, webinars, and workshops to reach a global audience
- A library of best practice guides, case studies, and other resources
- Communities of practice, committees, and working groups to share ideas
- A Lab Benchmarking Tool to track energy/facility data and the Labs2Zero program to help decarbonize the world's laboratories

Why Start an I2SL Chapter?

I2SL seeks individual leaders and organizations to share in its mission to educate and promote more sustainable, decarbonized laboratories and related high-tech facilities worldwide by becoming I2SL chapters. Organizations and individuals interested in starting an I2SL chapter will commit to use contacts, events, and other resources within their city, state, region, or country to promote the mission and activities consistent with those of I2SL.

Chapter Benefits

- Permission to be branded as an I2SL Chapter.
- Exclusive use of the trademarked I2SL logo with the chapter name beneath it upon acceptance of the chapter charter by I2SL's Board of Directors.
    - I2SL will provide logo use guidelines with the chapter logo that the chapter must honor.
- Use of the I2SL HQ mailing list of contacts that exist within the chapter's area of activities and registered members of I2SL in that area.
- Dedicated page on the I2SL website of information provided by the chapter, updated by I2SL HQ, or link to the chapter's self-hosted website, if applicable.
- A dedicated @I2SL.org email address that only the chapter will have access to.
- Access to I2SL accounting services, including procedures to receive the benefits associated with I2SL's 501(c)(3) tax-exempt status. *(This benefit does not apply to chapters located outside of the United States.)*
    - I2SL will save and distribute funds upon request from the chapter.
    - I2SL will not be responsible for ensuring sufficient chapter operating funds. This responsibility lies with the chapter's Board of Directors.
- Opportunities to raise chapter operating revenues through sponsorships and education events and activities that are consistent with the mission of I2SL.
- Directors and officers insurance for chapter officers, as well as liability insurance by I2SL HQ.
- Eventbrite account to manage registration and collect fees for chapter events.
- I2SL HQ web page of resources available to chapters, best practice guides, and quarterly calls to help chapters share ideas and better plan activities.
- Access to I2SL's workshop instructors upon request or taught by an I2SL-approved chapter instructor.
- I2SL President or other representatives attending/speaking at chapter events.
- Access and ability to share with chapter members any materials I2SL maintains.

Chapter Structure

U.S. I2SL chapters will operate under the 501(c)(3) tax "umbrella" of the headquarters organization (but not international chapters). By operating under I2SL HQ's tax umbrella, the chapter will avoid substantial costs associated with incorporation, annual reporting to the Internal Revenue Service, and necessary insurance fees. Also, by operating under the I2SL HQ tax umbrella, U.S. chapters will receive accounting services from I2SL HQ for an annual maintenance fee to be billed in the second and subsequent years of the chapter. Chapters will be accountable to I2SL HQ for all financial transactions it undertakes once the chapter charter is approved. International chapters are not responsible for U.S. tax reporting but must obey their own country's laws and regulations and are responsible for meeting such obligations. I2SL will not include tax-related services in international chapter fees.

Chapter Requirements

Reporting

Chapters submit to I2SL, as requested below, the following required documents:

- *Reports of Nomination and Election of Chapter Board of Directors*. Each chapter is required to elect officers that include a president, vice president, and treasurer. Other members (e.g., secretary and membership chair) may be elected as the chapter sees fit. Chapters must furnish I2SL HQ a complete list of their elected Board of Directors (i.e., officers and members) as elections are completed. The chapter's inaugural officers should commit to managing and guiding the chapter through its critical first three years. I2SL encourages chapters to ensure professional diversity among their Board of Directors.

- *Financial Reports Regarding Funds Collected and Expended*. I2SL provides several forms for chapter invoicing, sponsorship payment, reimbursement needs, and other reporting mechanisms to communicate with HQ when funds are raised, expended, or needed as reimbursement to chapter officers. They can all be found at www.i2sl.org/chapter-resources and should be used as needed to avoid confusion with I2SL bookkeeping at the risk of a chapter not receiving funds intended for that chapter.

Fees

Chapters are required to remit payment to I2SL as follows (Note: I2SL reserves the right to adjust fees to adequately cover services offered, but it will give chapters at least 60 days' notice before any adjustments are made):

- *$1,600 Start-Up Fee*. All chapters are required to make an initial, one-time payment to I2SL HQ within two months of chapter charter approval. This fee will cover accounting, insurance, and logistics support as described in the Chapter Benefits section. International chapters will have a reduced initial fee of $1,200.

- *10% of non-membership gross revenues*. A chapter is a franchise of I2SL HQ, and as such the chapter has purchased rights and privileges to information and branding developed by I2SL HQ. I2SL HQ must recover the costs associated with the creation and management of these shared activities, including but not limited to updates to the chapter's page on I2SL's website, maintenance of mailing lists, processing and managing American Institute of Architects (AIA) credits, and providing best practice guides, quarterly chapter officer calls, and other means of sharing information among chapters.

Therefore, each chapter will be required to pay I2SL HQ 10% of the organization's non-membership gross revenues as calculated at the end of I2SL's fiscal year December 31, given the following:

- o Non-membership chapter revenues are defined to include event and conference registration fees (individual and corporate), training revenues, and chapter sponsorships. Revenue from any chapter membership dues, if collected, will not be considered when deducting the 10% gross revenues.

- o Exempted from the 10% payments are government and educational grants received by the chapter, as well as donations received strictly for student scholarships.

- o A minimum of $300 is required to be submitted to I2SL HQ for organizations that earn less than $3,000 in gross revenues during a given fiscal year.

- o Chapters that are approved after October 1 are not subject to this fee until their next operating year. A chapter's operating year begins on the date the chapter received official approval from I2SL HQ's Board of Directors.

- o Chapters may be expected to share registration fees with I2SL HQ where coursework and training materials conducted by a chapter are produced and maintained by I2SL HQ. Chapters are encouraged to develop educational training courses and workshops of their own, but these must be reviewed by I2SL HQ prior to execution.

- <u>$1,200 Annual Accounting Fee</u>. This fee is to be paid by U.S. chapters operating under I2SL HQ's tax umbrella. This fee will cover accounting services I2SL HQ must undertake in reporting the full income of I2SL, including that received from the chapter, so that the chapter can be exempted under I2SL's 501(c)(3) status. *Not applicable to international chapters.*

  - o By operating under I2SL HQ's tax-exempt status, chapters are required to have all revenues deposited to I2SL HQ's bank account for distribution to the chapter as needed. This process will be developed between the chapter and I2SL HQ on a case-by-case basis.

  - o This fee will be invoiced by I2SL HQ following the beginning of the chapter's second operating year. A chapter's operating year begins on the date the chapter received official approval from I2SL HQ's Board of Directors.

Figure 1. I2SL Chapter Fee Chart

Fee	To Be Paid	Cost to Chapter*
Chapter Start-Up Fee	One-time fee to be paid within two months of receiving acceptance as an I2SL Chapter	$1,600 $1,200 for international chapters
Chapter Annual Operation Fee	Annual fee to be assessed from chapter funds by I2SL HQ at the close of I2SL's fiscal year December 31. *Chapters approved after October 1 are not subject to this fee until the next fiscal year.*	10% of chapter gross revenue (minimum $300)
Chapter Annual Accounting Fee *Not applicable international chapters.*	Annual fee to be assessed from chapter funds by I2SL HQ at the beginning of the chapter's second operating year.**	$1,200
* All fees are listed and required to be committed in U.S. dollars. **A chapter's operating year begins on the date the chapter received official approval from I2SL HQ's Board of Directors.		

Representing I2SL

Chapters agree to accurately represent I2SL by following I2SL's logo use guidelines and employing its mission statement. They also agree to the following:

- Share with I2SL HQ any technical training materials, case studies, best practices, tools, and other technical documents created by the chapter for promotion and use by other chapters.

- Promote the I2SL Annual Conference, Education Week, workshops, webinars, and other training opportunities as appropriate.

- Participate in development of and promote the Labs2Zero program, its tools, and the I2SL Laboratory Benchmarking Tool.

No chapter or any member of the chapter shall enter into any contracts with others in the name of I2SL or use the name of I2SL or the International Institute for Sustainable Laboratories in marketing of products or services to others without the written consent of chapter officers and the I2SL HQ Board of Directors.

Chapter Administration

Following are some tips for chapters just getting started:

- Schedule regular chapter meetings to conduct chapter business and plan upcoming events, no less than quarterly.

- Invite a member of the I2SL HQ Board of Directors to present and participate in a chapter meeting or event organized by the chapter. The attendance of an I2SL HQ Board of Directors member will depend on I2SL funds. Chapters can elect to pay for travel costs to ensure the attendance of a Board of Directors member.

- Consider developing chapter-specific bylaws. [I2SL HQ's bylaws](#) and [various chapter bylaws](#) are available as examples.

- Chapters are required to submit financial reports as found on I2SL's website at www.i2sl.org/chapter-resources for any event and other activities that may generates revenues or expenses within 30 days of the event/activity.

- Ensure that all chapter members, and particularly chapter officers, are I2SL HQ members in good standing. Chapter members may join directly through I2SL HQ's website at www.i2sl.org/membership, so chapters need not collect and remit membership fee payment to I2SL HQ.

  - Chapters must achieve and maintain approximately 25 members on an annual basis. I2SL encourages chapters to ensure professional diversity among its members.

  - Chapters may establish their own chapter member fee to support their activities. These fees shall be collected directly by the chapter.

Starting an I2SL Chapter

Consider the following steps in order to initiate interest in an I2SL chapter:

1. Contact info@i2sl.org if you have read this Chapter Guide and are a "leader" with a history of involvement with Labs21 and I2SL to express your interest in forming a chapter in your country, region, or city.

2. Schedule an informal meeting with known colleagues in the region that share a similar interest in forming an I2SL Chapter. These colleagues and other interested individuals should be familiar with I2SL and have a commitment to support the organization of an I2SL chapter. The group of chapter start-up members should include a balance of public- and private-sector professionals spanning laboratory and related high-tech facility designers, engineers, industrial hygienists, owners, and manufacturers.

3. Schedule a second meeting of the initial interested contacts and others within the region.

4. Develop an announcement about this second meeting and send the announcement to info@i2sl.org for input. I2SL will provide a list of contacts within the region to which chapters can send the announcement.

5. Hold the second meeting. Items to be covered in this meeting include:
   a. Review this *I2SL Guide for Creating an I2SL Chapter*.
   b. Seek acceptance of I2SL HQ and chapter membership requirements
      i. I2SL's mission and purpose
      ii. Chapter benefits
      iii. Chapter responsibilities
      iv. Selection of chapter officers (i.e., president, vice president, and treasurer)
      v. Discussion, approval, and signatures on Chapter Charter Application, including Petition and Agreement
         1. A minimum of 10 members (including officers) must be signatories on the petition. All of these members must be I2SL HQ members in good standing at the time the petition is received.

6. Submit the completed Chapter Charter Application to I2SL Executive Director Kathleen Brady, kathleen.brady@erg.com. Upon written approval from I2SL HQ (given within 30 days of receipt of the completed Chapter Charter Application), begin soliciting chapter members and sponsors and introduce them to the concept and purpose of the chapter to increase chapter membership and collect seed funding to support chapter activities. A completed Chapter Charter Application will include:
   - Contact list of the chapter's founding Board of Directors officers
   - Petition for chapter charter, including confirmed I2SL membership by all signers
   - Signed Chapter Agreement

All materials should be submitted to I2SL's Executive Director Kathleen Brady (kathleen.brady@erg.com).

I2SL HQ's approval of a chapter charter will be conditional on applications that exhibit the following:

- A strong and representative membership that declares support for the new chapter.

- A Board of Directors (minimum president, vice president, and treasurer) that agrees to manage and guide the chapter through its critical first three years.

I2SL HQ will review Chapter Charter Applications and provide the charter applicants acceptance or rejection of the charter within 30 days of receipt of the Chapter Charter Application. I2SL HQ will formally recognize all new chapters during the I2SL Annual Conference.

Dissolving an I2SL Chapter

Chapters wishing to be dissolved must provide a written notice signed by the elected president. A letter of dissolution will be provided by I2SL HQ that requires the signatures of all current chapter officers on behalf of the chapter's membership. In addition to notifying I2SL of its intent to dissolve, an incorporated chapter must dissolve itself on its own and in accordance with applicable federal, state, and local requirements. Note that chapter dissolution does not impact chapter members' status as I2SL HQ members.